



taxestogo[®]

TaxesToGo Guide for Tax Preparers
TaxSlayer Pro - Desktop

2025 Tax Year

What is TaxesToGo?

TaxesToGo is a mobile app that makes tax preparation simple and secure by allowing taxpayers and preparers to share current-year tax documents without visiting the office. Save time, reduce paperwork, and share documentation securely. It's a streamlined, secure process from start to finish.

With TaxesToGo, taxpayers can:

- Snap pictures of their tax documents and submit them securely.
- Apply for a bank product.
- Review and sign the return directly to the app.

How it Works:

1. Taxpayers submit documents through the app.
2. Documents are uploaded to your tax program.
3. You prepare the return in your tax program.
4. Send the taxpayer a complete return for electronic signature.
5. Receive signatures and E-file the return.

Key Features

- Integrated chat for real-time communication with clients.
- Available for Android and iOS (Download from Google Play or the App Store).
- Option to brand the app with your office logo and colors for a professional look.

Disclaimer: The TaxesToGo mobile app is designed for taxpayers to upload current-year tax documents and receive the current-year tax return to review and sign. Tax preparers will only use the TaxSlayer Desktop program to send and receive all documents.

Branded vs Generic Apps

TaxesToGo gives you the option to brand the app with your personal logo, automatically receiving client data on your program, and tracking your client's progress. There are many benefits to using the branded TaxesToGo app versus the generic app:

Connect Clients Directly to Your Office

Branded apps are tied directly to your office. When a taxpayer uses your referral link to create their TaxesToGo account, those returns will be submitted directly to your program and will appear in a queue. Generic app accounts are not linked to an office and must be manually pulled into an office.

Track Clients App Progress

Branded apps have more thorough reporting. Since branded app accounts are tied to your office, you can track every step of your taxpayer's process within the app using the TaxesToGo Web Report. Generic apps will not be shown in this report.

Chat with Clients

Branded apps can chat with users before the return is claimed. Generic apps do not have the ability to chat until the return is claimed by the office.

Personalized App Experience

Branded apps can be customized to better represent your office. You can upload your own logo to add more of a personal touch to the mobile app. The generic app will show the basic TaxesToGo logo throughout the process.

Branded App in Account Hub

Using a branded TaxesToGo app allows you to customize the look of the app, including your business logo and the color theme of the app.

How to Create Your Branded App:

To set up a branded app for your tax office:

1. Navigate to your Account Hub
2. Select **TaxesToGo** option on the left-hand side of your Account Hub or the VIEW option from the TaxesToGo tile on the Home Page.

The screenshot displays the Account Hub interface. On the left is a sidebar menu with the following items: Home, Account Information, Company Information, Bank Product Information, Educational Videos, New User Onboarding, Pro Premium, Partners Program, Seminar Information, TaxesToGo®, and Account History. The 'TaxesToGo®' item is highlighted with a red rectangular box. The main content area is divided into two sections. The top section is titled 'Notifications' and contains the text 'No' and 'Check thi'. The bottom section is titled 'TaxesToGo®' and contains the text 'A mobile app that allows your client to send their tax information to your office from anywhere.' Below this text is a blue button labeled 'VIEW', which is also highlighted with a red rectangular box.

Customize Your Branded App

The TaxesToGo Company Profile page will allow you to personalize your branded app.

1. Enter Profile Name
2. Select Color Theme from the dropdown menu.
3. Upload your business logo.

Once you have set the customization to your preferences, click **SAVE** at the bottom of the page. After it is saved, the Referral Link will be generated.

The screenshot displays the 'TaxesToGo® Company Profile' page. On the left is a navigation sidebar with options: Home, Account Information, Company Information, Bank Product Information, Educational Videos, New User Onboarding, Pro Premium, Partners Program, Seminar Information, TaxesToGo® (highlighted), and Account History. The main content area is divided into two sections: 'TaxesToGo® Company Profile' and 'TaxesToGo® Preview'.

