Taxes to Go Guide for Tax Preparers - Desktop

2022 Tax Year

What is Taxes to Go

The Taxes to Go Mobile App allows taxpayers to snap pictures and submit their tax documents to you, complete their tax return and even get a bank product from anywhere, without ever stepping foot in your office. Using the information sent through the app, you will prepare the tax return and send it back to the taxpayer to be signed. They will sign the documents inside the app, send it back to you and then the return is ready to e-file! It's fast, easy and secure.

The app includes a chat feature that is fully integrated to your Tax Program so you can always stay in contact with your customers. The Taxes to Go Mobile App is available for Android and iOS devices. It can be downloaded in the Google Play Store or from the App Store.

Taxes to Go is a generic mobile app, however you have the option to brand the app to your tax office. The branded Taxes to Go mobile app allows you to customize the color and logo shown within the app.

The Taxes to Go Mobile App is for your taxpayers. As a Tax Preparer, you will not download the app. Everything you receive from the app or send to the app will be done within your Tax Software.

Branded vs Generic Apps

With Taxes to Go you have the option to brand the app to your own business color and logo. There are many benefits to using the branded Taxes to Go app versus the generic app.

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

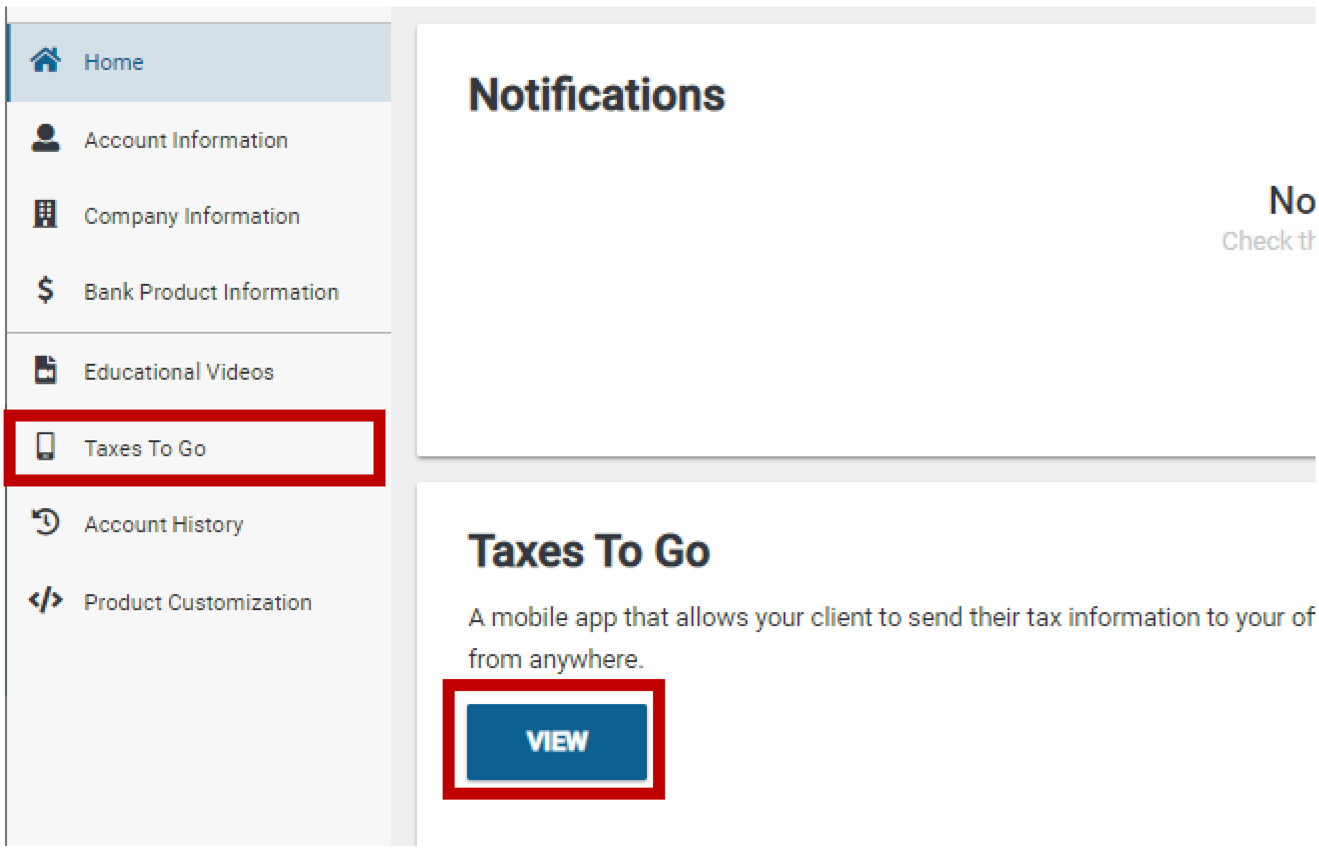
Branded apps have more thorough reporting. Since branded app accounts are tied to your office, you have the ability to track every step of the taxpayer's process within the app using the Taxes to Go Web Report. Generic apps will not show on this report until after they have been claimed into your office.

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 Taxes to Go app will show the basic Taxes to Go logo throughout the process.

