



taxestogo[®]

A guide on how to use Taxes to Go for both iOS and Android

2019 Tax Year

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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.

How to get Taxes to Go

The Taxes to Go Mobile App is available for all Premium Desktop and ProWeb users. To setup the branded Taxes to Go, go to the Taxes to Go configuration page in Account Hub. There you can upload a logo and change the color of the app. After you have completed configuration, you will send the Referral Link provided in Account Hub to the customer to begin the Branded Installation process.

For the generic Taxes to Go app, you will direct your customers to go to the App Store or Google Play Store and search for Taxes to Go.


Taxes to Go for iOS

Branded App Users

Initial Download

Before the taxpayer can download your branded mobile app, they will need to follow the Taxes to Go referral link from the Taxes to Go configuration page in your Account Hub. This link will take you to this page where you will need to fill out the information for the taxpayer:

Demo Taxes to Go Office

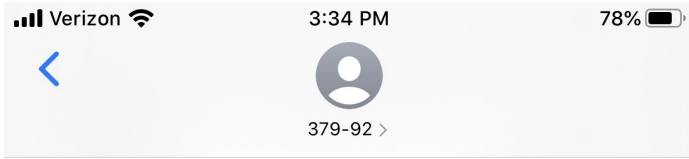


To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

Enter Your Phone Number	<input type="text" value="867-5309"/>
Enter Your Email	<input type="text" value="TestEmail@Gmail.com"/>
Enter your First Name	<input type="text" value="TaxestoGo"/>
Enter your Last Name	<input type="text" value="Test"/>
Enter Your Referral Code	<input type="text" value="123"/>

[CONTINUE](#)

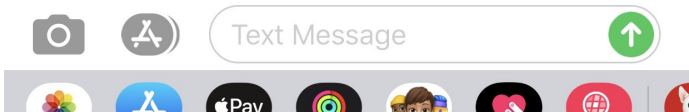
This page includes fields to input the taxpayer’s phone number, email address, name and the referral code for the Tax Preparer (if applicable). If you choose, you can also send the referral link to the taxpayer and they can complete this information themselves. This step is vital for the branding because this is how the app recognizes the branding.



Today 3:33 PM

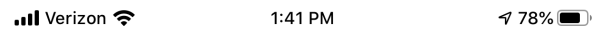
Thank you for requesting the Taxes To Go App! To get started with Demo Taxes to Go Office, tap the link below to get the app and use your email

[Redacted]@gmail.com to sign up. <https://taxestogo.com/GetApp>



After completing that step, the user will receive a text message from the automated Taxes to Go message system with a link to the App Store to download the Taxes to Go app.

Please Note: The app will not show branded in the app store. The branding is only applied once the user creates an account with the information input on the previous step.



< Search



Taxes To Go

Rhodes Computer Services

OPEN



3.3 ★★★★★

54 Ratings

4+

Age

What's New

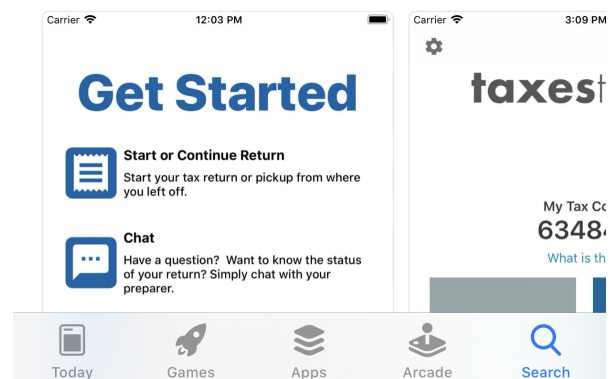
[Version History](#)

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



Account Creation

Once the app has been downloaded, the user will open it to the page below. They will need to use the exact email from the initial download to see the branding.

The taxpayer will type in the email address and click Create Account. That will take them to the account creation page to register with the Branded App.

Verizon

10:42 AM

84%

Verizon

9:00 AM

92%

Demo Taxes to Go Office



Already have an account? [Log In](#)

TestEmail@Gmail.com

867-5309

.....



.....



I agree to the terms

[View Terms](#)

Create Account

Enter your email address



Submit

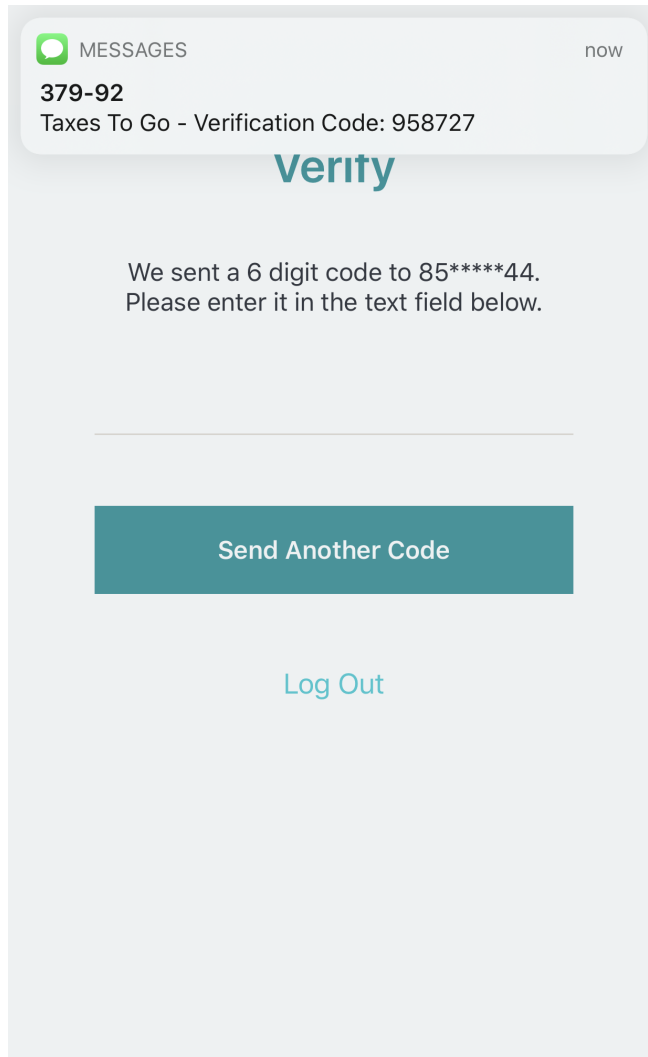
Enter your email address

Done

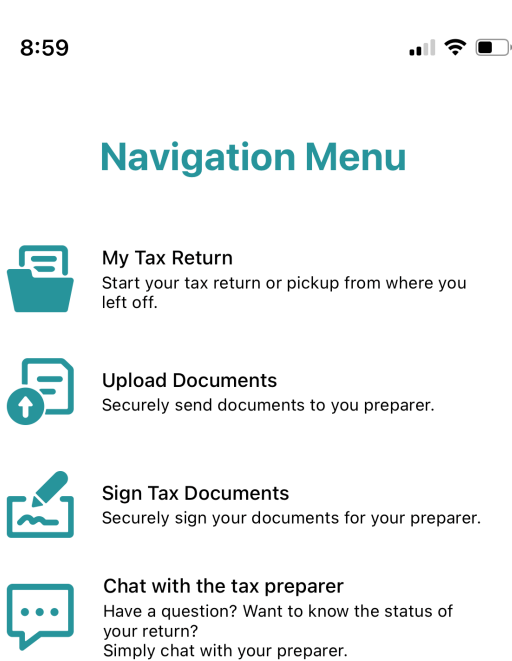
The taxpayer will need to put in their email address, phone number, create a password and agree to the terms.

