TAX PREPARATION PIPELINE

CREATE JOB TEMPLATES

Template Name: 1040 Tax Prep

- **Job Name:** [LAST_YEAR] 1040 for [ACCOUNT_NAME]
- **Absolute Due Date:** April 15, 2024 (We recommend you add due date for the job, but you will need to update the job template each year for the new tax year)

Template Name: 1065 Tax Prep

- **Job Name:** [LAST_YEAR] 1065 for [ACCOUNT_NAME]
- **Absolute Due Date:** March 15, 2024 (We recommend you add due date for the job, but you will need to update the job template each year for the new tax year)

Template Name: 1120S Tax Prep

- **Job Name:** [LAST_YEAR] 1120S for [ACCOUNT_NAME]
- **Absolute Due Date:** March 15, 2024 (We recommend you add due date for the job, but you will need to update the job template each year for the new tax year)

Template Name: 1120 Tax Prep

- **Job Name:** [LAST_YEAR] 1120 for [ACCOUNT_NAME]
- **Absolute Due Date:** April 15, 2024 (We recommend you add due date for the job, but you will need to update the job template each year for the new tax year)
- *Note:* This particular template would only be for corporations with a 12/31 fiscal year end

PIPELINE SETTINGS

Pipeline Name: Tax Prep Pipeline
Sort jobs by: Time in stage, oldest first
Job card fields: Account tags, Name, Due Date, Assignees
Default recurrence:

- **Repeat period:** Every year
- **Repeat on:** January 22
- **Start date:** Choose next January 22 on the calendar

SAMPLE TAX SEASON KICK-OFF EMAIL

*You will send this email via bulk e-mail in TaxDome. You can do this by sending to all accounts with a "Tax Prep" tag or by sending to each tag of "1040" "1065" etc. We recommend sending this email around the 1st of January, as long as it is sent prior to the start of your pipeline jobs kicking off. Use this sample language or customize it to make it your own firm's voice and process or add any nuances that might be relevant for your specific tax year. Set this up as an email template so you can use it again and again as needed. As TaxDome occasionally updates their client overview video, double check the link in the video to make sure it is still accessible prior to sending.

Email Template Name: Tax Season Kick-Off
Mode: Use contact shortcodes
Email Subject: It's that time of year!

Hi [FIRST_NAME]!

Let us be the first to officially welcome you to the tax season for [LAST_YEAR]. We're here to make sure your journey through taxes is as smooth and stress-free as possible.

Here's what's coming your way:

📬 Look Out for Tax Documents: Keep an eagle eye on your mailbox for any important tax documents that'll be making their way to you soon. Think W-2s, 1099s, 1098s, etc.

💼 How to Get Started: Later this month, you'll receive an invoice for a deposit payment and our annual engagement letter. These are your golden tickets to the next step – the Tax Organizer and Document Gathering Stage!

📂 Prepare Your Documents: Once you've gathered all of your tax documents, be ready to upload them in your secure portal when we send you your tax organizer. We will also ask you some questions to make sure we have everything we need to get started on your return.

🕵️ Refresh Your Memory: Refamiliarize yourself with your client portal by watching this video. Make sure you can sign into your client portal by clicking here [insert link to your direct client portal] and let us know if you have any questions!

Best regards,
(Your name here)

STAGE 1: INVOICE AND ENGAGEMENT LETTER

1.SEND MESSAGE: TP- TAX PREP INVOICE AND ENGAGEMENT

Message Template name: TP- Tax Prep Invoice and Engagement Letter

Subject: Important Next Steps for Your [ACCOUNT_NAME] Tax Preparation

Hello,

Your deposit invoice and engagement letter for this year's tax preparation services have been added to your client portal. A deposit invoice of $100 is necessary to get started. The remainder of your tax prep fees will be due upon signing for your final tax return.

These are crucial steps to kickstart our tax preparation process, so I kindly request you to complete them as soon as possible.

Once you've taken care of these, you'll be all set to receive your organizer, which will help you gather and submit your [LAST_YEAR] tax data. Additionally, you'll find a secure space to upload your tax documents.

Your prompt attention to these items in your portal will help us ensure a smooth and efficient tax preparation process. If you have any questions or need assistance, feel free to reach out. Looking forward to working with you this tax season!

Best regards,
(Your name here)

2.SEND INVOICE: TP- TAX PREP DEPOSIT

Invoice Template name: TP- Tax Prep Deposit

Description: A $100 deposit is required to get started on your tax preparation. Your remaining tax preparation fee will be due upon signing for your final tax return.

Send email to client when invoice created: toggled on
Message for client: Your $100 tax preparation deposit has been posted to your [ACCOUNT_NAME] client portal. Please log in to your account to pay this deposit.

