TaxesToGo Guide for Tax Preparers
TaxSlayer ProWeb

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 ProWeb 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.

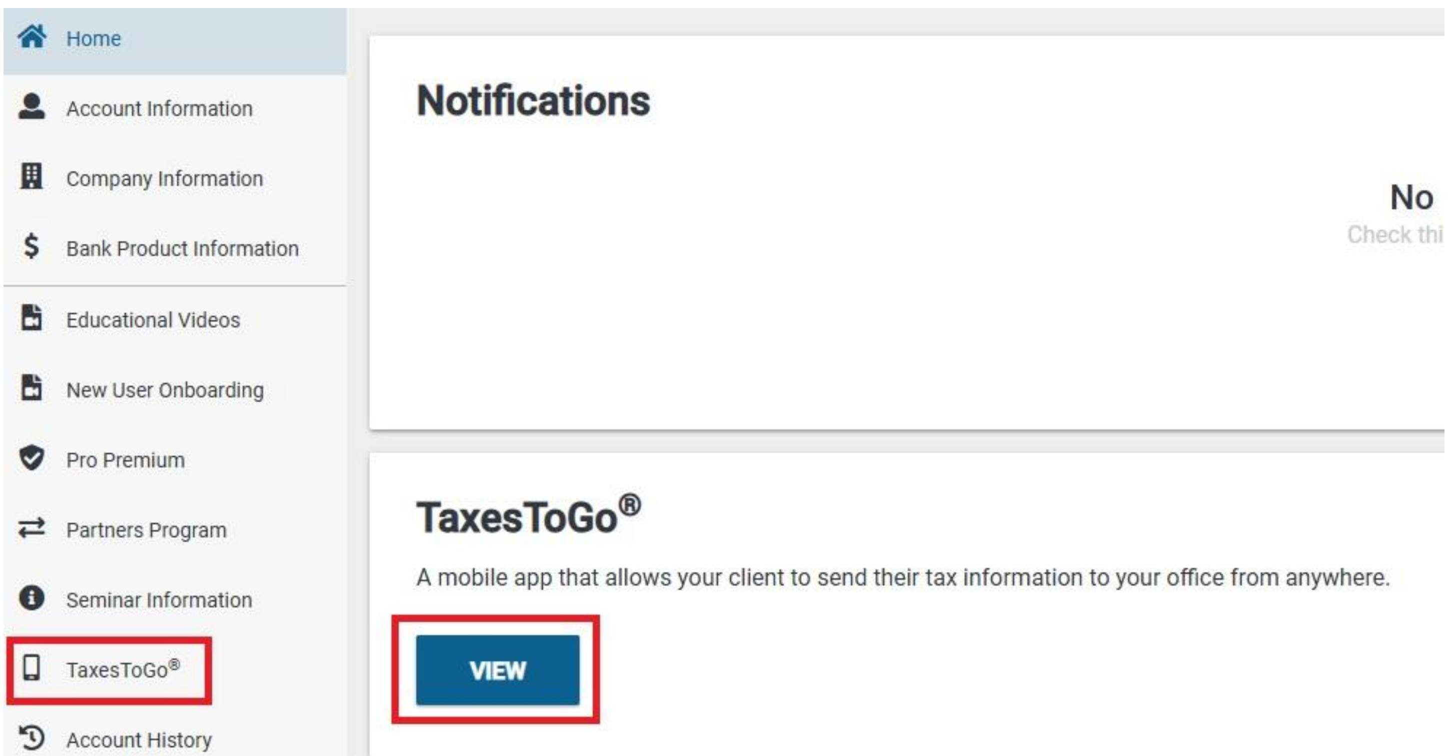
Branded App in Account Hub

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.