Passwords must include 1 uppercase, 1 lowercase, 1 number, and 1 special character

After successfully registering, the taxpayer will receive a text with a 6 digit code to the cell phone number used in the creation of the account. They will need to complete this to access the account.



Following the account creation, the app will guide you to the main page after the following screens. These pages will give the taxpayer information about the app navigation, tax codes, and push notifications.



8:59

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

8:59

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.



After passing the pages about app navigation, tax codes, and push notifications, the taxpayer will be guided to answer the question below. If they select Start a New Return, the app will guide them directly into the Tax Return section. We will continue with this option on page 11.

8:59



9:47



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

Demo Taxes To Go Office



My Tax Return

Status - Not submitted

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

CONTINUE

IRS, Where's my Refund?

If you have already started the return in your program, the taxpayer would just want to click Continue. Doing this will take them to the landing page for the app shown here.

We will discuss this landing page more on the next page.



On this landing page, the taxpayer will see tabs across the bottom. These include Tax Return, Documents, Signature, Chat and Settings.

The Tax Return section is where the taxpayer enters their personal information.

The Document section allows the taxpayer to upload any documents to you. If the taxpayer does not wish to complete the My Tax Return section, they will need to use this section to send over any tax documents to you.

Signatures and Chat (covered later) allow your taxpayer to sign documents and chat directly with you.

Please note, for Generic Taxes to Go users. The Tax Code will also display on this page.

Demo Taxes To Go Office



My Tax Return

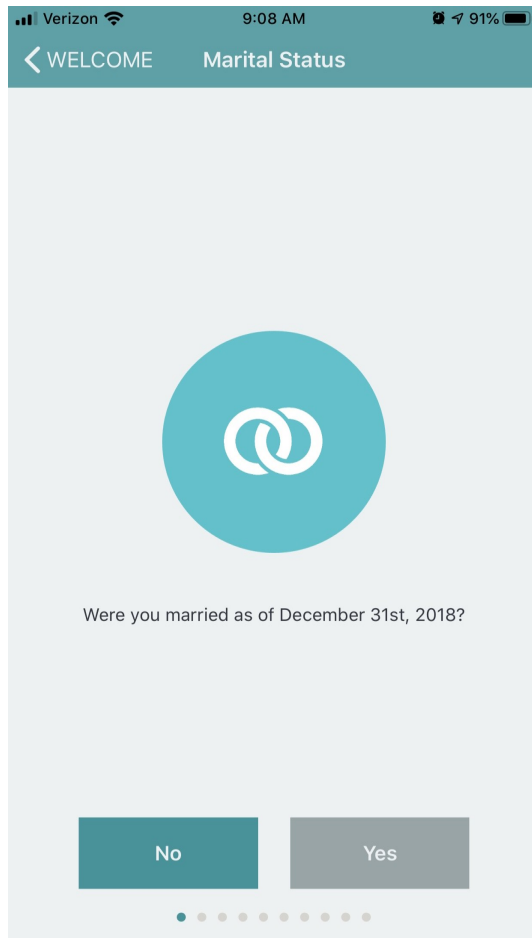
Status - Not submitted

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

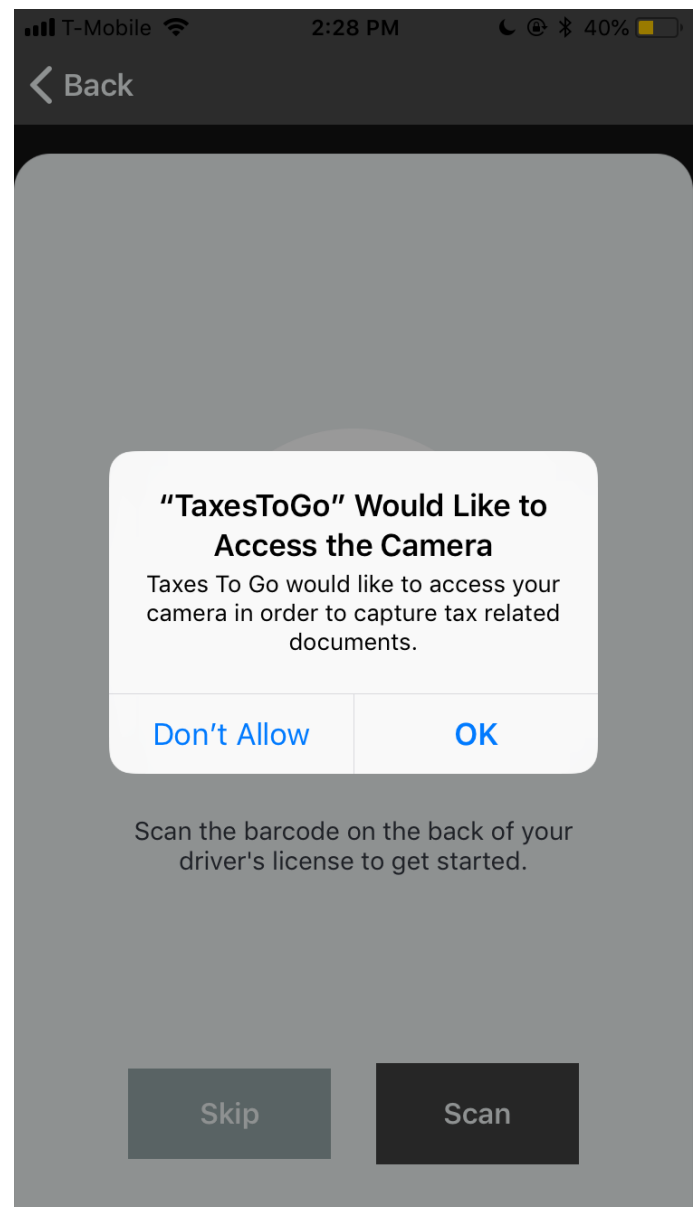
CONTINUE

[IRS, Where's my Refund?](#)

When starting the Tax Return section, the first step is to answer whether or not they were married. This will determine if the taxpayer will need to complete information for a spouse.



