



taxestogo[®]

Taxes to Go guide for Taxpayers

2024 Tax Year

Are you using the Branded Taxes to Go?

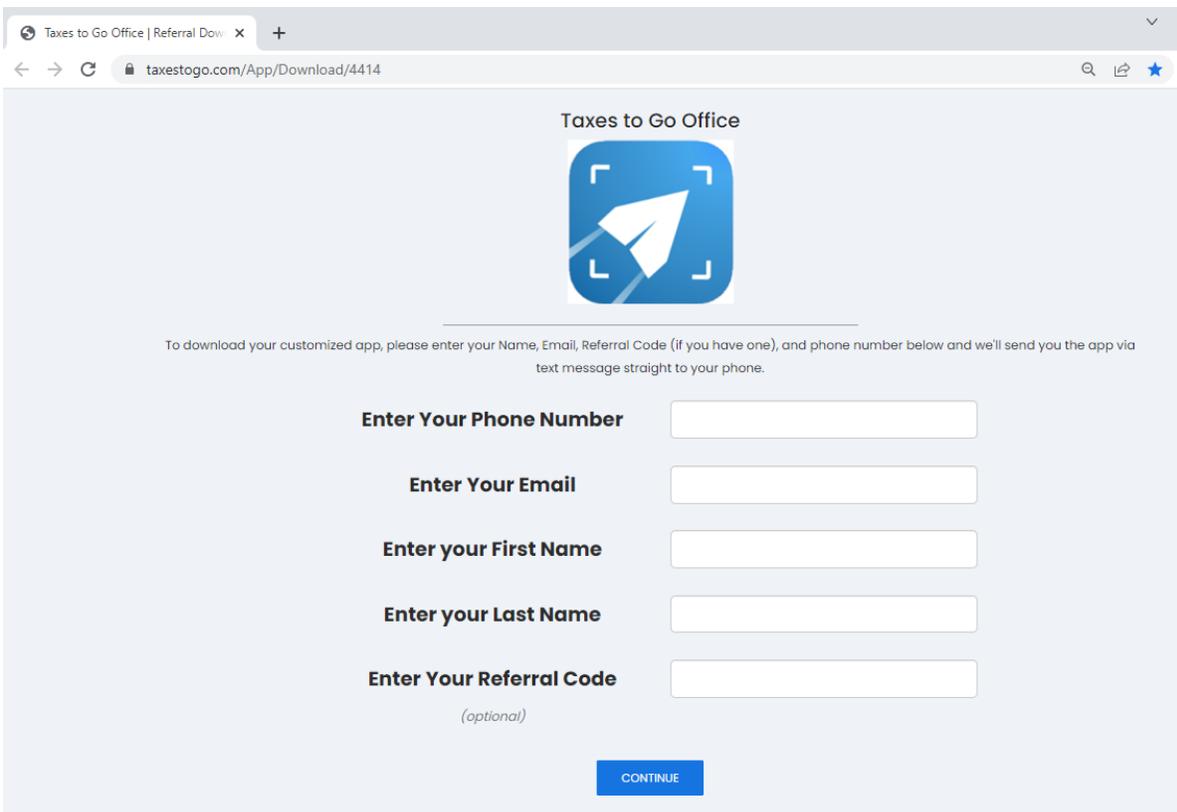
Before downloading Taxes to Go, you must get the Referral Link from your tax preparer.

In order to get the Branded Taxes to Go app, you must start by using the Referral Link provided by your preparer. This referral link will open to a website where you will need to fill out your

- Cellphone number
- Email address
- First name
- Last name
- (Optional) the Referral Code provided by your tax preparer

Once the necessary information has been filled out, click **Continue**.

Once you click Continue, you will receive a text message with a direct link to your App Store/Google Play Store to download Taxes to Go.

