

Jackson Hewitt[®]

TAX SERVICE

Office Opening Check List

- Clock in!
- Make sure all computers are up and running
- Turn lights on
- Check daily appointment calendar (leave this open all day)
- Check slack and rrd-jh.com for updates or alerts
- Put out tubes/wavy men/etc.
- Turn on Open sign
- Unlock doors



Daily Tasks to do Throughout the Day

- Check Emails
- Check appointment calendar
- Work rejects
- Make calls from return and start conversion
- Check Sign and Saves
- Check slack and rrd-jh.com all day for updates and alerts

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Office Closing Check List

- Vacuum, sweep and empty trash and shredders
- Clean and stock bathrooms
- Make sure all desks are sanitized and clean
- Check bank bag, prepare deposit slip
- Submit Cash report on RRD Portal (even if zero)
- Set Thermostat correctly- (68 winter 76 summer)
- Turn Off open sign and lights (leave LED signs lit)
- Bring in tubes/wavy men/etc
- Take out all trash to the dumpsters
- Clock out
- Sign out of Profiler correctly and Lock Computers
- Lock door
- Make deposit in night drop box at bank

