ACCOUNTANCY PRACTICE LAUNCH PROGRAMME · DO THE FIRST PIECE OF WORK TO ITS DEADLINE

First job delivery checklist

Get one real job from records to filed without a scramble at the deadline. Not tax advice.

01 Before you start

The records gate is where new practices lose the most time.

- [ ] Confirm the statutory deadline and work back from it.
- [ ] Check the client's records are complete, and chase any gaps early.
- [ ] Confirm the agent authorisation for this tax is live.

02 Do the work

- [ ] Work in your chosen software.
- [ ] File digitally where Making Tax Digital applies.

03 Before you submit

Errors here drive claims, so review before you file.

- [ ] Run a review checklist over the figures and the return.
- [ ] Sanity-check anything unusual against the prior period or the source records.

04 After you submit

- [ ] Confirm to the client, in plain English, that it is done.

PREFER THIS DONE FOR YOU?

Want software that keeps every deadline in view?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

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