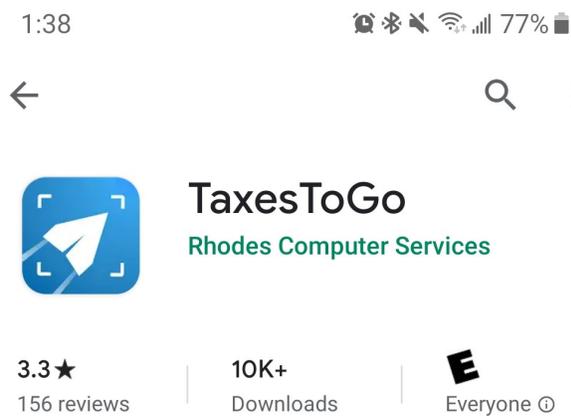


The screenshot shows a web browser window with the URL `taxestogo.com/App/Download/4414`. The page title is "Taxes to Go Office" and features a blue logo with a white paper airplane. Below the logo, a message reads: "To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone." The form contains five input fields with the following labels: "Enter Your Phone Number", "Enter Your Email", "Enter your First Name", "Enter your Last Name", and "Enter Your Referral Code" (with "(optional)" below it). A blue "CONTINUE" button is positioned at the bottom center of the form.

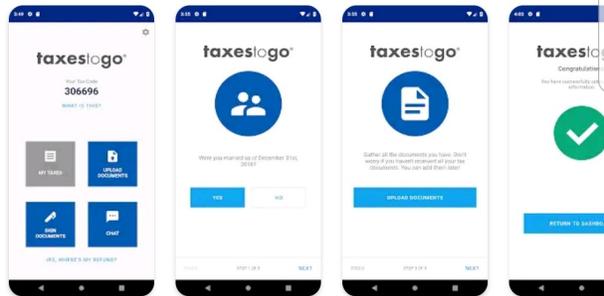
Downloading and Setting Up Taxes to Go

If you are using a Branded Taxes to Go app, please be sure to complete the information on the Referral Link prior to installing the app.