TaxesToGo® Company Profile

- Profile Name:** A text input field containing 'Tax Office'.
- Color Theme:** A dropdown menu set to 'Blue' with a blue color swatch.
- Profile Configuration:**
 - Only Show Logo On Mobile Site
 - Apply the same configuration to additional locations
- Upload Logo:** A 'Choose File' button with the text 'No file chosen' and an 'Upload Logo preview' link.
- SAVE** button (highlighted with a red box) and a [Need Help?](#) link.

TaxesToGo® Preview

The preview shows a mobile app interface with a status bar at the top (AT&T LTE, 3:15 PM, 100% battery). The app screen features a login form with 'Username' and 'Password' fields, a 'Did you forget your password?' link, a green 'Sign-In' button, and a 'Create Account' link at the bottom.

TaxesToGo Referral Link

This Referral Link is used by your taxpayers to access your Branded App. Each office will have their own unique Referral Link. Once your customization has been saved, the Referral Link is generated on the page.

Any taxpayer you wish to have your branded app must start using this Referral Link to create their TaxesToGo account.

You can share this link by sending it directly to your taxpayers, posting it on your website, or even adding it to your social media accounts.

TaxesToGo[®] Company Profile

Profile Name

Tax Office

Color Theme

Blue

Referral Link

<https://taxestogo.com/App/Download/8913>

Profile Configuration

Only Show Logo On Mobile Site

Apply the same configuration to additional locations

Upload Logo

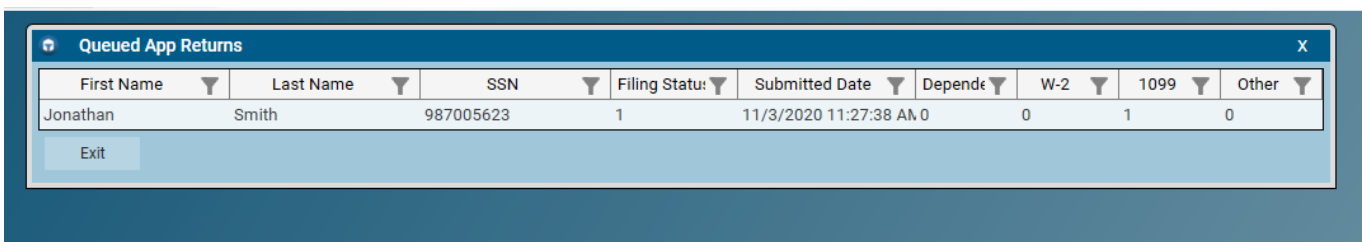
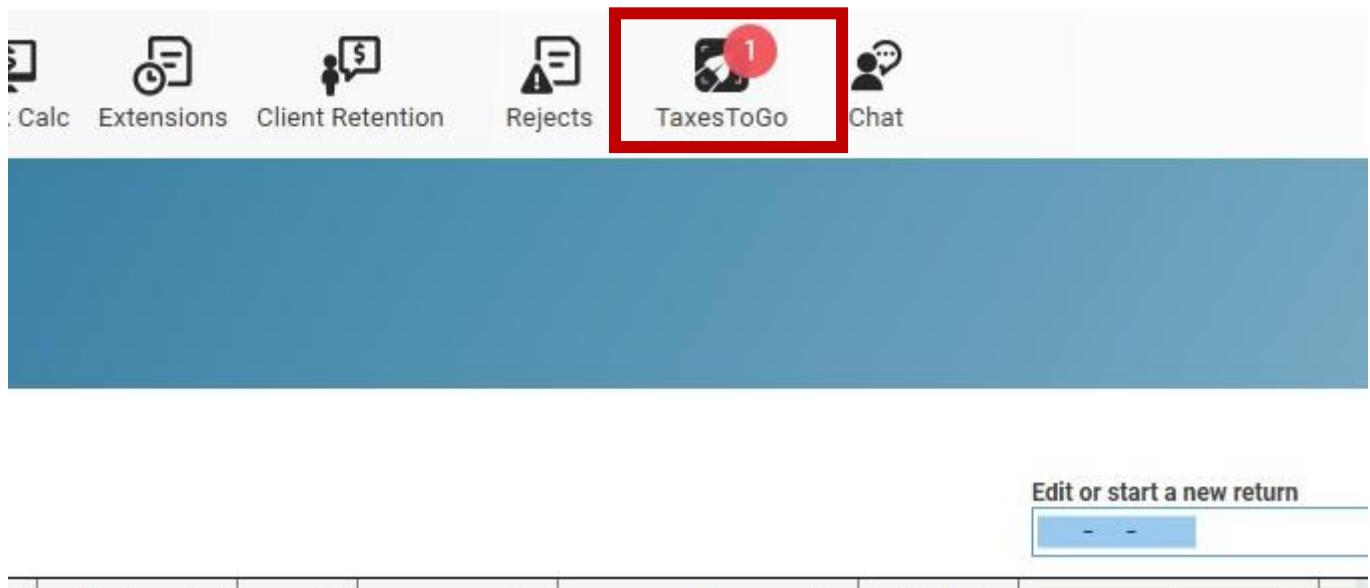
No file chosen

