Tax: R&D tax credit

	Ready to Start	R&D tax credit opportunity	Initial Discovery (step 1: Client & Project Discovery)	Initial Discovery (Step 2: Engagement Letter)	R&D tax credit engagement	Waiting for Engagement Letter	Set-up / Initiation (Step 1: Client Data Request)	R&D tax credit information needed	Set-up / Initiation (Step 2: Kick-off Call)	Preparation (Step 1: Calculation Preparation)	Preparation (Step 2: Project Qualification Preparation)	Additional information needed for your R&D tax credit project	Preparation (Step 3: Final Calculation)	Review (Step 1: Manager Review)	Review (Step 2: Partner review and sign-off)	Credit Delivery (Step 1: Assemble Credit Forms and Tax Ready Emails)	Credit Delivery (Step 2: Review and Send)	Congratulations! Your federal and/or state R&D tax credit is complete.	Follow-up
Client Manager	Update and save the client task below to set up a discovery meeting		Schedule/confirm R&D initial tax discovery meeting with client Complete discovery summary (pros, cons) and follow-ups				Update the following Data Request client task based on the client's situation (and add factsheet)		Schedule/confirm R&D kick-off meeting with client (and upload of critical data) Complete kick-off summary (pros, cons) and follow-ups								Close out project tasks: close "Complete project" / Schedule R&D tax credit work session / create opportunities (+ work item or checklist)	
Client		Schedule your R&D credit kick-off meeting at www.calendly.com/ajanovic/cash			Sign-off confirm receipt of your R&D Tax Credit engagement letter			Schedule your R&D tax credit kick-off call at https://calendly.com/ajanovic	Review and confirm the R&D tax credit project team Upload employee information Upload your current-year and prior three years)			Action item #1 Action item #2 Action item #3						Review and confirm receipt of your R&D tax credit final paperwork	
Admin				Prepare and send engagement letter		Confirm receipt of R&D tax credit engagement letter													
Preparer										Build the base R&D tax credit calculation	Complete site visit / follow-up call Update R&D tax credit calculation based on additional information (site visit, follow-up call, client provided documents)		Complete R&D final calculation (including missing info, finalize calculation, and complete self review)			Prep and review the forms for the R&D tax credit project			
Reviewer														Complete manager review of the R&D tax credit (e.g. review calcs, review forms, confirm future resolved concerns)			Review R&D tax credit forms, credit numbers, and tax software input Review, approve and send R&D tax credit tax ready emails to client tax lawyer		
Partner															Complete partner review of R&D tax credit				