



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	Review Shareholder history + Share values (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	
7	Company Incorporations and the digital certificate	

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. Review Shareholder history + Share values

Please click [here](#) for more information on what needs to be reviewed in relation to shareholders that have been imported from ASIC.

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.

Item 7. Company Incorporations and the digital certificate

If you previously completed company incorporations in CAS Desktop, you will need to re-lodge an RA53 to re-authorise your digital certificate in CAS 360.

For more information on the RA53, please click [here](#).

If you're having issues locating your existing digital certificate, please click [here](#).

Alternatively, if you are new to incorporations or wish to purchase a new digital certificate from Symanetc - please click [here](#).

If you have any queries regarding the digital certificate or the associated processes, please contact our Support Team for further assistance.