



ezytax
BLUE

code of
conduct

CODE OF CONDUCT

The following rules must be adhered to for the mutual benefit of all, plus the efficient and economic operation of this business:

- Be friendly and polite to other staff members and clients, always be courteous.
- Mobile phones are to be switched off or on silent during working hours.
- No food or drink to be consumed at Tax Booths (except bottled water) due to Shopping Centre rules.
- No personal calls or messages are to be taken during working hours unless for emergencies.
- No personal internet usage is permitted on any Company computers at any time.
- Headphones, ear pods, Air pods or any other types of ear pieces (except hearing aids) must not be worn while sitting at the booth.
- Assigned jobs are to be completed before finishing time each day. If this cannot be done then Management should be notified.
- Breaks: 1 x 10 minute morning break
 1 x 30 minute lunch break (if working longer than 6 hours).
- Before going on breaks, the manager/supervisor is to be notified always.
- You must type in Slack when you arrive at the beginning of your shift and when you leave.
- When going on a break or leaving the booth for any reason, you must type in Slack when you leave and when you return.
- RosterElf must be used to Clock-on, Clock-off, going on breaks, returning from breaks and whenever you leave the booth.
- Work is to be completed accurately and efficiently.
- Accurate billing of and accurate receipt of payment from customers must be adhered to at all times.
- At all times, clients must be dealt with in a polite and professional manner irrespective of whether it is face-to-face, telephone or email contact.

ANNUAL LEAVE

Annual leave is not permitted between the months of June and November as this is the busiest time of the year and all staff will be required at work.

Request for annual leave must be submitted to Management at least two (2) months prior to annual leave being taken.

SICK LEAVE

If you are going to be sick for the day, you must give Jeremy/Jessica/Soheila at least 2 hours notice so they can replace you. Contact details are:

Jeremy – 0466652385

Jessica – 0466652383

Soheila – 0403893297 (Cairns Only)

It is unacceptable to send a text message or not contact them at all. For those who are sick for more than one day, a doctor's certificate is required.

TOIL

For Full-time employees: a record will be kept of all additional hours worked over the standard 40 hour week. This time will be given as Time Off In Lieu (TOIL) after tax season (June to November) of any given year. Request for TOIL must be submitted to Management at least two (2) months prior to TOIL being taken.

EG: If by November any employee has accumulated 40 hours of TOIL, they will be given one week of paid time off.

DRESS CODE

The dress code for Ezytax Blue is documented in the Uniform Policy signed by all employees.

INTERNET USAGE

The internet is provided to access the server and the ATO website. At no time is it to be used for personal use. Any tampering with internet settings or personal use will result in a breach of company policy and a written warning will issue. Repeated offense will result in termination of employment.

JOB DESCRIPTIONS

The following are the key duties (but not limited to) of our Administration Staff/Tax Consultants:

Collect and sort mail

- Validate I-Forms and file alphabetically (surname)
- Do banking and go to Post Office
- Photocopy and file Trust Account Authority
- Answering telephone calls
- Deal with clients arriving and leaving
- Office Administration including but not limited to Invoicing, Debt Recovery, Receipt of payment from clients, etc.
- Firm Accounting
- Data Entry
- Completing Tax Returns
- Before finishing, ensure time-sheets are filled in, office/booths are cleaned and tidy & rubbish bins are emptied.

CUSTOMER SERVICE POLICY

Customer Service is what pays your wages. Without any customers you would not have a job. Remember this when you deal with people. It is your job to be a nice, polite and helpful to the customers and make them think that you really care and will do the job better than anyone else could. This will ensure they will come back to us next year as well as ensuring the integrity and reputation of the company.

Always remember – Treat others how you would like to be treated.

When dealing with an unhappy customer, make it your job to get to the bottom of the problem. All queries of any nature should be on Slack. Never pass a problem on to other people. This is what makes customers dissatisfied and more abrupt. Tell them as soon as you get to the bottom of the problem, you will give them a call. Never raise your voice or be rude to an unhappy customer as this will make the situation worse.

