



Tax Notice Compliance Readiness

Use this readiness tool to evaluate your tax notice management process, assess whether your team is aligned with industry best practices, and identify areas for improvement. Simply **check one box per section** that best reflects your current process. Total your points to assess your next move.

Current Resolution Timelines

- ☐ Under 30 days (5 points)
- ☐ 30-60 days (3 points)
- ☐ Over 60 days (1 point)

Volume and Frequency of Notices

- ☐ High resolution rate with under 10% backlog (5 points)
- ☐ Moderate resolution rate with 10-30% backlog (3 points)
- ☐ Low resolution rate with over 30% backlog (1 point)

Notice Prioritization and Tracking

- ☐ Automated prioritization and full lifecycle tracking (5 points)
- ☐ Manual prioritization or partial tracking (3 points)
- ☐ No prioritization or tracking (1 point)

Multi-Jurisdictional Management

- ☐ Comprehensive tracking for each jurisdiction (5 points)
- ☐ Partial tracking for some jurisdictions (3 points)
- ☐ No specific tracking by jurisdiction (1 point)

Use of Automation

- ☐ Over 75% automation (5 points)
- ☐ 50-75% automation (3 points)
- ☐ Less than 50% automation (1 point)

Proactive Compliance Management

- ☐ Real-time updates and minimal escalations (5 points)
- ☐ Periodic updates with some escalations (3 points)
- ☐ No regular updates, frequent escalations (1 point)

Cost of Compliance and Outsourcing

- ☐ Low penalties, no or minimal outsourcing (5 points)
- ☐ Moderate penalties or limited outsourcing (3 points)
- ☐ High penalties & heavy outsourcing (1 point)

Notice Intake

- ☐ Scanner used in mailroom (5 points)
- ☐ One person/team tracking incoming notices (3 points)
- ☐ Manual: emails, shared drives, spreadsheets (1 point)

How'd you do?

35-40 points: Peak performance! Your team is closely aligned with industry best practices.

25-34 points: Strong foundation. Your team is on track but could benefit from increased efficiency and automation.

15-24 points: Friction exists. Automation can directly address these inefficiencies.

<15 points: Risk is high, visibility is low. Immediate action is needed to modernize intake & compliance ops.



Interested in a **live demo**? Let's explore how intelligent notice management can improve your score *and* outcomes.