

Checkpoint AU

Div 7A Workflow Solution

The Div 7A Workflow Solution provides you with nine easy to follow, detailed flowcharts that identify risks and solutions. They cover the entire risk area including Unpaid Present Entitlements (UPEs), Interposed Entities (both companies and trusts) and Corrective Action.

These flowcharts are linked to the most current legislation and various tools including calculators, templates, and decision trees.

Templates included are Client letters, Minutes and Loan Agreements.
The Calculators included are:

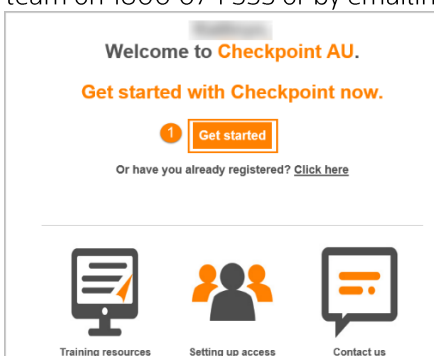
- Minimum yearly repayment calculator
- Corrective action calculator
- Unpaid distribution calculator
- Distributable surplus calculator

Logging into Checkpoint

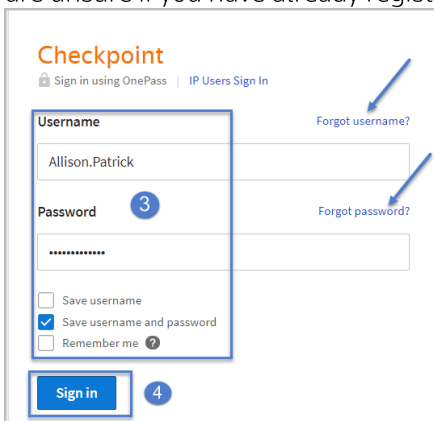
Logging into Checkpoint requires a **Onepass** registration.

To register:

1. Click the **Get Started** link found in the **Welcome to Checkpoint** email received from Thomson Reuters.
Note: If you have not received your Welcome email or require assistance, please contact our Support team on 1800 074 333 or by emailing Techcare.anz@thomsonreuters.com.



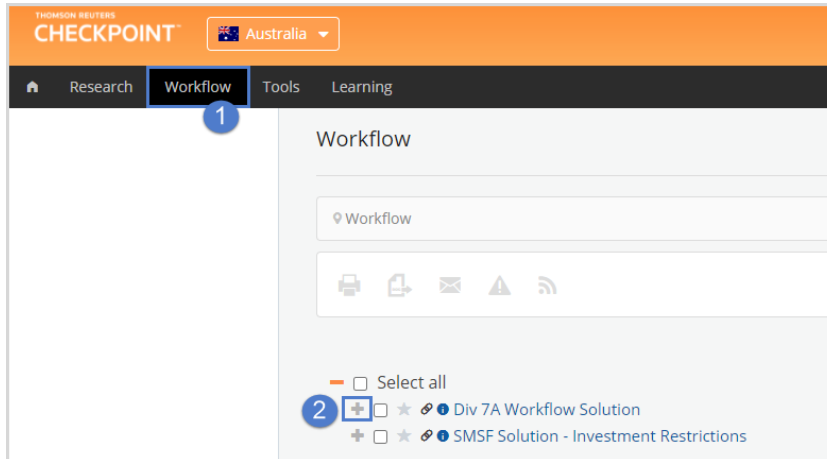
2. Log into Checkpoint at www.checkpointau.com.au.
Note: It is recommended that you save the Checkpoint web address as a favourite.
3. Enter your **Username** and **Password**. Ensure to select one of **Save/Remember** me options.
4. Click the **Sign In** button.
Hint: Use the **Forgot username?** / **Forgot password?** links if you have forgotten login details or if you are unsure if you have already registered for a Onepass.



