AGENDA

Day 1 – Monday November 18, 2024

8:30 AM – 9:00 AM   Registration / Check-In

9:00 AM – 9:30 AM   Introduction Staff and Sponsors *(Echelon / ATOMPay / MCDC)*

9:30 AM – 10:30 AM   NEW ATOM Updates

10:30 AM – 10:45AM   Break

10:45 AM – 11:15AM   ATOM Value Added Services

11:15 AM – 12:15PM   Workflow / Processes *(X-TAX Best Practices)*

- Appointments *(Phone / Virtual)*

12:15 PM – 1:15 PM   Lunch in house (*Compliments of Echelon*)

- How to use your ATOMPay portals *(IPOS, Echelon, and Paya)* presented by Lauren Meneses, Echelon Sales Support Specialist

1:00 PM – 3:00 PM   Workflow / Processes Cont. *(X-TAX Best Practices)*

- Drop Offs *(Physical / Virtual)*
- Self-Check-In
- Tax Preparation *(In-person / Virtual / Drop Off)*

3:00 PM – 3:15 PM   Break

3:15 PM – 4:45 PM   Workflow / Processes Cont. *(X-TAX Best Practices)*

- Tax Preparation Cont. *(In-person / Virtual / Drop Off)*

4:45 PM – 5:00 PM   Sponsor (MCDC) – Small Business Administration (SBA) Loan Process

5:00 PM – 6:30 PM   Happy Hour in house *(Compliments of MCDC)*

- Tour of the X-TAX office
- Network with other ATOM Users

AGENDA

Day 2 – Tuesday November 19, 2024

9:00 AM – 10:30 AM   Workflow / Processes Cont. *(X-TAX Best Practices)*

- Remote Tax Preparers
- Print and Assemble

10:30 AM – 10:45 AM Break

10:45 AM – 12:00 PM Workflow / Processes Cont. *(X-TAX Best Practices)*

- Reviewing
- Transmit/Receive
- Other

12:00 PM – 1:00 PM   Lunch in house *(Compliments of ATOM Pay)*

- Workflow / Processes *(ATOM User shares their Best Practices)*

1:00 PM – 2:00 PM   Before Tax Season Set up *(X-TAX Best Practices)*

2:00 PM – 3:00 PM   ATOM Tips and Tricks

3:00 PM – 3:15 PM   Break

3:15 PM – 4:30 PM   Workflow / Processes *(ADMIN Set up)*

Times may differ due to questions and demonstrations but we will try to stay on track as much as possible.