

ERO Leadership

Homework Worksheet - Multiple Choice

Choose the best answer for each question.

1. What does an EFIN provide to an ERO?

- A. Automatic business success
- B. Authorization to participate in IRS e-file
- C. Unlimited protection from compliance issues
- D. Automatic leadership skills

2. Which question reflects a leadership mindset?

- A. How many returns can I personally prepare?
- B. How can I build a system that serves more clients without sacrificing quality?
- C. How can I avoid reviewing team work?
- D. How can I eliminate all office policies?

3. Which is one area an ERO leader should set goals for?

- A. Client growth
- B. Ignoring compliance
- C. Removing documentation standards
- D. Avoiding team development

4. What happens when office expectations are not communicated clearly?

- A. Consistency improves automatically
- B. Confusion follows
- C. Compliance becomes easier
- D. No effect occurs

5. Which is an example of a clear office expectation?

- A. Returns may be transmitted without review
- B. Clients do not need intake forms
- C. Every return should contain supporting documentation
- D. Confidential information may be shared freely

6. Why is accountability important in an ERO office?

- A. It protects the business, EFIN, and clients
- B. It eliminates the need for review
- C. It replaces compliance
- D. It is mainly used as punishment

7. Which is a method for creating accountability?

- A. Ignore errors
- B. Use checklists and quality control reviews
- C. Allow unrestricted transmission
- D. Avoid meetings

8. Which statement best reflects the module's view of production?

- A. Production matters more than quality
- B. Quality matters just as much as production
- C. Only speed matters
- D. Accuracy can be ignored during peak season

9. Which practice helps protect the EFIN?

- A. Shared user logins
- B. No review process
- C. Separate user logins and monitored filing activity
- D. Allowing every preparer full system access

10. Can an ERO delegate all responsibility for the EFIN?

- A. Yes
- B. No
- C. Only during peak season
- D. Only to a PTIN holder

11. Which issue can a return review help identify?

- A. Missing documents
- B. Dependent issues
- C. Income reporting mistakes
- D. All of the above

12. Which item belongs on a basic return review checklist?

- A. Social Security Number
- B. Filing status
- C. Required signatures
- D. All of the above

13. What is the best approach after a preparer completes a return?

- A. Assume it is correct
- B. Transmit immediately
- C. Trust the team but verify the work
- D. Skip documentation review

14. Which leadership behavior should be avoided?

- A. Providing training
- B. Creating clarity
- C. Failing to train team members
- D. Setting consistent standards

15. Which is a recommended communication practice?

- A. Be vague
- B. Document important conversations
- C. Avoid performance discussions
- D. Let team members guess expectations

16. What should become part of the office culture?

- A. Compliance
- B. Rushing
- C. Ignoring documentation
- D. Volume at any cost

17. Which statement matches a compliance-first office?

- A. Compliance may be sacrificed for volume
- B. Reviewing returns and protecting client information are expected
- C. Due diligence can be skipped during busy season
- D. Only revenue matters

18. During peak season, what should leadership focus on?

- A. Organization and communication
- B. Rushing reviews
- C. Ignoring compliance
- D. Overlooking documentation

19. Which role could be developed as the office grows?

- A. Compliance Lead
- B. Team Lead
- C. Office Manager
- D. All of the above

20. What is the ultimate goal of leadership development in this module?

- A. Make the whole office depend on one person
- B. Build a business that can operate through systems and leadership
- C. Avoid delegating any responsibility
- D. Remove team leadership roles

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Homework Answer Key

1. **B** - Authorization to participate in IRS e-file
2. **B** - How can I build a system that serves more clients without sacrificing quality?
3. **A** - Client growth
4. **B** - Confusion follows
5. **C** - Every return should contain supporting documentation
6. **A** - It protects the business, EFIN, and clients
7. **B** - Use checklists and quality control reviews
8. **B** - Quality matters just as much as production
9. **C** - Separate user logins and monitored filing activity
10. **B** - No
11. **D** - All of the above
12. **D** - All of the above
13. **C** - Trust the team but verify the work
14. **C** - Failing to train team members
15. **B** - Document important conversations
16. **A** - Compliance
17. **B** - Reviewing returns and protecting client information are expected
18. **A** - Organization and communication
19. **D** - All of the above
20. **B** - Build a business that can operate through systems and leadership