After choosing Yes or No, the taxpayer will be directed to the next screen where the app will give them the option to scan the barcode on the back of their driver's license. This will pull data from the license onto the necessary fields. In order to scan the driver's license, the taxpayer will need to allow access for the Taxes to Go app to access the phone's camera.



Verizon 3:56 PM 75%

Cancel Enter Information

First Name
Jonathan

Last Name
Smith

Date of Birth
10/18/1988

DRIVER'S LICENSE

Drivers License Number
129834765

Drivers License Issue Date
10/18/2015

Drivers License Expiration Date
10/18/2020

ADDRESS

Street Address
800 West Main St

City

Verizon 9:15 AM 90%

Cancel Enter Information

DRIVER'S LICENSE

Drivers License Number
129834765

Drivers License Issue Date
11/18/2015

Drivers License Expiration Date
11/18/2020

ADDRESS

Street Address
800 West Main St

City
Grovetown

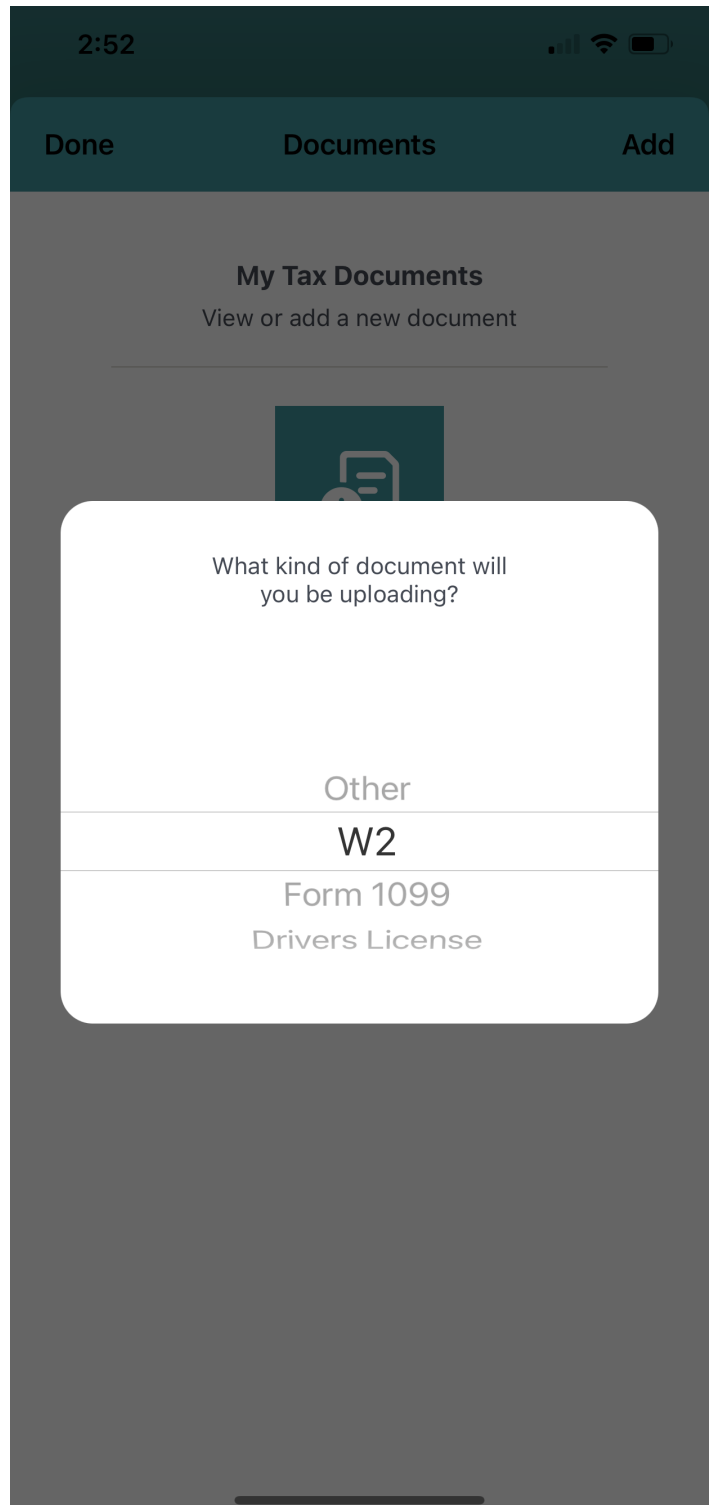
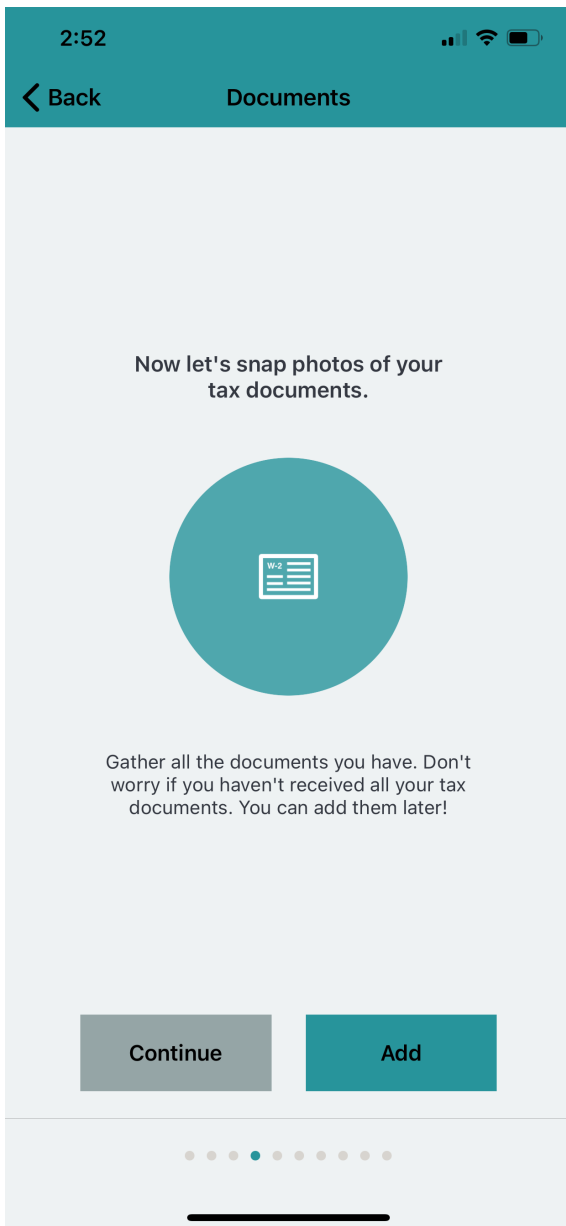
State
GA