Setting up your Branded App

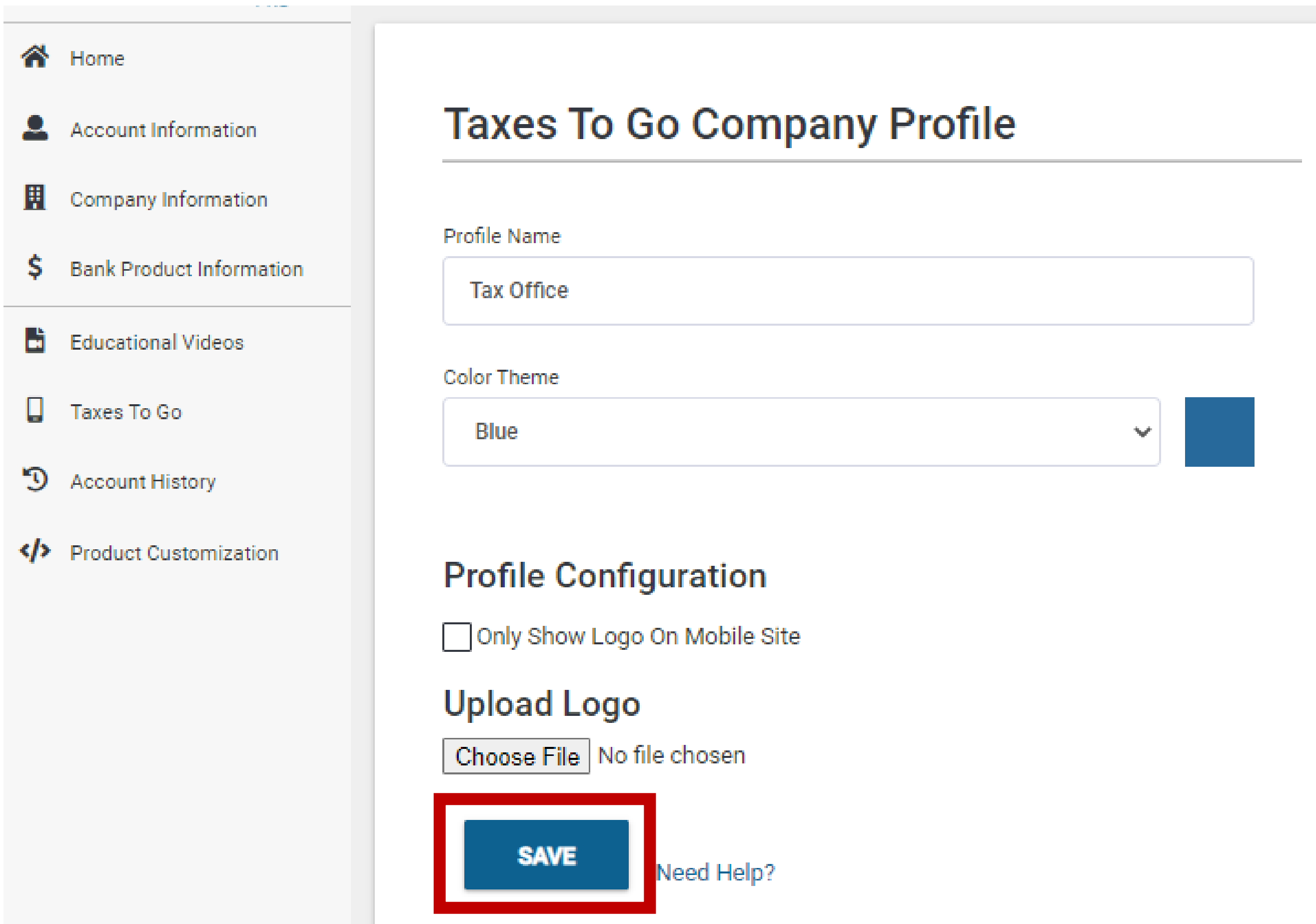
Using a branded Taxes to Go app allows you to customize the look of the app, including your business logo and the color theme of the app.

To setup a branded app for your tax office, you will click the Taxes to Go option on the left-hand side of your Account Hub or the VIEW option from the Taxes to Go tile on the main page.



The Taxes to Go customization page will allow you to set your Profile Name, Color Theme, and upload your business logo.

Once you have set the customization to your preferences, click SAVE at the bottom of the page.

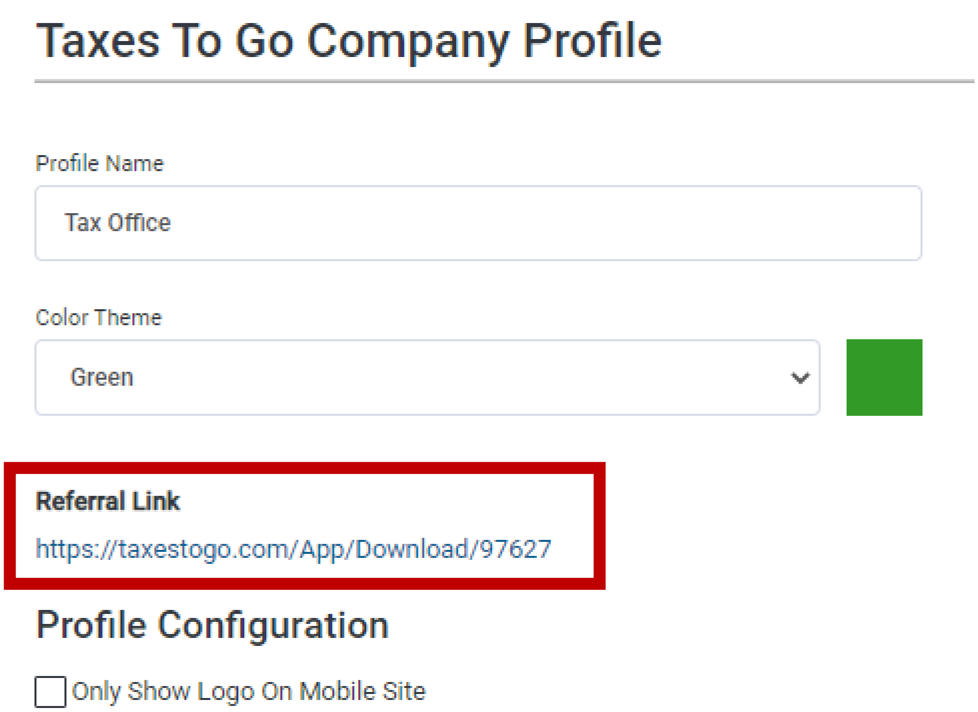


After your customization has been saved, you will see a Referral Link generate on the page.

