

## **Tax Return Project Work Flow Example**

### **❖ F360 *Unassigned* and NOT STARTED status in global Projects tab**

- Receive the project source documents
  - in person
  - electronically via email
  - client portal (client portal preferred))

### **❖ F360 *assigned scanner or data specialist* and status changed to SCANNING or your wording of preference for this step (target date calculated from this date, also signifies document received date in history logs in F360)**

#### **Tasks for template**

- Scan physical docs or process electronic docs to consumable format for preparers ( i.e.. Organize and get into one pdf)

### **❖ F360 *assigned to preparer* and status changed to PREPARATION**

#### **Task for template**

- Preparer executes preparer checklist and communicates with the team if needed
- Communication with the team is done in the project comments section in F360 and tags a user in a comment
- Preparer communicates with the client via email/call/text and places a summary of that communication or missing items list in the activity section for the project
- F360 assigned to preparer and status changed to waiting on information (if applicable)

### **❖ F360 *Assigned to reviewer* and status changed to REVIEW once the info is received and entered (*go straight to this step if no missing info exists*)**

❖ **F360 assigned back to the preparer for REVIEWER COMMENTS as the status if there are items the reviewer wants the preparer to review and or change**

- Once the preparer addressed the items, the project can go back to the **REVIEWER** for final review if needed

❖ **F360 Assigned processor and status changed to PROCESSING**

**Task/Checklist**

- Here the processor prints the returns (physical copies) or processes them electronically (for e-delivery-preferred)
- If email – delivery, then the client copy is selected and you allow access to the client portal in F360
- The processor makes sure contacts are set up and have portal access (if not already done)
- Processor “requests signature “ on the actionable items docs
- The processor creates the invoice at this step in F360 and sends it via email to the client or prints for physical client delivery (need more discussion here for each firm)

❖ **F360 assigned to processor and status changed to WAITING ON CLIENT APPROVAL**

- Once the 8879 is signed

❖ **F360 assigned to processor and status changed to WAITING ON GOVERNMENT APPROVAL**

**Task/Checklist**

- Here is where the electronic file is submitted to the taxing authority
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❖ **F360 assigned to processor and change status to COMPLETED**

**Task/Checklist**

- This is the final step and is done once the e-files are accepted