


# Digitally Signing Tax Returns

In an effort to save paper, postage and time, we are using Xero Digital Signatures for electronic signing of Income Tax Returns and other End of Year documents.

The process is a bit more involved than physically signing a paper copy of your Return, however, it is faster and much more secure.

Once we have completed your Tax Return, we will send it to you for digital signing.

You will receive an email like this with a link to review and sign your Return.



**Document to Sign**  
Haslam Consulting & Accounting

Hi Indi,

We've just finished your tax return.

Please take a minute to review and sign so we can lodge it with the ATO.

Please check your bank account details shown on the bottom of the fifth page before signing. If the bank details shown are incorrect, please call our office on 1300 427 526 to update them. Note, you can still sign this copy of the return.

You are not required to make your digital signature reflect your physical signature, any of the signing methods listed are sufficient.

Our estimate of your tax assessment is shown on the fourth page of the document. Please note that if you have any outstanding amount(s) payable to any Commonwealth government department(s), any refund due will be applied to those debts.

If an invoice from us is to be issued for this service, it will be sent via separate email.

Any original documents held by our office will be returned to you via Australia Post.

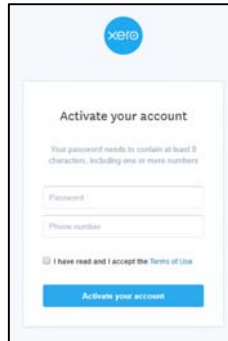
Alternatively, if you would prefer to sign your Income Tax Return in hard copy or have any queries about this process, please contact us on 1300 427 526.

[Review Documents](#)

Click the 'Review Documents' link to check and sign your Tax Return.

You will be taken directly to one of these two screens. Follow the appropriate set of instructions to view and sign your documents.

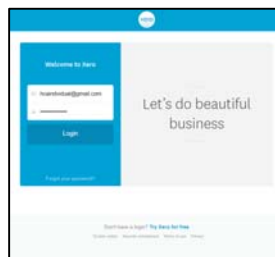
If you have never used this system before and do not have a Xero account, you will be taken to the "Xero Activate Your Account" page.



Go to [Page 3](#) and follow the [Steps A1 – A7](#) to digitally sign your Tax Return or any other documents we have sent you for signing.

OR

If you have used this system previously, you will be taken to this screen



Enter the email address that your Tax Return was sent to and the password you created previously.

Go to [Page 6](#) and follow the [Steps B1 – B5](#) to digitally sign your documents

If you have forgotten your password, please see [Page 8](#) for Password Reset Instructions.

## Step A1

Create a password – this will be your password each time you login so make sure you make it something you will remember.

Enter your phone number.

Read and accept the Terms of Use.

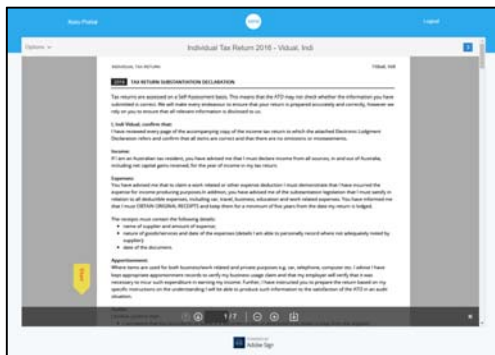
Click the 'Activate your account' button.

## Step A2

You will now be taken directly to your Tax Return.

Please review the details and ensure the information is correct.

In particular, please ensure your **home address** and **bank account details** are correct.