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

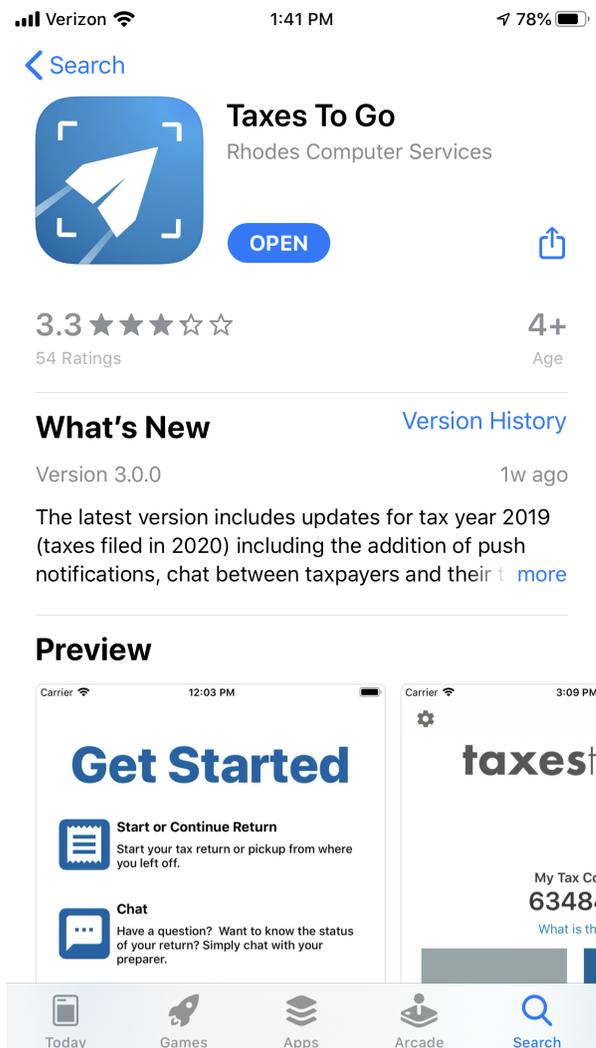


Install



About this app

TaxesToGo® is the most convenient way to file



Search



Taxes To Go

Rhodes Computer Services

OPEN

3.3 ★★★★★
54 Ratings

4+
Age

What's New

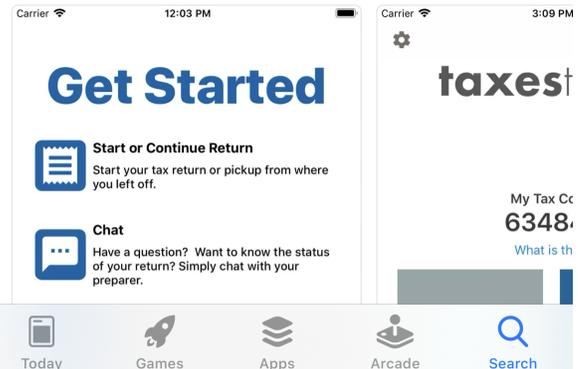
Version History

Version 3.0.0

1w ago

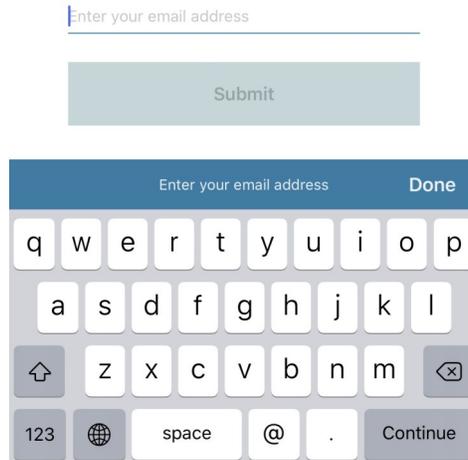
The latest version includes updates for tax year 2019 (taxes filed in 2020) including the addition of push notifications, chat between taxpayers and their t [more](#)

Preview



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

Branded Taxes to Go users must use the same email address that was used on the Referral Link page.



The image shows a web form with a text input field containing the placeholder text "Enter your email address". Below the input field is a light blue "Submit" button. A mobile keyboard is overlaid on the bottom half of the form, showing a standard QWERTY layout with a "Continue" button at the bottom right.

Step 3: Complete the Taxes to Go registration. You will need to provide your cellphone number and create a password for your account.

taxestogo[®]

taxestogo@email.com

7061234567

.....

.....

I agree to the terms [Privacy Policy](#)
[License Agreement](#)

Register

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

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

taxestogo[®]

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

[RESEND CODE](#) [CHANGE USER](#)

Submit

Step 5: Read the Navigation Menu, My Tax Code, Push Notifications pages for more information on each of those areas of the Taxes to Go app.

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 if you are either starting a new return with your tax preparer or adding documents to an existing return your tax preparer already has.

Start New Return - You will need to select this option if your Tax Preparer does not have your tax information and/or has not started your tax return.

Already have a Return - You will only select this option if your Tax Preparer has already started your tax return and currently has all of your Basic Information.

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?

