

STAGES

| OUTSIDE OF PIPELINE | INVOICE & ENGAGEMENT LETTER | REQUEST DOCUMENTS | REVIEW DOCUMENTS | DRAFT RETURN | REVIEW RETURN | CLIENT APPROVAL | E-SIGNATURE/CLIENT INVOICE | E-FILE | ACCEPTED/REJECTED | RETURN COMPLETE | ON HOLD |
|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------|---------------------------------------------|---------------------------------------------------------------|-------------------------------------------------------------------------------------|--------------------------------------------------------------------|-------------------------------------------------------|------------------------------------------------------------|---------------|
| Add a tag to every tax prep account for their tax form type (e.g. 1040, Sch C, 1065, 1120, or 1120S) | SEND MESSAGE: TP- TAX PREP INVOICE AND ENGAGEMENT | SEND MESSAGE: TP- ORGANIZER AND REQUEST CLIENT DOCUMENTS | SEND MESSAGE: TP- RECEIVED ORGANIZER AND IN REVIEW | SEND MESSAGE: TP- STATUS UPDATE - IN PREP | SEND MESSAGE: TP- STATUS UPDATE - IN REVIEW | CREATE TASK: TP- UPLOAD TAX RETURN AND LINK TO JOB | CREATE TASK: TP- CREATE BALANCE DUE INVOICE | SEND MESSAGE: TP- YOUR 8879 and INVOICE PAYMENT HAVE BEEN RECEIVED | SEND MESSAGE: TP- YOUR RETURN HAS BEEN FILED | SEND MESSAGE: TP- THANK YOU! YOUR RETURN HAS BEEN ACCEPTED | |
| Update Tax Prep folder template to include the next tax year if you haven't already done so | SEND INVOICE: TP- TAX PREP DEPOSIT *Turn on reminders to desired frequency | SEND ORGANIZER: TP- INDIVIDUAL TAX PREP ORGANIZER (1040 TAG ONLY) *Turn on reminders to desired frequency | CREATE TASK: TP- CONFIRM CLIENT RESPONSES AND DOCUMENTS ARE COMPLETE | CREATE TASK: TP- PREPARE TAX RETURN | CREATE TASK: TP- REVIEW TAX RETURN | CREATE TASK: TP- SEND MESSAGE: PLEASE APPROVE YOUR TAX RETURN | CREATE TASK: TP- UPLOAD 8879 W/ KBA LOCKED WITH BALANCE DUE INVOICE AND LINK TO JOB | CREATE TASK: TP- E-FILE RETURN | CREATE TASK: TP- CONFIRM RETURN ACCEPTANCE | | |
| Create a new tag for the prior tax year (e.g. 2023) to be used in the second stage | SEND CONTRACT: TP- TAX PREP ENGAGEMENT LETTER *Turn on reminders to desired frequency | SEND ORGANIZER: TP- BUSINESS TAX PREP ORGANIZER (1120S TAG ONLY) *Turn on reminders to desired frequency | | | | | CREATE TASK: TP- SEND MESSAGE: YOUR E-SIGNATURE IS NEEDED | | CREATE TASK: TP- UPLOAD FINAL RETURN TO CLIENT PORTAL | | |
| Send "Tax Season Kick-off" bulk email to all tax prep clients | | SEND ORGANIZER: TP- BUSINESS TAX PREP ORGANIZER (1120 TAG ONLY) *Turn on reminders to desired frequency | | | | | | | | | |
| | | SEND ORGANIZER: TP- BUSINESS TAX PREP ORGANIZER (1065 TAG ONLY) *Turn on reminders to desired frequency | | | | | | | | | |
| | | APPLY FOLDER TEMPLATE: TAX PREP | | | | | | | | | |
| | | UPDATE ACCOUNT TAGS: ADD 2023 | | | | | | | | | |
| | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: ON | AUTOMOVE: OFF | AUTOMOVE: OFF |