CONFRONTATIONAL CUSTOMERS

Should a customer become aggressive, confrontational, intimidating or offensive it is important that you stay calm and use a quieter voice. Raising your voice will inflame the situation, whereas using a quieter voice will force them to have to listen harder, lower their voice and calm down. Should the customer continue in the manner stated above then this is the point when you are to stop dealing with them and ask them to leave. If you are in one of the Shopping Centres, there are Security Guards and Police Patrols on hand. You will find the number for them in the Contact List. Please keep a copy of this list in your drawer or folder at all times.

Jeremy and Jessica also need to know when a situation has escalated to this level and should be notified on Slack asap or called directly. Do not attempt to continue the situation once the decision has been made to contact Security or the Police

DISCIPLINARY PROCEDURES

The discipline procedures are as follows:

- Verbal Warning
- 1st Written Warning
- 2nd Written Warning
- Final Warning
- Termination of Contract.

Verbal Warning:

A verbal warning will be issued by management in the event of the following:

- Breach of Operating Procedures
- Misuse of company property including email and Internet
- Disobeying directions given by the Directors or Supervisor
- Continual Late arrival to work without notice to Management

1st Written Warning:

- Continual Breach of company policies & procedures
- Continual repeat of above despite verbal warnings given
- Turning up to work intoxicated or under the influence of drugs.

2nd Written Warning:

- Any of the above continuously

Final Warning:

- Deliberate damage to company property
- Any of the previous indiscretions, happening continuously.

Termination of Contract:

- Theft of company property
- Blatant disregard for company property and the people they work with
- Continual breaches of the any of the above

- Offensive language which causes Staff Harassment
- Illegal activities

COMPANY MOBILE PHONE

- Company Mobile phones are for company outgoing calls only.
- At no time is any employee to use the mobile phones for personal use.
- Caller ID must be switched off for all outgoing calls.
- Any tampering with mobile phone settings or personal use will result in a breach of company policy and a written warning will be issued. Repeated offense will result in termination of employment.

BOOTH SECURITY

- Security of the booth and its contents are the responsibility of the employee/s rostered for that particular day.
- Ensure filing cabinet is always locked.
- Ensure money tins and equipment are secured inside the locked filing cabinet.
- Do not leave the day's takings in the filing cabinet. Takings MUST be banked daily.
- Do not leave the booth unless you have notified Management via Slack.
- It is the responsibility of all employee/s to ensure all equipment is kept in good working order.
- Theft or malicious damage of Company property will not be tolerated.
- Tampering with booth security cameras will not be tolerated and will result in immediate dismissal.
- It is the rostered employee/s responsibility to ensure the alarm is set at the end of every day. Failure to do so will result in a written warning.

PRIVACY POLICY

- Due to the sensitive nature of the data Staff are privy to, privacy laws dictate Staff must secure clients' information immediately.
- Do not leave sensitive information out for others to see.
- At no point in time are staff allowed to copy, transfer or email any data from the server, Slack, emails or any other platform used relating to Ezytax Blue, its related parties and/or its clients.
- Staff are not allowed to create any Google drives or have information regarding Ezytax Blue and its clients on any external platforms.
- Tampering of any computer monitoring software is strictly prohibited and will result in immediate dismissal.

WIX - ADMIN PORTAL

The Admin Portal is located at www.ezytaxblue.com.au/admin-portal. This is where you will find:

- ✓ Company-wide Notices
- ✓ Manuals and Guides
- ✓ Tax Training
- ✓ Shortcuts to relevant websites
- ✓ Shortcuts to relevant Jotforms
- ✓ Shortcuts to relevant ATO calculators
- ✓ AdobeSign
- ✓ Square
- ✓ SMS Broadcast
- ✓ Wix
- ✓ Paypal

An invitation to Wix will be sent to your Ezytax Blue email upon commencement of employment. Follow the instructions to setup and log in. Please ensure you click **LOG OUT** at the end of every shift.