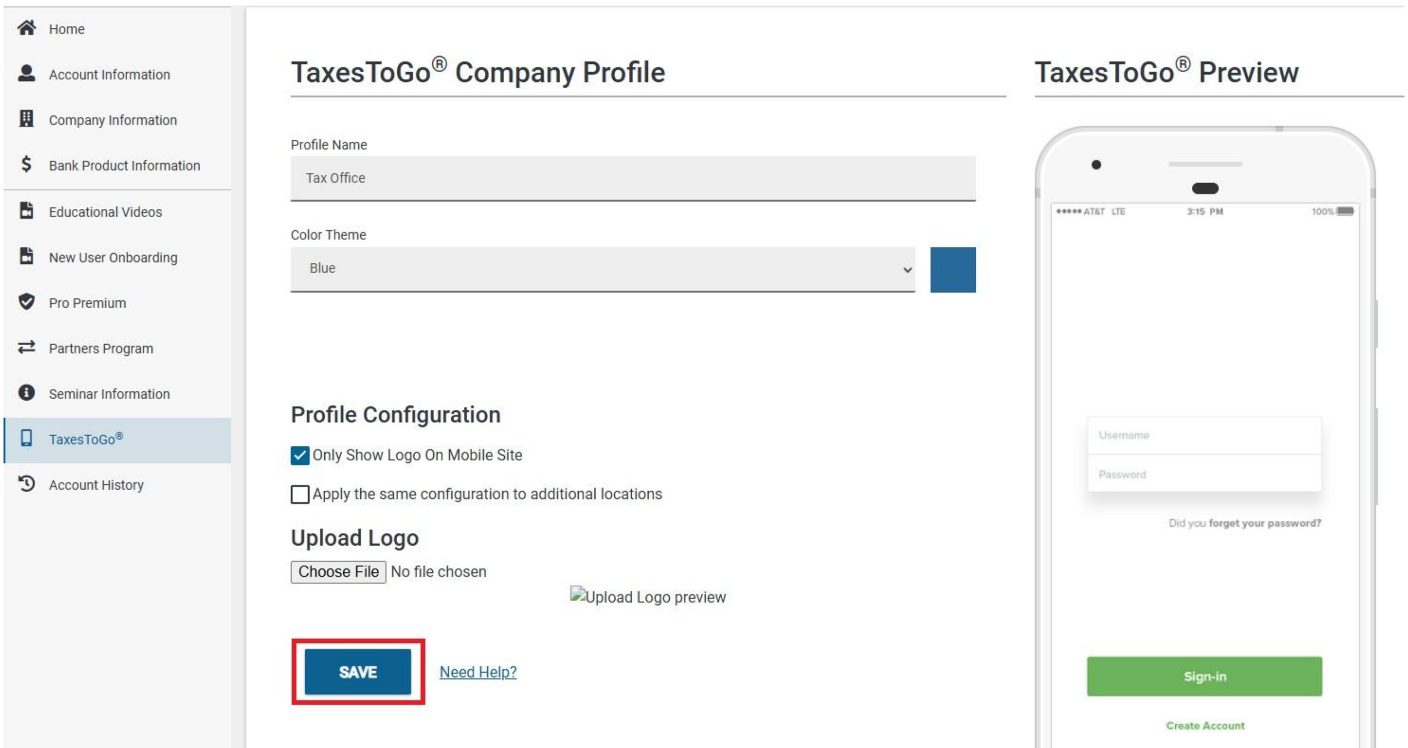


Customize Your Branded App

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.

