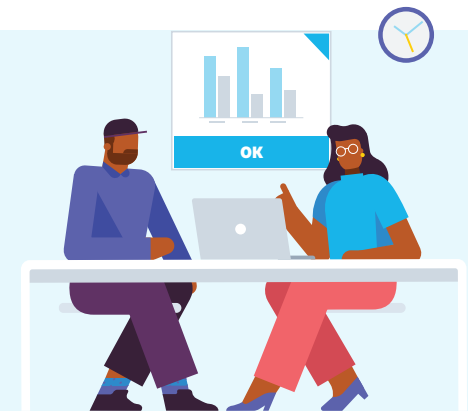


# Whichever method you choose, Xero takes care of lodgement with the ATO so you always lodge on time.



**Xero has two methods for lodging business activity statement for your clients.**



\* Free for Bronze Partners and above

## Lodge BAS with Xero

From a Xero organisation

- ✓ Perfect for BAS agents who have only a few clients, and they all use Xero
- ✓ Email notification letting you know if the BAS is unsuccessful
- ✓ Lodge your clients TPAR directly from within your clients Xero subscription

## Xero Tax\*

For all of your clients regardless if they are using Xero or not

- ✓ Ideal if you have a number of clients - both Xero and non Xero that you manage and lodge activity statements for
- ✓ Automatic activity statements and pre fill features lets you never miss a lodgement or instalment obligation
- ✓ Seek approvals and get activity statements digitally signed by clients using Document Packs in HQ to streamline the lodgement process

# Moving to Xero Tax

Before you make the move to Xero Tax, it can help to review your current processes.

What are you currently doing?  
What's working and what's not?  
You can use this checklist as a starting point.

Ready to get started?



[Xero Tax self-implementation course](#)



[Contact your account manager for advice on choosing the most suitable solution](#)



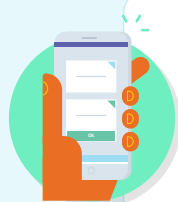
## Keeping it all in order

Do you obtain authorisation from your clients prior to lodgement of their activity statements?

How do you send an activity statements and financial documents for signature?



Document Packs in HQ might be the solution.



## Tracking your clients obligations

How do you track your clients' activity statement lodgement obligations?

How do you ensure you are capturing all obligations like PAYG and FBT instalments?



Automatic activity statements help track your outstanding obligations.

How do you monitor what has been lodged and what is still outstanding with the ATO?



Reports on Xero Tax track lodged and outstanding statements.



## Implementing change



Speak to the staff who might be affected by the process improvements.

What is your most important KPI to reach?