FrontdeskAI

FOR THE 2026 TAX YEAR (2027 FILING SEASON)

2027 Tax Season Front Desk Playbook

for Canadian accounting firms

Version 1.0, November 2026. Free to share with your team and colleagues.

How to use it

Start with the call audit (page 12) for one week, before changing anything. Then adapt the triage rules, file stages and client messages, and measure again in week four. Nothing here needs new software.

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Operational practices, not tax, legal or professional advice. Adapt to your professional obligations, confidentiality requirements and systems. Full article: tryfrontdesk.ca/blog/tax-season-calls

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.

PHONE TRIAGE

Ten call types, and what happens to each

Call	Handled by	Safe to collect	Client records?	Escalate when	Caller's next step
Routine admin (hours, address, what to bring, portal help)	Receptionist, or an AI receptionist working from approved answers	Name, number, the question	No	The answer isn't in your approved answers	An answer, or a callback from the right person
New-client enquiry	Receptionist captures it; an accountant decides whether to take it	Name, contact details, return type, years involved, any CRA letter or deadline, referral source, permission to follow up	No	There's a deadline, a CRA notice or a sign of complexity	Told what happens next and when they'll hear back, or booked if your criteria allow it
Document submission	Receptionist, or an AI receptionist	Name, which documents	No	A portal problem you can't fix	Your secure upload link or drop-off instructions, never “just email it”
Appointment request	Receptionist, or an AI receptionist with booking access	Name, contact details, purpose, preferred times	Your calendar only	An accountant needs to decide how long it is or who attends	Booked, or offered times, with a confirmation
Return status	A receptionist who can see your workflow system, once the caller's identity is confirmed	Name, number on file	Yes	Their identity can't be confirmed, or the file has stalled	The current stage, or a callback to the number on file
Pricing	Receptionist, or an AI receptionist, from your published starting prices	Return type, rough complexity	No	The work needs scoping before you can quote	A starting price and how the final fee is set, or a short scoping call
CRA correspondence	Receptionist logs it; an accountant reviews it	Type of letter, the date on it, any response date it gives	Not to log it	Always: same or next business day	Asked to upload a copy securely; an accountant's review is booked
Tax advice (“Can I claim this?”)	Accountant	The question, name, number	Usually	Always	Booked time or a callback. No answer at the front desk.
Urgent deadline	Receptionist captures it; an accountant decides the same day	The deadline, return type, what's missing	Sometimes	Always	Told when they'll hear back. No promise to file until an accountant accepts the work.
Complaint	Receptionist logs it; a manager or partner responds	What happened, what they want, contact details	Sometimes	Always	Told the complaint is logged, and who will call them back

CLIENT INTAKE

New-client intake form

Collect only what's needed to decide. No SIN, banking details or return contents on an enquiry call.

Date and time	
Name	
Phone and email	
Return type (personal / self-employed / corporate / other)	
Tax years involved; any unfiled?	
CRA letter or deadline? Date on it	
Corporate year-end (if any)	
State of records	
What changed this year	
Fee expectation	
How they found us	
OK to contact before next season? (Y/N, date asked)	
Outcome: accept / accept with conditions / refer or next season's list	
Next step and owner	

CASL: an enquiry gives implied consent to send commercial email for six months (CRTC guidance). Ask for permission to contact them later, and record the date.

CAPACITY

Qualification and capacity worksheet

Question	Why it matters	Routine	Complex or urgent	Can't take it now
What kind of return?	Sets the hours and who prepares it	Personal return, slips only	Self-employed, rental, corporate	Work you don't offer
Which tax years?	Unfiled years multiply the work	This year only	Earlier years unfiled	Several years, with no records
Any CRA letter or deadline?	Some dates can't move	None	A notice or request with a date on it	A deadline sooner than you can meet
How organized are the records?	Preparation time depends on it	Slips and receipts ready	Missing bookkeeping or records	Needs bookkeeping before any return
What changed this year?	Life events add complexity	Nothing new	Moved provinces, started a business, sold property, foreign income	–
Fee expectations?	Avoids later write-offs	Fine with your starting price	Needs a quote	Expects less than your minimum
How did they find you?	Referral partners may get priority	–	–	–
May we contact them later?	Needed before you contact them about next season (see the note below)	–	–	–

Rough capacity check (a planning sketch, not a staffing forecast)

Line	Formula	Your numbers	Illustration
Available hours	Preparers × prep hours a week × weeks to deadline		3 × 25 × 10 = 750
Committed hours	Existing returns × average hours each		220 × 2.5 = 550
Buffer	Available × buffer % for rework and review		15% = 112.5
Left for new work	Available − committed − buffer		87.5
New returns	Left ÷ average hours per new return		÷ 3 ≈ 29

FILE READINESS

File readiness stages

A suggested workflow, not an accounting standard. Rename the stages to match your practice management software or spreadsheet.