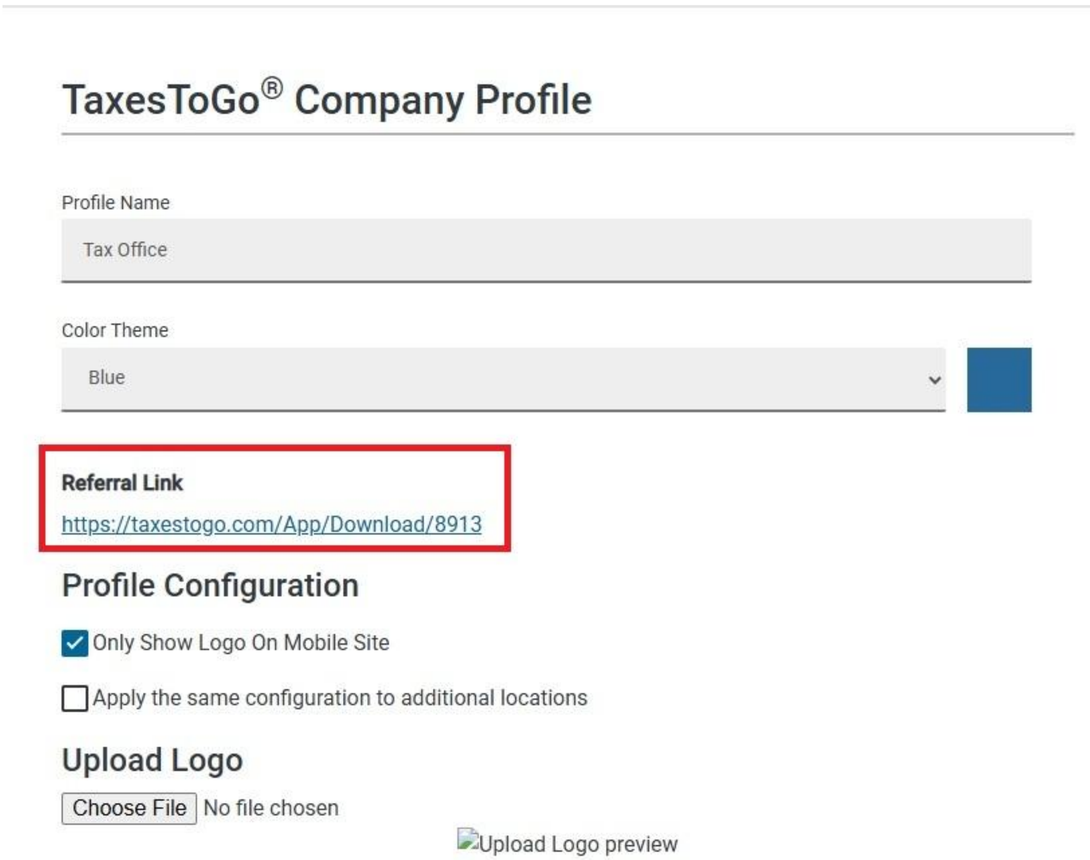


TaxesToGo Referral Link

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.

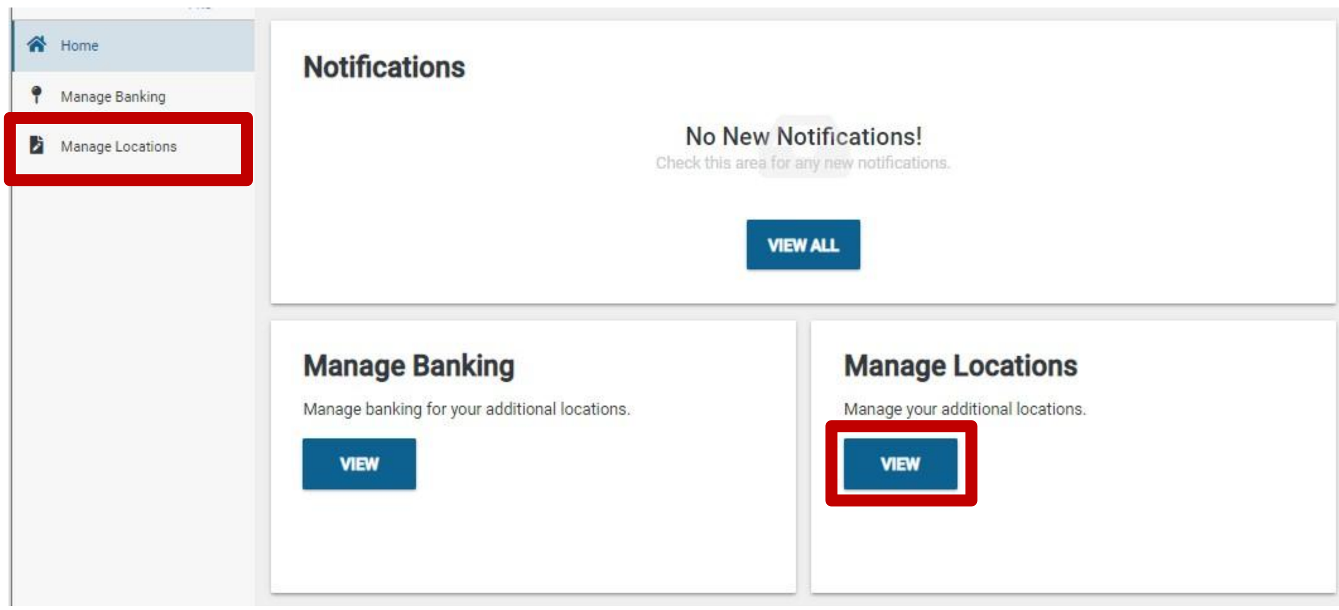
You can share this link by sending it directly to your taxpayers, posting it on your website, or even adding it to your social media accounts.



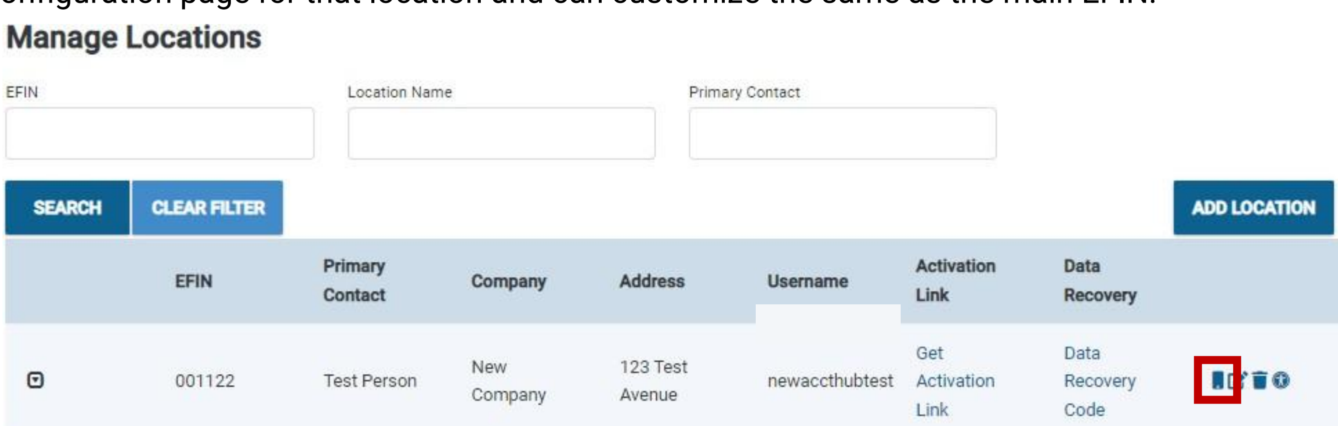
Setting up Branded Apps for Additional Locations