 Upload Logo preview

Pulling TaxesToGo Returns into TaxSlayer Pro

To create a new return with a branded TaxesToGo app account, in TaxSlayer Pro, select:

1. **TaxesToGo** icon from the large icon menu at the top of the program.
2. Double-click the taxpayer from the list in the **Queued App Returns** menu.



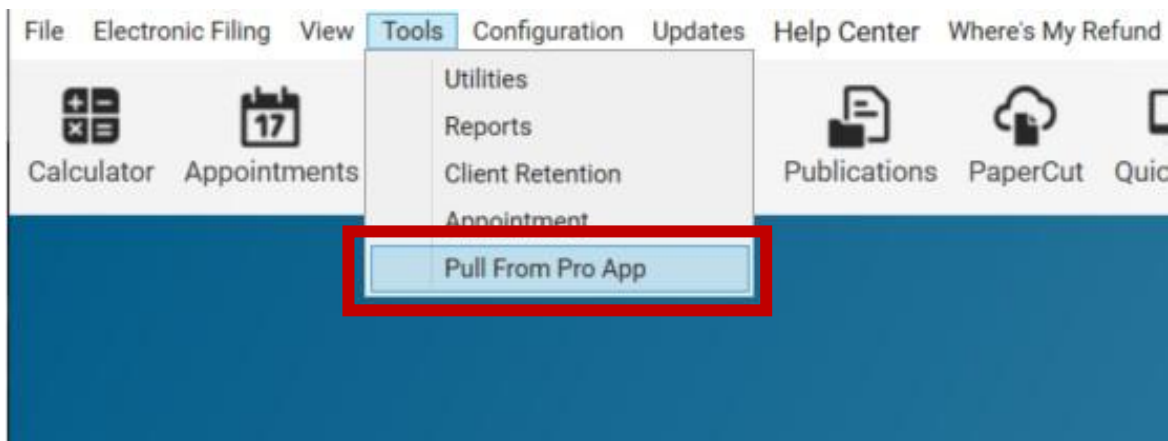
This action creates a new TaxSlayer Pro Desktop return and automatically imports the taxpayer's provided information. Review the Personal Information Section within the return before proceeding.

