



taxestogo[®]

TaxesToGo Guide for Taxpayers


2025 Tax Year

Are you using the Branded TaxesToGo?

Before downloading TaxesToGo, you will need a Referral Link from your tax preparer. Open the Referral Link provided by your preparer. This will take you to a registration page and will enter the following information:

- Cellphone number
- Email address
- First name
- Last name
- The Referral Code (optional, only if your preparer gave you one)

After you select **Continue**, you will receive a text message with a direct link to download the TaxesToGo app from the App Store or Google Play.



To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

Enter Your Phone Number

Enter Your Email

Enter your First Name

Enter your Last Name

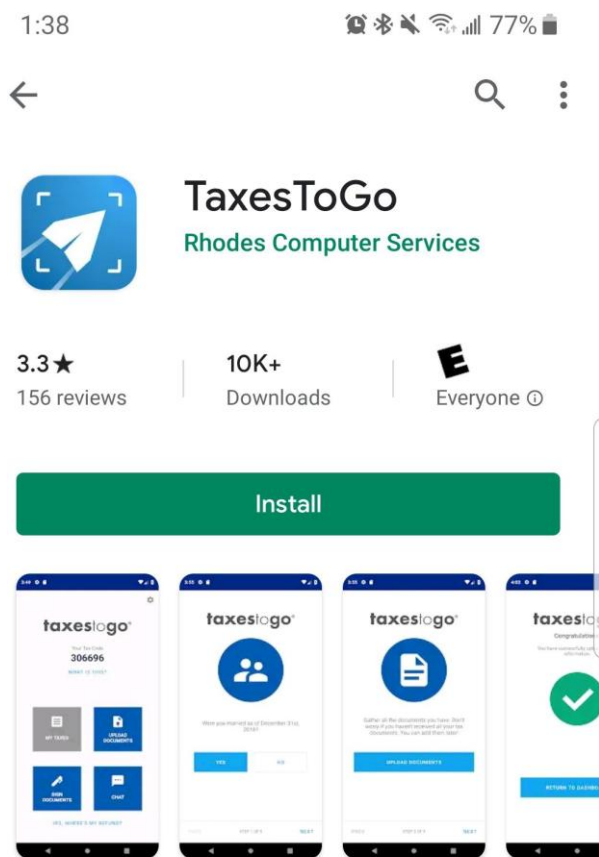
Enter Your Referral Code
(optional)

CONTINUE

Downloading and Registering TaxesToGo

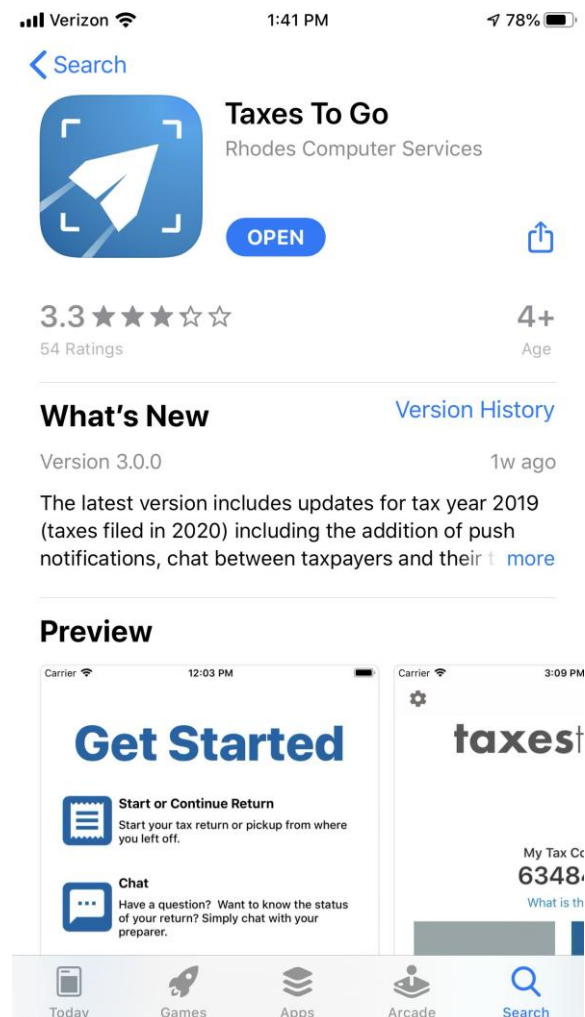
If you are using a Branded TaxesToGo app, make sure to complete the registration process through your Referral Link before installing the app.

