

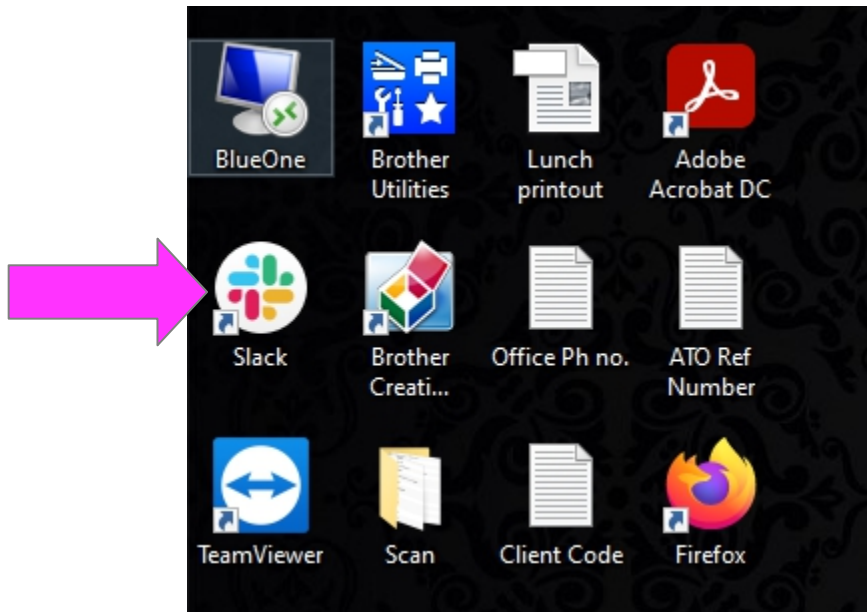
ezytax
BLUE

slack



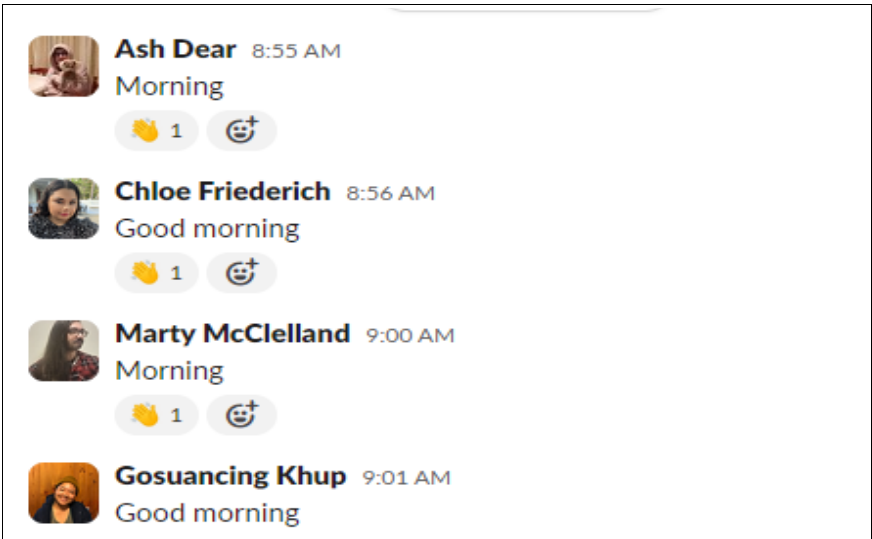
SLACK

Slack is our means of communication with each other between the different office locations. It is a chat based program which uses voice and written chat for communication. This program allows all employees to be in contact with each other at all times and should be used first before picking up a telephone or email.

