ONE-PAGE REFERENCE

Tax season phone triage

Six decisions the front desk makes every day. Adapt them to your firm's policies and professional obligations.

If the caller wants an appointment
Confirm the purpose, take their name and number, and follow your booking rules. If the purpose needs an accountant to scope it, book a short call instead of a full meeting.

If the caller asks whether their return is done
Confirm the caller is the client, using your firm's usual identity check. Then look up the file's current stage in your workflow system. If you can't confirm who they are, or can't see the file, call them back at the number you have on file.

If the caller asks whether an expense is deductible
Say it's a question for their accountant, take down the question and book time or a callback. Don't answer it at the desk.

If the caller has received a letter from the CRA
Note the type of letter, the date on it and any response date it gives. Ask for a copy through your secure portal, and book a review with an accountant.

If the caller thinks a CRA call was a scam
Follow the CRA's scam guidance (summarized in the reference section), and tell the client's accountant the same day.

If the caller is new and needs an urgent filing
Take down the tax year, return type, deadline and what records they have, then apply your acceptance criteria. Don't promise a filing date until an accountant has accepted the work.

Who does what

Who	What
Receptionist	Giving approved answers to routine questions, taking down new enquiries, booking, checking callers' identity using your firm's process, logging CRA letters and complaints, and sending the three client messages.
Accountant	Anything that needs professional judgment: advice, CRA correspondence, accepting complex or urgent work, and deciding whether to start a file with something missing.
Suitable for an AI receptionist	Answering routine questions from approved scripts, taking down new enquiries with your questions, booking where it connects to your calendar, and routing calls to the right person.
Needs a secure integration and identity verification	Status lookups and anything else that reads client records.
Never for an unqualified person or system	Giving tax advice, interpreting CRA letters, confirming a return is complete or filed without access to your records, and collecting SINs, banking details or tax return contents over a general phone line.

Privacy at the front desk

- Before you discuss a client's file, confirm the caller really is that client, using your firm's usual identity check. If you can't, call them back at the number you have on file.
- Don't collect SINs, banking details or anything from a tax return on a general enquiry call, in voicemail or in call notes. Collect them through your secure process once the person becomes a client.
- Ask clients to upload documents to your secure portal, not to send slips or ID by regular email.
- Keep call notes short: who called, what they needed and what happens next.
- If you use an answering service or an AI tool, check where it stores call data and for how long, and make sure that meets your privacy obligations.