



Tax Filing Process

1. Electronic organizers are sent out in early January to help gather the paperwork needed to prepare your return. The organizer will be sent to you through Liscio, our secure portal.
 - A paper copy of the organizer is available upon request.
2. We receive your paperwork. Paperwork can be submitted to our office via Liscio, mail or drop off.
 - The fastest method to send your documents is by uploading them to Liscio. If you have mailed us your paperwork, we will send you an email to confirm receipt.
3. Once your documents are received, they are scanned into our software and given to your preparer.
 - Your preparer will contact you to let you know they have started working on your return. They will contact you if they have any questions or need any further paperwork.
4. Once your return has been prepared, it will be reviewed by a firm partner.
5. A draft of your return and the e-file forms will be uploaded to Liscio for you to review along with your invoice. **The e-file forms need to be signed and returned to either Jamie Sweeney (jamie@hlacpa.com) or your preparer before we can transmit your returns.**
 - The *safest* way to return the e-file forms is by uploading them to Liscio.
6. Once we have received your signed e-file forms, we will transmit your return. You will receive an automated email notifying you when your return has been accepted.
7. The digital copy of your return will remain in Liscio for you to access at any time.
 - Paper copies are available upon request.

The sooner you submit your tax information, the sooner we can file your return!

- **The closer we get to the filing deadline the longer it may take to prepare your return as our workload increases dramatically.**
- **If we do not receive your paperwork by April 1st, we will automatically file an extension for you.**