Step 1: Download Taxes to Go directly from your App Store or Google Play Store.



About this app

TaxesToGo® is the most convenient way to file



Step 2: Open the application and enter your email address.

Branded TaxesToGo users must use the same email address used on the Referral Link registration page.

email@example.com

Sign In

Step 3: Complete the TaxesToGo registration by entering your cellphone number and creating a secure password for your account.

taxestogo@email.com

7061234567

.....

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I agree to the terms

[Privacy Policy](#)

[License Agreement](#)

Register

Already have an account? [SIGN IN](#)

Step 4: Enter the MFA (multi-factor authentication) code to gain access to your new account.

We sent you a 6 digit code.
Please enter it in the text field
below.

SEND ANOTHER CODE

LOG OUT

Submit

Step 5: Review the **Navigation Menu**, **My Tax Code**, **Push Notifications** pages for more information on each of those areas of the TaxesToGo app. Then select **Continue**.

Navigation Menu



My Tax Return

Start your tax return or pickup from where you left off.



Upload Documents

Securely send documents to your preparer.



Sign Tax Documents

Securely sign documents from your preparer.



Chat with the tax preparer

Have a question? Want to know the status of your return? Simply chat with your preparer.

My Tax Code



Share your unique code with the tax preparer. The preparer will use this code to gain access to your tax return information

Push Notifications



By enabling push notifications, your preparer can keep you up to date on your return status as well as any information needed to complete your return.

Uploading Your Tax Information

Step 1: Select **Start New Return** or **Continue** if you already have a return.

Start New Return – Select this if your Tax Preparer has not started your tax return or does not have your tax information.

Already have a Return - Select **Continue** if your Tax Preparer has already started your tax return and has your basic information on file.



Starting a new return?

Let's start collecting important details of your tax return including your marital status, driver's license, dependents, and documents.

START NEW RETURN

Already have a return?

I don't need to enter my tax return data.
My Preparer already has my tax return information.

CONTINUE

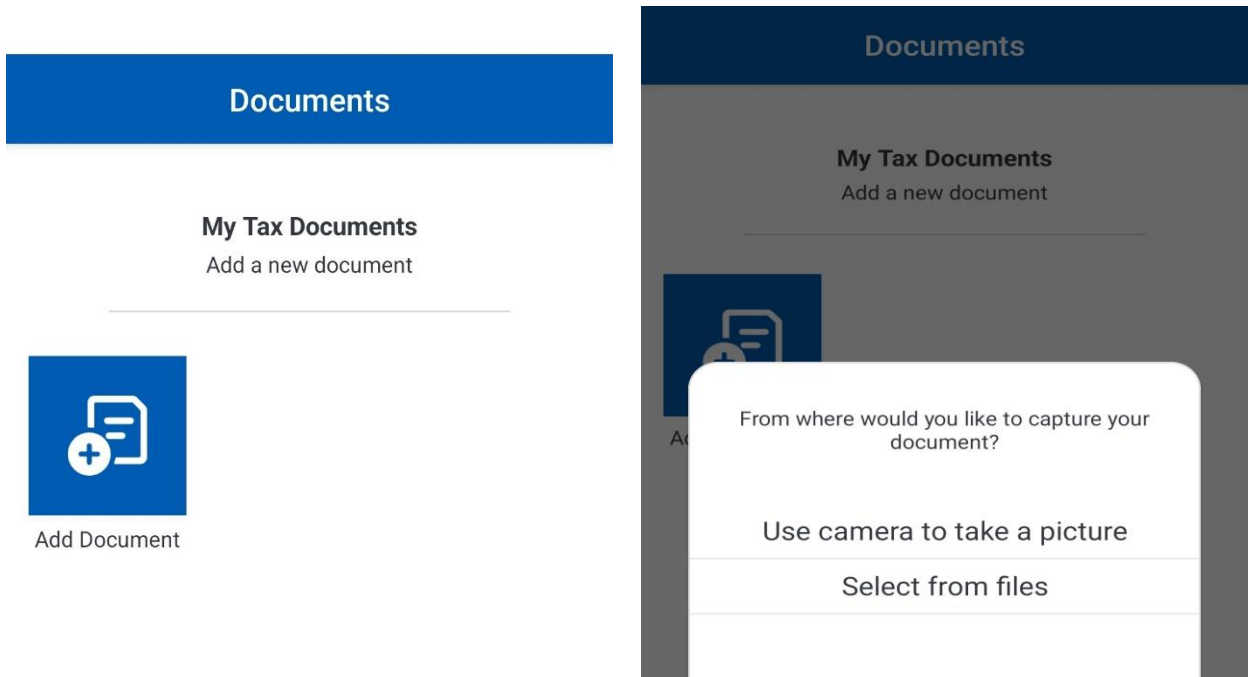
Step 2: Select **Start New Return** to begin entering in your Basic Information.

