# ACCOUNTING INTERNSHIP EXPO

# Clayton Bodnar - Tax Intern @ Herbein

- Scan in workpapers
- Prepare tax organizer
- Prepare tax returns

#### XCM Dashboard

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#### • Fix review points

• Miscellaneous tasks

#### <u>Workflow</u>

• Acess to all programs

Favorites 🔹 🍾 Add Files 😝 Add Hyperlinks 🖄 Advanced Search

• Only used certain ones for internship

#### <u>Document</u>

- For tasks to be assigned and moved
  - Connects firm wide
- Unassigned pool returns

### <u>Return Manager</u>

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- Where client tax files are located
  - 1040 Support
  - Workpapers
  - Correspondence

- Bit Year
   Diet D
   Name
   Name
  - Lookup client returns
  - Rollforward the returns
  - Prepare the returns

#### Lessons Learned

- How to use programs listed
- How to scan in workpapers
  - How to input K-1s
- How to keep a task list and schedule
  - Overall efficiency
- How to address different situations in

returns