Zip Code
30813

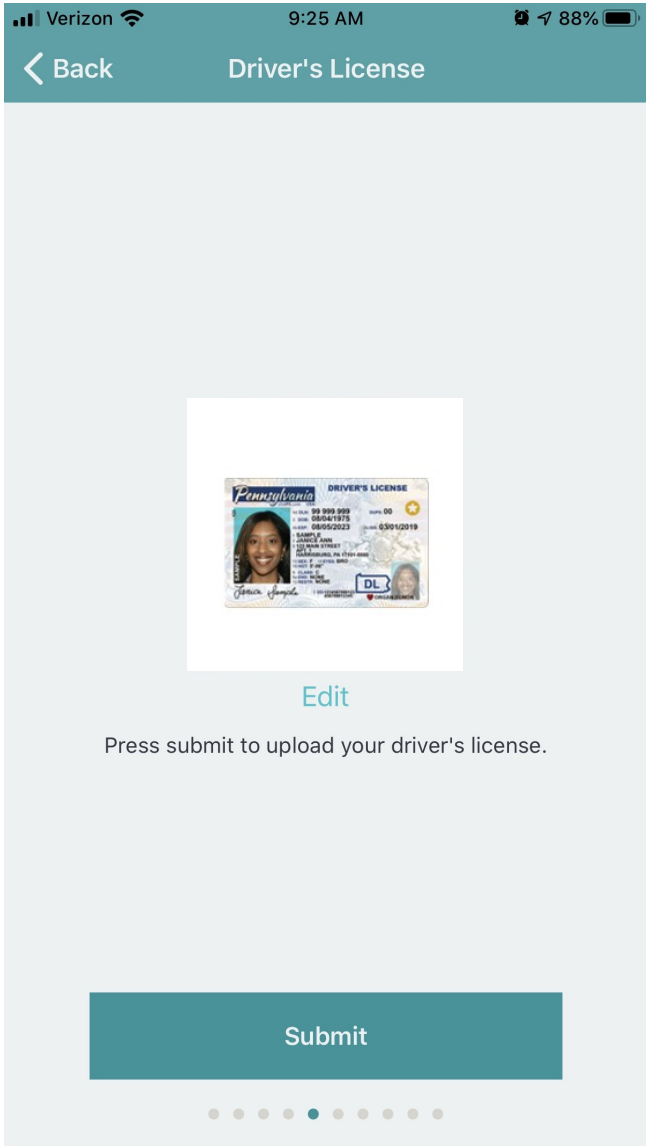
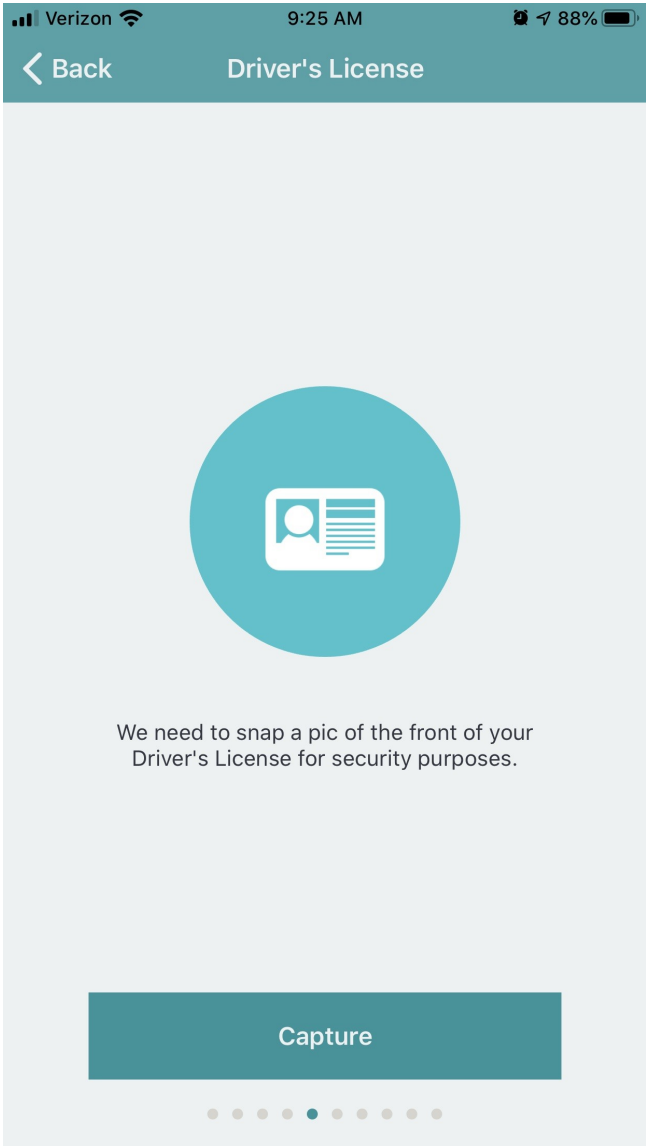
Save

The information for taxpayer and spouse will need to be fully completed before the user will be able to continue on to the next screen.

Following the basic information fields, the taxpayer will then be prompted to upload their tax documents to the app. They can choose to take a new photo or select from their pictures.




Next, the app will ask for a photo of the taxpayer's driver's license. This will be compared by the preparer to the selfie (added next) for security purposes.



Then the user will take a Selfie


Selfie Time!



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

Capture

Selfie Time!



[Edit](#)

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

Continue

Then, the taxpayer will put in the information for any dependents. Just like the taxpayer and spouse, the dependent information will need to be fully completed before the user can continue to the next page.

The image shows two overlapping mobile app screens. The background screen is titled 'Dependents' and asks 'Have any dependents?'. It features a teal circle with a white smiley face icon and the text: 'Qualifying dependents greatly lower your tax bill. Helping you get the biggest refund possible.' At the bottom are 'Skip' and 'Add' buttons. The foreground screen is titled 'New Dependent' and contains a form with the following fields:

- First Name: Jack
- Last Name: Smith
- SSN: 145-00-1455
- Date of Birth: 01/18/2017
- Months in Home: 12
- Childcare Expenses: 0.00
- Relationship: Son
- Dependent in school full time

A 'Save' button is located at the bottom of the 'New Dependent' form.

