

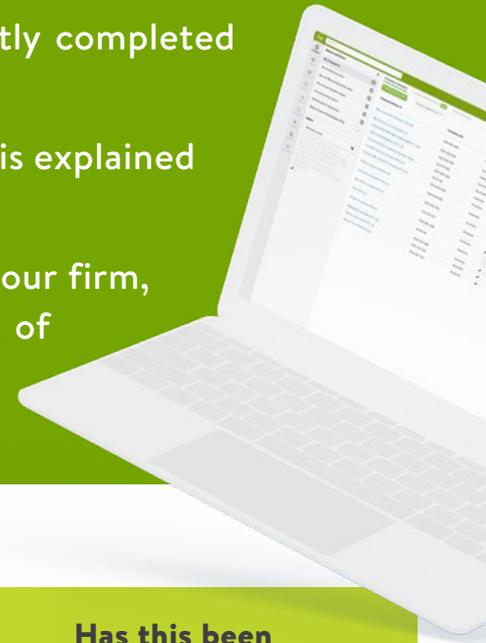


Post-Onboarding Checklist

This checklist is designed to assist users who have recently completed their transition to CAS 360.

The below table outlines 6 key areas for review. Each item is explained in further detail on the 2nd page.

We recommend reviewing each item and if applicable to your firm, implementing or applying the recommended step as part of your transition to CAS 360.



Checklist Number	Item to be checked	Has this been completed?
1	Lodge an RA61 to confirm all companies are in CAS 360	
2	Make use of the Alerts feature	
3	Update RA72 Beneficial Owner (applies to firms who have imported data from ASIC)	
4	Update Share Allotment Dates (applies to firms who have imported data from ASIC)	
5	Input email addresses and/or mobile phone numbers for relevant contacts in CAS 360	
6	Customise your Document and Email templates	

Item 1. Lodge an RA61 to confirm all companies are in CAS 360

We recommend preparing and lodging an RA61 - Request Review Date report. When ASIC sends back the RA62, you'll be able to see if there are any companies that ASIC have you as the agent for but are not in CAS 360. For more information, please click [here](#).

Item 2. Make use of the Alerts feature

Alerts in CAS 360 help you stay on top of your corporate compliance work and are designed to minimise the risk of late fees/penalties due to late debt payments or missed annual reviews.

For more information on alerts, please click [here](#).

NOTE: If you had similar alerts/reminders set up in your previous software, these will not come across automatically. You will need to ensure new reminders/alerts are utilised in CAS 360.

Item 3. Update RA72 Beneficial Owner (applies to firms who have imported data from ASIC)

If a shareholding had a beneficial owner attached, ASIC does not send through the correct beneficial owner name when the data is downloaded, so a generic RA72 Beneficial Owner will be attached. You will need to edit the shareholding and update the RA72 Beneficial Owner to the correct beneficial owner. For more information on this, please click [here](#).

Item 4. Update Share Allotment Dates (applies to firms who have imported data from ASIC)

For shareholders, the date of allotment will show as the date the data import from ASIC was done. This is only cosmetic and won't affect your lodgements. However, if you wish, you may edit the shareholding and change the date to the correct allotment date.

Alternatively, if you prefer, the CAS 360 Team can assist to update ALL shareholding dates to be the same as the date of incorporation for the related company. This is a global process that is applied for all companies. *Speak to your dedicated Client Success Consultant for more information on this process.*

Item 5. Input email addresses and/or mobile phone numbers for relevant contacts

In order to be able to send emails or SMS directly to your clients via CAS 360, you will need to have their email addresses and/or mobile numbers input for the individual contact(s) in CAS 360.

Speak to your dedicated Client Success consultant for information on how we can assist with this process.

Item 6. Customise your Document and Email templates

CAS 360 allows you to easily customise your document and email templates. We recommend reviewing our templates webinar - please click [here](#) to access the webinar.