Remote Help Checklist

- Use this checklist to implement best-practices when engaging remote work

| Infrastructure

There are a few logistical things you'll need to think through to make remote work easy and pain-free for you and your freelancer.

◯ **Tax & Accounting Software**

- How will they access your tax/accounting software?
- Is it cloud-based or will they need access to your server?
- Is your server hosted? Can you add a user and for what cost?

◯ **Workflow**

- How will you distribute what work you would like them to perform?
- Are they taking all returns of a certain type or fee range?
- How do you want to track their progress and know when work is done or needs follow-up?

◯ **Secure Document Access**

- How will you share client source documents?
- Do you have a secure document sharing mechanism already set up? Can you add a user?
- Do you have Access Control to your document storage now so you can control when and where any users access their documents?
- If you don't, you can use a tool like [Practice Protect](#) or work with your local IT Professional to put the right security measures in place.

| Client & Staff Messaging

Anytime a new person is involved in your workflow, if & and how this person will be introduced to clients and staff should be thought through.

◯ **Communication**

- Will this person communicate with clients or just process their work internally?
- If they will communicate with clients, do they know what to say so it's clear they are a valuable part of your team?
- Do they need a firm-branded email address or any other collateral to maintain your firm's branding?
- Do any applicable members of your staff understand this person's role and know how to work together successfully?