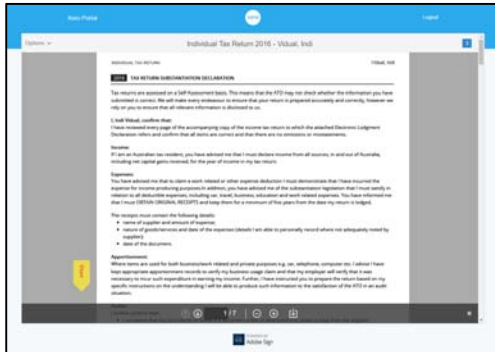


Individual Tax Return 2017			
1 Jul 2016 – 30 Jun 2017			
YOUR NAME			
First Name	Given Name	Family Name	Other Name
DOB	State of Birth	Are you an Australian Resident?	
Has your postal address changed since completing your last tax return?			
YOUR POSTAL ADDRESS		YOUR HOME ADDRESS	
PO Box 5020	11111 Highway 10m		
Suburb	Postcode	State	Postcode
020	4200	QLD	4200
Country - If not Australia			
Has your postal address changed since completing your last tax return?			
YOUR CONTACT DETAILS			
Mobile number	Day time contact number	Email address	
	0123456789		
YOUR BANKING INFORMATION (IFT DETAILS)			
Include the Bank Label			
Bank Number			
Branch	Account Number	Account Name	Preferred Institution Name
	123456789	ABC Bank	ABC Bank
TAX AGENT CONTACT DETAILS			
Tax Contact	Agent Ref Number	Contact Number	
Branch Position	123456789	123456789	

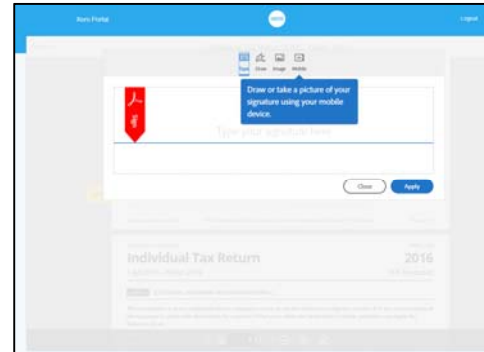
The **Postal address** and **Daytime Phone number** are for our office. These are the details the ATO will use in the event that there are any queries regarding your Return.

### Step A3

Once you have checked your return, scroll back to the first page and click the yellow 'Start' arrow.



You can now select a signing option. If you already have an electronic digital signature, you can upload it using the 'image' option.

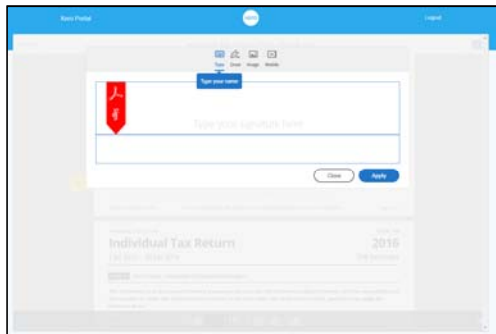


You can also take a photo of your signature using your mobile phone and upload that if you wish.

### Step A4

The easiest of the signing options is 'Type'.

Select 'Type' from the option buttons and you will be prompted to type your name. Click "Apply".



By clicking the yellow 'Next' arrows, you will then be stepped through the three points to be signed. These are located on pages 1, 2 and 3 of your Return.



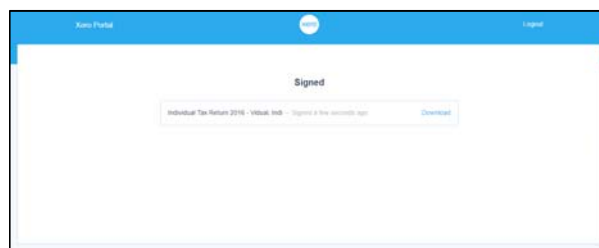
## Step A5

Once the three signatures have been completed, you will see a red 'Sign' arrow and a blue 'Click to Sign' button.

By clicking the blue 'Click to Sign' button you are confirming that the details are correct, and you are authorising our office to lodge your return.

## Step A6

You will then be taken to the confirmation page. You can download a PDF copy of your Return for your records if you wish. Our office will have a copy in your electronic file and in the event that you require a copy you can contact our office on 1300 427 526 or [accounting@haslam.com.au](mailto:accounting@haslam.com.au) to request a copy.



