taxestogo®

Taxes to Go Guide for Tax Preparers

2024 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 versus 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 submitted 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.

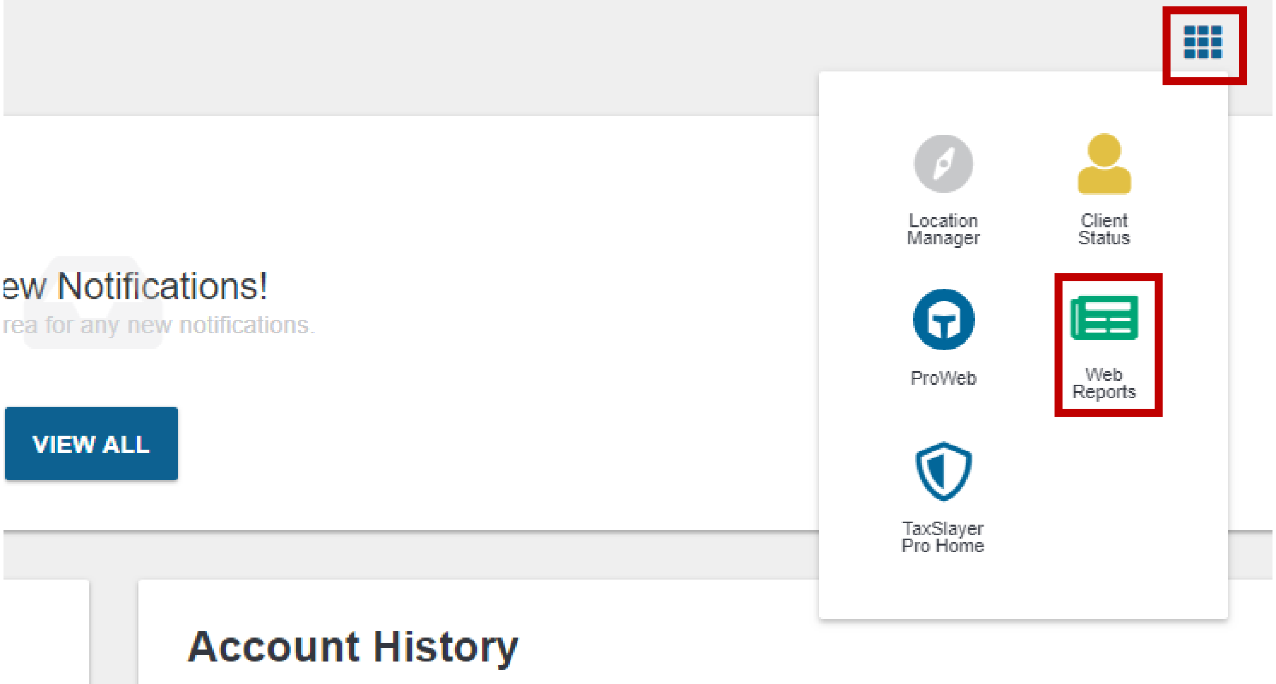
Branded apps have more thorough reporting. Since branded app accounts are tied to your office, you have the ability to track every step of the taxpayer's process within the app using the Taxes to Go Web Report. Generic apps will not show on this report until after they have been claimed into your office.

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.

Taxes to Go Reporting

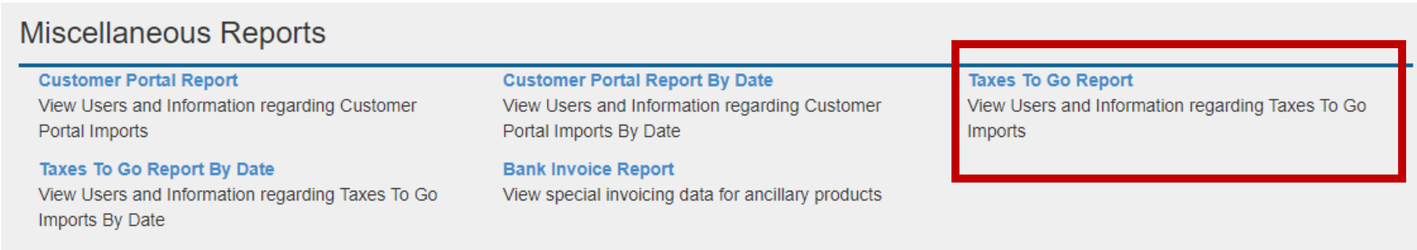
Within Web Reports (the online reporting tool available through your Account Hub) you can run the Taxes to Go report to check on your Taxes to Go returns.