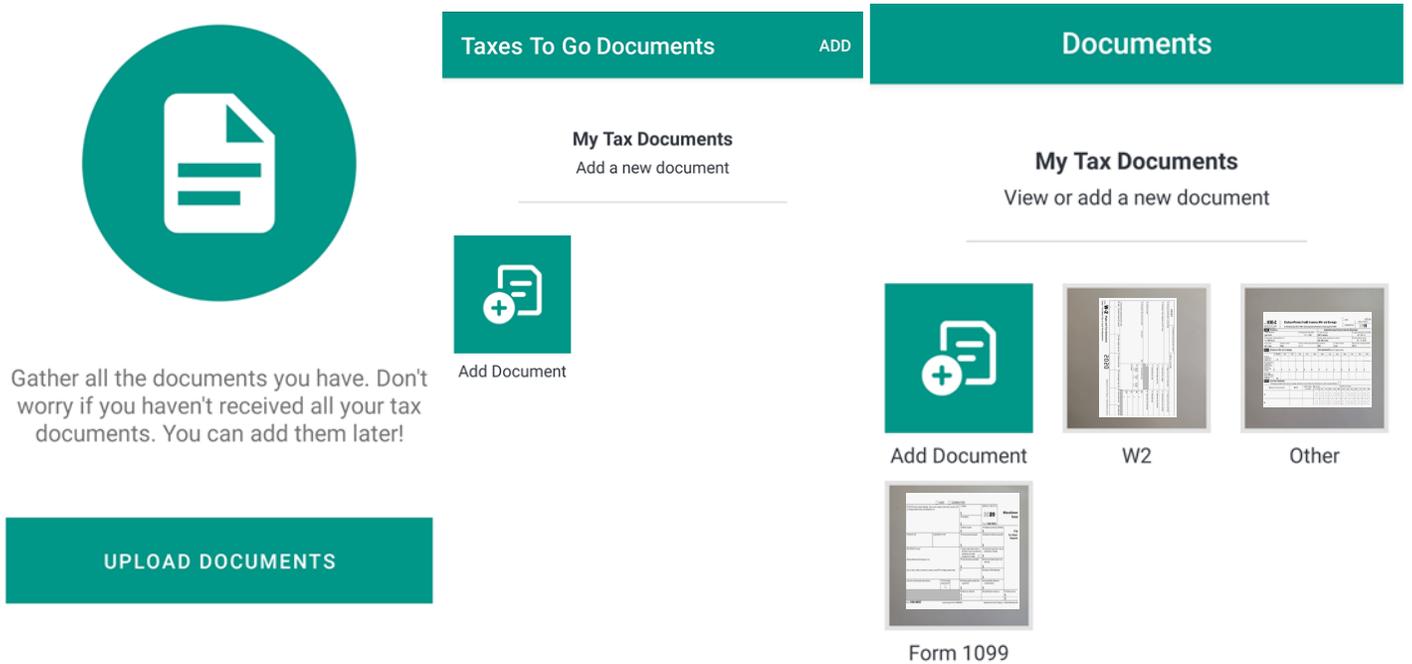
I don't need to enter my tax return data. My Preparer already has my tax return information.

CONTINUE

Step 2: Click **Let's Get Started** 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)

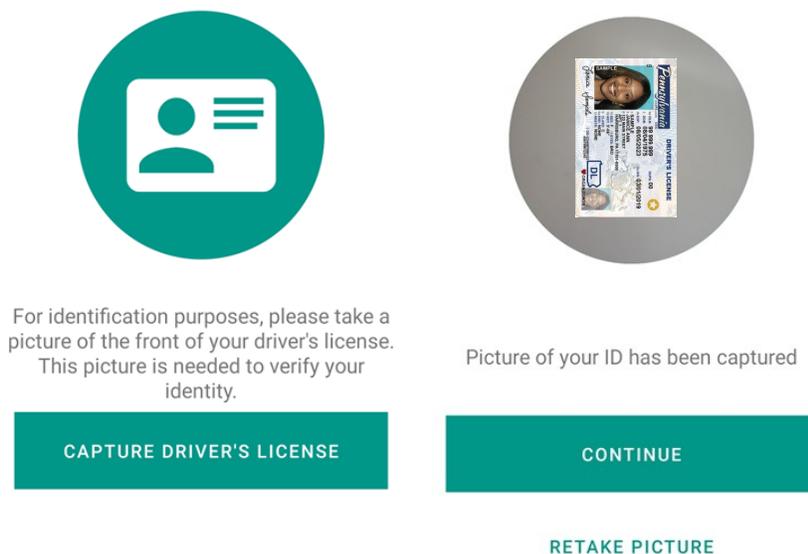
Step 3: Upload all of your tax documents into the app. Your documents can either be uploaded directly from your phone's photo album or by taking a picture of them.



Gather all the documents you have. Don't worry if you haven't received all your tax documents. You can add them later!

