Buttons (**we can take reference from H&R Block Website**) hrblock.com

Home

Individual-

Individual tax filing

* Tax Planning
* **AMENDMENT FILING**
* **ITIN ASSISTANCE**
* **W4 PLANNING**
* **TAX AUDIT REPRESENTATION**

Corporate

* Formation of LLC,C-Corp, S-Crop
* Payroll
* Bookkeeping
* Form Generation
* Tax Planning

Our Story

Resource -

After Client Login

Main Menu:

1. Home
2. Personal Information
3. Documents
4. Tax estimates
5. Payment
6. Information to Generate Final documents
7. Review & Confirm documents
8. Final Tax documents

1. **Home:** Here we can show the above process flow chart along with current status

**2. Personal Information:**

Visa status:

Marital status:

Date of marriage:

Taxpayer DOB:

Spouse DOB:

Taxpayer Holding SSN(Yes/No):

Taxpayer First date of entry to the USA:

Spouse Holding ITIN(Yes/No):

Spouse Visa category:

Spouse First date of entry to the USA:

How many dependents(Kids):

Dependents Date of birth:

Dependents Holding SSN/ITIN:

Dependents first date of entry to USA:

Which state have you resided for full year of 2023 With zip code :

+Add state

Current Address

Other source of income

1. Have you sold any stocks ?

2. Have you earned any Interest Income ?

3. Do you have any dividend Income?

4. Do you have any Rental or Business

5. Income/expenses ?

6. Do you have any Distributions from the IRA ?

7. Have you earned any Foreign Income?

8. Do you have any distributions from H.S.A ?

**3. Documents to Upload:** (W2’s, 1099’s, Any other documents)

We have to provide dashboard where client can upload the docs

**4. Tax Estimates:**

A Tabular form where we can show the tax estimates (Federal Refund, state, city)

**5. Payment: A Paypal link from there client can pay directly to us**

**6. Information to Generate Final documents**

[Tax Payer]: SSN -

First Name:

Last Name:

[Spouse]: SSN -

First Name:

Last Name:

[Son]: SSN -

First Name:

Last Name:

Add dependents if you have?

Bank Account details:

Account Number:

Routing Number

Type of Account

**7.Review & Confirm documents :** Here we will upload final tax documents for review and client has to e-sign (e-sign for the conformation of the client to go-ahead with e-filing)

**8. Final Tax documents:** HNI will upload filed tax documents for the client records.

**Automation:**

1. As soon as the client uploads the documents, the ops team has to get notified and the entire details and documents have to be converted into one file along with the file number.
2. Admin’s dashboard should have live status access of every file
3. Client support over the website to resolve his queries