myprosperity

Tax return in Rooms

PROCESS MAP

Initial contact

Let your client know that you will be completing their tax return in Rooms.

Open a Room

Invite your client to a new Room and upload a copy of their tax return/NOA from the previous year.

Fee disclosure

Use fee disclosure template in myprosperity or create a custom form and tailor as needed.

Request signature

Add a new task in the Room, select the fee disclosure document for signing and assign to the client.

Client signs document in myprosperity

Tax checklist

Add a new task in the Room, select your tax checklist and assign to the client.

Client completes tax checklist

Review checklist

Once your client submits their checklist, review it for any missing or additional information that is needed.

Request any clarification that is needed quickly using the **@mention** function in Rooms.

To request additional information and documents, create a task in the Room with email reminders.

Do tax return

Complete the client's tax return in your system of choice.

Client signature

Complete client signature of tax return in your system of choice or create a new task in the Room, upload the tax return and request a signature from the client.

Tip: Turn on auto reminders to prompt your client 3, 6 and 9 days before your chosen deadline.

myprosperity notifies you when the client has signed via email

Lodge tax return

Lodge the client's tax return in your system of choice.

Bill for service

Bill for your service in your system of choice and upload a copy of the bill to the Room.

Client pays bill

Add NOA and bill reciept

Once received, upload the NOA and bill reciept to the Room.

Refund

You extract your fee from the refund amount.

No refund

Set up a To-Do in the Room to pay the tax bill.

Client pays tax bill

Notify client

Notify the client once their refund has been credited, minus the fees incurred, via the **@mention** function in Rooms.

Close Room

All done! You can now close the Room.

For more details, visit myprosperity.com.au