If your tax business operates across multiple locations, you must configure TaxesToGo for each office individually. Each office has a unique **TaxesToGo Referral Link.** From inside Account Hub, select:

- The app switcher at the top right and **Location Manager** from the list of icons.
- **Manage Location**



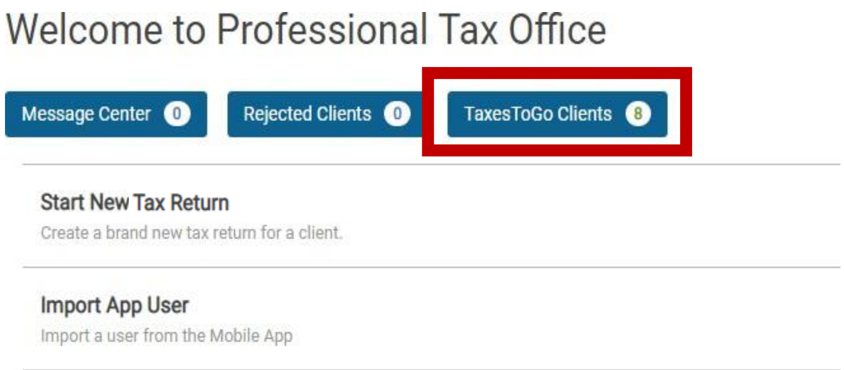
From the list of locations, you will click on the phone icon. This will open TaxesToGo configuration page for that location and can customize the same as the main EFIN.



Pulling TaxesToGo Returns into ProWeb

To create a new return with a branded TaxesToGo app account:

1. Navigate to the Welcome Page of TaxSlayer ProWeb.
2. Click on the TaxesToGo Clients button.

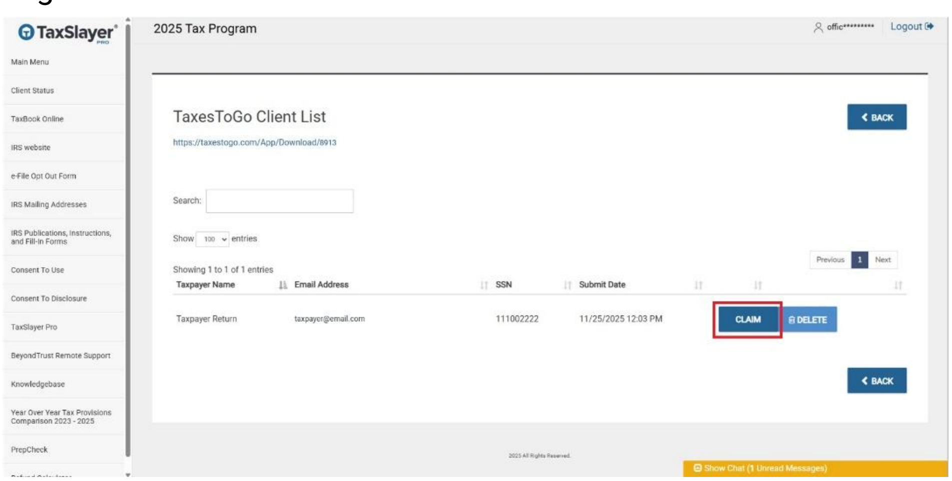


Claiming Branded TaxesToGo Returns

When you click the TaxesToGo Clients button, a list of all your branded TaxesToGo returns waiting to be claimed will appear. To start a new return using the taxpayer's uploaded information:

1. Locate the taxpayer in the list
2. Click **Claim** next to their name.

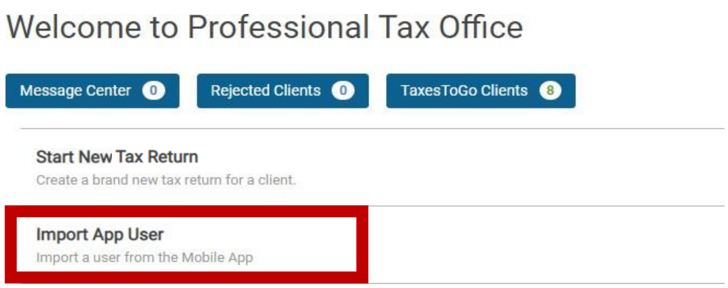
This action creates a new ProWeb return and automatically imports the taxpayer's provided information. Before continuing, review the Personal Information Section within the return before proceeding.