Verizon 10:12 AM 86%

< Back Contact Information

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

Phone Number
867-5309

Continue

xxx-xxx-xxxx Done

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
	0	< X

Next, the taxpayer will be asked to put in Contact Information for the preparer. The number should be one the taxpayer uses regularly. The preparer will use this number to contact the Taxpayer if necessary.

Verizon 10:14 AM 86%

< Back 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 than the preparation and filing of your tax return without your consent. You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will...

Consent granted by user

Continue

Progress indicator: 10 dots, 10th dot filled.

Before the taxpayer can submit their information, they will need to sign the Consent to Use.

Finally, the taxpayer will review their information and submit the app return.

Verizon 10:15 AM 86%

Back Review

Tap to edit any incorrect information. When you are ready, tap Submit to upload your information.

Your Information Edit

First Name Jonathar
Last Name Smith
Date of Birth 11/18/1981
Social Security Number
Contact Number

Spouse Information

First Name
Last Name
Date of Birth
Social Security Number
Contact Number

Your Driver's License Edit

Expiration Date 11/18/2020
License Number 129834765

Spouse Driver's License Edit

Address 800 West Main St
City Grovetown
State GA
Zip Code 30813
Issue Date 12/18/2015
Expiration Date 12/18/2020
License Number 981276345

Spouse Driver's License

Dependents Edit

First Name Jack
Last Name Smith
Date of Birth 01/18/2017
SSN 145-00-1455
Childcare Expenses \$0
Relationship Son
Full Time Student No

Submit

Verizon 10:15 AM 86%


Back Review

Tap to edit any incorrect information. When you are ready, tap Submit to upload your information.

Demo Taxes to Go Office

Congrats!

You have successfully uploaded your information.



Continue

When the app has been submitted, the taxpayer will then be guided back to the main page. This page will update them as to the status of their return. It will show submitted until you have pulled that app return into your program. Once you do, it will update to claimed by preparer.

9:47



Demo Taxes To Go Office



My Tax Return

Status - Not submitted

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

CONTINUE

[IRS, Where's my Refund?](#)



Tax Return



Documents



Signature



Chat



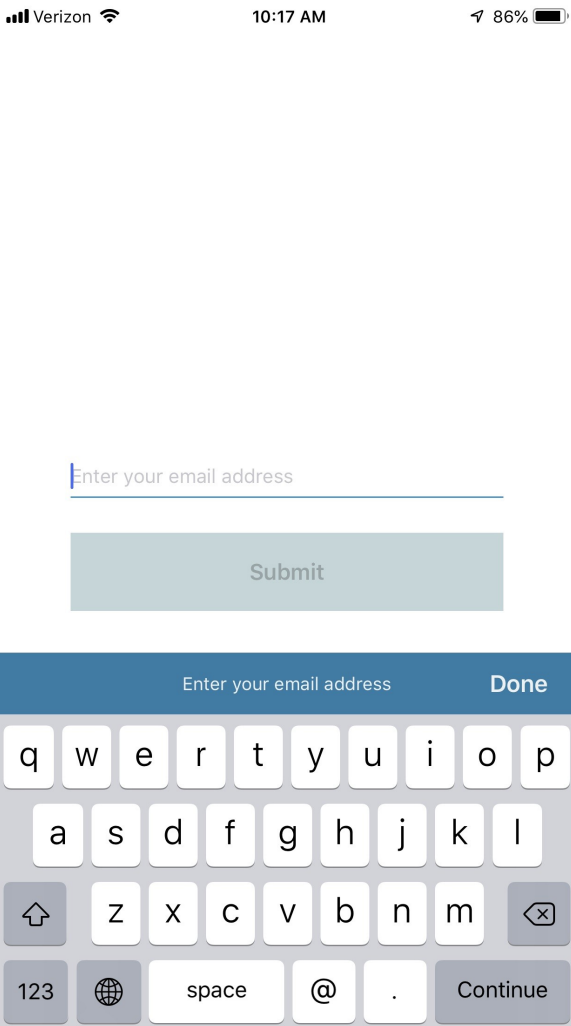
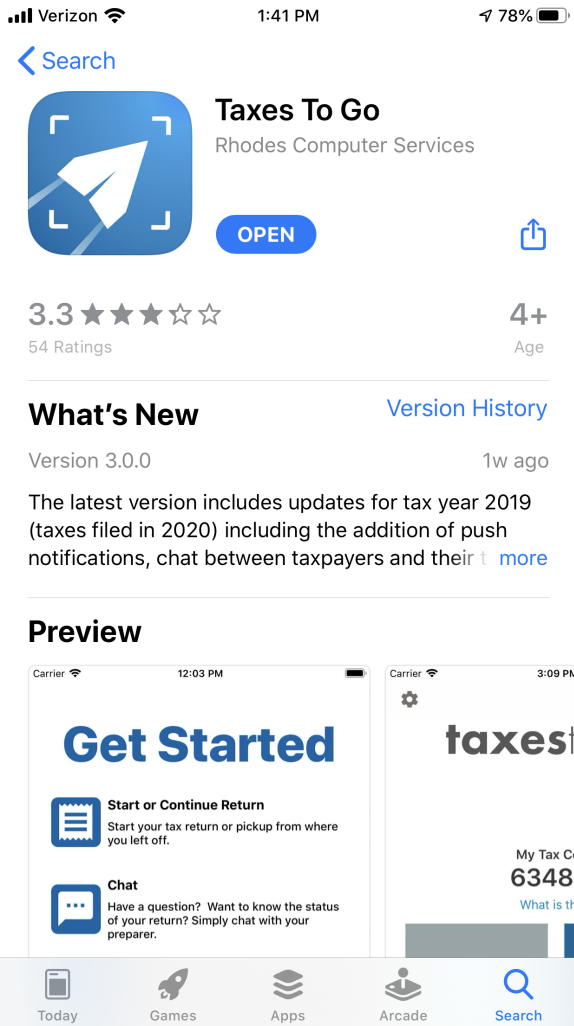
Settings

Taxes to Go for iOS

Generic App Users

Initial Download

For the generic mobile app, the user will go to the App Store and download Taxes to Go directly. After the install is complete, the user will put in their email address and click Submit.



Next, the taxpayer will be prompted to create a new account with Taxes to Go.



Already have an account? [Log In](#)

TestEmail@Gmail.com

867-5309

.....



.....