This Referral Link is used by your taxpayers to access your Branded App. Each office will have their own unique Referral Link.

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

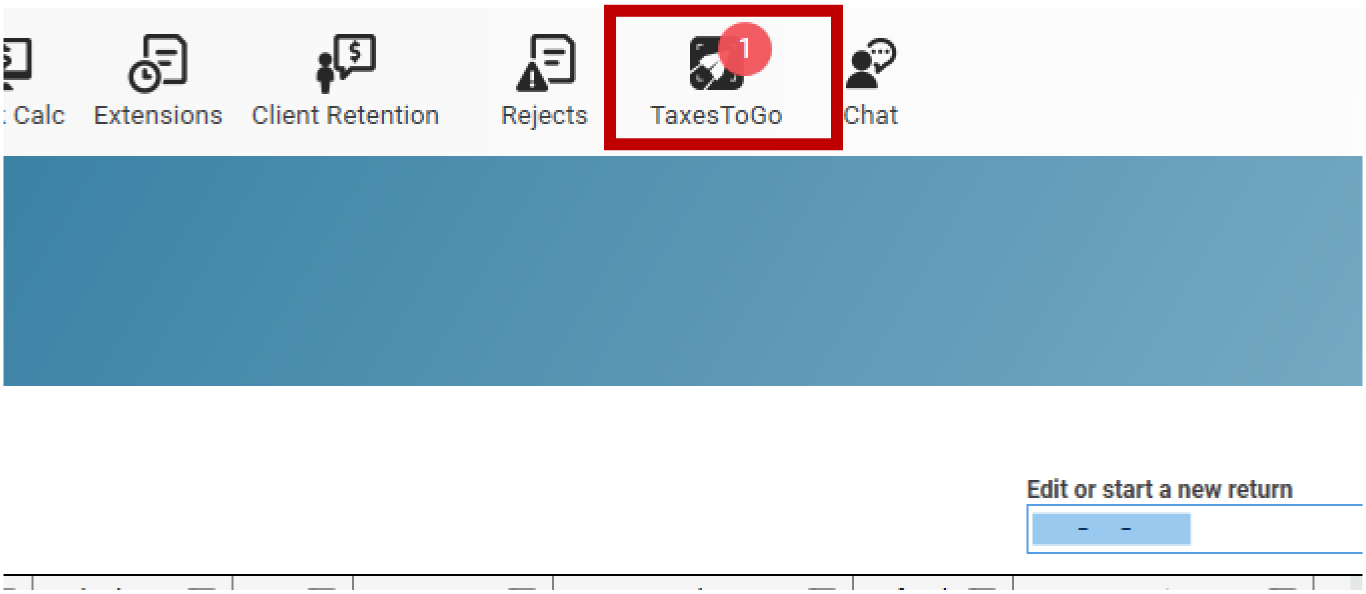
You can share this link by sending it directly to your taxpayers, posting it on your website, or even adding it onto your social media accounts.



Pulling Taxes to Go Returns Desktop

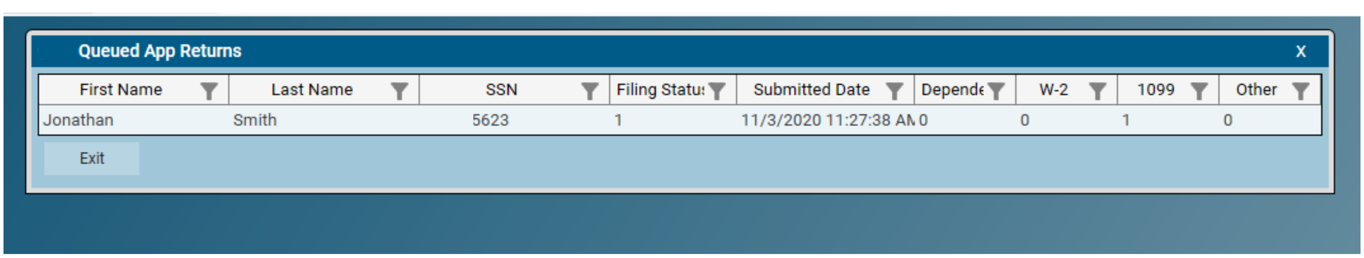
To create a new return with a Branded Taxes to Go app account, you will click on the TaxesToGo box at the top of your Desktop program.

When you have new Taxes to Go returns to claim, you will see a red number next to the Taxes to Go icon.



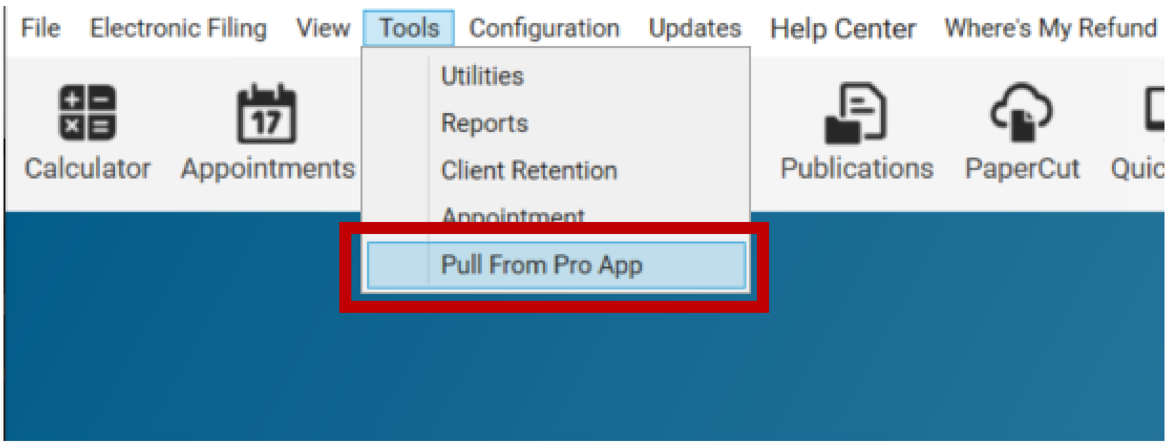
This will open a list of all your Branded Taxes to Go returns waiting to be claimed. To start a new return using the Taxes to Go information, double click the taxpayer from the list.