UPLOAD DOCUMENTS

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



For identification purposes, please take a picture of the front of your driver's license. This picture is needed to verify your identity.

CAPTURE DRIVER'S LICENSE

Picture of your ID has been captured

CONTINUE

[RETAKE PICTURE](#)

Step 5: Take a selfie.



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

RETAKE PICTURE

Step 6: Add your dependents if applicable. You will need to enter the dependent's:

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



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.

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

706-123-4567

Step 8: Sign the Consent to Use.

Branded Taxes to Go users will not have to fill in their Tax Preparer's name. This information will pre-populate for you.

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 ot...

MORE

Tax Preparer / Company Name

Demo Taxes to Go Office

Taxpayer Name

Tax Office

CONSENT

Step 9: Review the information that you have added throughout this process. If all information is complete and accurate, Submit your tax information to your Tax Preparer.

Generic Taxes to Go users must share their email address and tax code with their Tax Preparer in order for their information to be received.

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 706-123-4567	EDIT
Granted Consent to Use Yes	EDIT
Uploaded documents 3	EDIT
Captured selfie Yes	EDIT

Taxpayer Test	EDIT
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[PREV](#)

STEP 9 OF 9

[SUBMIT](#)

You will receive confirmation once the submission has been successful.

Congratulations!

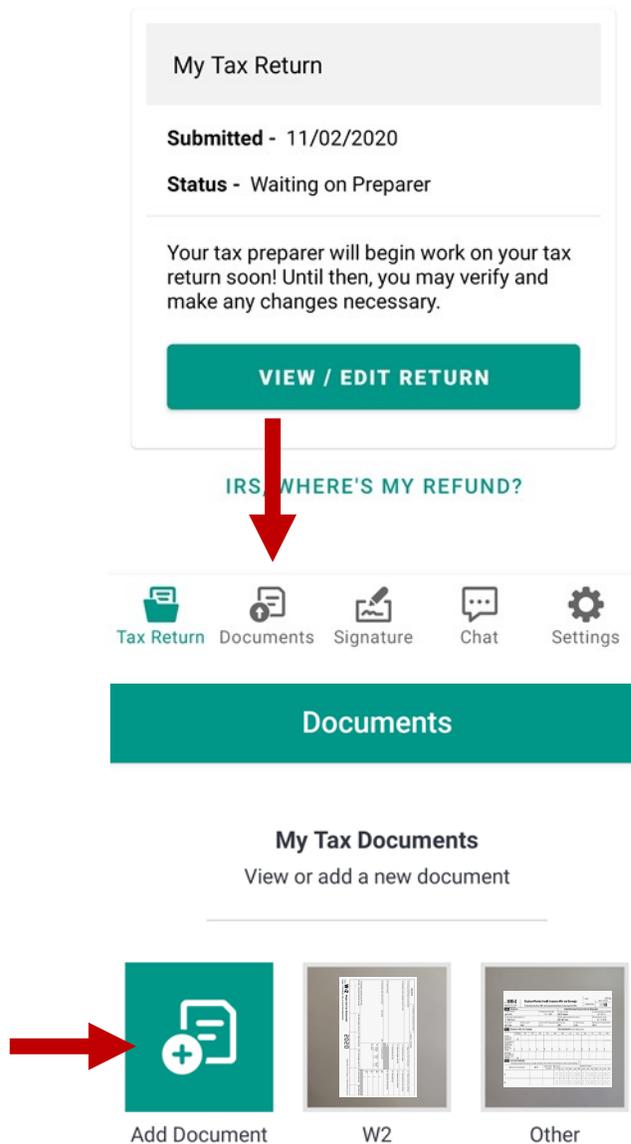
You have successfully uploaded your information.



[RETURN TO DASHBOARD](#)

Uploading Additional Documents

From the Dashboard of your Taxes to Go 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.