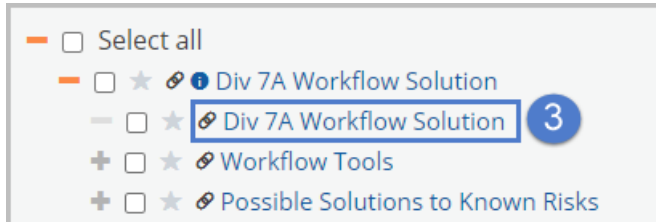
Accessing the Solution in Checkpoint

Once logged into Checkpoint:

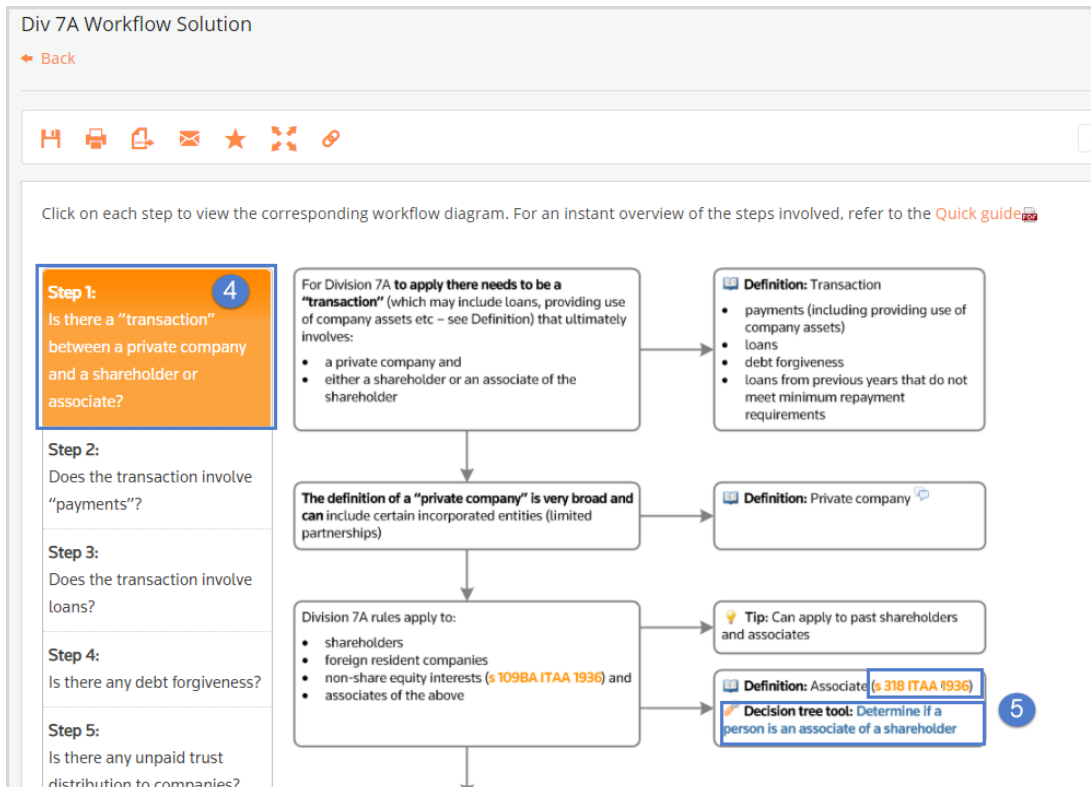
1. From the top black menu bar, select the **Workflow** option.
2. Select the '+' icon.



3. Select the **Div 7A Workflow Solution** link



4. Select one of the step(s) to view the associated workflow diagram
5. Use the links provided in each diagram to view referenced legislation, or tools like calculators, templates, or decision trees.