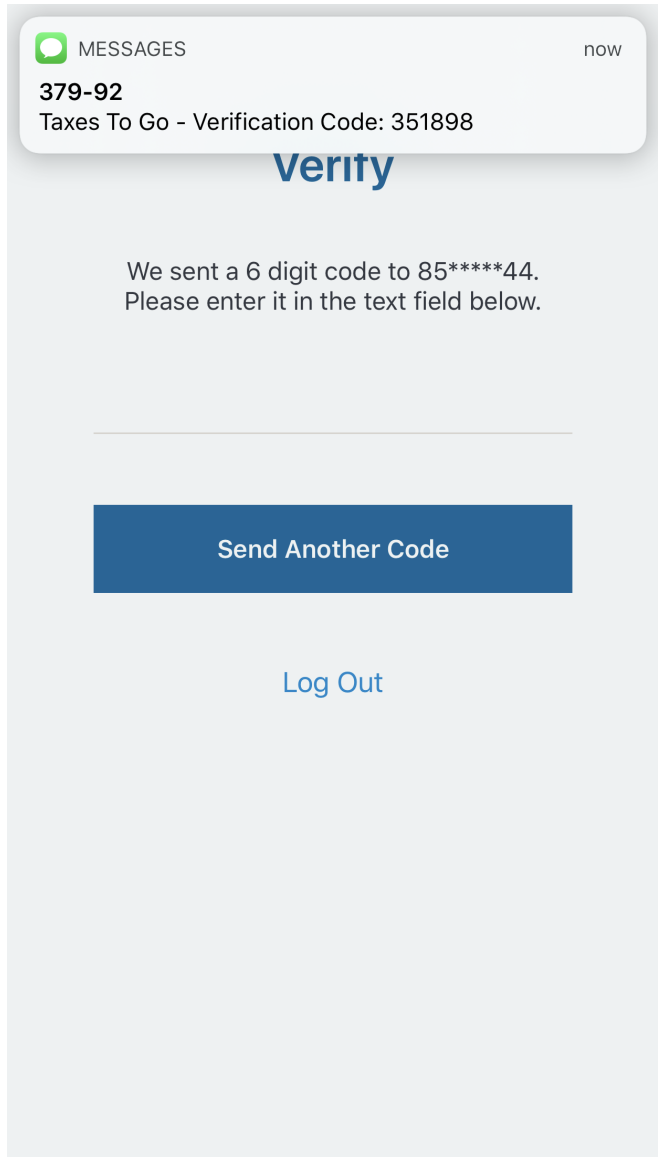


I agree to the terms

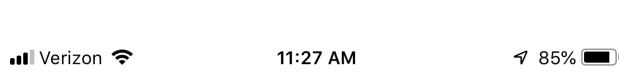
[View Terms](#)

Create Account

After the account is created, the user will receive a Verification Code to enter into the app.



Following the account creation, the app will guide you to the main page after the follow screens. These pages will give the taxpayer information about the app navigation, tax codes, and push notifications.



Let's Get Started



Start or Continue Return

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



Chat

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



Upload

Securely send documents to your preparer



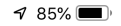
Sign Tax Documents

Securely sign documents from your preparer

Continue



11:27 AM



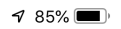
Availability



Some items will not be available until your preparer enables them.



11:27 AM



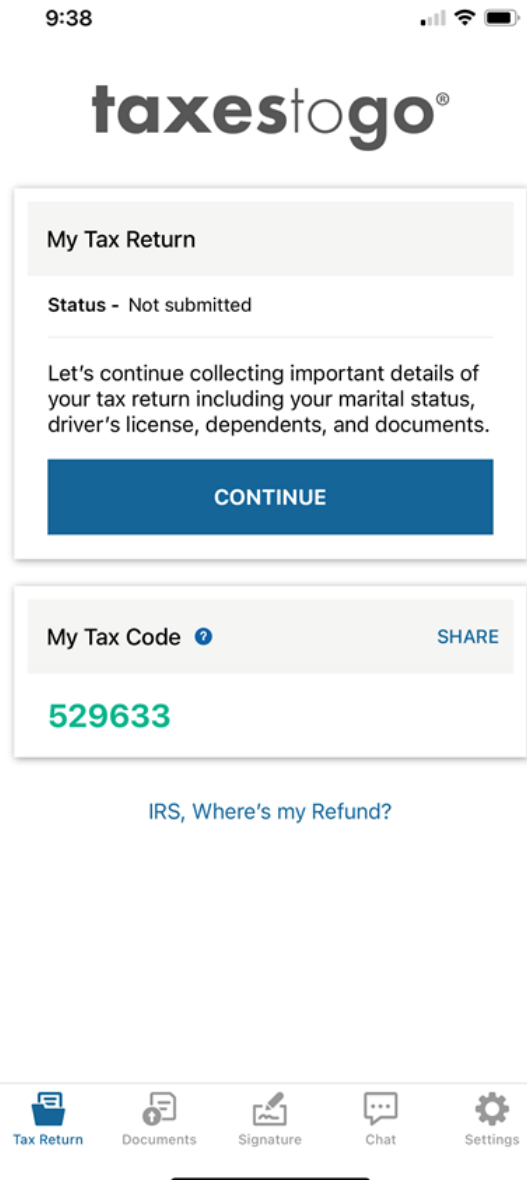
Push Notifications



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.

On the main page of the Generic Taxes to Go app the taxpayer will see a 6 digit code. This code will need to be provided to the preparer for the information to be pulled into the program. This can be given to the preparer by clicking Share.

The My Tax Return section for the Generic App is completed exactly as the Branded App is. For reference on this part please see page 11.




Taxes to Go for Android

Branded App Users

Initial Download

Before the taxpayer can download your branded mobile app, they will need to follow the Taxes to Go referral link from the Taxes to Go configuration page in your Account Hub. This link will take you to this page where you will need to fill out the information for the taxpayer:

Demo Taxes to Go Office

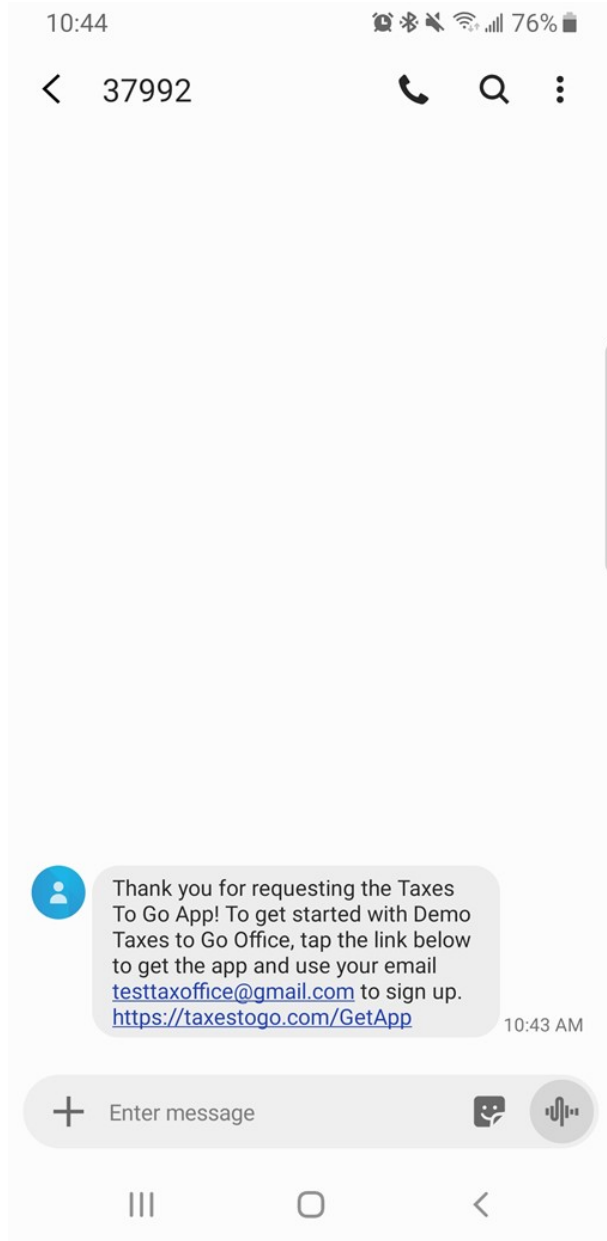


To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

Enter Your Phone Number	<input type="text" value="867-5309"/>
Enter Your Email	<input type="text" value="TestEmail@Gmail.com"/>
Enter your First Name	<input type="text" value="TaxestoGo"/>
Enter your Last Name	<input type="text" value="Test"/>
Enter Your Referral Code	<input type="text" value="123"/>

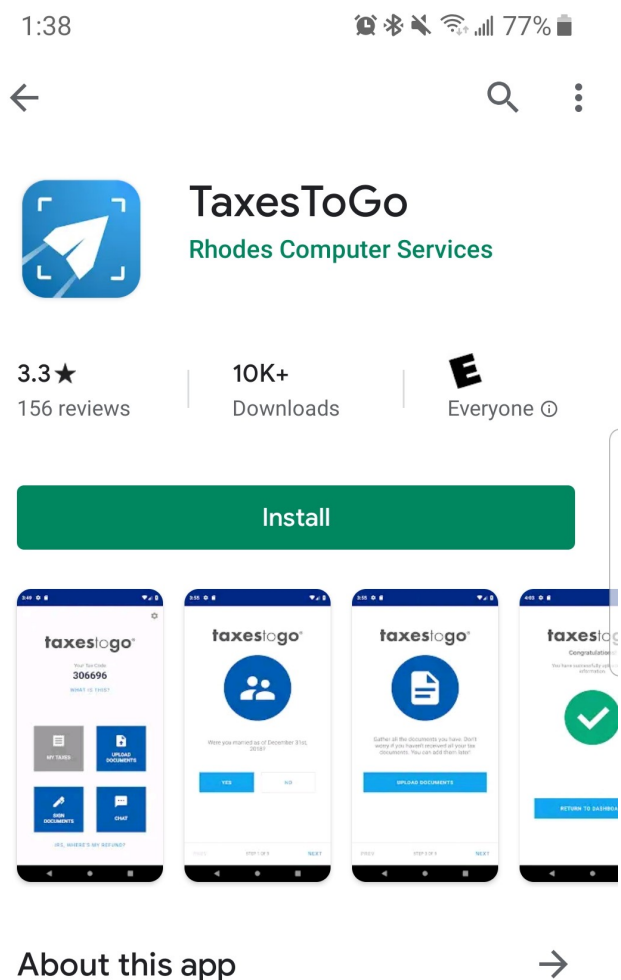
[CONTINUE](#)

This page includes fields to input the taxpayer's phone number, email address, name and the referral code for the Tax Preparer (if applicable). If you choose, you can also send the referral link to the taxpayer and they can complete this information themselves. This step is vital for the branding because this is how the user's account recognizes the branding.



After completing that step, the user will receive a text message from the automated Taxes to Go message system with a link to the Google Play Store to download the Taxes to Go app.

Please Note: The app will not show branded in the app store. The branding is only applied once the user creates an account with the information input on the previous step.



TaxesToGo® is the most convenient way to file

Account Creation

Once the app has been downloaded, the user will open it to this page. They will need to use the exact email from the initial download to see the branding.

The taxpayer will type in the email address and click Create Account. That will take them to this page to Register with the Branded App:



email@example.com

Sign In

[CREATE ACCOUNT](#)

The taxpayer will need to put in their email address, phone number, create a password and agree to the terms.

Passwords must include 1 uppercase, 1 lowercase, 1 number, and 1 special character

Demo Taxes To Go Office



taxpayer@email.com

7061234567

.....

.....

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

Register

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



After successfully registering, the taxpayer will receive a 6 digit code to the cell phone number used in the creation of the account. They will need to complete this to access the account.

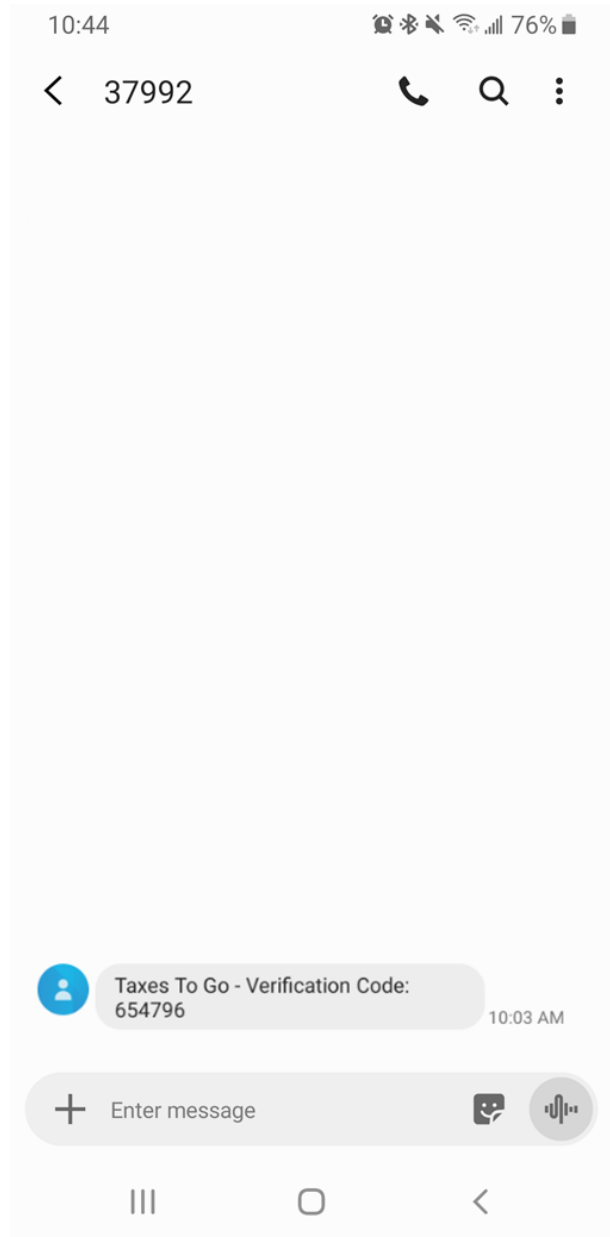


Demo Taxes to Go Office

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

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

Submit



Following the account creation, the app will guide then to the main page after the following screens. These pages will give the taxpayer information about the app navigation, tax codes, and push notifications.