Claiming Generic TaxesToGo Returns

To create a new return with a generic TaxesToGo app account:

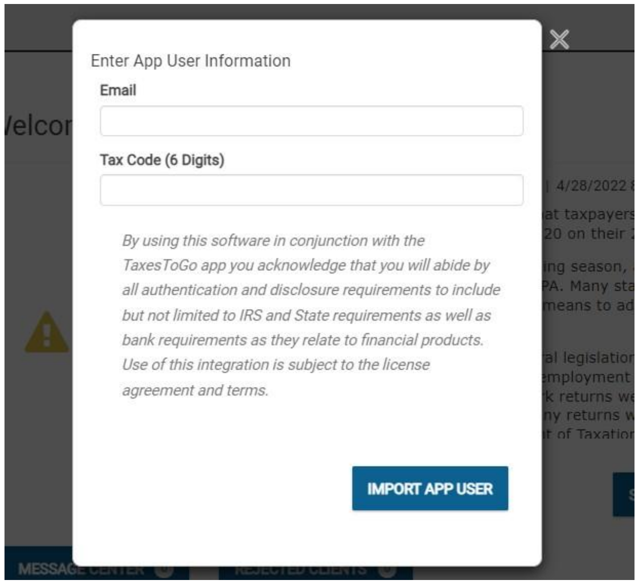
1. Navigate to the Welcome Page of TaxSlayer ProWeb.
2. Select **Import App User**



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 **Import App User** a new ProWeb 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 in ProWeb, 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.

To associate an existing return in ProWeb, from the Client List you will select:

1. **Tools** dropdown menu
2. **Sync Return with Mobile App**

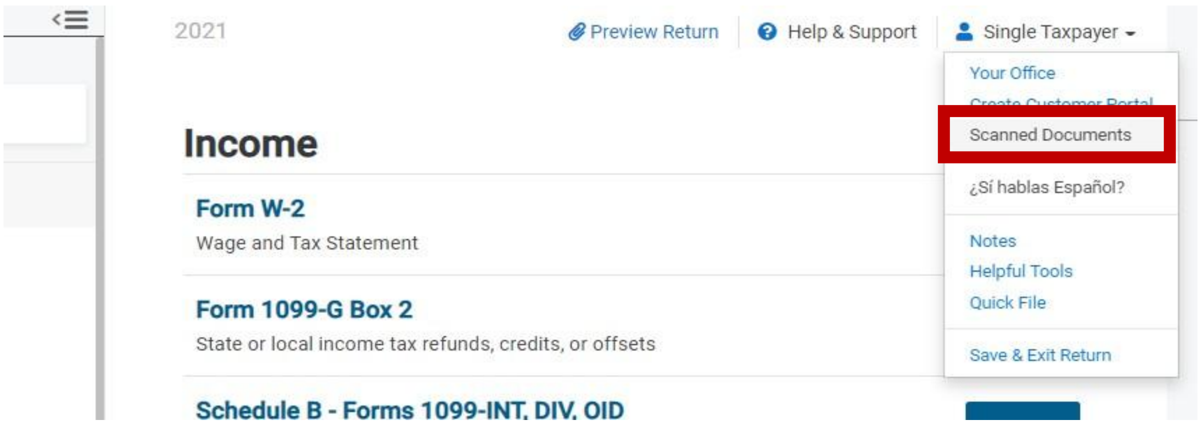
This will open a new menu for you to enter the email address and Tax Code for the app account. You will need to get this information directly from your taxpayer. Branded app users can retrieve this information from the TaxesToGo Web Report.