Claiming Generic TaxesToGo Returns

To create a new return with a generic TaxesToGo app account, in TaxSlayer Pro, select:

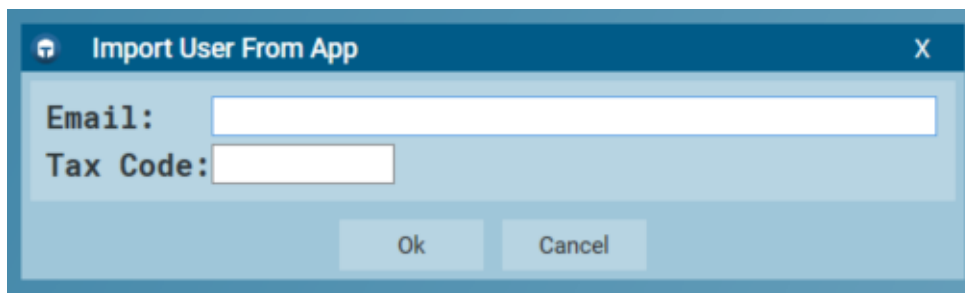
1. **Tools** dropdown menu
2. **Pull From Pro App**

Note: This option will not be available unless you are on the main page of your Desktop program. You cannot access this option from inside another return.



A dialog box will appear prompting you to enter the App User Information. To import the taxpayer's data from the generic TaxesToGo app, you will need:

1. The email address associated with the app
2. The 6-digit Tax Code provided by the taxpayer



After selecting **Ok** a new TaxSlayer Pro return is created. This action automatically imports the taxpayer's information provided. Review the Personal Information Section within the return before proceeding.

Linking an Existing Return with TaxesToGo

If you have already started your client's tax return on TaxSlayer Pro, the taxpayer can still use TaxesToGo to send their information and to sign documents. Linking an app return with an existing return allows you to connect the data from the app with the return you have already created.

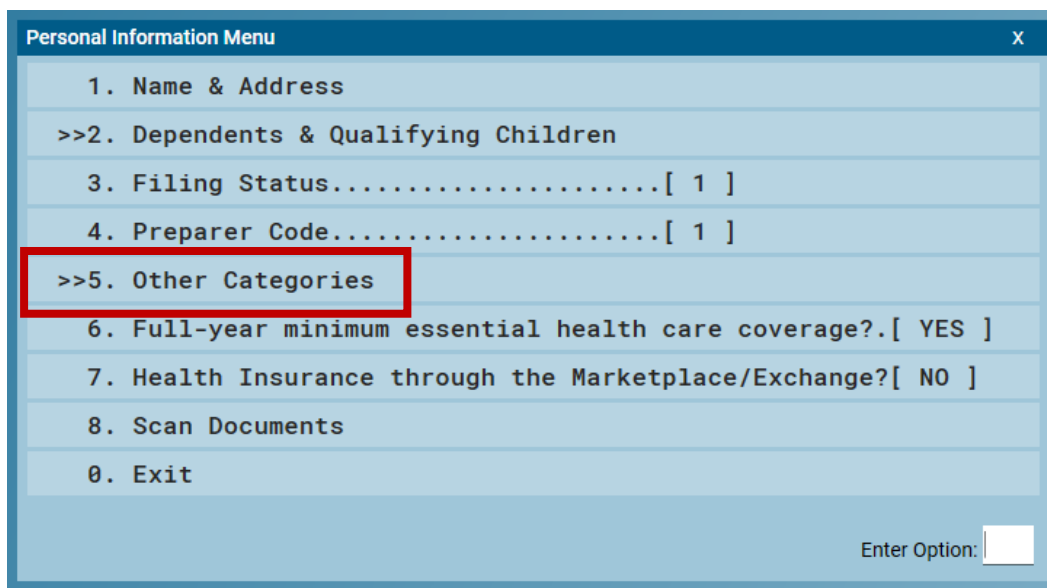
Once this connection is established:

- Your client will be able to upload documents directly to you.
- You will be able to send documents back to them for review and signature.

Note: Before you can associate an app return with a TaxSlayer Pro return, you must make sure the email address has already been entered in the Name & Address menu.