Line items:
- **Product or Service:** Tax Preparation Deposit
- **Amount:** $100

3.SEND CONTRACT: TP- TAX PREP ENGAGEMENT LETTER

Contract Template name: Tp- Tax Prep Engagement Letter

*If you already have an existing engagement letter, create this template using that information. If you do not already have an engagement letter, we recommend you work with an attorney; however, there are templates in TaxDome that you can use.

- Tip: Be sure to include the deadline that you require your client to send you their tax information in order for you to file their taxes by the deadline. This includes any extension policies your firm has

Note: If you have a different engagement letter for different entity types, you can repeat this automation and add a conditional tag to each one (e.g. 1040, 1120, 1120S, 1065). Repeat individually, because if you add multiple tags to a condition, ALL tags must be present for that condition to occur.

STAGE 2: REQUEST DOCUMENTS

1.SEND MESSAGE: TP-ORGANIZER AND REQUEST CLIENT DOCUMENTS

Message Template Name:TP- Organizer and Request Documents
Subject: Your Organizer is Ready!

Hello,

Thank you for submitting your deposit and signing the engagement letter for your [ACCOUNT_NAME] tax return! To facilitate a smooth and efficient tax preparation process, we have prepared a tax organizer for you that will ask some necessary questions about the prior tax year and allow you to upload your tax documents. You can find it waiting for you in your client portal.

We kindly ask that you complete the organizer and upload your documents as soon as possible. This step is essential to ensure that we have all the necessary information to accurately prepare your tax return. Keep in mind that responses and documents not received one month prior to your tax deadline may require an extension and are not guaranteed to be processed before the tax deadline.

We are here to assist you every step of the way. If you have any questions or need guidance while filling out the organizer, please don't hesitate to reach out. Simply reply to this message or contact us through your Client Portal.

Thank you for entrusting us with your tax preparation needs!

Best Regards,
(Your name here)

2.SEND ORGANIZER: TP- INDIVIDUAL TAX PREP ORGANIZER

Organizer Template Name: TP- Individual Tax Prep Organizer

*If you already have an existing tax prep organizer for individuals, use this to create an organizer template. You may revisit the organizer video in the features section if needed - this will give you a refresher on the conditional questions and other features available in the organizers. If you do not already have a tax organizer that you use for your firm, you can use one of the individual tax organizer templates that is available within TaxDome.

- Be sure to have a section within your organizer that requests the tax documents you need from your client and use the upload feature to allow them to upload directly to the form.
- When you add this to your pipeline, you will set up conditional tag for only 1040

3.SEND ORGANIZER: TP- BUSINESS TAX PREP ORGANIZER

Organizer Template Name: TP- Business Tax Prep Organizer

*If you already have an existing tax prep organizer for businesses, use this to create an organizer template. You may revisit the organizer video in the features section if needed - this will give you a refresher on the conditional questions and other features available in the organizers. If you do not already have a business tax organizer that you use for your firm, you can use one of the business tax organizer templates that is available within TaxDome.

- Be sure to have a section within your organizer that requests the tax documents you need from your client and use the upload feature to allow them to upload directly to the form.
- When you add this to your pipeline, you will set up conditional tag for your businesses. You will need to add an automation for each business tax form type (for example, one automation for the business organizer with 1065 tag only, another automation for the business organizer with the 1120S tag only, etc.) If you instead create one automation with all of the business tags, the automation will only occur if an account has ALL of those tags.

4.APPLY FOLDER TEMPLATE: TAX PREP

- Be sure you have already updated your existing tax prep folder template to include the most recent tax year prior to kicking off your pipeline.
- If you need a refresher on the tax prep folder structure, check out the module titled “Customize your setup with folders” under the “Setting Up Your Account” set.

5.UPDATE ACCOUNT TAGS: ADD 2023

- Be sure you have already created a tag with the current tax year prior to the pipeline kicking off (e.g. 2023)
- You will want to update your pipeline each year to point to the new tax year’s tag

STAGE 3: REVIEW DOCUMENTS

1.SEND MESSAGE: TP- RECEIVED ORGANIZER AND IN REVIEW

Message Template Name: TP- Received Organizer and in Review

Subject: We've received your [ACCOUNT_NAME] tax organizer!

Hello,

We have received your tax organizer and documents for the [ACCOUNT_NAME] tax return! We will be reviewing your responses and documents and will let you know if we have any questions or need anything else.

Once we confirm we have everything we need, we will let you know once your draft return is in progress.

Best Regards,
[Your Name]

2.CREATE TASK: TP- CONFIRM CLIENT RESPONSES AND DOCUMENTS ARE COMPLETE

Task Template Name: TP- Confirm client responses and documents are complete
Description: Review the client submitted organizer and documents. Confirm you have complete responses and documents. If there is any missing information, DO NOT mark this task complete, as this will move the job to the next stage.