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

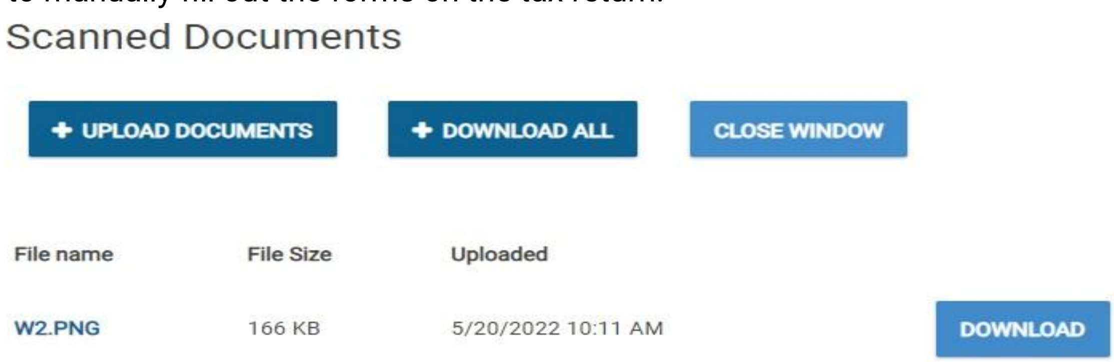
Accessing Uploaded Documents in ProWeb

After starting the tax return using TaxesToGo information, you must complete and save all **Basic Information** before accessing uploaded documents.

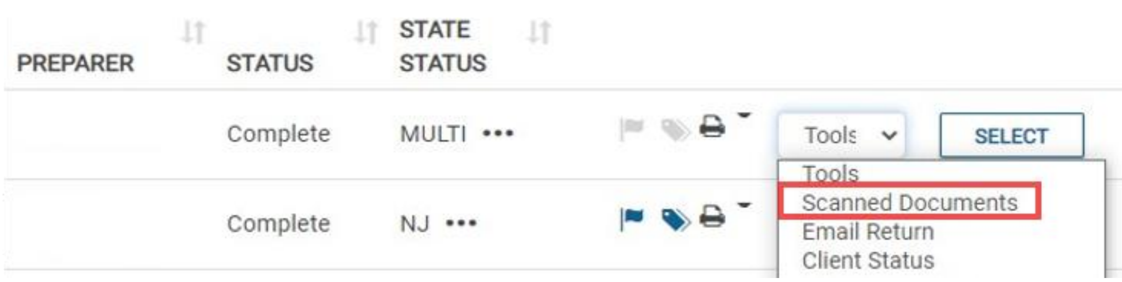
Once you reach the **Income Menu**, open the Taxpayer Name dropdown menu and select Scanned Documents.



The menu **Scanned Documents** will open displaying all documents uploaded through the TaxesToGo app. From this screen, you can download and then view each file. These documents are used to manually fill out the forms on the tax return.



The **Scanned Documents** menu can also be accessed in the **Client List** from the **Tools** dropdown menu.

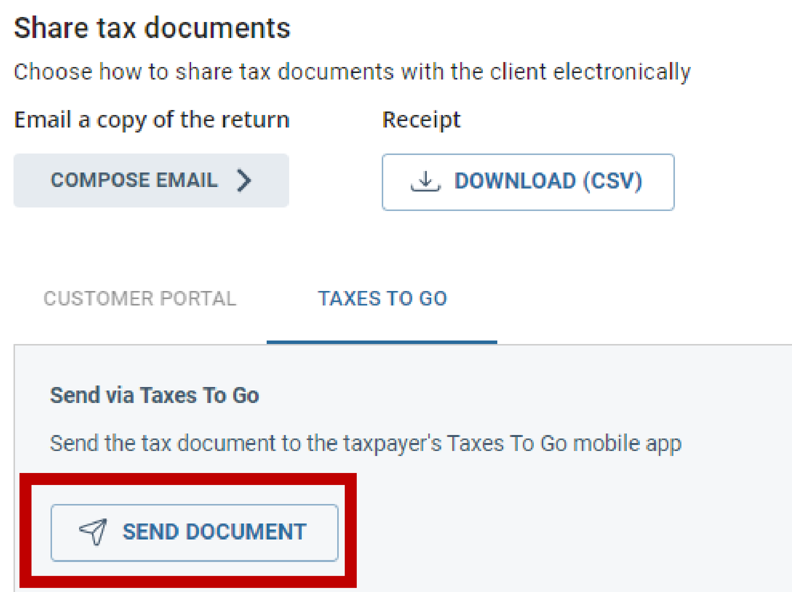


Getting Signatures through TaxesToGo in ProWeb

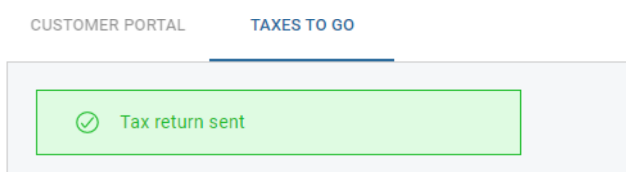
After completing the tax return, you can send the tax return to the TaxesToGo app for signatures. This includes:

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

To do this, from the **E-File** section, select **Submission Page** of the return and then select **Send Document**. The Submission Page is the last part of the e-file process.

