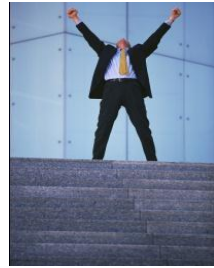
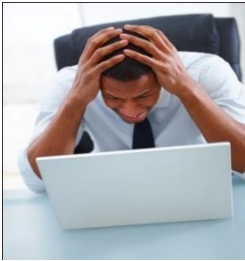


Missing Information at the Start of a Task



Symptoms (Pain)

Causes (Diagnosis)

Best Practices and Recommendations

AWS Capabilities

- Workflow is interrupted by missing information
- Client insists it was included in the packet (when it wasn't)
- Client is frustrated because we ask for dated information


- No checklists to request information in a timely manner
- Don't review received documents to see if it was complete; client isn't notified immediately of missing info.
- Don't follow up regularly to obtain missing information

- Use checklists for required information
- Call client on a periodic basis & track requests
- Review WIP coming due with missing information
- Utilize a central DB to track and report on missing information

- Tracks the status of missing information for all clients and tasks
- Interactive reports to manage client follow up and log document requests
- Tasks do not appear on the work dashboard for processing until all information is received

Track the status of Missing Information for all clients and tasks

AWS Home Screen Taxation Reporting **Tax Preparation - Missing Information**



Refresh

Tax Returns With Missing Information

Client Name	Tax Year	Tax Form	Info Recd	Miss Info	MI Recd	MS
All Weather Services, Inc.	2010	1040	<input type="text" value="2/5/2011"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Craft, Mark	2011	1040	<input type="text" value="12/20/2011"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Non-Profit Company	2009	990	<input type="text" value="11/7/2011"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Smith, Walter	2011	1040	<input type="text" value="9/13/2011"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Total:	<input type="text" value="4"/>					

6/8/2012 Page 1 of 1

Note: tasks do not appear on the work dashboard for processing/review until all required information is received