



Property Management Company (PMC) Onboarding Checklist

Completed?	Onboarding Tasks:
<input type="checkbox"/>	Complete New User Enrollment on AZTaxes.gov (Only required for new PMCs.)
<input type="checkbox"/>	Complete the PMC Application: https://azdor.gov/forms/tpt-forms/property-management-license-application (Only required for new PMCs - ensure email address provided on PMC application is registered in AZTaxes.gov.)
<input type="checkbox"/>	<p>Verify if the property owner (PO) has a valid TPT license.</p> <ul style="list-style-type: none"> <input type="checkbox"/> If no license exists, apply for the correct license on behalf of your taxpayer: <ul style="list-style-type: none"> <input type="checkbox"/> Residential Rental Only: https://azdor.gov/forms/tpt-forms/residential-rentals-only-application <input type="checkbox"/> All other business classifications, including short term/vacation rentals, commercial lease, etc: https://azdor.gov/forms/tpt-forms/joint-tax-application-tpt-license <input type="checkbox"/> If license does exist, engage the property owner’s license on AZTaxes.gov: <ul style="list-style-type: none"> <input type="checkbox"/> Log into the PMC account on AZTaxes.gov. <input type="checkbox"/> Click “View” under the “Actions” header on the PMC License. <input type="checkbox"/> Click “Account Maintenance” under the “Actions” header. <input type="checkbox"/> Click the blue “Engage New PO” button. <input type="checkbox"/> Enter the property owner’s license number - the legal business name will auto-populate based on the number entered. <input type="checkbox"/> Enter the engagement date - can either be typed or selected from the pop-up calendar. <input type="checkbox"/> Check the box to indicate that there is a valid POA on file. <input type="checkbox"/> Click the “Engage New PO” button.
<input type="checkbox"/>	Complete Form 285-PMC for each new client: https://azdor.gov/forms/power-attorney-poa-disclosure-forms/residential-rental-property-disclosure-authorization-form
<input type="checkbox"/>	If desired, obtain delegate user access to the property owner’s AZTaxes.gov account
<input type="checkbox"/>	Download E-File Solution Spreadsheet from the AZTaxes.gov PMC account.
<input type="checkbox"/>	*Complete one spreadsheet for all engaged property owners within the same filing frequencies. Separate spreadsheet for each filing frequency (monthly, quarterly, annually).
<input type="checkbox"/>	*When time to file, login to AZTaxes.gov and upload the completed spreadsheet. <small>PMCs must file and remit taxes on behalf of client property owners using the PO's license numbers on AZTaxes.gov.</small>
<input type="checkbox"/>	*Pay on behalf of your property owner. <small>PMCs must file and remit taxes on behalf of client property owners using the PO's license numbers on AZTaxes.gov.</small>

Tasks indicated by an asterisk () are repeated based on the property owner’s filing frequency.



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Completed?	Offboarding Tasks:
<input type="checkbox"/>	Update the mailing address of the property owner’s TPT license to no longer reflect the PMC’s address: https://azdor.gov/forms/tpt-forms/property-management-company-mailing-address-update-form
<input type="checkbox"/>	Disengage the property owner’s TPT license on AZTaxes.gov (this date will default to 30 days out). <ul style="list-style-type: none"> <input type="checkbox"/> Log into the PMC account on AZTaxes.gov. <input type="checkbox"/> Click “View” under the “Actions” header on the PMC License. <input type="checkbox"/> Click “Account Maintenance” under the “Actions” head <input type="checkbox"/> Find the license that must be disengaged on the list. Under the “Actions” header to the far right, click “Disengage.” <input type="checkbox"/> Enter the disengage date - must be at least 30 days out.
<input type="checkbox"/>	File and pay final return.
<input type="checkbox"/>	Pay any outstanding balances.
<input type="checkbox"/>	Update saved spreadsheets to remove the property owner’s information.
<input type="checkbox"/>	Submit Form 285-PMC revoking access to the property owner’s account.
<input type="checkbox"/>	IF PROPERTY IS NO LONGER COLLECTING RENT, close the license. If property is being managed by another PMC or by the owner, DO NOT close the license.
<input type="checkbox"/>	If the PMC has obtained delegate user access to the property owner’s TPT account, have the property owner go into his/her account and revoke access.