## Step A7

At this point, our office will receive an email advising that your Return has been signed. Our internal Xero file will also update the status from

Out to Sign

to

Returned

Type	Period End	Year	Due date	Status	Edited
ITR	30 Jun 2016	2016	15 May 2016	Out to Sign	14 Nov 2017

Type	Period End	Year	File Date	Edited	Sign status
ITR	30 Jun 2016	2016	15 May 2016	15:41 AM	Returned

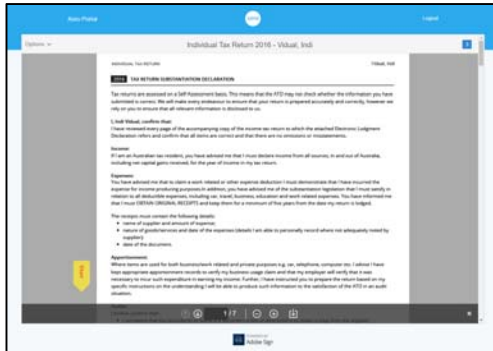
Once we receive this notification, your Return will be lodged with the ATO. During the year, the ATO's processing times vary, but their standard processing time is 28 business days. If that 28 days has elapsed, and your Return has not yet been processed, we can then contact the ATO to find out if there is a problem with the lodgment or processing.

## Step B1

You will now be taken directly to your Tax Return.

Please review the details and ensure the information is correct.

In particular, please ensure your **home address** and **bank account details** are correct.



NAME	Given Name	Family Name	Other Name
John Doe	John	Doe	

YOUR POSTAL ADDRESS	YOUR HOME ADDRESS
123 Main Street Brisbane QLD 4000 Australia	456 Home Lane Brisbane QLD 4000 Australia

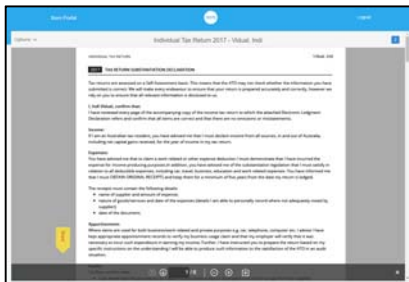
  

YOUR CONTACT DETAILS	YOUR BANKING INFORMATION (BFI) DETAILS
Mobile number: 08 1234 5678 Day time contact number: 08 1234 5678 Email address: john.doe@example.com	BFI Number: 123456789 Account Number: 987654321 Account Name: John Doe Financial Institution Name: ABC Bank

The **Postal address** and **Daytime Phone number** are for our office. These are the details the ATO will use in the event that there are any queries regarding your Return.

## Step B2

Once you have checked your Return, scroll back to the start and click the yellow "Start" arrow, you will be taken through the signing steps using the same method as previously chosen.



NAME	Given Name	Family Name	Other Name
John Doe	John	Doe	

YOUR POSTAL ADDRESS	YOUR HOME ADDRESS
123 Main Street Brisbane QLD 4000 Australia	456 Home Lane Brisbane QLD 4000 Australia

YOUR CONTACT DETAILS	YOUR BANKING INFORMATION (BFI) DETAILS
Mobile number: 08 1234 5678 Day time contact number: 08 1234 5678 Email address: john.doe@example.com	BFI Number: 123456789 Account Number: 987654321 Account Name: John Doe Financial Institution Name: ABC Bank

## Step B3

By clicking the yellow 'Next' arrows, you will then be stepped through the three points to be signed. These are located on pages 1, 2 and 3 of your Return

**Step B4**

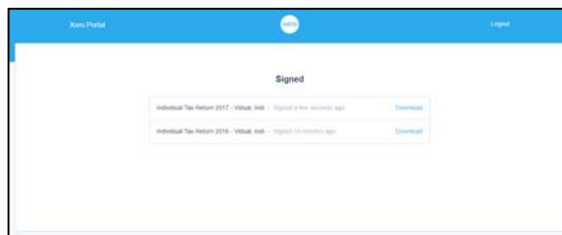
Once the three signatures have been completed, you will see a red 'Sign' arrow and a blue 'Click to Sign' button.



By clicking the blue 'Click to Sign' button you are confirming that the details are correct, and you are authorising our office to lodge your return.