This will begin a new return. The information uploaded in the app will be imported into the program. You will need to review the Personal Information menus (including dependent information) to ensure accuracy.



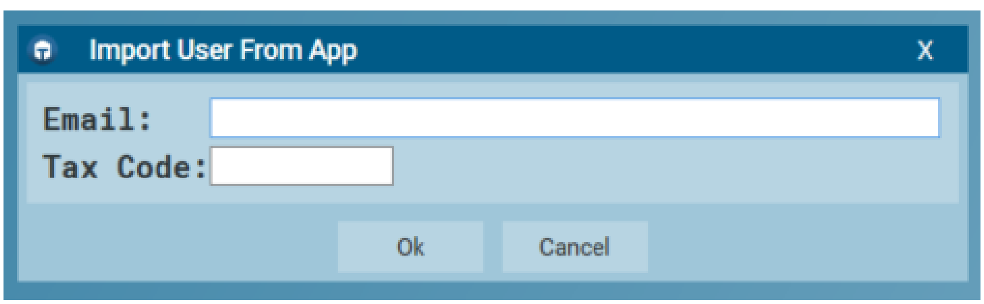
To create a new return with a Generic Taxes to Go app account, you will click on the Tools dropdown and then select Pull From Pro App.

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.



This will bring up a box to Import User From App. **You will need to get the email address and the 6 digit tax code from your taxpayer to import the app information into your program.**

This will begin a new return. The information uploaded in the app will be imported into the program. You will need to review the Personal Information menus (including dependent information) to ensure accuracy.

