

JACKSON HEWITT
TAX SERVICE

Jackson Hewitt Orientation 2013
Champions of Joy for Families of Every Kind

WELCOME!
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- **Introductions**
- **Housekeeping**
- **Agenda**

Tax Refund Joy

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**Registered Tax Return
Preparer Requirements**

- PTIN
- CE Credits
- Competency Test

© 2012 JH

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What Should I Complete & When?

- BIT 1,2,3
- Mandatory Modules
- Practice Scenarios
- Tax Prep Readiness Test (TPRT)
- Tax Update Training
- Spotlight Training
- Employee Paperwork

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Employee Paperwork Review and Policies

- Forms
- Mystery Shoppers
- JH Service Policy
- Employment Agreement
 - Dress Code
 - At Will Employment
 - Non-Compete/Solicit
 - Cell Phone/Personal Calls
 - Bonus

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Employee Resources Available

- JHNET
- www.mijhtaxpro.com
- Email
- People
- MyTaxManager
- JH Mobile
- Facebook
- Newsletters

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www.JHNET.com

- Checking Your Schedule
- Customer Lookup
- Appointment Scheduler
- Return Retrieval
- Ask Jackson
- Sears Info
- Walmart Info
- Learning Center
 - Additional Learning
 - Job Aids

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www.MIJHTAXPRO.com

- Email
- Credit Card Processing
- Resources

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CALENDAR: FOCUS ITEMS

- TRAINING
- OPENING DATES
- SEASONS WITHIN THE SEASON
- EMPLOYEE AUCTION
- PICNIC

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Facebook

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HOW MUCH DOES IT COST?

- Pricing Structure - How?
- Coupons & Procedures
- Refer A Friend
- Promotions
- Retail
- Friends & Family
- Discounting
- Asking for "The Fee"

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WHAT IS ELECTRONIC FILING?

- **Send:** Your Computer ⇄ FTS ⇄ JH ⇄ IRS & State
- **Acknowledge:** IRS ⇄ JH ⇄ FTS ⇄ Customer Lookup

- Error Checks
- Drain Times
- What is the Master File?
- Rejected Returns?

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HOW CAN THEY PAY?

- Cash, Check, Credit, Debit, Sears Credit Card*
 - Refund Direct Deposited up to 21 days
 - Walmart Associates can use MoneyCard
 - Refund Check Mailed up to 21 days
 - Balance Due debited from bank account
 - Balance Due paid with Check/Money Order
- Assisted Refund-Fees withheld from Refund**
 - Refund disbursed in office via check up to 21 days***
 - Refund disbursed on SmartCard Debit Card up to 21 days***
 - Refund direct deposited in taxpayer's account (or MoneyCard)

*Bank & JH Processing Fee of \$49.95
**Additional \$10 fee assessed for check printing and/or SmartCard
***In Sears Retail locations only

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WHAT WAS THE REFUND ANTICIPATION LOAN & WHAT MIGHT YOU HEAR ?

- "Rapid Refund"
- One Day Loan
- RAL
- Can I get my money fast?

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WHAT HAPPENED TO THE RAL?

- Lending Collapse
- Lawsuits
- Challenged by IRS
- Elimination of Debt Indicator=Risk

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SO HOW LONG WILL IT TAKE FOR CLIENTS TO GET MONEY?

- Up to 21 days
- Check refund status in 24-48 hours online
- Last year the average time was 14 days

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GUARANTEES

- Free Accuracy Guarantee
 - Error we make – we pay P&I. Included no additional cost.
- Gold Guarantee
 - Pays up to \$5,000 for error we make. \$35 automatically added.
 - Real Life Stories.

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MyTaxManager

Go to Website

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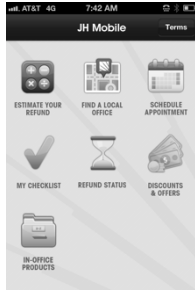
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Electronic Storage And Signature (ESS)

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JH Mobile



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ETHICS & DUE DILIGENCE

- Mandatory Module/2 CEs
- 8867 Changes
- Code of Conduct
- Coming Soon: ProFiler

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THE CUSTOMER EXPERIENCE

- Building the Client Connection Module
- 10 Steps
- Coming Soon: Engaging Client/Interview

<http://www.jh.com>

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LOGMEIN Instructions

<http://www.logmein.com>

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PROFILER

- CLOCKING IN/OUT
- LOBBY QUEUE
- PRACTICE RETURNS
- STARTING NEW RETURN
- OPEN EXISTING RETURN
- DEMONSTRATION
- DUE DILIGENCE