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

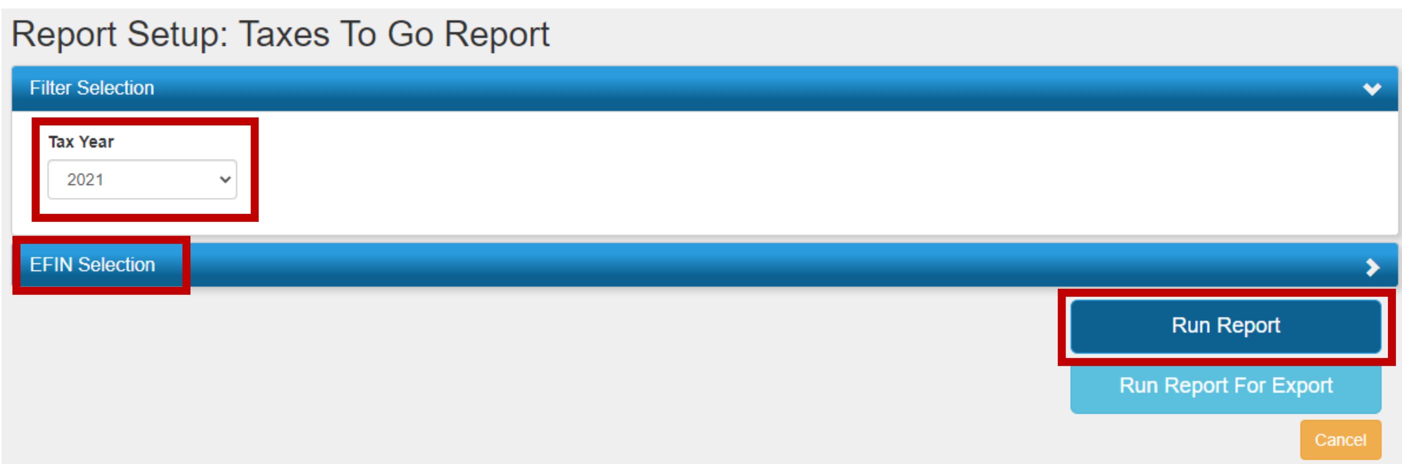


You can also access Web Reports by going directly to https://www.taxstatusnow.com/reports/web and logging in using your credentials for Account Hub.

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



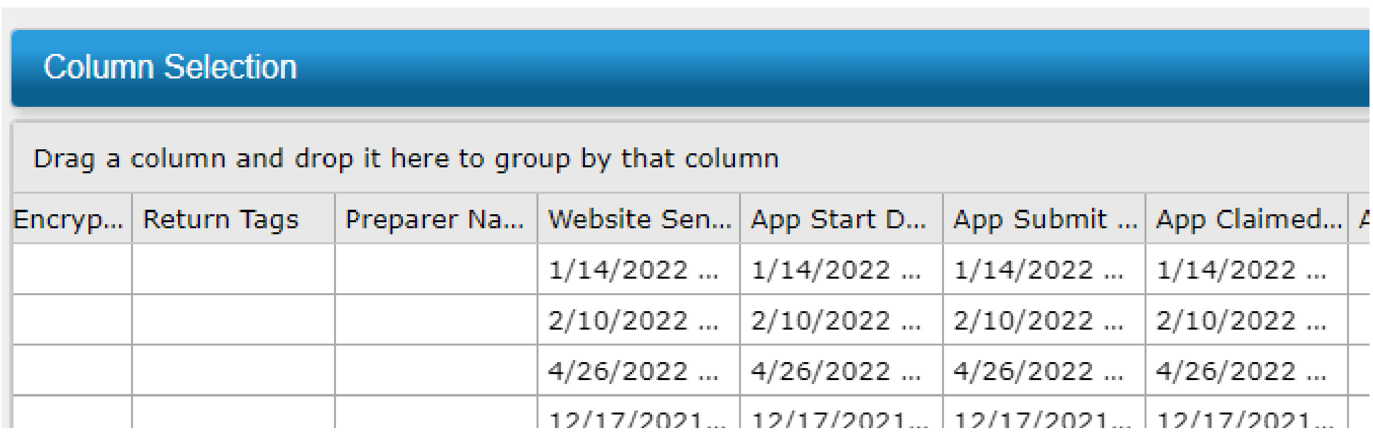
On the Report Setup page, you will select the Tax Year you are running the report for, select your EFIN from the EFIN Selection section, then choose Run Report.



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)



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...
			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.