Chatting with your Tax Preparer

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

The image shows two parts of the Taxes to Go app interface. On the left is the 'My Tax Return' card, which displays the submission date (11/02/2020) and status (Waiting on Preparer). A red arrow points from the 'VIEW / EDIT RETURN' button on this card to the 'Chat' tab in the bottom navigation bar. On the right is a screenshot of the 'Chat with Tax Preparer' screen, showing a conversation history with messages such as 'Account created on 1/18/2019', 'I just sent another W-2!', 'I got it, thanks!', 'Taxpayer has signed a document.', 'Spouse has signed a document.', and 'Thanks!'. At the bottom of the chat screen is a text input field and a send button.

My Tax Return

Submitted - 11/02/2020

Status - Waiting on Preparer

Your tax preparer will begin work on your tax return soon! Until then, you may verify and make any changes necessary.

VIEW / EDIT RETURN

IRS, WHERE'S MY REFUND?

Chat

Chat with Tax Preparer

Account created on 1/18/2019
1/18 11:25 AM

I just sent another W-2!
1/18 01:29 PM

I got it, thanks!
Nicole Test 1/18 01:30 PM

Taxpayer has signed a document.
1/18 02:04 PM

Spouse has signed a document.
1/18 02:04 PM

Thanks!
1/22 08:26 PM

Signing Tax Documents

When you have documents ready to be signed, you will be notified through the Taxes to Go app. To sign your documents, select the Signature tab along the bottom of your Taxes to Go dashboard. Your signature only needs to be added once. After that, the app will apply that signature to any remaining documents and only ask you to submit the document back.

My Tax Return

Submitted - 11/02/2020

Status - Documents ready for your signature

SIGN DOCUMENTS

1040 U.S. Individual Income Tax Return **2019**

Filing Status: Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)

Your first name and middle initial: **TAXPAYER TEST** Last name: **TEST** Your social security number: **123-00-4567**

If joint return, spouse's first name and middle initial: **SPOUSE TEST** Last name: **TEST** Spouse's social security number: **765-00-4321**

Home address (number and street), if you have a P.O. box, see instructions. Apt. no. **123 TEST** Presidential Election Campaign: Yes No None

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). **AUGUSTA, GA 30906** Foreign country name: Foreign province/state/country: Foreign postal code:

Standard Deduction: Spouse itemizes on a separate return or you itemize a dual-status return

Someone can claim: You as a dependent Your spouse as a dependent

Age blindness: Yes (Must be before January 2, 1995) No (Must be before January 2, 1995) Is blind

Dependents (see instructions):

First name	Last name	SSN	Relationship to you	Child for credit	Child for other dependents
CHILD TEST		222-00-2222	DAUGHTER	<input type="checkbox"/>	<input type="checkbox"/>

1 Wages, salaries, tips, etc. Attach Form(s) W-2 90000

2a Tax-exempt interest 2b Taxable interest. Attach Form 1099-INT 2c

3a Qualified dividends 3b Other dividends. Attach Form 1099-DIV 3c

4 IRA distributions 4a Pension and annuities 4b Social security benefits 4c Capital gain or loss. Attach Schedule D if required. If not required, check here 4d Other income from Schedule 1, line 9 4e

5 Adjustments to income from Schedule 1, line 10 5a Subtract line 4e from line 5b. This is your **adjusted gross income** 24400

6 Standard deduction or itemized deductions from Schedule 1, line 11 6a

7 Qualified business income deduction. Attach Form 8885 or Form 8885-A 7a

8 Add lines 1 through 6, and 7a. This is your **total income** 199

9 Taxable income. Subtract line 7a from line 8b. If zero or less, enter -0- 199

10a Add lines 9 and 10 10b

11 Taxable income. Subtract line 11a from line 8b. If zero or less, enter -0- 199

IRS, WHERE'S MY REFUND?

Tax Return Documents **Signature** Chat Settings

Taxpayer signature required **ADD SIGNATURE**

Spouse signature required **ADD SIGNATURE**

Tax Return Documents **Signature** Chat Settings