Stage	What it means	Moves on when	Usually owned by
Awaiting documents	The request has gone out. Nothing, or not everything, has arrived.	The first document arrives.	Admin
Documents received	Something has arrived.	It's logged, and the client has been sent template B.	Admin
Completeness check pending	Waiting to be checked against this client's document list.	Someone checks it against the list, within the window your firm sets.	Admin or junior staff
Ready for preparation	Everything on the list is in, or an accountant has approved starting without a missing item, and that's recorded.	A preparer is assigned.	Admin, then preparer
In preparation	Being prepared.	The draft is done, or a question blocks it.	Preparer
In review	A reviewer is checking it.	Approved, or sent back with questions.	Reviewer
Awaiting client action	Waiting on the client: a missing item, an answer, approval, a signature or payment.	The client responds. The file goes back to the stage it left.	Admin follows up; preparer confirms
Completed	Filed, and the client has been told.	Done	Admin

Rules

- A file reaches “Ready for preparation” only after a completeness check, not when documents arrive.
- Each check produces one message listing everything that's missing, not one message per item.
- When a file moves to “Awaiting client action”, record what's needed and the date you asked. It returns to the stage it left once that's resolved.
- Count how many times each file goes back to “Awaiting client action”. That count is your rework measure.
- Give urgent files their own lane: a fixed number of slots, entry only with an accountant's approval, and the same logging as every other file.
- If a client can't get a document, an accountant decides whether work can start without it. Record what's missing, and get the client's agreement in whatever form your firm requires.

CLIENT MESSAGES

Client communication templates

Each answers a question before the client calls to ask it. Replace the [placeholders]. Don't promise turnaround times you can't keep.

Template A: Document request

Send once, with the full list, when you open the client's file for the season.

Subject: Documents for your [2026] tax return

Hi [First name],

To prepare your [2026] [personal / self-employed / corporate] return, we need:

1. [Document]
2. [Document]
3. [Document]

Please upload them to [secure portal link]. Please don't send tax slips or ID by regular email.

Once everything is in, we'll check it against this list and tell you if anything is missing. Your return joins our preparation queue after that check.

If something on the list doesn't apply to you this year, reply and tell us. That saves us asking twice.

[Your name]
[Firm name] | [Phone]

Template B: Documents received

Send the same day documents arrive. Clients who know you have them don't call to ask.

Subject: We received your documents

Hi [First name],

We received [number] document(s) from you on [date]: [list, or "see your portal"].

This confirms we have them. It doesn't yet mean your file is complete: our next step is to check them against your list. If anything is missing, we'll ask for it all in one message.

You don't need to do anything right now.

[Your name]
[Firm name]

Template C: Status update

Send when the file changes stage, so the client never has to call to find out.

Subject: Your [2026] return: [stage]

Hi [First name],

Here's where your [2026] return stands.

Stage: [Awaiting documents / In preparation / In review / Waiting for your approval / Filed]
What we need from you: [Nothing right now / the item, and how to send it securely]
Next update: [when it moves to the next stage / a date]

If anything changes on your side, such as a new slip, address or bank account, please tell us through [portal or channel], not by voicemail.

[Your name]
[Firm name]

Two habits

- Use one channel for documents and updates, so clients know where to look.
- Send template C every time a file changes stage, even when the news is “still waiting”.

CRA

CRA letters, scam calls and authorization

CRA letter escalation checklist

1. Log the client, the type of letter, the date on it, the date you received it and any response date it gives.
2. Ask the client to upload a copy through your secure portal. Don't take its contents by voicemail.
3. Book an accountant's review for the same or next business day.
4. Before anyone calls the CRA about it, check that the client has authorized your firm to represent them.
5. For a notice of assessment or reassessment, the accountant checks the objection deadline. The CRA's rule for individuals is the later of one year after the return's filing deadline or 90 days after the notice date. For corporations it's 90 days after the notice date.
6. Tell the client who is handling it and when they'll hear from you.

When a client reports a suspicious CRA call

- The CRA says it won't demand immediate payment by e-Transfer, cryptocurrency, prepaid credit cards or gift cards, threaten arrest or deportation, or ask for personal or financial information in a voicemail.
- A real CRA agent may ask a caller to confirm their name, date of birth or SIN, so a SIN request alone doesn't prove a scam.
- The client should end the call, look up an official CRA number on canada.ca and call it themselves, or sign in to their CRA account to check.
- If they shared personal or financial information, the CRA says to contact it (1-833-995-2336 for personal accounts), their bank, the credit bureaus and local police, and to report it to the Canadian Anti-Fraud Centre.
- Tell the client's accountant the same day.

