Tax Season Readiness: Workflow Checklist

ARE YOUR WORKFLOW PROCESSES READY FOR TAX SEASON?

	Not at all confident	Not confident	Confident	Extremely confident
All forms and documents are consistently named and filed in the correct folder.	☐	☐	☐	☐
Staff and partners will know at all times during tax season what they are supposed to be working on.	☐	☐	☐	☐
We have the ability to schedule and manage staff and reviewers including their capacity of work, for any reason (e.g. bottleneck, resources available, due date at risk, cost, etc.).	☐	☐	☐	☐
Assign work based on any factors (e.g. skills, expertise, client, staff pay, etc.).	☐	☐	☐	☐
We can easily see the realtime status of any project.	☐	☐	☐	☐
Our scanner, OCR and scanning tools allow our team to work digitally so that we are not managing paper this tax season.	☐	☐	☐	☐
We can easily deliver tax documents in any format our clients prefer (e.g. paper, secure email, web portal).	☐	☐	☐	☐
All documents relating to a specific project will be stored and worked on in our engagement software.	☐	☐	☐	☐
We have gathering tools that ensure it is easy to gather documents from a variety of sources such as paper, email, web portal and scanner.	☐	☐	☐	☐
Our PDF Editor has markup tools tax professionals' need (e.g. tick marks, calculator tape, signatures).	☐	☐	☐	☐
We have the software needed to measure and analyze budgeted time to actual time spent on each section of a project.	☐	☐	☐	☐
Every word and every number in our engagement and storage software is fully searchable for quick reference.	☐	☐	☐	☐

If you checked any items at less than 'extremely confident', there are opportunities to improve efficiency of your workflow. Contact Doc.It today for more information.

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