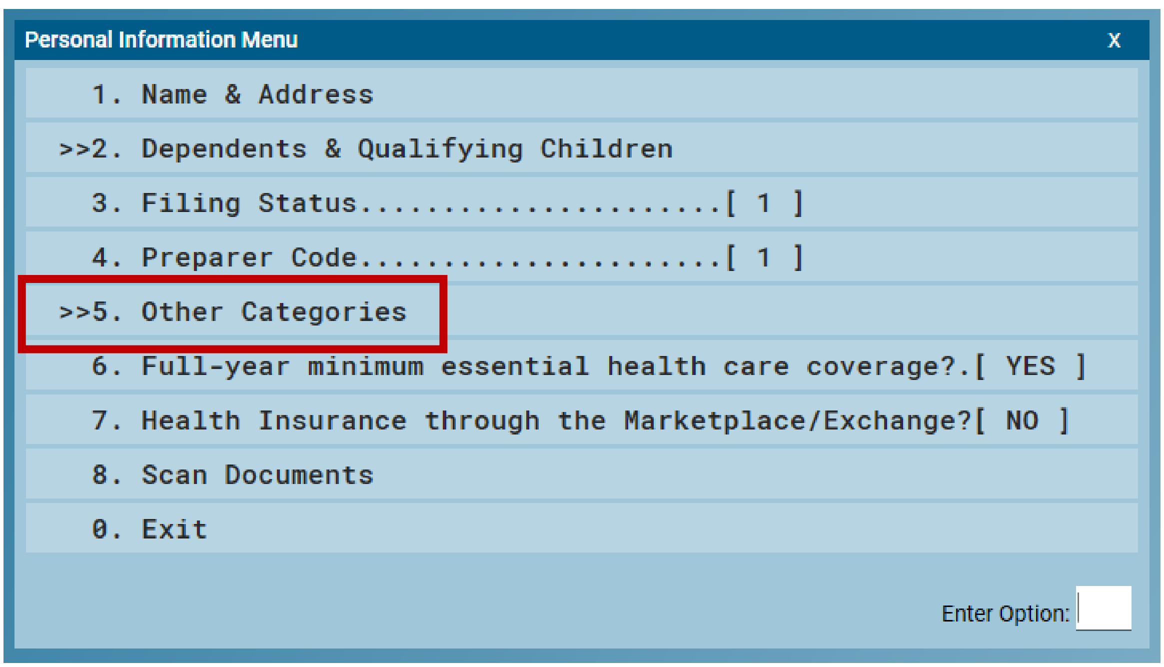


Associating an Existing Return with a Taxes to Go Account in Desktop

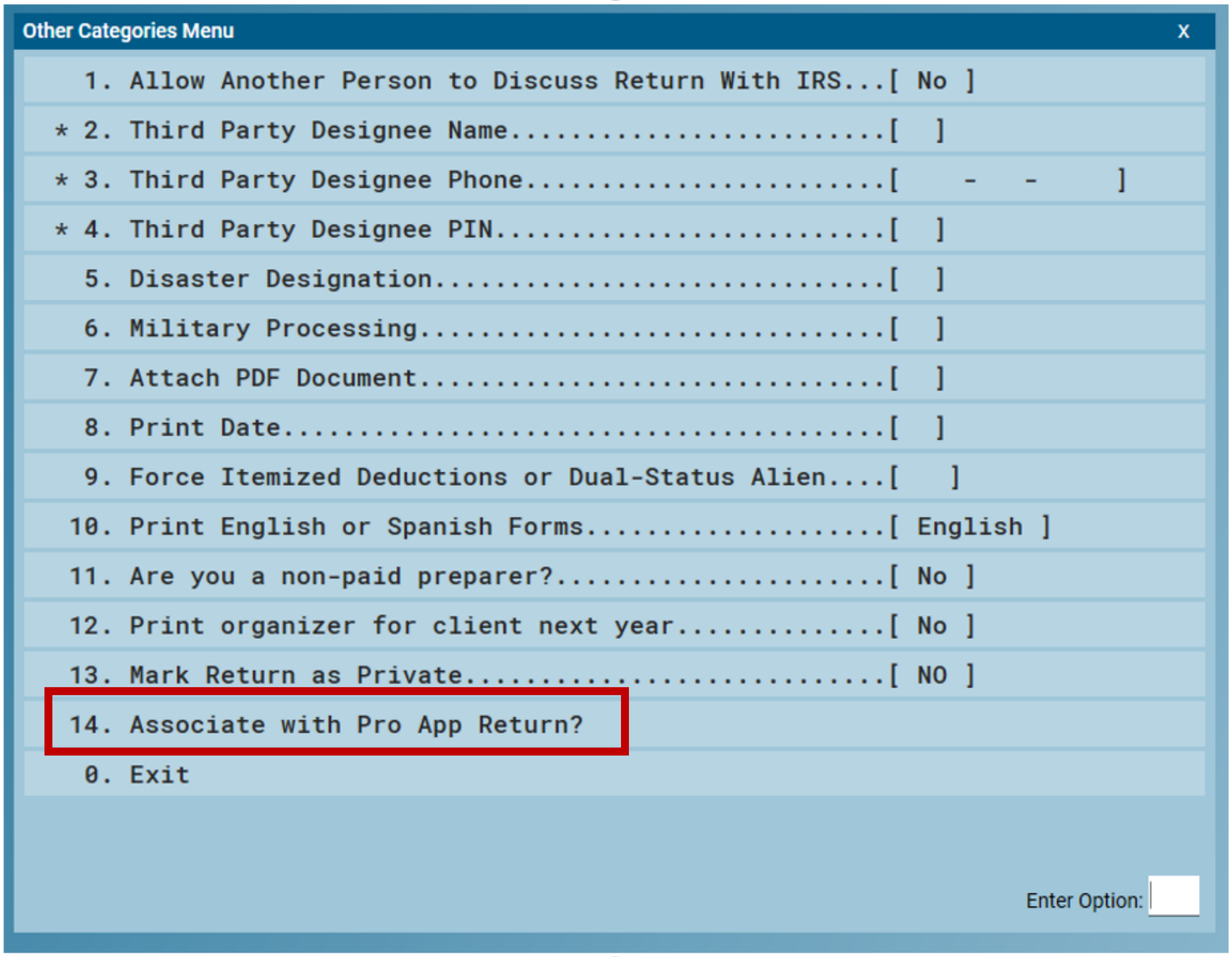
If you have already started your client's tax return in your program, the taxpayer can still use the Taxes to Go to send you their information and to sign documents. Associating an app returns with an existing return allows you to take a return you've already created in your program and connect it to an app return. Once this connection is made, your client will be able to upload documents to you and you will be able to send documents back to them.

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

To associate an existing return in Desktop, from the Personal Information menu inside a return you will select Other Categories.



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



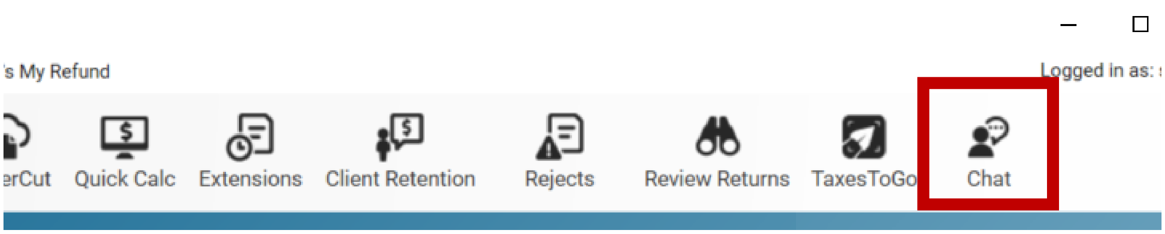
Selecting this will only bring up an area to enter the tax code for the app user. The email must be entered in the Name & Address menu prior to this point.

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

Chatting with your Taxpayer in Desktop

After you create a new return with Taxes to Go data, you will be able to communicate with that taxpayer via the Chat feature. Chat for your Taxes to Go clients can be accessed from the top of your Desktop program.

In addition to correspondence with your taxpayer, you will also receive notifications through Chat when the taxpayer has signed documents. When you have a new chat or notification you will see a red number next to the Chat icon.