Authorization, during onboarding

- Through My Account: the client adds you under Authorized representatives. This is the fastest route.
- Through Represent a Client: you send the request and the client confirms it. The CRA says the client may need to confirm within 10 business days.
- Form AUT-01: offline access only (phone, mail, fax, in person). It must reach the CRA within six months of being signed.

Sources: CRA pages listed on page 13. Verify current CRA guidance before relying on it.

IMPLEMENTATION

Four-week plan

Week	Focus	What to do
Week 1	Measure	Log every call for five working days with the interruption audit sheet: purpose, minutes, who handled it, and whether it repeated an earlier call.
Week 2	Standardize	Write your approved answers and routing rules from the triage table, build each client type's document list, and adapt the three client messages.
Week 3	Implement	Set up the file stages in the software you already use (or a spreadsheet), brief the front desk, and set up phone forwarding for overflow calls.
Week 4	Evaluate	Repeat the week 1 log and compare. Keep what reduced repeat calls and interruptions, and fix what didn't.

What to measure

Metric	How to measure it	Week 1	Week 4
Administrative calls per day	Count from the audit log		
Repeat calls about the same issue	Calls marked “repeat” in the log		
New-client enquiries captured	Enquiries with complete intake details		
Time to first response	Hours from enquiry to your first reply		
Files ready for preparation	Share of open files at or past “Ready for preparation”		
Returns to “Awaiting client action”	Average per file: your rework measure		
Escalations needing an accountant	Count from the log		
Callbacks completed when promised	Callbacks done ÷ callbacks promised		
Staff time on routine enquiries	Minutes from the log, per day		

REFERENCE

2027 filing season dates

For the 2026 tax year, from the CRA's 2027 deadline list. General rules; individual circumstances differ. Weekend and holiday dates move to the next business day.

Date	What's due	Status
Last day of February (March 1, 2027)	T4 and T4A slips. February 28, 2027 is a Sunday, so the CRA's weekend rule moves it to Monday.	Confirmed
March 15, 2027	First quarterly instalment, for individuals who pay them.	Confirmed
April 30, 2027	Most individual returns, and any balance owing for every individual, including the self-employed.	Confirmed
June 15, 2027	Returns for self-employed individuals with a December 31 year-end, and their spouses or common-law partners. Some tax shelter cases are due April 30.	Confirmed
Six months after year-end	Corporate T2 returns. The balance is generally due two months after year-end, or three for some Canadian-controlled private corporations.	Confirmed
Late February 2027	Online filing opens. The CRA hadn't announced the 2027 date when we checked; in 2026 it opened February 23.	Expected

WEEK 1 AND WEEK 4

Interruption audit worksheet

Log every administrative call for five working days. Include the time to get back to work, not just the call.

Date	Time	Caller (client, prospect, CRA, other)	Purpose (triage category)	Minutes, including getting back to work	Handled by	Could someone else have handled it? (Y/N)	Repeat of an earlier call? (Y/N)	Outcome / next step

SOURCES

Sources

- CRA, 2027 tax deadlines for businesses and self-employed individuals: https://www.canada.ca/en/services/taxes/resources-for-small-and-medium-businesses/2026-tax-deadlines-canadian-businesses-self-employed-individuals.html
- CRA, online filing start date (2026 season): https://www.canada.ca/en/revenue-agency/news/newsroom/tax-tips/tax-tips-2026/tax-season-starts-february-23-heres-what-you-need-to-start-filing.html
- CRA, authorize a representative: https://www.canada.ca/en/revenue-agency/services/tax/representative-authorization/how.html
- CRA, representatives: request authorization: https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/help-cra-sign-in-services/representatives-request-authorization.html
- CRA, income tax objections decision tree: https://www.canada.ca/en/revenue-agency/services/about-canada-revenue-agency-cra/complaints-disputes/file-objection-cppei-appeal-minister/income-tax-decision-tree.html
- CRA, recognize a scam: https://www.canada.ca/en/revenue-agency/corporate/scams-fraud/recognize-scam.html
- CRA, report a scam: https://www.canada.ca/en/revenue-agency/corporate/scams-fraud/report-scam.html
- Office of the Privacy Commissioner, PIPEDA safeguards principle: https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/p_principle/principles/p_safeguards/
- CRTC, guidance on implied consent (CASL): https://crtc.gc.ca/eng/com500/guide.htm
- Woodard and Mango, 2024 Accounting Industry Report (US, 287 respondents): https://report.woodard.com/articles/effective-client-communication-2024-woodard/mango-accounting-report-mgowr-ocewr

Checked November 2026. Version 1.0, November 2026. Operational practices, not tax, legal or professional advice.

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