**Step B5**

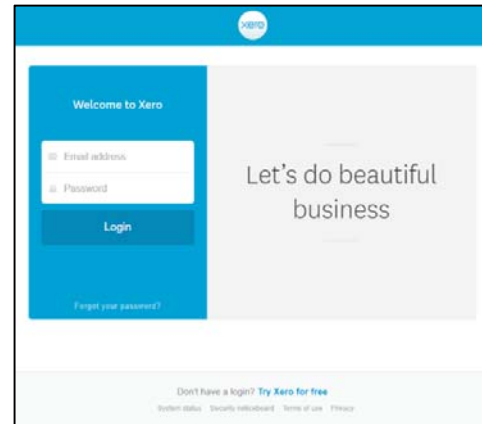
You will then be taken to the confirmation page. You can download a PDF copy of your Return for your records if you wish. Our office will have a copy in your electronic file and in the event that you require a copy you can contact our office on 1300 427 526 or [accounting@haslam.com.au](mailto:accounting@haslam.com.au) to request a copy.



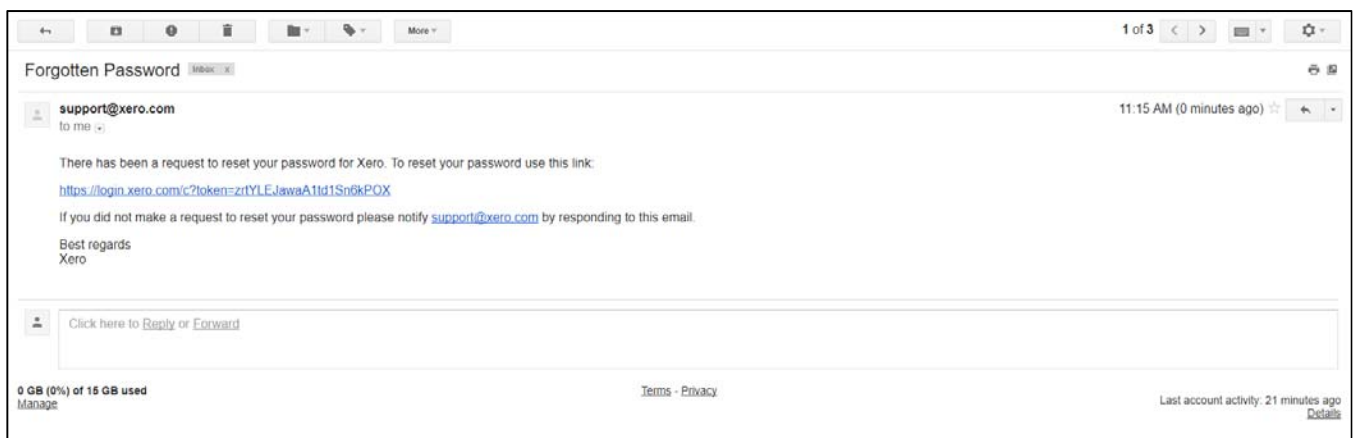
At this point, our office will receive an email advising that your Return has been signed. Once we receive this notification, your Return will be lodged with the ATO. During the year, the ATO's processing times vary, but their standard processing time is 28 business days. If that 28 days has elapsed, and your Return has not yet been processed, we can then contact the ATO to find out if there is a problem with the lodgment or processing.

## Password Reset Instructions

If you click the "Review Documents" link in the "Document to Sign" email and are taken directly to this screen, but you do not remember your password, click the "Forgot your password?" link.



Xero will then send you a Password Reset email

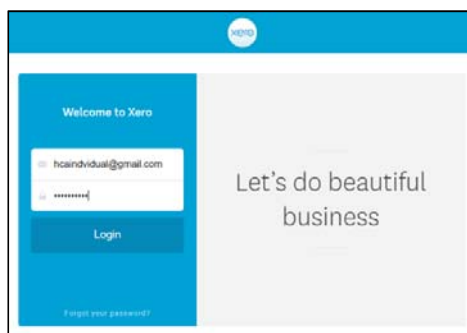


Click the hyperlink as instructed in the email. You will then be taken to this screen

Enter your password twice to save it into the Xero Digital Signature system.



When you click the "Reset Password" button, you will be taken to this screen.



**IMPORTANT: Close the browser window and go back to the original email.**

If you login in directly from this point, you will be taken to this screen

[Close the browser window and go back to the email.](#)

Click the "Review documents" button in the original email and you will be taken directly to the document to be reviewed and signed.