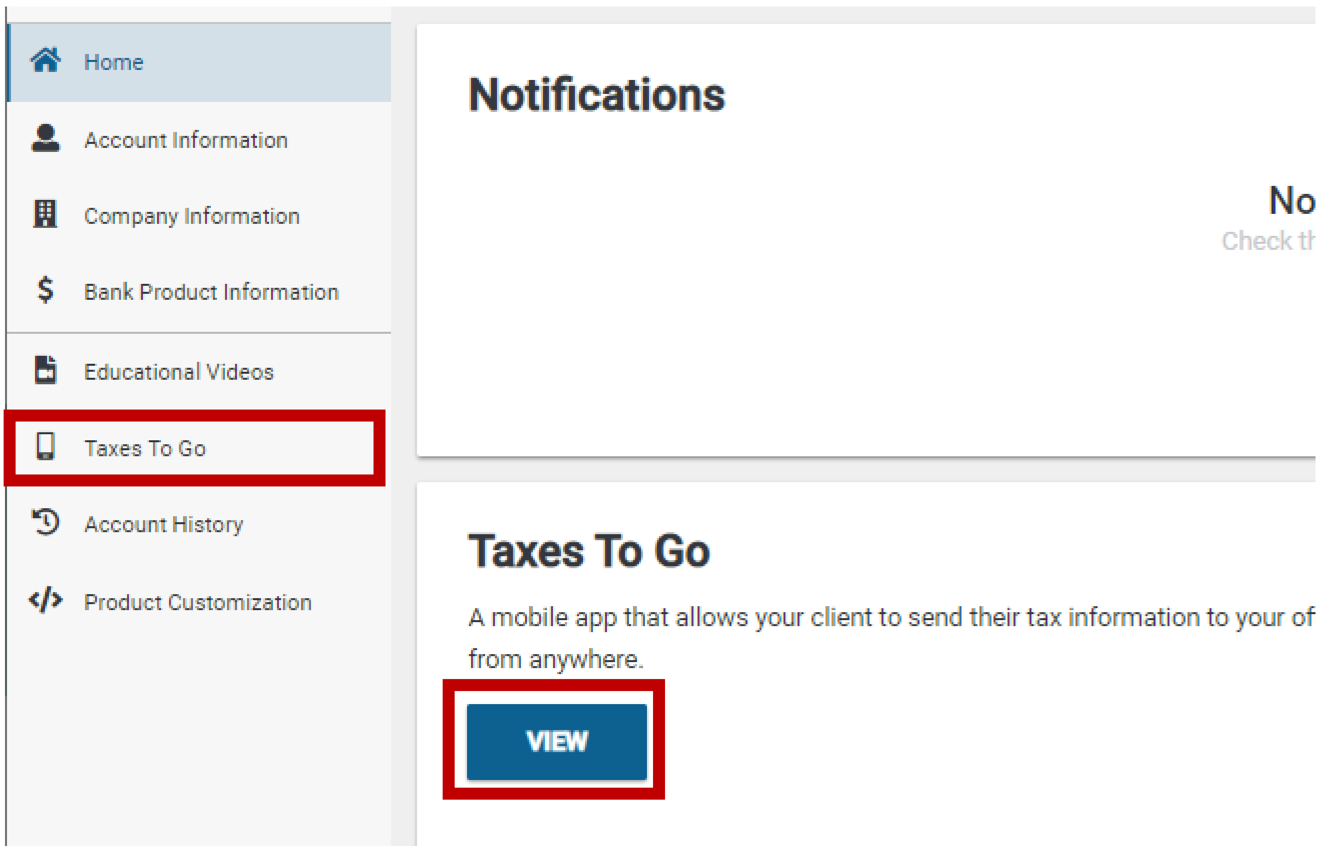
App Submit Date - This date refers to when the taxpayer completed the entire My Taxes section inside their app and clicked submit. If there is nothing listed for App Submit Date, that means the taxpayer has not completed the My Taxes section and the app return. If the taxpayer is using your branded app, 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.

Setting up your Branded App

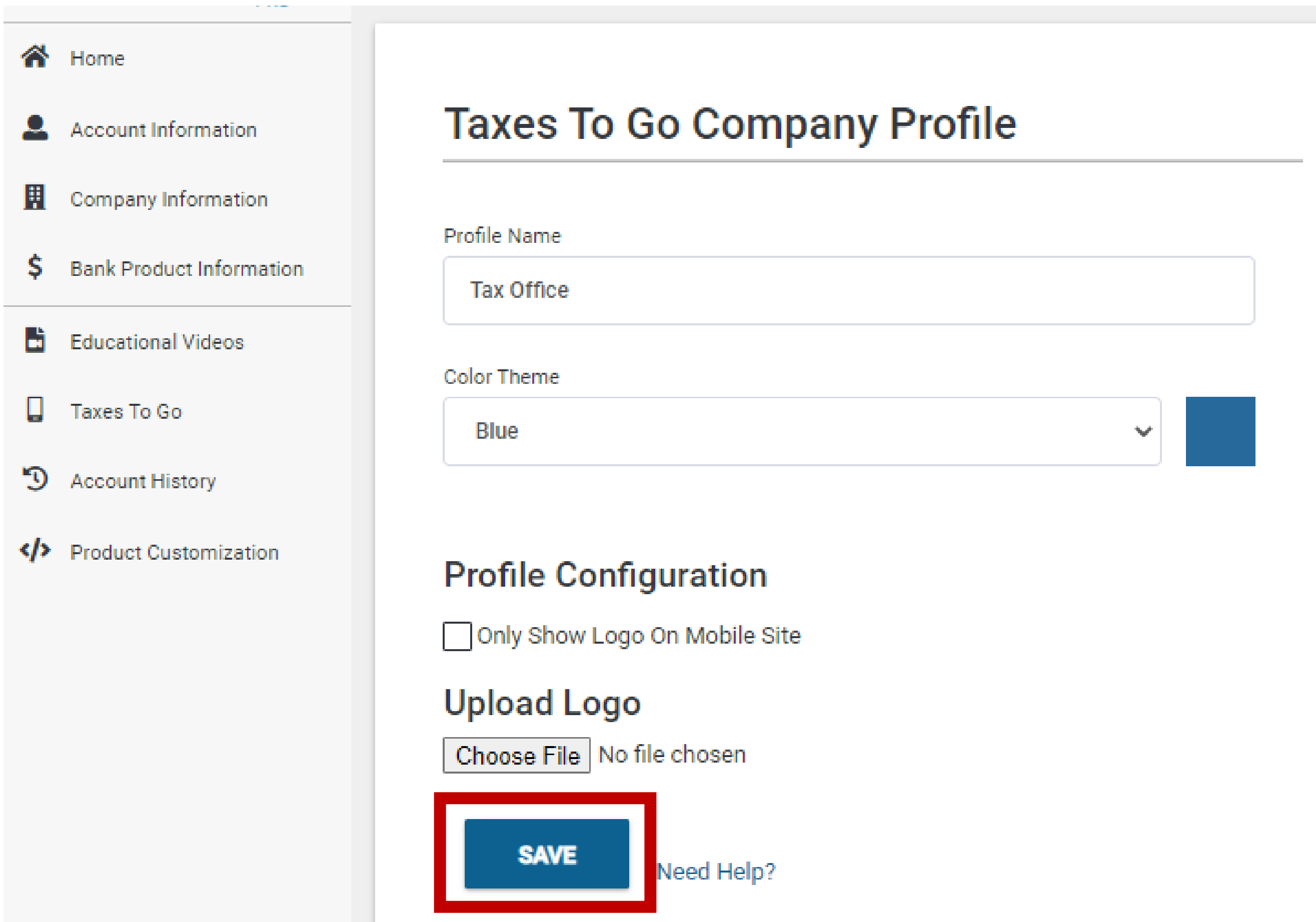
Using a branded Taxes to Go app allows you to customize the look of the app, including your business logo and the color theme of the app.

