Property Management Company (PMC) Onboarding Checklist

Completed?	Onboarding Tasks:
☐	Complete New User Enrollment on AZTaxes.gov: https://azdor.gov/media-center#1 **(Only required for new PMCs.)**
☐	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.)**
☐	Complete Form 285-PMC for each new client: https://azdor.gov/forms/power-attorney-poa-disclosure-forms/residential-rental-property-disclosure authorization-form

☐	Verify if the property owner (PO) has a valid TPT license.
	     ☐ If no license exists, apply for the correct license on behalf of your taxpayer:
	         ☐ Residential Rental Only:
	             https://azdor.gov/forms/tpt-forms/residential-rentals-only-application
	         ☐ All other business classifications, including short term/vacation rentals, commercial lease, etc:
	             https://azdor.gov/forms/tpt-forms/joint-tax-application-tpt-license
	     ☐ If license does exist, engage the property owner's license on AZTaxes.gov:
	         ☐ Log into the PMC account on AZTaxes.gov.
	         ☐ Click "View" under the "Actions" header on the PMC License.
	         ☐ Click "Account Maintenance" under the "Actions" header.
	         ☐ Click the blue "Engage New PO" button.
	         ☐ Enter the property owner's license number - the legal business name will auto-populate based on the number entered.
	         ☐ Enter the engagement date - can either be typed or selected from the pop-up calendar.
	         ☐ Check the box to indicate that there is a valid POA on file.
	         ☐ Click the "Engage New PO" button.

☐	If desired, obtain delegate user access to the property owner's AZTaxes.gov account
☐	Download E-File Solution Spreadsheet from the AZTaxes.gov PMC account.
☐	*Complete one spreadsheet for all engaged property owners within the same filing frequencies. Separate spreadsheet for each filing frequency (monthly, quarterly, annually).
☐	*When time to file, login to AZTaxes.gov and upload the completed spreadsheet. PMCs must file and remit taxes on behalf of client property owners using the PO's license numbers on AZTaxes.gov.
☐	*Pay on behalf of your property owner. PMCs must file and remit taxes on behalf of client property owners using the PO's license numbers on AZTaxes.gov.

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

PMC Offboarding Checklist

Completed?	Offboarding Tasks:
☐	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
☐	Disengage the property owner's TPT license on AZTaxes.gov (this date will default to 30 days out).
☐	File and pay final return.
☐	Pay any outstanding balances.
☐	Update saved spreadsheets to remove the property owner's information.
☐	Submit Form 285-PMC revoking access to the property owner's account.
☐	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.
☐	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.