To associate an existing return in TaxSlayer Pro, from the return you will select:

1. **Personal Information Menu**
2. Other Categories



From the Other Categories Menu, you will then select **Associate with Pro App Return**.

Other Categories Menu

- 1. Allow Another Person to Discuss Return With IRS... [No]
- * 2. Third Party Designee Name..... []
- * 3. Third Party Designee Phone..... [- -]
- * 4. Third Party Designee PIN..... []
- 5. Disaster Designation..... []
- 6. Military Processing..... []
- 7. Attach PDF Document..... []
- 8. Print Date..... []
- 9. Force Itemized Deductions or Dual-Status Alien.... []
- 10. Print English or Spanish Forms..... [English]
- 11. Are you a non-paid preparer?..... [No]
- 12. Print organizer for client next year..... [No]
- 13. Mark Return as Private..... [NO]
- 14. Associate with Pro App Return?**
- 0. Exit

Enter Option:

3. This will open a new menu for you to enter Tax Code for the app account. The email must be entered into the Name & Address menu prior to this point.

Tax Code

Note: Once you have entered the tax code, you will get confirmation that the return has been synced.

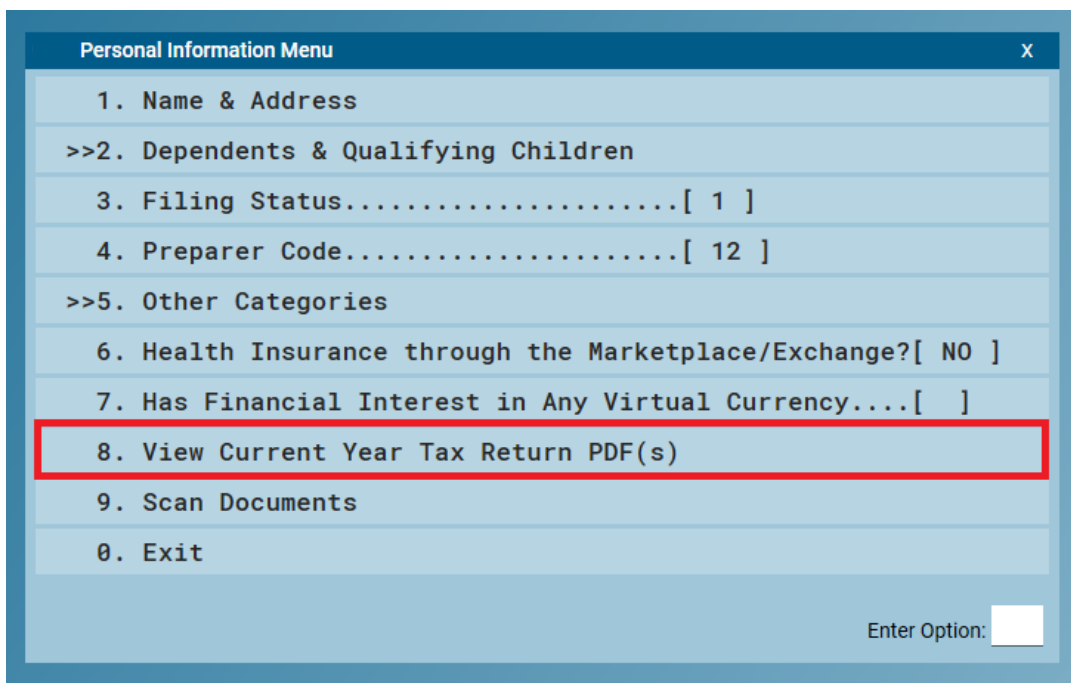
Accessing Uploaded Documents

Once you have started the tax return using the TaxesToGo information, you will need to navigate through the Basic Information screens before you can access the uploaded documents.

- Name & Address
- Dependents & Qualifying Children
- Healthcare Insurance through the Marketplace/Exchange
- Financial Interest in Any Virtual Currency

After you have navigated through all the menus, the program will show the Personal Information Menu.