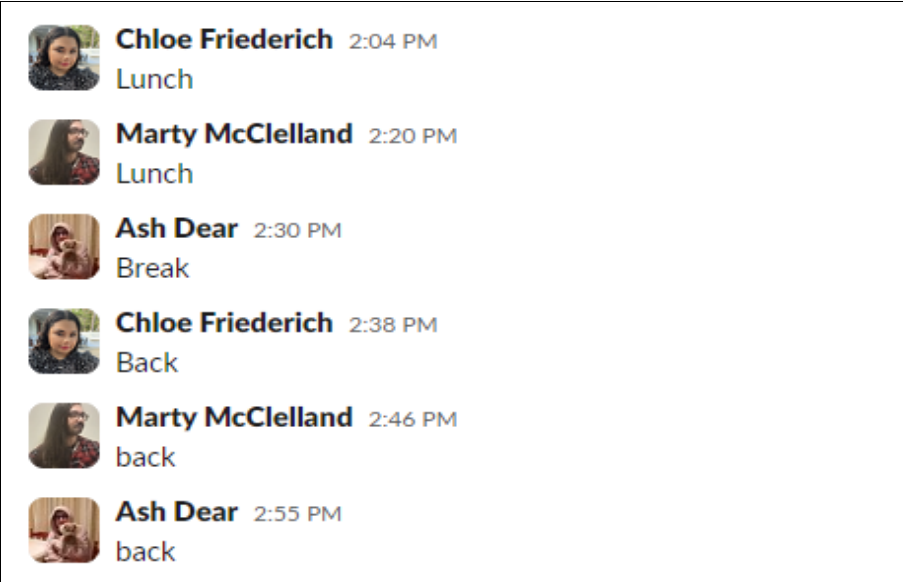


Slack is to be turned on when employees log into their assigned computers. All staff are required to pay attention to Slack at all times.

- **Beginning of your shift:** You **MUST** message the relevant Slack channel so that Management and other staff know you are there. A simple message such as “Good morning” will suffice preferably in your city's Slack channel.

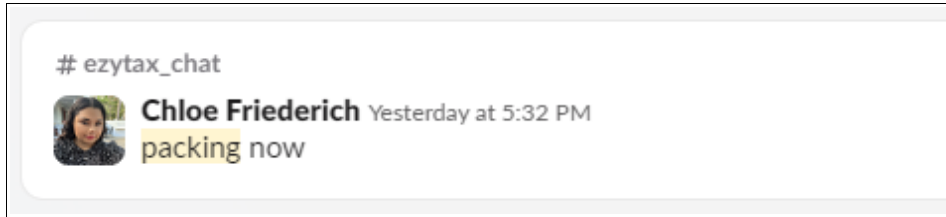


➤ **Lunch and other breaks:** If for any reason, you need to leave the booth for a bathroom break or for lunch you must mention this on Slack and repeat when you return. For example “Bathroom” when leaving, “Back” when returned. Should you need help with a return you can also use Slack to post the question on the relevant channel – in most cases the fastest way to get a response is to post on your location's channel.

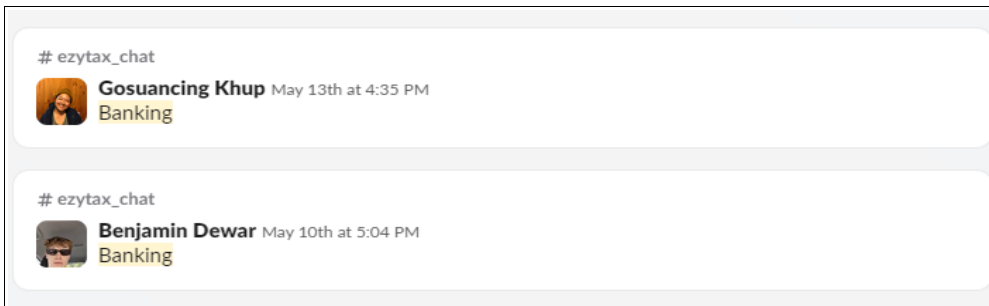


➤ **End of shift:** You must post at the following points -

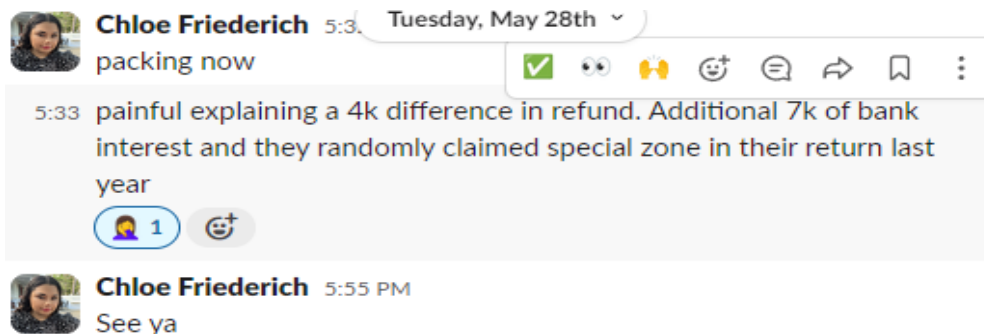
➔ Packing up – post when you are packing up the booth.



➔ Banking – post when you are heading to the bank.