You will need to enter:

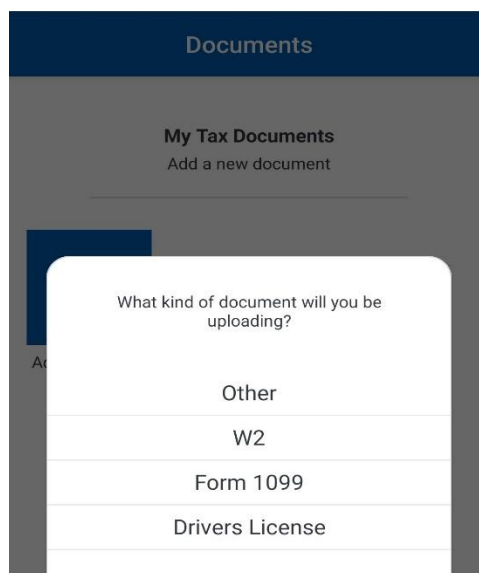
- Your marriage status for the last tax year (married or not)
- Your personal information (including name, date of birth, social, address, and driver's license number)
- Your spouse's personal information (if applicable)

Step 3: Upload all your tax documents into the app.

Your documents can either be uploaded directly from your phone's photo album or by taking a picture of them.



Step 4: Capture your Driver's License in the App.



Step 5: Upload a picture of yourself.

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For identification purposes, please take a picture of yourself. Remember, a good selfie clearly shows your face, has good lighting, and background contrast!

TAKE A SELFIE



Your selfie has been captured

CONTINUE

Step 6: Add your dependents, if applicable. Enter the following dependent Information:

- First and last name
- Social Security Number
- Date of Birth
- Childcare expenses
- Relationship to you

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Do you have any Dependents? Qualifying dependents greatly lower your tax bill, helping you get the biggest refund possible.

ADD DEPENDENTS

I DO NOT HAVE DEPENDENTS

Step 7: Provide the best phone number for your Tax Preparer to contact you.

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Contact Information

We need your contact information so your preparer can get in touch with you in case any additional information is needed.

Phone Number

Step 8: Sign the Consent to Use.

Branded TaxesToGo users do not need to enter their tax preparer's name, the app will automatically fill this information for you.

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Consent To Use

Your tax preparer needs your consent to use your tax information.

Federal law requires this consent form be provided to you (you refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes other tha...

MORE

Tax Preparer / Company Name

Taxpayer Name

Spouse Name

CONSENT


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Consent To Use

Your tax preparer needs your consent to use your tax information.

Federal law requires this consent form be provided to you (you refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes other tha...

MORE

 Consent to use granted

Step 9: Review and Submit Tax Information

Review the information and if all information is complete and accurate, select **Submit**. Your Tax Preparer will not be able to retrieve any of your tax information until the Review page is successfully submitted. You will receive confirmation once the submission has been successful.

Note: Generic TaxesToGo users must share their email address and tax code with their Tax Preparer before their information is received.

taxestogo™ Review

Check your information carefully and click to edit any incorrect information. When you are ready, press Submit button to upload your information.