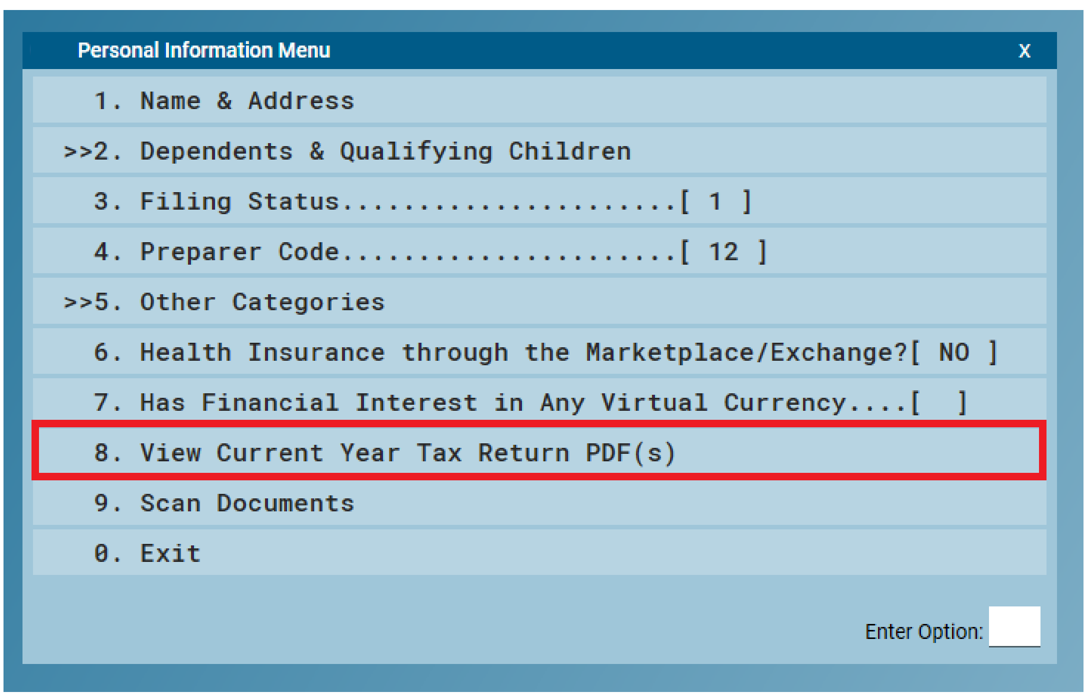
Accessing Uploaded Documents in Desktop

Once you have started the tax return using the Taxes to Go information, you will need to navigate through all of the Basic Information screens before you can access the uploaded documents. This will include

- Personal Information
- Dependents
- Advanced Child Tax Credit Amounts
- Recovery Rebate question
- Healthcare status

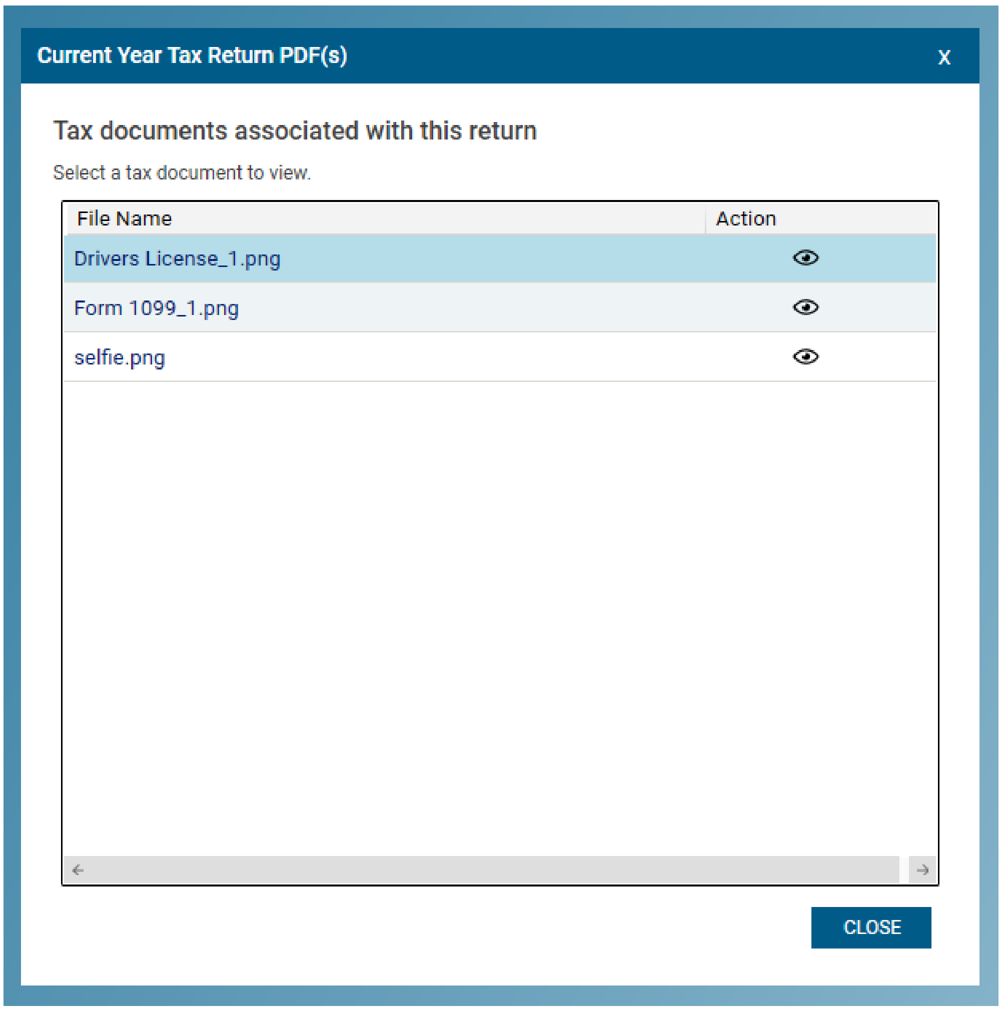
After you have navigated through each of those menus, the program will show the main Personal Information Menu.

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



This will open a new tab to show all the documents that were uploaded through the Taxes to Go app. From there, you will be able to download and then view the documents. These documents will be used to manually fill out the forms on the tax return.