From there, you will select **View Current Year Tax Return PDF(s)**.

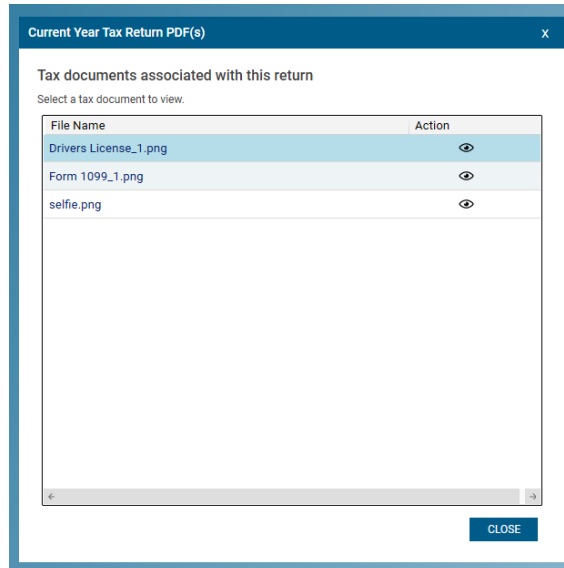


The screenshot shows a window titled "Personal Information Menu" with a close button (X) in the top right corner. The menu contains the following options:

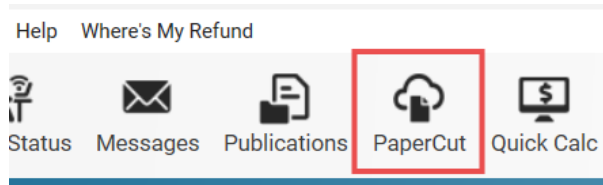
- 1. Name & Address
- >>2. Dependents & Qualifying Children
- 3. Filing Status.....[1]
- 4. Preparer Code.....[12]
- >>5. Other Categories
- 6. Health Insurance through the Marketplace/Exchange?[NO]
- 7. Has Financial Interest in Any Virtual Currency....[]
- 8. View Current Year Tax Return PDF(s)**
- 9. Scan Documents
- 0. Exit

At the bottom right of the menu, there is a label "Enter Option:" followed by a small white input box.

After selecting **View Current Year Tax Return PDF(s)**, a new tab will open to show the documents that were uploaded through the TaxesToGo app. From there, you can download and review the documents. These documents will be used to manually complete the tax return forms.

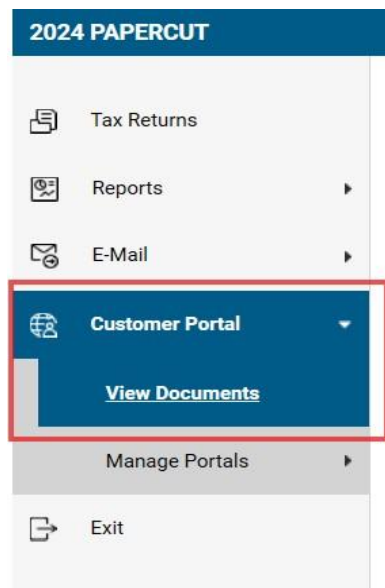


All saved and uploaded documents can also be accessed through PaperCut.



From PaperCut select:

- Customer Portal
- View Documents
- Search for Client

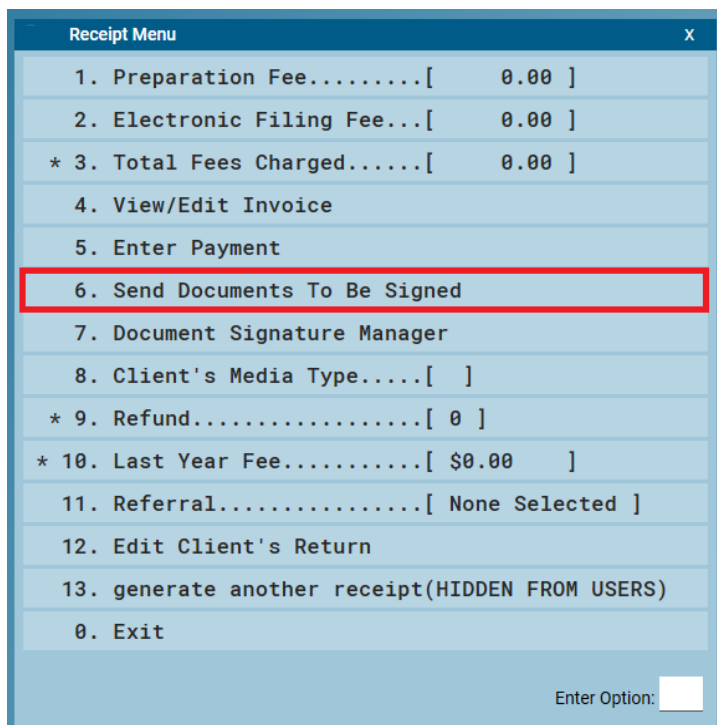


Getting Signatures through TaxesToGo in Desktop

After completing the tax return, you can send the tax return to the TaxesToGo app for signatures. This includes:

- Federal Return
- Bank Application
- Consent to Use and Disclose
- State Return(s)

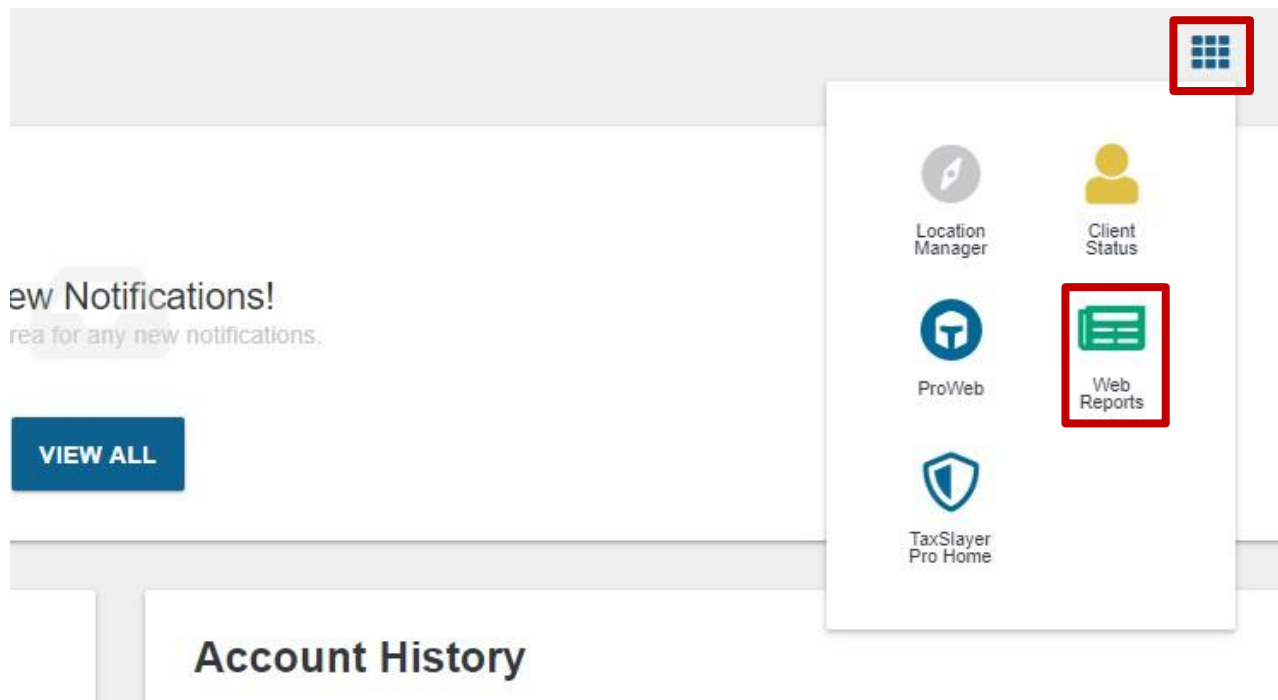
To do this, you will select **Send Document to be Signed** on the **Receipt Menu** of the return. **The Receipt Menu** is the last menu you see when exiting a return.