Phone number	EDIT
Granted Consent to Use	EDIT
Uploaded documents	EDIT
Captured Selfie	EDIT
	EDIT
Social Security Number	

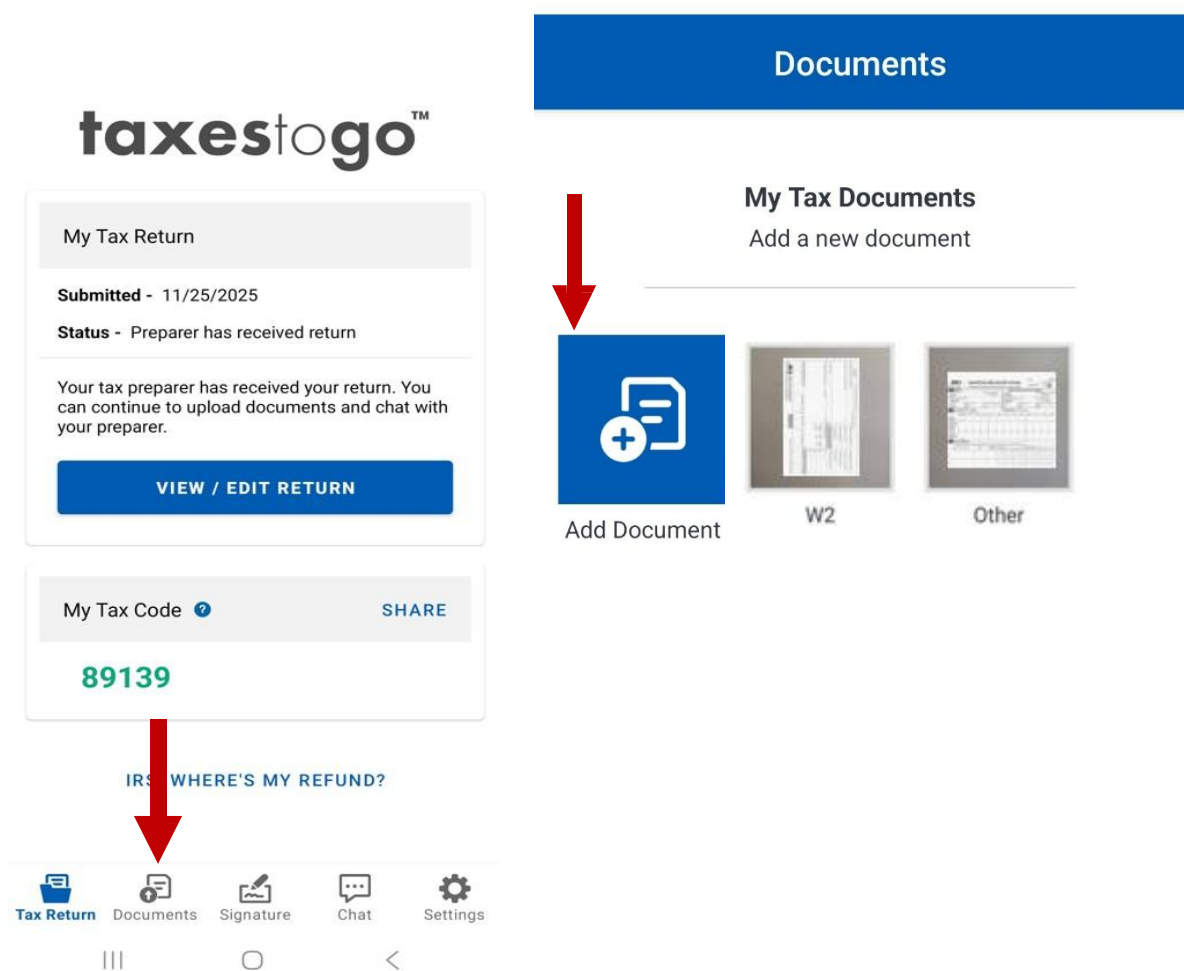
[PREV](#)

STEP 9 OF 9

[SUBMIT](#)