If needed, send the client a message with any clarifying questions or request for missing information/documents.

Once you have everything you need to draft the return, mark this task as complete.

STAGE 4: DRAFT RETURN

1.SEND MESSAGE: TP- STATUS UPDATE - IN PREP

Message Template Name: TP- Status Update - In Prep

Subject: Status Update - [ACCOUNT_NAME] Tax Return in Prep

Hello,

We have begun drafting your [ACCOUNT_NAME] tax return. Once we have completed and reviewed your return, we will upload the draft to your Client Portal for you to review and approve. We will let you know once that is ready!

Best Regards,
[Your Name]

2.CREATE TASK: TP- PREPARE TAX RETURN

Description: Once Tax Return has been prepared, mark this task as complete.

STAGE 5: REVIEW RETURN

1.SEND MESSAGE: TP- STATUS UPDATE - IN REVIEW

Message Template Name: TP- Status Update - In Review
Subject: Status Update - [ACCOUNT_NAME] Tax Return in Review

Hello,

We have begun completing our final review of your [ACCOUNT_NAME] tax return. Once we complete this final detailed review, we will upload the draft to your Client Portal for you to review and approve. We will let you know once that is ready!

Best Regards,
[Your Name]

2.CREATE TASK: TP- REVIEW TAX RETURN

Description: Complete review of client draft tax return and mark task complete.

STAGE 6: CLIENT APPROVAL

1.CREATE TASK: TP- UPLOAD TAX RETURN AND LINK TO JOB

Description:
Upload Tax Return for client approval and link to job.
https://help.taxdome.com/article/139-uploading-documents
Settings to toggle ON when uploading (Keep others off):

- Notify client
- Request client approval
- Reminders (Choose reminder frequency to ensure client approves the return)
- Document Description - DRAFT [Enter Tax Year] Tax Return for Your Approval
- Link Jobs: Link to your tax prep job associated with this return

2.CREATE TASK: TP- SEND MESSAGE: PLEASE APPROVE YOUR TAX RETURN

Description: Once the draft return is uploaded for client approval and linked to the job, send a message to the client letting them know by using the template TP- Please Approve Your Tax Return.

*Note: This automation is to create a TASK that will prompt you to send a message manually using a template you will initially set up separately. We don't want to set this up to automatically send the message, as we want to make sure the return has already been uploaded for client approval and linked to the job before this message is sent to the client. Use the below language to set up a message template to make this step easier.

Message Template Name: TP- Please Approve Your Tax Return
Subject: Please Approve Your [ACCOUNT_NAME] Tax Return!

Hello,

Your [ACCOUNT_NAME] tax return has been uploaded to your client portal and is ready for your review. Once you have reviewed and approved this draft tax return, please indicate your approval by clicking the "I Approve" button below the document.

If you don't approve, choose "I Disapprove" and you will be prompted for feedback so we can make any adjustments as needed before sending a new draft for your approval.

Once you have selected that you approve, we will send an invoice for your final balance due. Once this is paid, you will be able to access the uploaded form 8879 for your e-signature which will allow us to proceed with e-filing your return.

Your prompt action is appreciated so we can get your return filed timely.

Let us know if you have any questions.

Best Regards,
[Your Name]

STAGE 7: E-SIGNATURE/CLIENT INVOICE

1.CREATE TASK: TP- CREATE BALANCE DUE INVOICE

Description: Create an invoice for the balance due for this tax return using the template TP-Tax Prep Balance Due.

*Set up the below invoice template that can be used when manually creating the balance due invoice. When sending, you will just need to plug in the balance due amount.

Invoice Template Name: TP- Tax Prep Balance Due
Description: This invoice represents your remaining balance due for your [ACCOUNT_NAME] tax return. Once this invoice is paid, you will be able to sign form 8879 that will allow us to e-file your tax return.
Product or Service: Tax Prep Balance Due

2.CREATE TASK: TP- UPLOAD 8879 W/ KBA LOCKED WITH BALANCE DUE INVOICE AND LINK TO JOB

Description:

1. Upload form 8879 to a folder shared with clients. When uploading, click +Link to invoice and choose the invoice you created in the previous step. Then click +Link to job and choose the related tax prep job. Don't notify/send email to client yet.
2. Go to the document, click the three right dots to the right and choose Request signature. Apply signature template or choose signers. Select the toggle to add KBA. Add reminders as desired.