After sending the tax return to the TaxesToGo app, you will receive confirmation that the documents were successfully shared. Once the taxpayer signs the documents in the app, you will see the signatures on the **Receipt Menu** in the **Document Signature Manager Menu**.

TaxesToGo Web Report

TaxesToGo Web Report can assist tracking a taxpayer's progress in the app. From inside Account Hub, select the app switcher at the top right and then choose Web Reports from the list of icons.



You can also access Web Reports by going directly to <https://www.taxstatusnow.com/reports/web> and logging in using your credentials for Account Hub.

From Web Reports, scroll down to **Miscellaneous Reports** and select **TaxesToGo Report**.

Miscellaneous Reports		
Customer Portal Report View Users and Information regarding Customer Portal Imports	Customer Portal Report By Date View Users and Information regarding Customer Portal Imports By Date	TaxesToGo Report View Users and Information regarding TaxesToGo Imports
TaxesToGo Report By Date View Users and Information regarding TaxesToGo Imports By Date	Bank Invoice Report View special invoicing data for partner products	User Access Report View ProWeb Preparer Login History for your EFINs

On the Report Setup page, you will select the Tax Year you are running the report for, select your EFIN from the EFIN Selection section, then choose Run Report.

Report Setup: Taxes To Go Report

Filter Selection ▼

Tax Year
2021 ▼

EFIN Selection ▶

Run Report

Run Report For Export

Cancel

TaxesToGo Web Report Details

From the report, you will be able to see

- Taxpayer's first and last name
- Email address and phone number used to create the Taxes to Go account
- Taxpayer's social security number
- Website Sent Date
- App Start Date
- App Submit Date
- App Claimed Date
- Validation Code for that app account (i.e. the Tax Code)

Column Selection							
Drag a column and drop it here to group by that column							
Encryp...	Return Tags	Preparer Na...	Website Sen...	App Start D...	App Submit ...	App Claimed...	A
			1/14/2022 ...	1/14/2022 ...	1/14/2022 ...	1/14/2022 ...	
			2/10/2022 ...	2/10/2022 ...	2/10/2022 ...	2/10/2022 ...	
			4/26/2022 ...	4/26/2022 ...	4/26/2022 ...	4/26/2022 ...	
			12/17/2021...	12/17/2021...	12/17/2021...	12/17/2021...	

Website Sent Date - This date refers to when the email address tied to that Taxes to Go account was used on the Referral Link website. Generic app users with a 6-digit tax code will not have a Website Sent Date.

App Start Date - This date refers to when the app account was created. If there is nothing listed under App Submit Date, there has been no app account created with that email address.

App Submit Date - This date refers to when the taxpayer completed the entire My Taxes section inside their app and clicked submit. If there is nothing listed for App Submit Date, that means the taxpayer has not completed the My Taxes section and the app return. If the taxpayer is using your branded app, they will not show in the branded app queue until they have submitted their information over to you.

App Claimed Date - This date refers to when you successfully pulled the app return into your program.

Chatting with your Taxpayer in Desktop

After you create a new return with TaxesToGo data, you can communicate with that taxpayer through the Chat feature. Select the Chat icon to message your TaxesToGo clients. When you receive a new chat or notification, a red badge and number will appear on the Chat icon.

What You Can Do with Chat:

- Send and receive messages with your taxpayer.
- Receive notifications when the taxpayer signs documents.