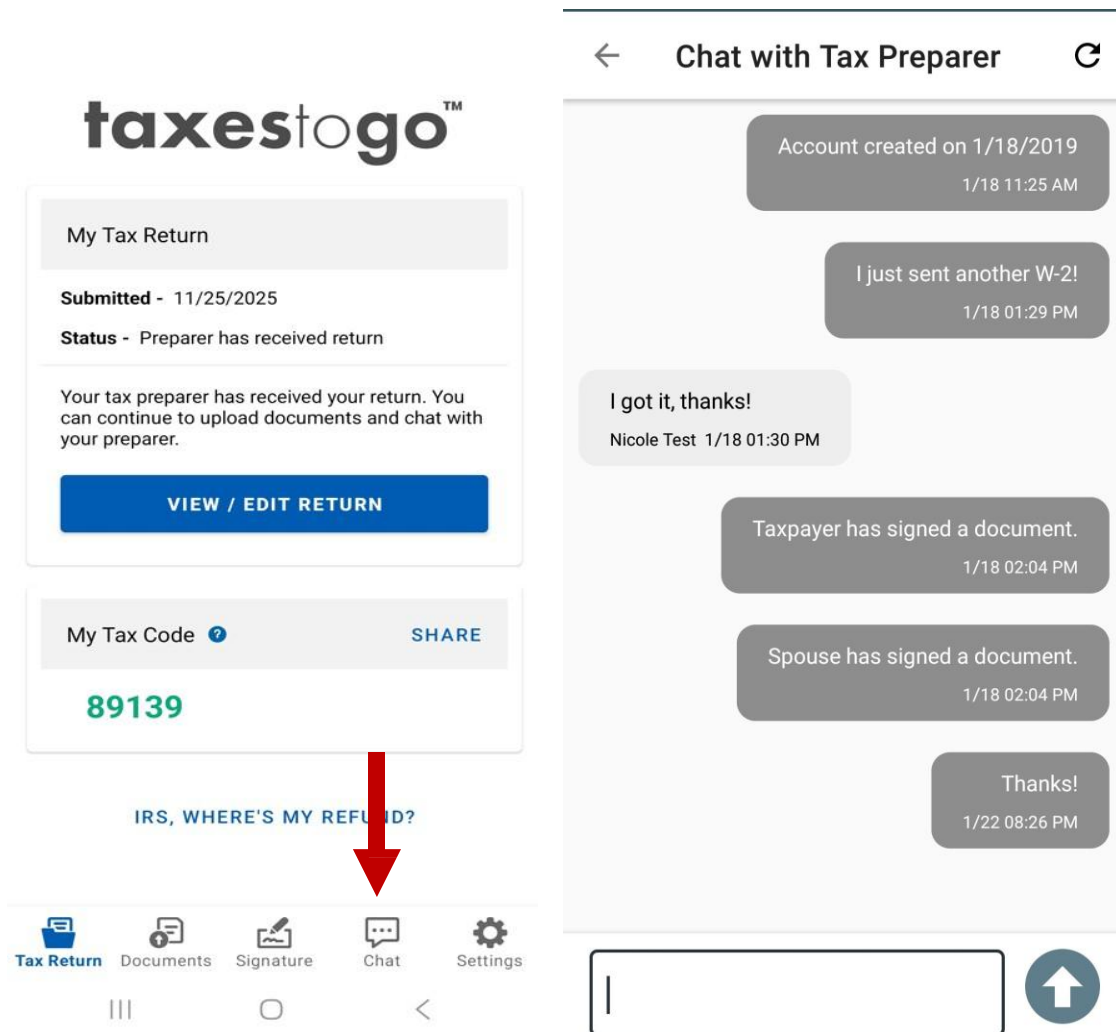
Uploading Additional Documents

From the Dashboard of your TaxesToGo app, you can upload additional documents to your Tax Preparer by clicking on the Documents tab along the bottom. From there, you can upload additional documents by clicking the Add Document option.