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.

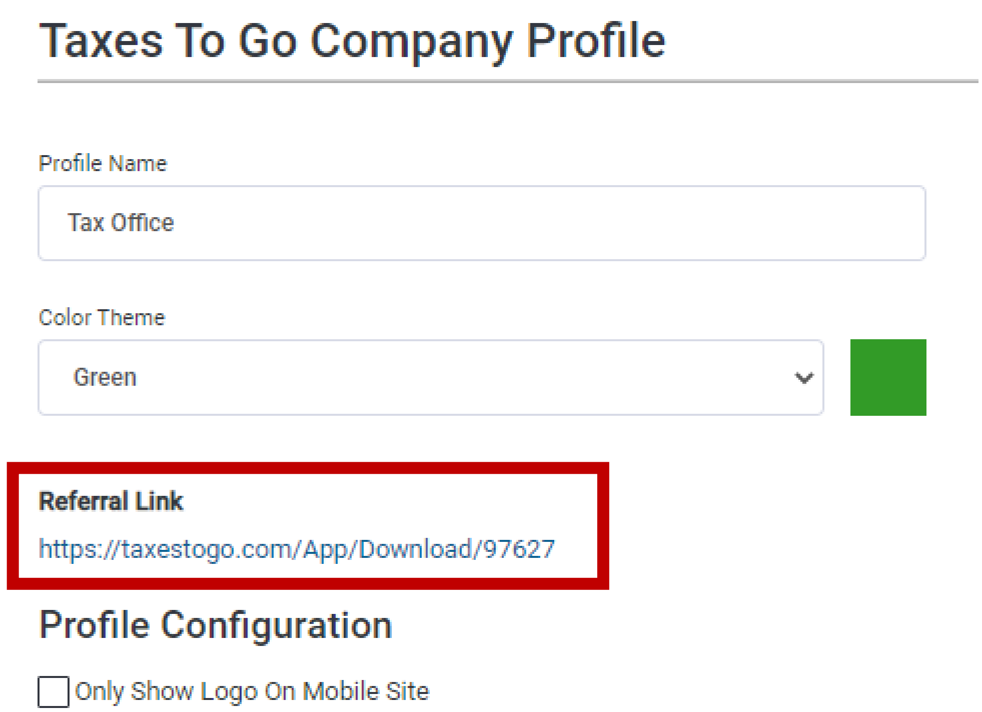


After your customization has been saved, you will see a Referral Link generate on the page.

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.