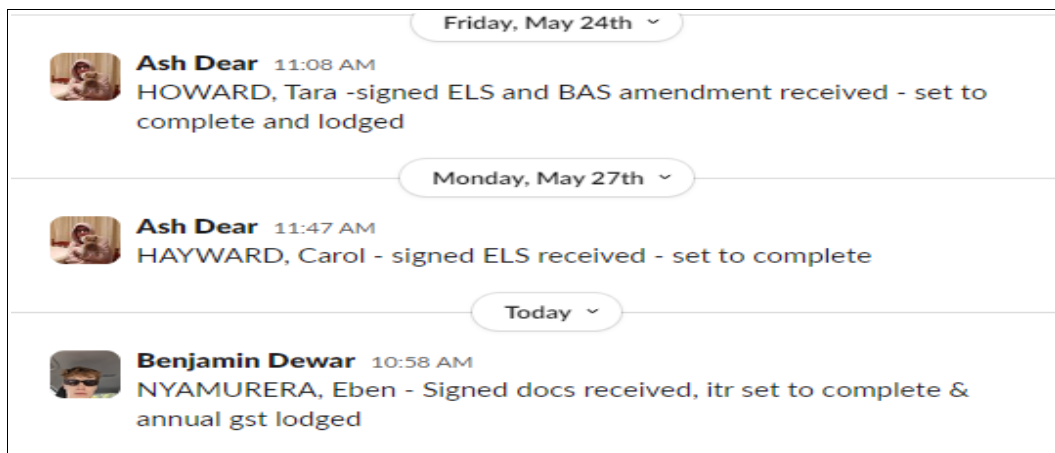


➔ Leaving – post when you are leaving for the day.

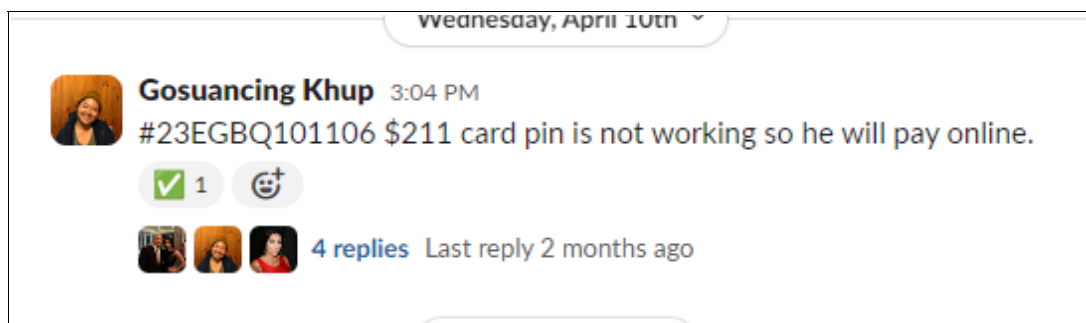


There are several channels on Slack which have different roles. You must ensure you have been added to the following channels:

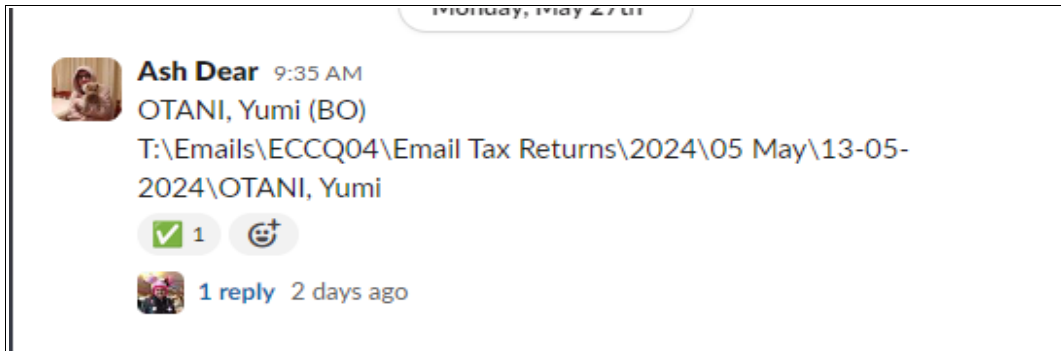
- **#ezytax_blue** – This channel is for company wide discussion or announcements.
- **#ezytax_cairns/brisbane/goldcoast/townsville** – These channels are for matters relating to their respective locations.
- **#lodgments** – To deal with lodged/rejected tax returns.