Helpful Links:
https://help.taxdome.com/article/291-e-signatures-explained
https://help.taxdome.com/article/287-knowledge-based-authentication-kba

3.CREATE TASK: TP- SEND MESSAGE: YOUR E-SIGNATURE IS NEEDED

Description: Once you have created the balance due invoice, uploaded form 8879 and added e-signature with KBA, locked form 8879 to the balance due invoice, and linked form 8879 to your tax prep job, send client a message using the template **TP- Your E-Signature Is Needed**

*The above automation is only a task to send a message using a template and does not send the message automatically. It is important that you complete the above tasks prior to manually sending this message. Separately, set up the below message template so you can use the template to quickly send the manual message.

Message Template Name: TP- Your E-Signature Is Needed
Subject: Your E-Signature Is Needed for [ACCOUNT_NAME] Tax Return

Hello,
Now that you approved your tax return, we have prepared form 8879 for you to electronically sign. This signed form is required for us to be able to file your return on your behalf and is available in your client portal. In your client portal, you will also find an invoice for the total balance due for your [ACCOUNT_NAME] tax return. Once this invoice is paid, you will be able to access and sign form 8879.

As you electronically sign this form, each signer will be directed to answer a few multiple choice questions that help confirm your identity (for example, a former address or name of your mortgage lender).

Don't worry if you get this wrong. If this doesn't work, you can always print, physically sign, and then upload this form to your client portal instead. Here are some tips to scan and upload with your mobile device if needed:
https://client-help.taxdome.com/article/41-uploading-documents-on-mobile

We appreciate your prompt response on the invoice and form 8879 to make sure we can get your return filed timely.

Best Regards,
[Your Name]

STAGE 8: E-FILE

1.SEND MESSAGE: TP- YOUR 8879 AND INVOICE PAYMENT HAVE BEEN RECEIVED

Message Template Name: TP- Your 8879 and Invoice Payment Have Been Received
Subject: Thank you! Your [ACCOUNT_NAME] 8879 and Invoice Payment Have Been Received

Hello!

Your signed form 8879 and your final invoice payment have been received. We will now proceed with filing your [ACCOUNT_NAME] tax return. We will let you know once your return has been filed.

Best Regards,
[Your Name]

2.CREATE TASK: TP- E-FILE RETURN

Description: Once you have e-filed your client's federal/state tax returns, mark this task as complete.

STAGE 9: ACCEPTED/REJECTED

1.SEND MESSAGE: TP- YOUR RETURN HAS BEEN FILED

Message Template Name: TP- Your Return Has Been Filed
Subject: Your [ACCOUNT_NAME] Tax Return Has Been Filed

Hello,

We wanted to let you know that your [ACCOUNT_NAME] Tax Return has been filed! We will confirm once your return has been accepted by the IRS and/or state agencies.

Best Regards,
[Your Name]

2.CREATE TASK: TP- CONFIRM RETURN ACCEPTANCE

Description: Once you confirm that your client's tax return filing has been accepted by the applicable federal and/or state agencies, mark this task as complete. IMPORTANT: Do not mark this task as complete if the return has been rejected. If rejected, send a message to the client letting them know and include next steps. You may manually move the job back to a prior stage if applicable (e.g. Client Approval if you need to make a change), but be aware of any automations that will kick off and make sure the automated client communication is still appropriate for your situation.

3.CREATE TASK: TP- UPLOAD FINAL RETURN TO CLIENT PORTAL

Description: Upload your client's final return to their client portal. If you provide estimated tax information, be sure to include this in the document and inform your client in the description when uploading and ensure the notify setting is toggled.

STAGE 10: RETURN COMPLETE

1.SEND MESSAGE: TP- THANK YOU! YOUR RETURN HAS BEEN ACCEPTED

Message Template Name: TP- Thank You! Your Return Has Been Accepted
Subject: Thank you! Your [ACCOUNT_NAME] Return Has Been Accepted!

Hello,

We are thrilled to inform you that your [ACCOUNT_NAME] tax return filing has been accepted and is on its way to the next phase of processing. Thank you for choosing us to handle your tax needs this season!

A copy of your final tax return has been added to your client portal and will include any estimated tax payment information that you may need to pay, if applicable.

If you are expecting a refund, you can track the status using the IRS Where's My Refund tool. You can contact your state's taxation department to learn about tracking your state tax refund status.

Your trust in us means the world, and we're committed to delivering the best service possible. If you had a positive experience working with us, would you mind taking a moment to share your feedback? Your review would greatly help others who are looking for reliable tax support. [Insert link or instructions where they can leave you a review]

We're here to make your tax journey as smooth as possible. If you have any questions or need further assistance, don't hesitate to reach out.

Best Regards,
[Your Name]

STAGE 11: ON HOLD

*This stage does not have any automations and is used only as a placeholder. When using your pipeline, manually move a job to this stage if you need to place the job on hold.