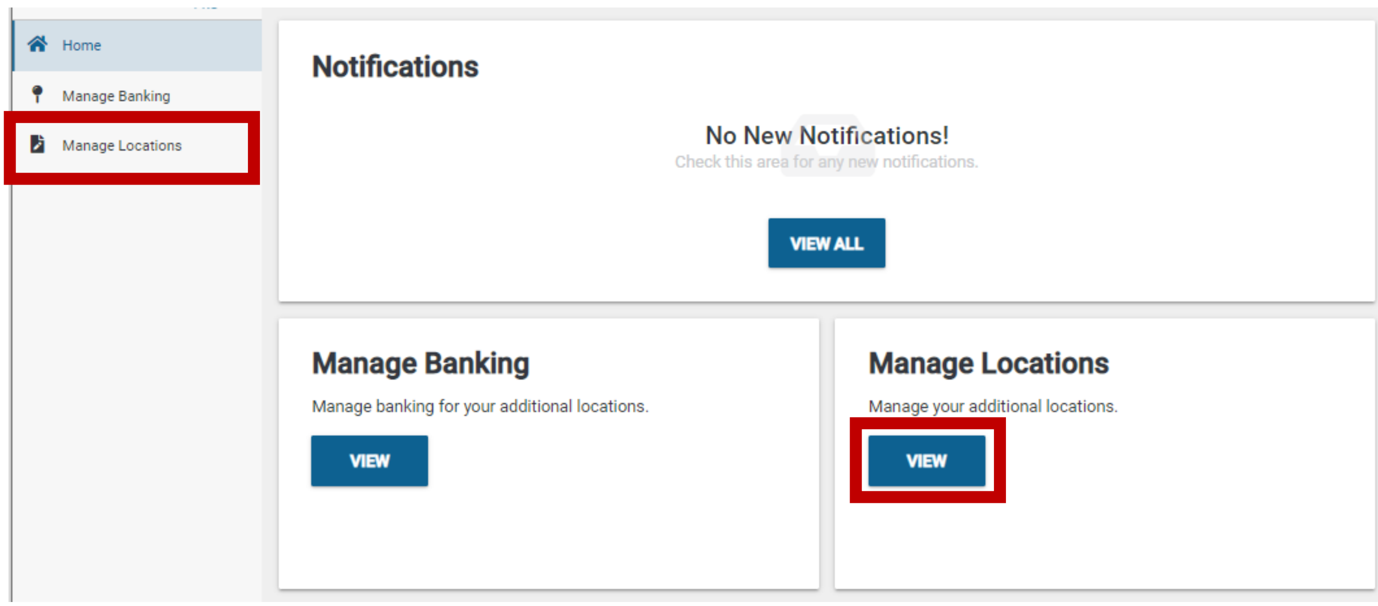
You can share this link by sending it directly to your taxpayers, posting it on your website, or even adding it onto your social media accounts.



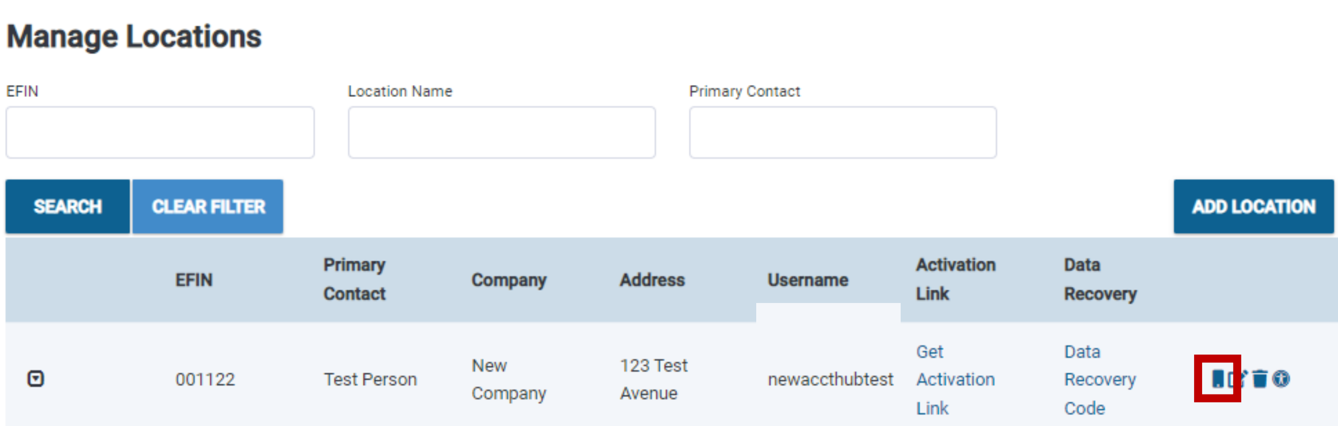
Setting up Branded Apps for Additional Locations

If your tax business has multiple locations, you will need to setup the Taxes to Go configuration for each office you have. **Each office will have a unique Taxes to Go Referral Link.**

To setup configuration for each of your additional locations, you will need to go into the Location Manager and choose Manage Locations from the left-hand side or select VIEW on the Manage Locations tile.