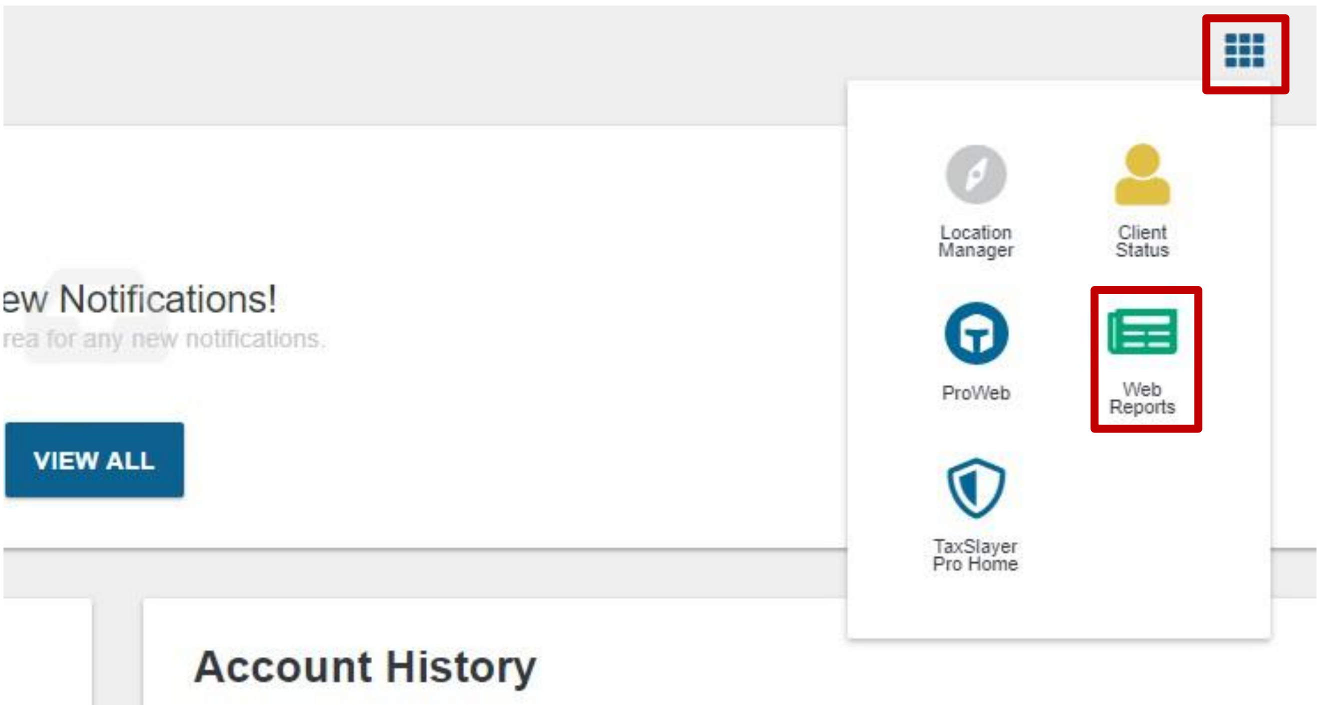


After sending the tax return to the TaxesToGo app, you will receive confirmation that the documents were successfully shared. Once the taxpayer signs the required forms in the app, their signatures will appear on the **Submission Page** and on the corresponding forms within the return.



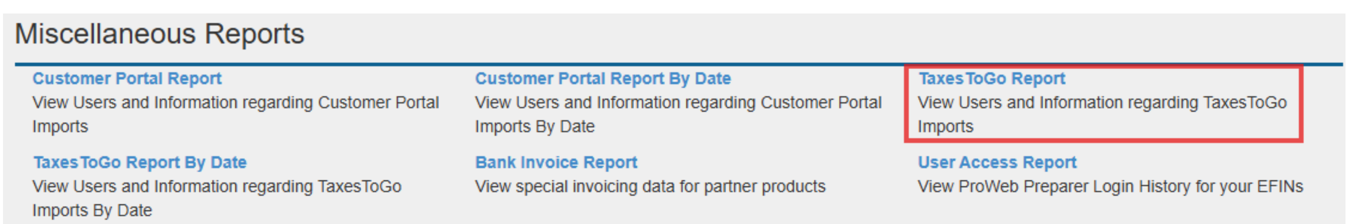
TaxesToGo Web Report

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.

