Client lodgements - AU

Looking for help with lodgement issues? See Validation errors in MYOB Practice tax.

The Corporate admin **Client lodgements** page displays all created, outstanding, lodged and rejected ASIC forms.

The ellipsis menu displayed next to each form lets you perform different actions, depending on the form type and status.

Status	Description
Outstanding	Displays all unlodged forms. Selected by default.
In progress	Displays all unlodged, partially prepared forms that not been completed, and a task has not been created.
Pending signature	The task has been created and forms sent to the client for signing.
Pending authorisation forms *Bulk 484 updates only*	The task has been created and forms sent to the clients for signing. This status only appears in the **Status** column. You'll only be able to see these bulk updates when you've selected the **Outstanding** status tab.
Ready to begin *Bulk 484 updates only*	Your client has approved and signed the forms. The forms are ready for you to begin the bulk update that will be sent to ASIC. This status only appears in the **Status** column. You'll only be able to see these bulk updates when you've selected the **Outstanding** status tab.
Ready to lodge	Your client has approved and signed the forms. The forms are ready to be sent to ASIC.
Under review	The form has been lodged and is currently under ASIC's review.
Rejected	The form has been lodged and has been rejected by ASIC.

Status	Description
Done	The form has been lodged and accepted.

To view Client lodgements

To access the **Client lodgements** page, select **All clients** and click **Corporate Admin** on the top menu bar.

To send documents for signing via Portal

1. In the Client lodgement page, click the ellipsis button and choose **Send for Signing via portal**. The Create task page appears.

> If you regularly send documents with the same text, you can save time by using one of your practice's task templates to automatically fill in the **Title** and **Description** fields. Just click **Apply a template** (Apply a template).

2. Complete the details on the page.
3. Click **Create task** for the selected client.

To lodge a form

1. From the **Client lodgements** page, click the **Ready to lodge** tab.
2. Click the ellipses button for the form you want to lodge.
3. Choose **Lodge**.

To create, register or set up an entity

1. From the **Client lodgements** page, click **Create an entity** located on the top-right of the page. The **Create an entity** page appears with the following options:
   - Register a new company (201) - AU
   - Set up a discretionary trust - AU
   - Set up a self-managed super fund (SMSF) - AU

2. For the type of entity you want to set up, click **Prepare form**.

To resume or delete an In Progress form

1. From the **Client lodgements** page, click the **In progress** tab.
2. Click the ellipsis button next to the form you want to resume or delete.
3. Choose **Resume** to continue preparing the form, or **Delete** to delete the In progress form.

To edit the documents and details in a form you already started

You can edit details of 484 forms any time before they reach the Ready to lodge status. For other forms, if you want to change details before lodgement, you'll have to prepare a new form.

1. From the **Client lodgements** page, click the **Pending signature** tab.
2. Select the ellipsis button next to the form you want to edit.
3. Choose **Edit signatories**.
4. Make your changes and click **Create forms**.

> You can select multiple signatories.

To verify the documents included as part of a form

1. From the **Client lodgements** page, click the **Under review** tab.
2. Click the ellipsis button next to the form you want to verify and click **Download documents**.