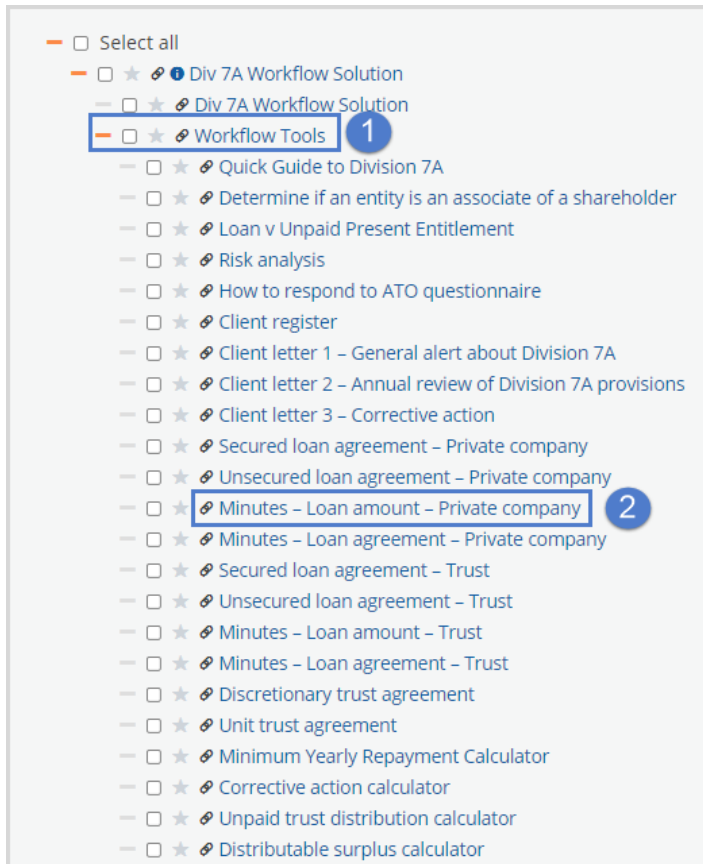
Div 7A Workflow Solution Tools

All the tools included in the Workflow solution diagrams can also be accessed directly from the Div 7A Workflow table of contents.

After navigating to the Workflow screen and opening the Workflow Solution:

1. Select the '+' icon to the left of Workflow Tools
2. Select the required tool from the list to open.

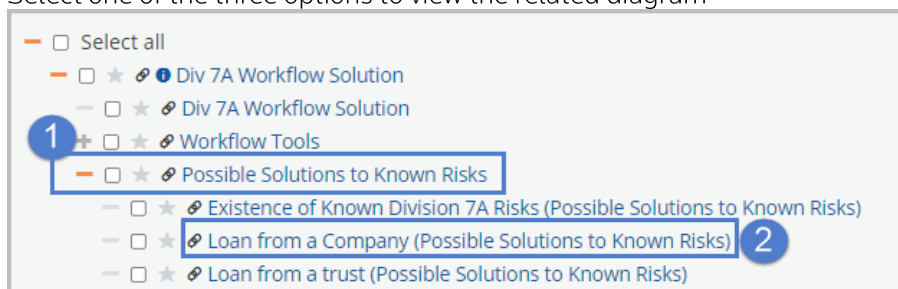
Note: Calculators will open in Excel and templates will open in Word.



Viewing Information in the Possible Solutions to Known Risks section

After navigating to the Workflow screen and opening the Workflow Solution:

1. Select the '+' icon to the left of Possible Solutions to known Risks
2. Select one of the three options to view the related diagram



3. Select a link in the diagram to view further information.

Note: This will open in a new tab.

Loan from a Company (Possible Solutions to Known Risks)

← Back

Use the links in the diagram to guide you to relevant information:

| Timing of problem | Pre 30 June 2004 | 1 July 2004 to 30 June 2006 | From 1 July 2006 |
|------------------------|---------------------|-----------------------------|------------------|
| Less than min yr repay | Select ³ | Select | Select |
| Problem loan doc | Select | Select | Select |
| Other | Select | Select | Select |

- 1 Documentation at date of loan, MYR before year end
- 2 Documentation and MYR by lodgment date
- 3 Deemed dividend on shortfall of MYR
Subsequent dividend exemption extended to associates

Creating a Quicklink (Shortcut) to the Div 7A Workflow Diagrams

After navigating to the Workflow screen and opening the Workflow Solution:

1. Select the **Star** icon to the left of the Div 7A Workflow Solution link
2. Enter a name for the Quicklink
3. Select the **Save** button.

Note: The Quicklink can be accessed from the **My Quicklinks** portal on the **Home** screen:

Further Resources & Support

- Click [here](#) to access the Checkpoint Support portal
- For technical support, contact our Support team on 1800 074 333 / techcare.anz@thomsonreuters.com
- Click [here](#) to register for a Checkpoint training session.

