

Income Tax Reporting From Interbill

Go to Reports - Select the last report on the right, **Office Report**. Set date for last day of the calendar year, **12/31/xx**.

Find Total **Payments Received YTD**: Use this figure as your gross income. (If you do not report costs advanced as a business expense, then subtract **Applied to Costs YTD** from Total Payments Received for your Gross Income Figure.)

Payments include money transferred from Client Trusts Accounts and Retainer Accounts to pay client statements.

To audit your figure back to individual client payments, go to the **Log Report** (first report on the left. select **Start date 1/1/xx** (reporting year) and **End Date 12/31/xx** (reporting year) select **Payments, Transfers for Trust and Transfers from Retainers**. Press **Display Report** (pdf or CSV). The combined total equals Payments received for the year on your Office Report.