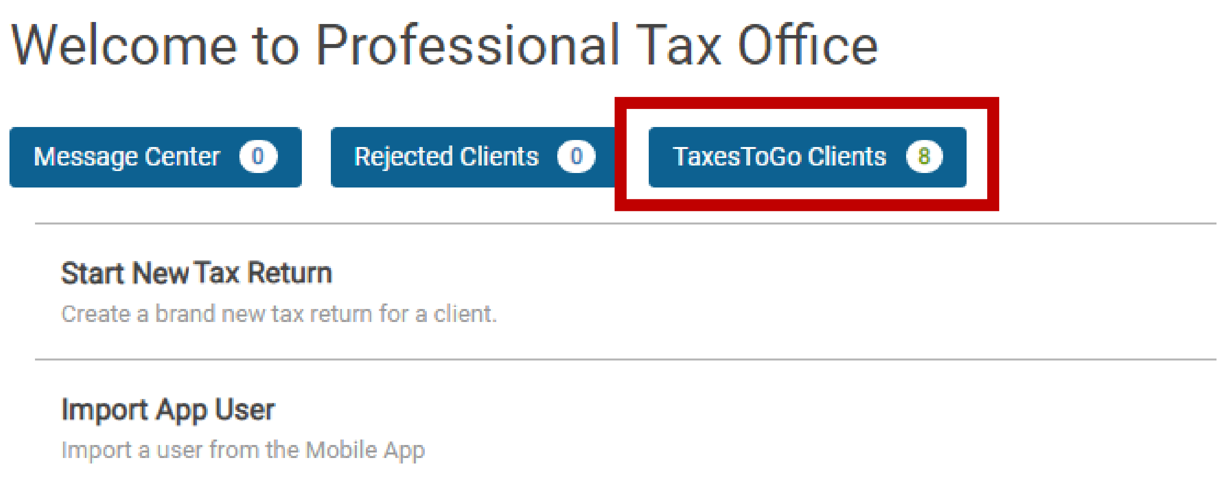
From the list of locations, you will click on the phone icon. This will open the Taxes to Go configuration page for that particular location. This customization will work just like the one from the main EFIN.



Pulling Taxes to Go Returns into ProWeb

To create a new return with a branded Taxes to Go app account, you will click on the TaxesToGo Clients box on the Welcome page of your program.

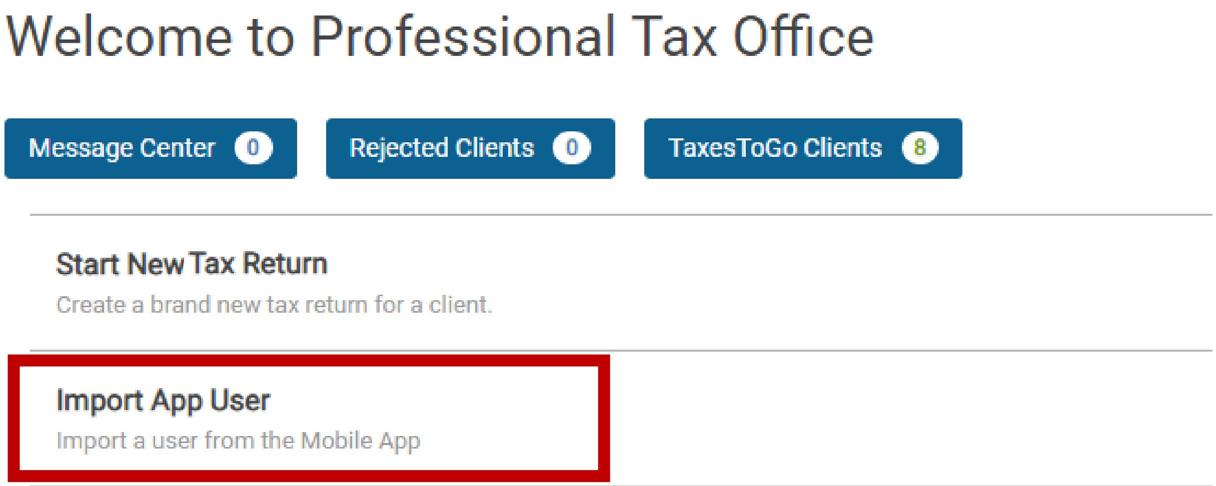
This option will only show when you have Branded App Accounts waiting to be claimed. If there are currently none to be claimed, this box will not show.



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, click Claim next to the taxpayer's information.

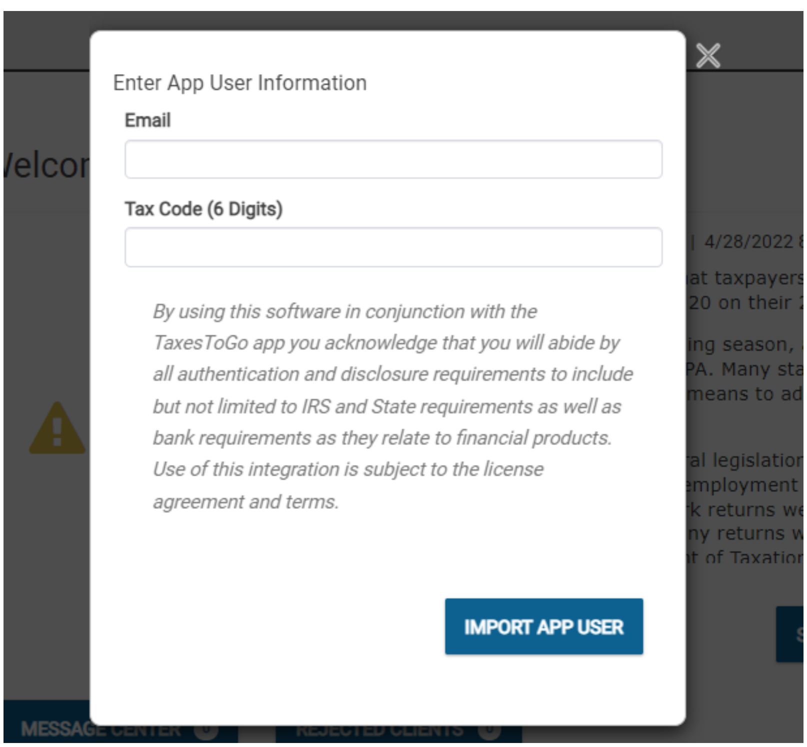
This will begin a new return. The information uploaded in the app will be imported into the program. You will need to review the Personal Information menus (including dependent information) to ensure accuracy.