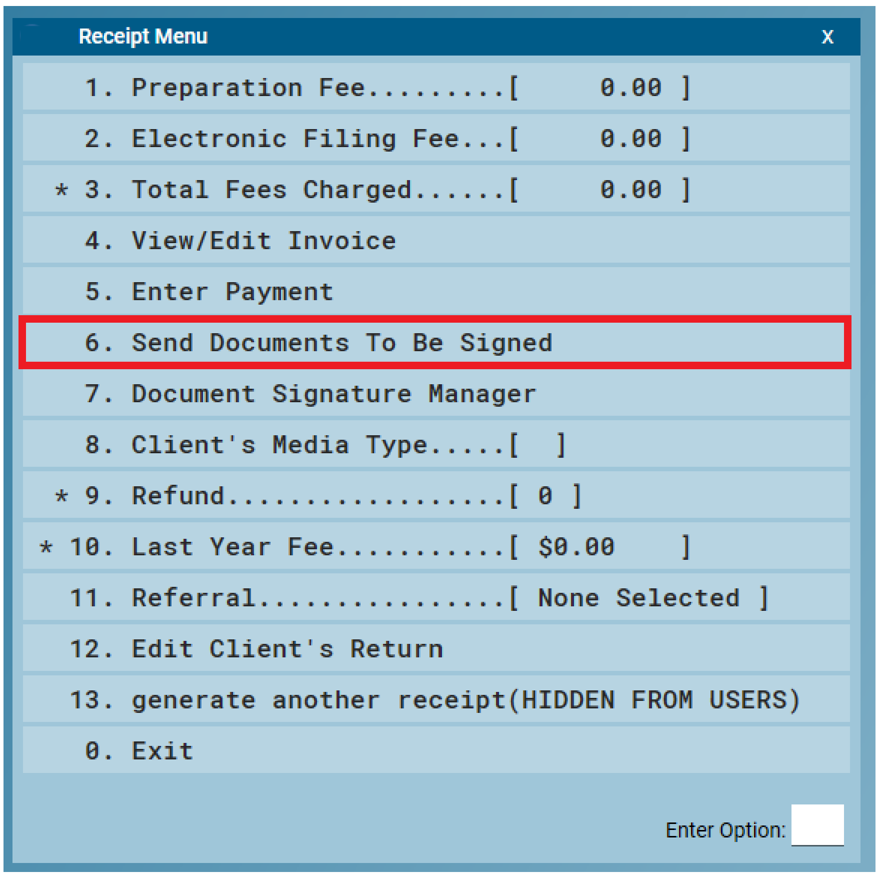
This documents can also be accessed through PaperCut with the other documents that have been saved to PaperCut.



Getting Signatures through Taxes to Go in Desktop

After you have completed the tax return using the information from Taxes to Go, you will send the Tax Return back to the Taxes to Go app for signatures. This will include the Federal Return, Bank Application, Consent to Use and Disclose, and the 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.

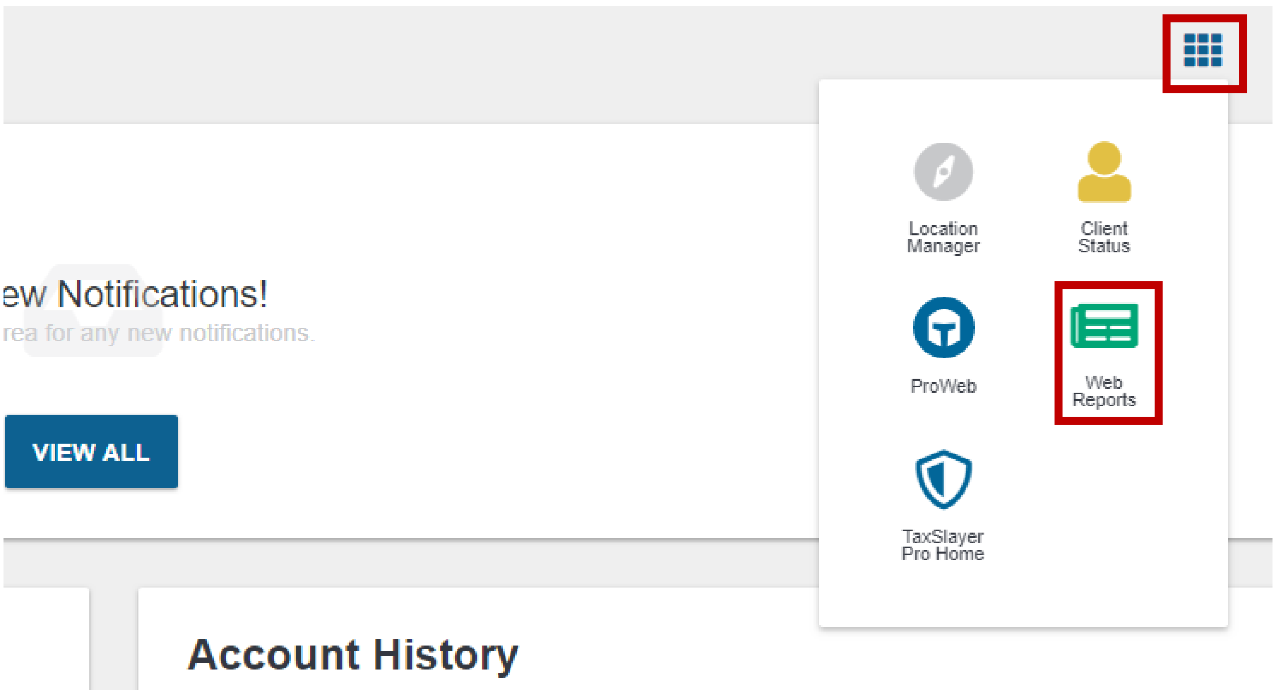


You will get confirmation that the Tax Return has been sent. **Once the taxpayer signs the documents in the app, you will see the signatures on the Receipt Menu under Document Signature Manager and the respective forms.**