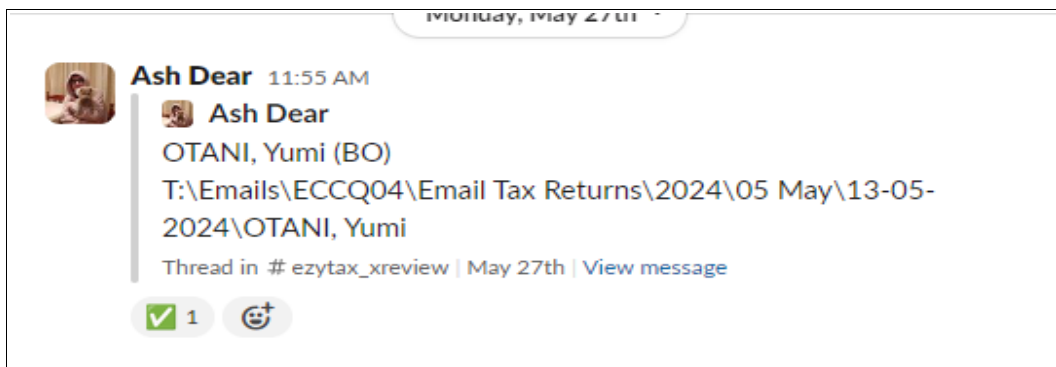
- **#ezy_payments** – If a client must pay by bank transfer (DD), post the invoice number, amount and reason so management can track payments and notify you when the payment has been received. When payment has been received, put a green Tick when you have updated the SS and ITR.



- **#ezytax_xreview** – If there are issues with reviewing a return (such as missing documents) or if you want to request a review for a specific piece of work it will happen in this channel. Returns that need to be sent for signing via Adobesign are reviewed here and not in the bottom of your SS. A green Tick means it has been reviewed and can be sent for signing (if applicable).



- **#ezy_emails** – This is where emails are dealt with. If you need an email sent, post here.
- **#ezy_adobesign** If you need ELS signed via AdobeSign, post here. Share the thread from the relevant channel eg: Review channel, to ensure continuity.

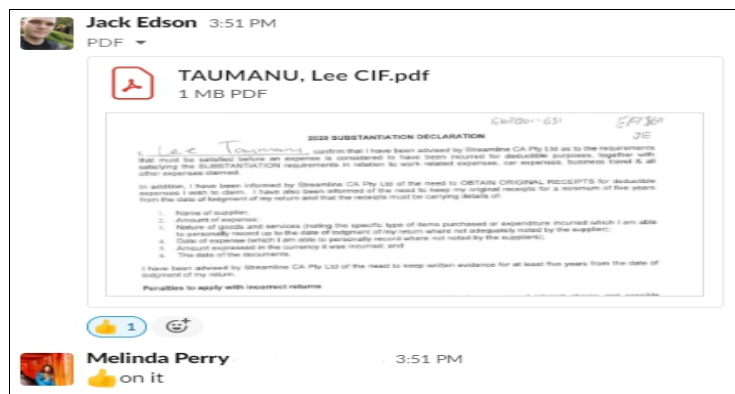


- **#ezy_taxreturns** – If you are busy with returns and need help to speed along your queue you can post a completed CIF here and someone who is free will get the return started and entered to MYOB to minimise the work you have to do when the client reaches their turn at the desk.

- This channel is reserved for the posting of surplus returns. If you are busy with a return at the booth you can have a client from the queue complete a CIF and post it to this channel. Should someone be free at another location see this they can then “claim” the return. The person that claimed the return will then begin the ITR. They will not be able to complete the ITR entirely but they can ensure the client has their info entered into MYOB and enter basic prefill information thereby saving you and the client time when they reach the front of the queue.

****If you are not currently with a client or working on assigned tasks keep an eye on #ezy_taxreturns channel as neither your colleagues nor our clients enjoy queues.**

1. To claim a return that has been posted either respond or react to the message with a :thumbs up: emoji so that everyone knows it is being worked and by whom.



2. **MAKE SURE YOU ARE ON THE CORRECT SERVER** – if you're not sure, ask the person if they're on BO or BZ. Once you have confirmed, begin entering the client's info into MYOB. **Remember that Cairns and Townsville use BlueZero, Gold Coast and Brisbane use BlueOne. VA Drive is on BlueOne.**
3. Keep an eye on the channel as the person who posted the CIF may have caught up and will need to begin the return themselves. If they don't post anything enter as much information as you can into the return from the clients prefill. Once this is

done message the channel saying “***CLIENT NAME*** done”.

SLACK CODE OF CONDUCT:

- Slack and all of its contents form part of Streamline CA's property.
- Taking pictures or screen shots are strictly prohibited as it is a breach of Privacy Laws.
- Showing Slack and any of its content to outside parties is strictly prohibited as it is a breach of Privacy Laws.
- Misuse of Slack can result in a warning and/or termination.
- Be polite at all times.
- It is your responsibility to ensure that you are paying attention to Slack at **ALL TIMES**.
- Whenever you are asked to complete a task, ensure you acknowledge it WHEN assigned (a thumbs up emoji is acceptable) AND when it is completed. It is not Management's responsibility to chase you for completed work.
- Prompt responses to Management is required.