To create a new return with a Generic Taxes to Go app account, you will click on the Import App User option on the Welcome page of your program.



This will bring up a box to enter the App User Information. **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.**

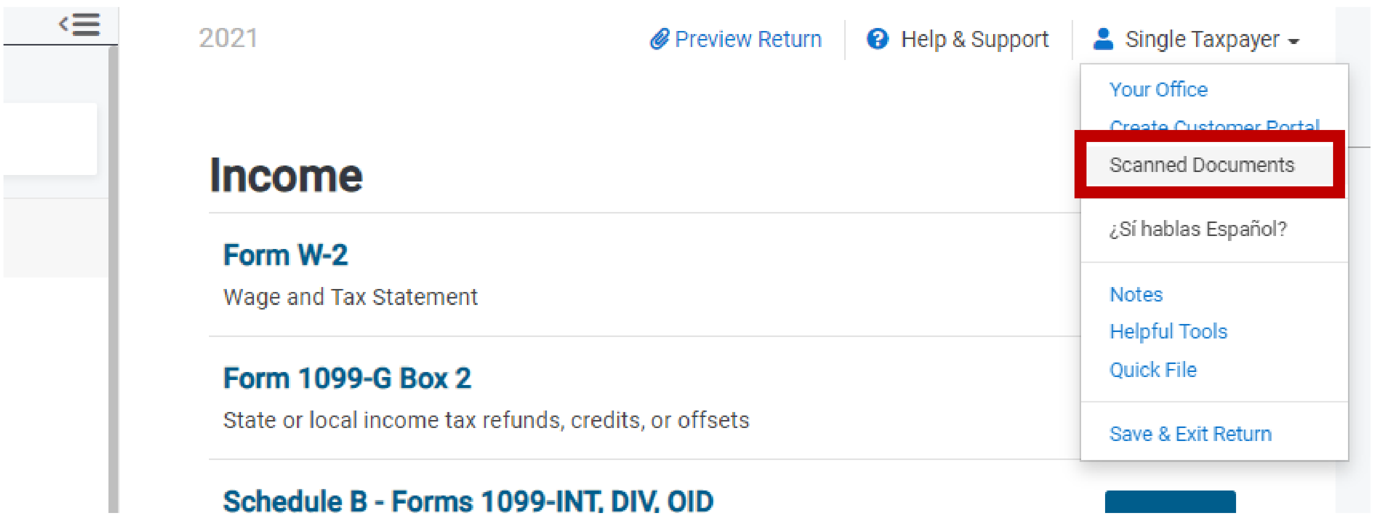
This will begin a new return. The information uploaded in the app will be imported into the program. You will need to review the Personal Information menus (including dependent information) to ensure accuracy.



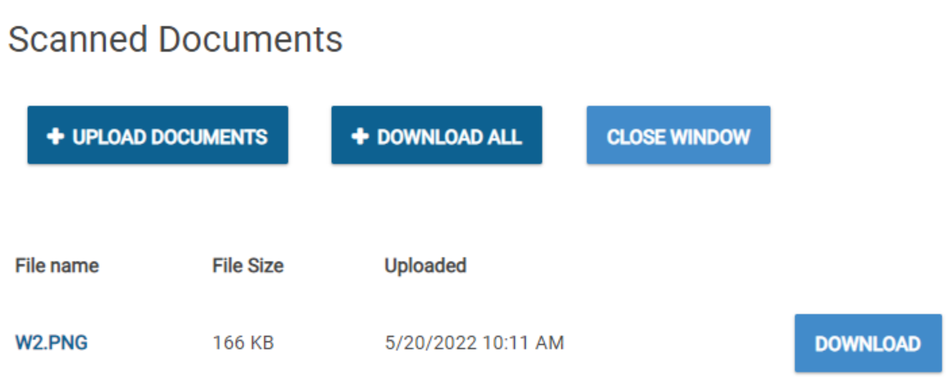
Accessing Uploaded Documents in ProWeb

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.

After saving the Basic Information menus and landing on the Income Menu, you will select Scanned Documents from the Taxpayer Name Dropdown.



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.