Chat with Your Tax Preparer

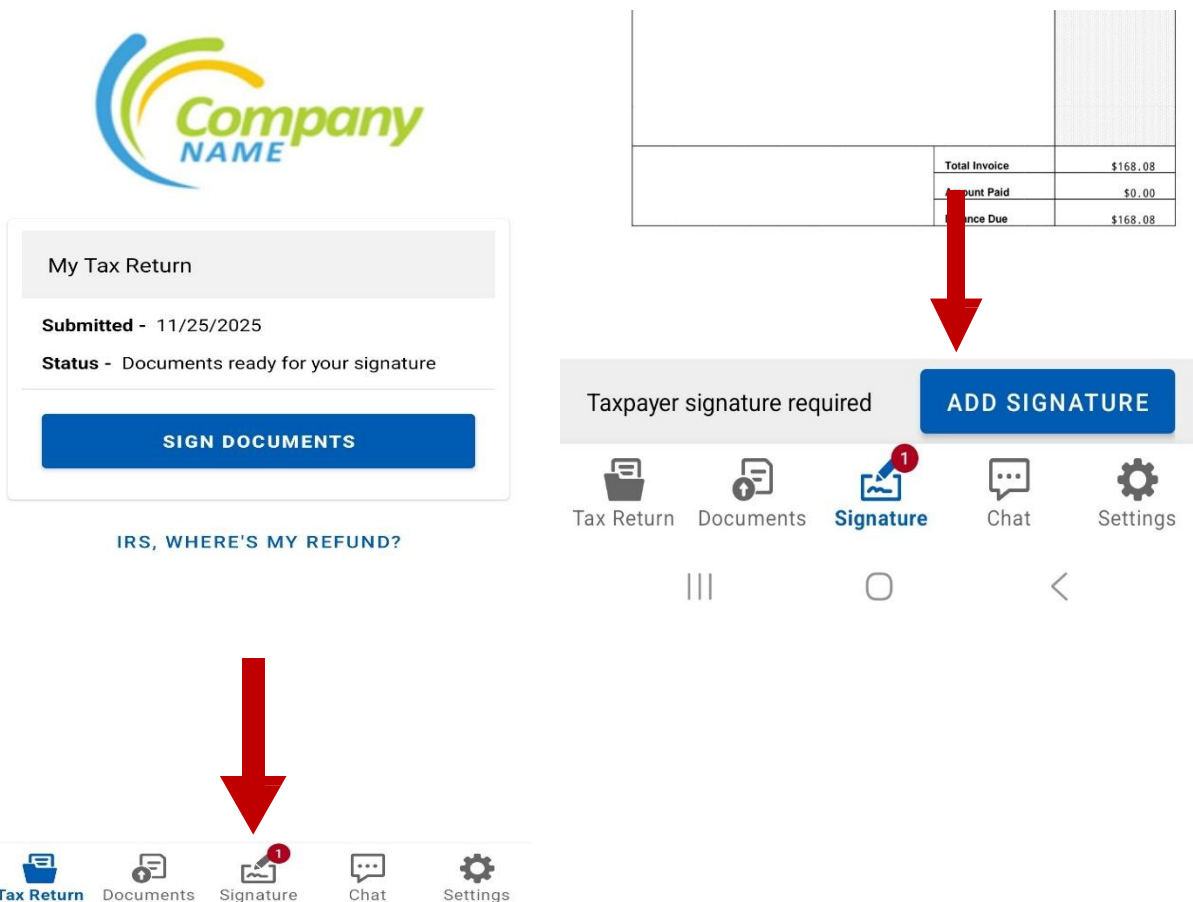
After your Tax Preparer has received your TaxesToGo information, you can chat at any time with them through the TaxesToGo app. To do this, select the Chat tab along the bottom of your TaxesToGo Dashboard.



Signing Tax Documents

When you have documents ready to be signed, you will be notified through the TaxesToGo app. To sign your documents, select the **Signature** tab along the bottom of your TaxesToGo Dashboard. Select **Add Signature** and **Submit** to send documents to be filed.

You only need to create a signature once. The app will apply that signature to any remaining documents. For future documents, you will need to review the changes and select **Submit**.



TaxesToGo Settings Overview

The TaxesToGo **Settings** tab gives you access to your profile details, account management, along with links to the Privacy Policy and Terms of Service.

Profile Settings

Profile Settings provides information that may be required by your Tax Preparer:

- View the email address associated with your account.
- To view your unique Tax Code, select **Show My Tax Code**.
- Share your Tax Code directly with your preparer, select **Share**.

Account Management

From the Settings tab, you can:

- **Log Out** of the app at any time.
 - **Delete Account** select this option and follow the MFA verification steps to remove account.
 - **Push Notifications** to change or allow notification permissions.
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