
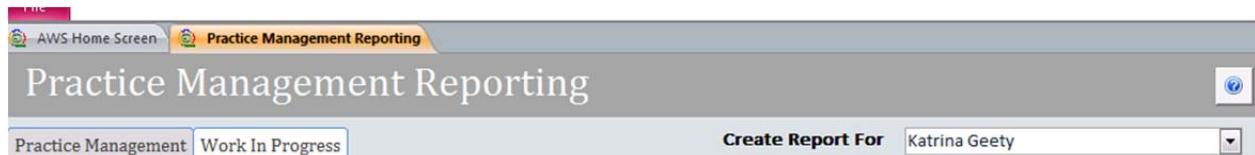


IDENTIFYING AND MANAGING THE COMPLETION OF TASKS

There are several ways to identify critical tasks that need to be completed:


1. Work in Progress Report
2. Employee Dashboard
3. Specific Modules
4. Module Reports



1. **Work In Progress Report:** Run the Work In Progress Report for the period desired (upcoming week, month, etc.). It can be run for the entire company, a specific employee or a client. The report can be sorted by module and due date. If you select the report in “interactive” mode , you can open up the task from the report and change due dates, priorities and assignments. The reports can also be filtered.



Work In Progress Reports

Reports By Module

Company  

Selected Employee  


Run Report For:

Run Reports Until Due Date Of:

Reports By Due Date

Company  

Selected Employee  

Run Report For:



- Employee Dashboard:** From the Employee Dashboard, select the employee and either All Modules or a specific module. It will show tasks in due date order. If the task does not have a due date, it will appear at the top of the display.

Accountants' Workflow Solution Dashboard Run Dashboard For **Sasha Simms**

Payroll & Taxes | Accounting Services | Notices | Taxation | Client Management | All Modules

Client	Module	Due	Pty	Time	Status	Assigned To
Hubbard, Kathy	Financial & Tax Planning		0	0	Not Started	SKS
Arundel Plumbing Inc	Payroll Checks	8/29/2013		0		
Clean Stops	Payroll Checks	8/29/2013		0.5		
Arundel Plumbing Inc	Payroll Checks	9/12/2013		0		

Most firms use a concept called “chunking” when performing tasks. For example, payroll taxes may be processed on Tuesdays. On Tuesday morning, the employee will open the dashboard and open the Payroll Tax module.

Accountants' Workflow Solution Dashboard Run Dashboard For **Samuel E Smith**

Payroll & Taxes | Accounting Services | Notices | Taxation | Client Management | All Modules

Payroll Checks | Payroll Taxes | Other Filings

Payroll Taxes

Client Name	Year	Month	Type	Status	Last Pay	Due Date	Completed	MI
Arundel Plumbing Inc	2013	QTR 3	QPRT	Not Started	9/30/2013	10/31/2013		<input type="checkbox"/>
Clean Stops	2013	QTR 3	QPRT	Not Started	9/30/2013	10/31/2013		<input type="checkbox"/>
Arundel Plumbing Inc	2013	QTR 4	QPRT	Not Started	12/31/2013	1/31/2014		<input type="checkbox"/>
Arundel Plumbing Inc	2013	Annual	1099	Not Started	12/31/2013	1/31/2014		<input type="checkbox"/>
Clean Stops	2013	QTR 4	QPRT	Not Started	12/31/2013	1/31/2014		<input type="checkbox"/>
Clean Stops	2013	Annual	1099	Not Started	12/31/2013	1/31/2014		<input type="checkbox"/>
Arundel Plumbing Inc	2013	Annual	1096	Not Started	12/31/2013	2/28/2014		<input type="checkbox"/>
Clean Stops	2013	Annual	1096	Not Started	12/31/2013	2/28/2014		<input type="checkbox"/>

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- Specific Module:** The manager or supervisor can review the module dues dates to ensure that all tasks that are due are completed. For example, the manager knows that payroll taxes are to be completed by end of day Tuesday. They should review the payroll tax module to ensure that they are completed. TIP: The administrator (AWS gatekeeper) should review the payroll tax module Monday morning to ensure that all information required to perform the task is received.

DM	Client	Year	Month	Due Date	Return	Last Pay	Info Recd	MI	MI Recd	Info Assigned	Entry As
DM Link	Arundel Plumbing Inc	2013	QTR 3	10/31/2013	QPRT	9/30/2013		<input type="checkbox"/>		SES	
DM Link	Clean Stops	2013	QTR 3	10/31/2013	QPRT	9/30/2013		<input type="checkbox"/>		SES	
DM Link	Arundel Plumbing Inc	2013	Annual	1/31/2014	1099	12/31/2013		<input type="checkbox"/>		SES	
DM Link	Arundel Plumbing Inc	2013	QTR 4	1/31/2014	QPRT	12/31/2013		<input type="checkbox"/>		SES	
DM Link	Clean Stops	2013	Annual	1/31/2014	1099	12/31/2013		<input type="checkbox"/>		SES	
DM Link	Clean Stops	2013	QTR 4	1/31/2014	QPRT	12/31/2013		<input type="checkbox"/>		SES	
DM Link	Arundel Plumbing Inc	2013	Annual	2/28/2014	1096	12/31/2013		<input type="checkbox"/>		SES	
DM Link	Clean Stops	2013	Annual	2/28/2014	1096	12/31/2013		<input type="checkbox"/>		SES	

- Module Reports:** There are numerous reports to assist you in managing your firm’s priorities and the completion of tasks. Following is an example of the payroll and payroll tax module reports.

Payroll & Taxes Reporting

Create Report For:

Payroll & Taxes

Payroll Checks

- Payroll Check Status
- Payroll Check Status - Selected Employee
- Payroll Check Status - Unassigned
- Payroll Check Status - Missing Information
- Payroll Check Status - Completed Not Billed

Payroll Tax Returns

- Tax Return Status
- Tax Return Status - Selected Employee
- Tax Return Status - Unassigned
- Tax Return Status - Annual
- Tax Return Status - Overdue Returns
- Tax Return Status - Missing Information
- Tax Return Status - Completed Not Billed

Excel Exports

- Payroll Checks
- Payroll Tax Returns

Workflow 4 Accountants™

Accounting Services
Taxation
Practice Management
Payroll & Taxes