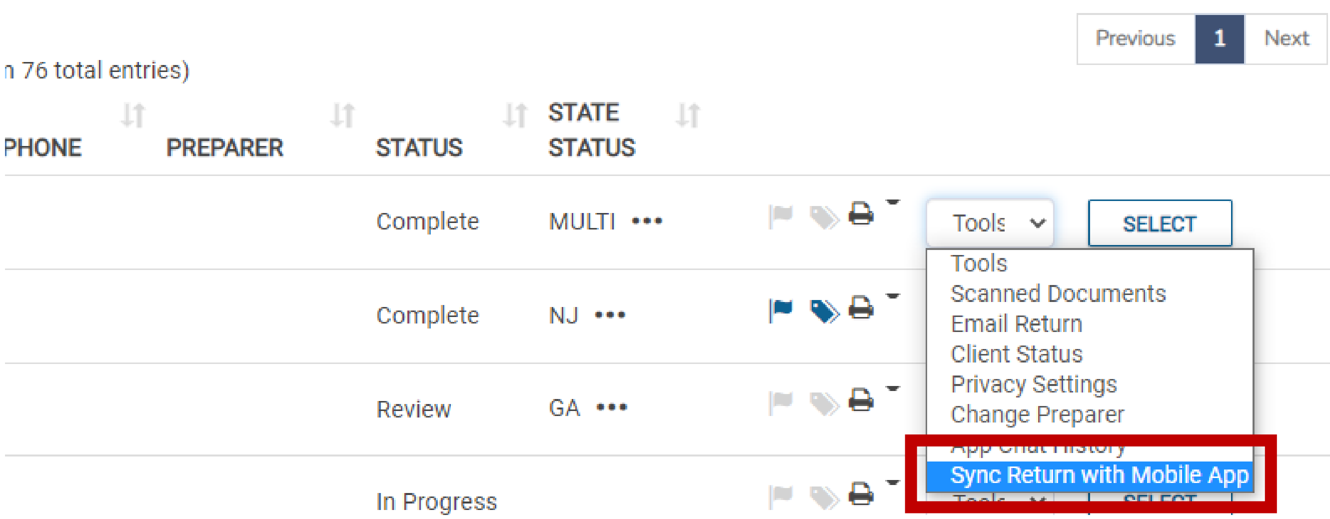
Associating an Existing Return with a Taxes to Go Account in ProWeb

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.

To associate an existing return in ProWeb, from the Client List you will select the Tools dropdown next to the taxpayer you wish to associate and choose Sync Return with Mobile App.

This will open a new menu for you to enter the email address and tax code for the app account. You will need to get this information directly from your taxpayer. For Branded App users, their Tax code will be available from the settings menu inside the app.

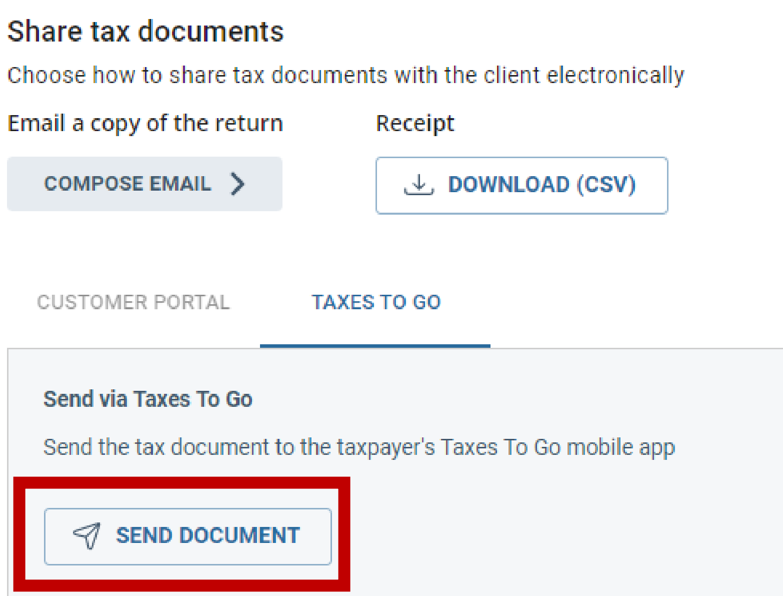
Once you have entered the tax code, you will get confirmation the return has been synced.



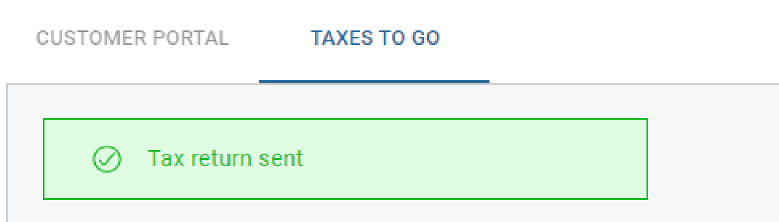
Getting Signatures through Taxes to Go in ProWeb

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 on the Submission Page of the return. The Submission Page is the last part of the e-file process.



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 submission page and the respective forms.**



Chatting with your Taxpayer in ProWeb

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 Welcome page of your 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 the Chat box will show (1) Unread Messages.