Taxes to Go Reporting

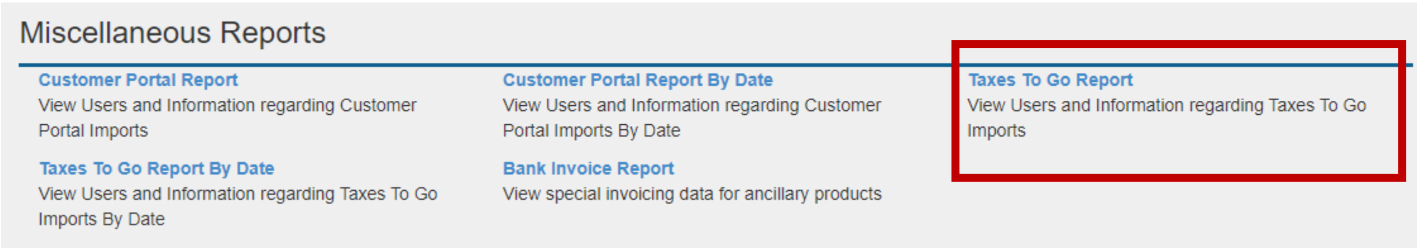
Within Web Reports (the online reporting tool available through your Account Hub) you can run the Taxes to Go report to check on your Taxes to Go returns.

From inside Account Hub, select the cube at the top right and then choose Web Reports from the list of icons.

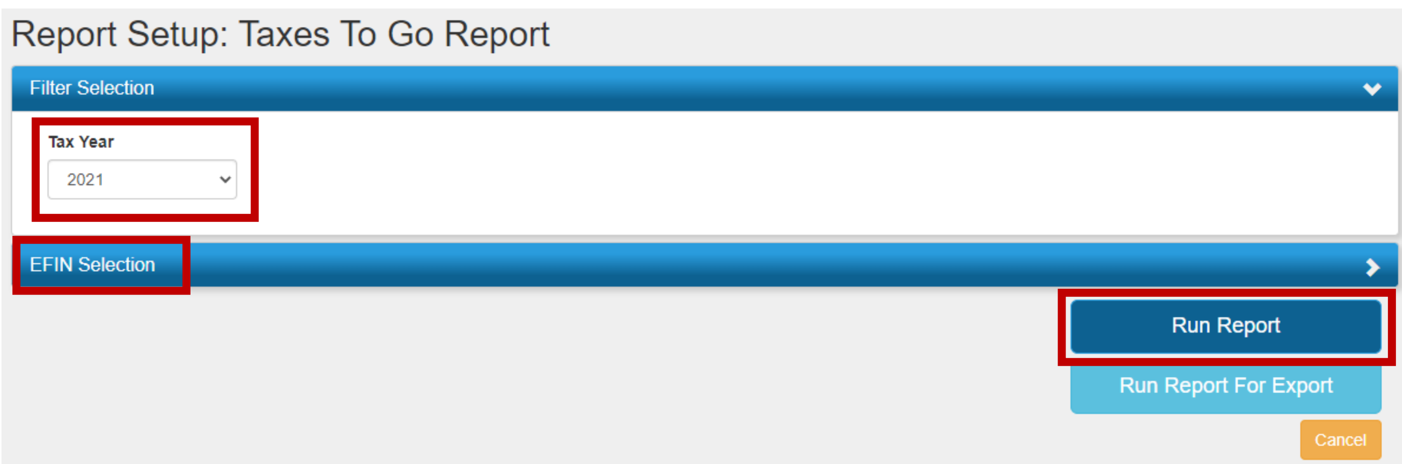


You can also access Web Reports by going directly to https://www.taxstatusnow.com/reports/web and logging in using your credentials for Account Hub.

From the main page of Web Reports, scroll down to Miscellaneous Reports and select Taxes to Go Report.



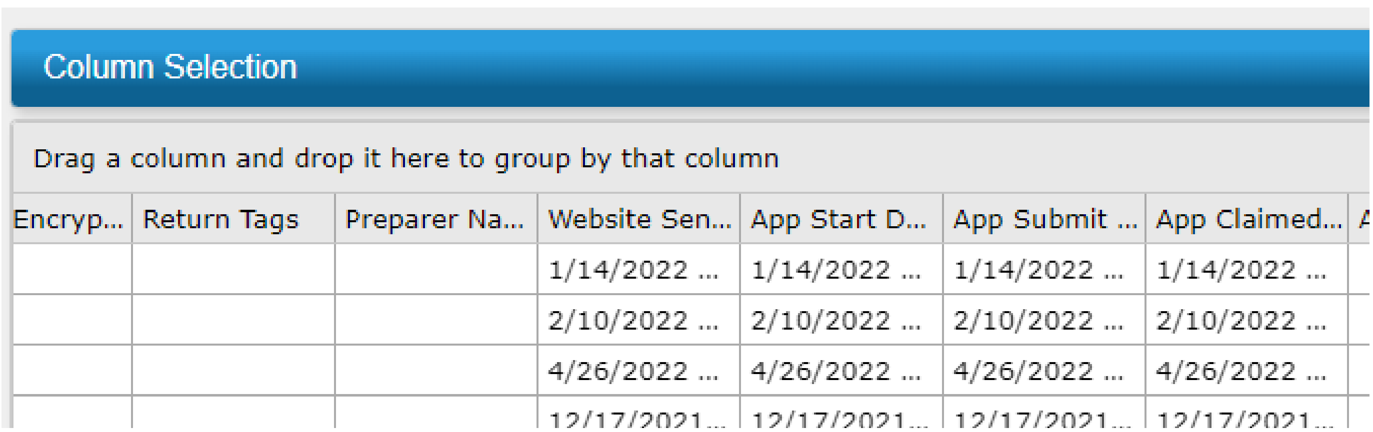
On the Report Setup page, you will select the Tax Year you are running the report for, select your EFIN from the EFIN Selection section, then choose Run Report.



Any branded app return linked to your office will show on this report through every step. Generic app returns will only show on this report once they have been claimed into your program.

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)



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.