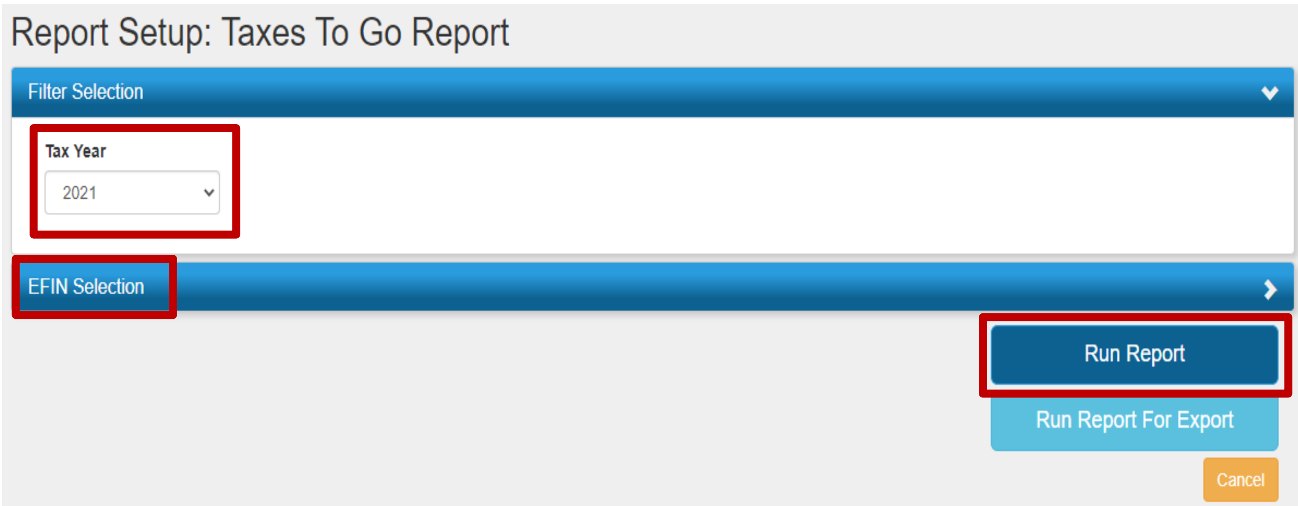


You can also access Web Reports by going directly to https://www.taxstatusnow.com/reports/web and logging in using your credentials for Account Hub.

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



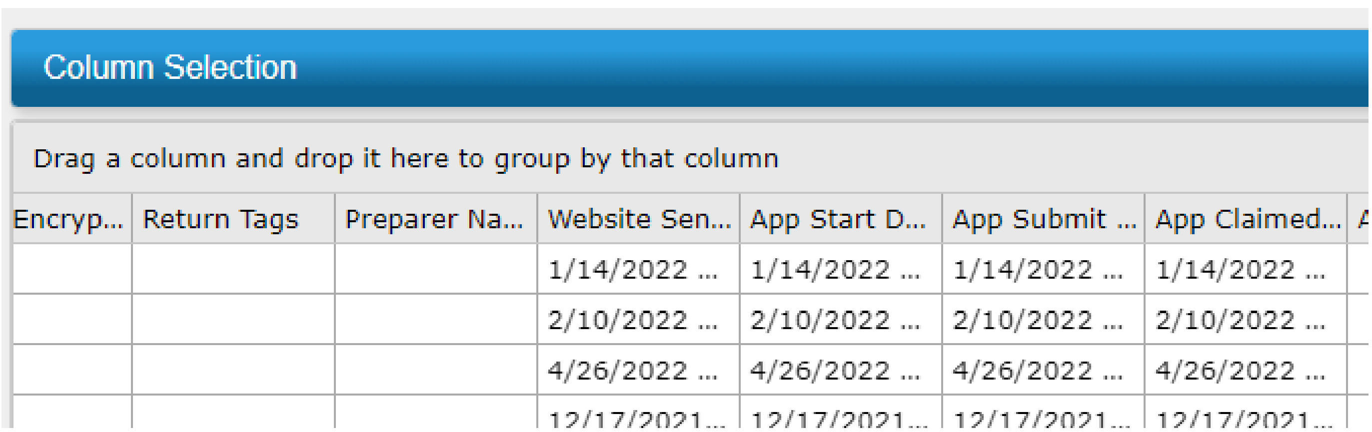
On the Report Setup page, you will select the Tax Year you are running the report for, select your EFIN from the EFIN Selection section, then choose Run Report.



TaxesToGo Web Report Details

From the TaxesToGo Web 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 TaxesToGo 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.

Chat with Your Taxpayer in ProWeb

After you create a new return with TaxesToGo data, you can communicate with that taxpayer through the Chat feature. Chatting for your TaxesToGo clients can be accessed from the Welcome Page of ProWeb. When you have a new chat or notification the Chat box will show (1) Unread Messages.

What You Can Do with Chat:

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