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

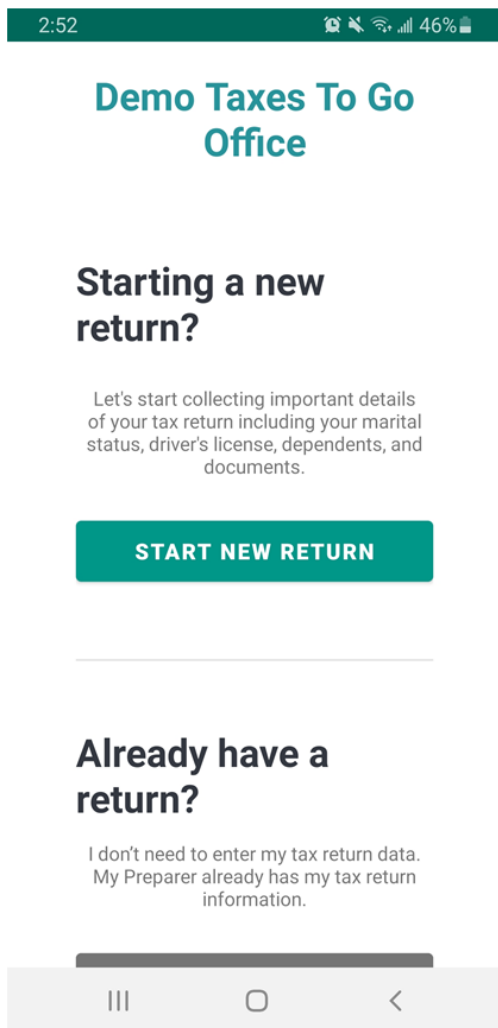
CONTINUE



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.

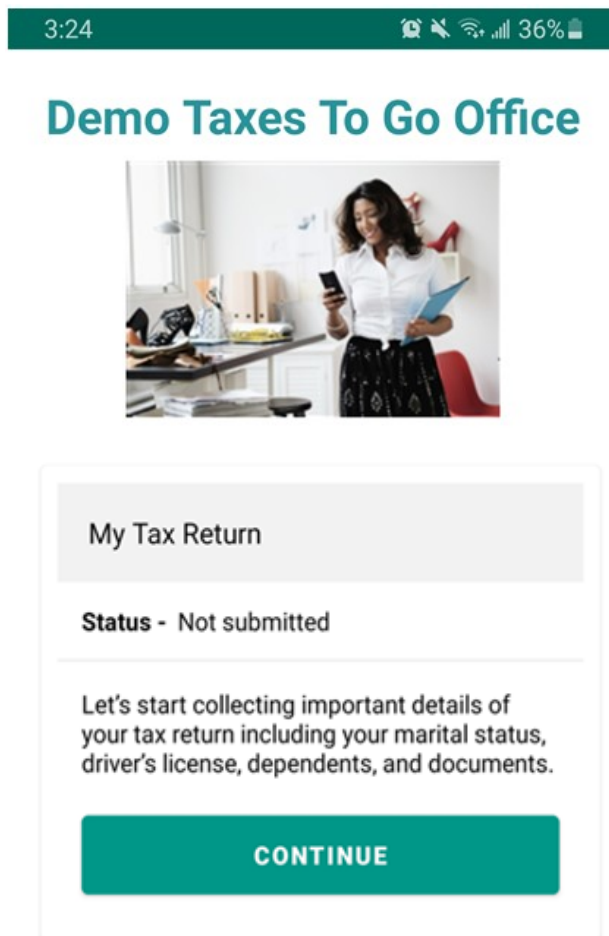


After passing the pages about app navigation, tax codes, and push notifications, the taxpayer will be guided to answer the question below. If they select Start a New Return, the app will guide them directly into the Tax Return section. We will continue with this option on page 31.

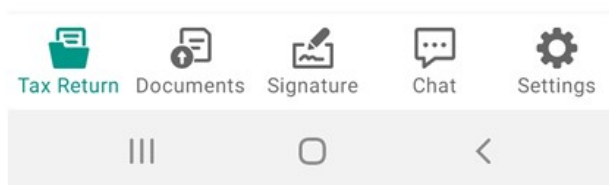


If you have already started the return in your program, the taxpayer would just want to click Continue. Doing this will take them to the landing page for the app shown here.

We will discuss this landing page more on the next page.



IRS, WHERE'S MY REFUND?



On this landing page, the taxpayer will see tabs across the bottom. These include Tax Return, Documents, Signature, Chat and Settings.

The Tax Return section is where the taxpayer enters their personal information.

The Document section allows the taxpayer to upload any documents to you. If the taxpayer does not wish to complete the My Tax Return section, they will need to use this section to send over any tax documents to you.

Signatures and Chat (covered later) allow your taxpayer to sign documents and chat directly with you.

Please note, for Generic Taxes to Go users. The Tax Code will also display on this page.

3:24



Demo Taxes To Go Office



My Tax Return

Status - Not submitted

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

CONTINUE

IRS, WHERE'S MY REFUND?



The Tax Return section of the app allows the taxpayer to fill out basic information about them, their spouse and dependents and to upload all tax documents they've received. The first step is to answer whether or not they were married. This will determine if the taxpayer will need to complete information for a spouse or not.



Demo Taxes To Go Office



Were you married as of December 31st, 2019?

YES

NO

PREV

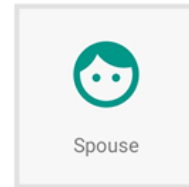
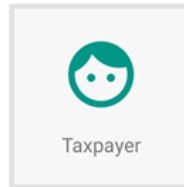
STEP 1 OF 9

NEXT



Demo Taxes To Go Office

You and your spouse



PREV

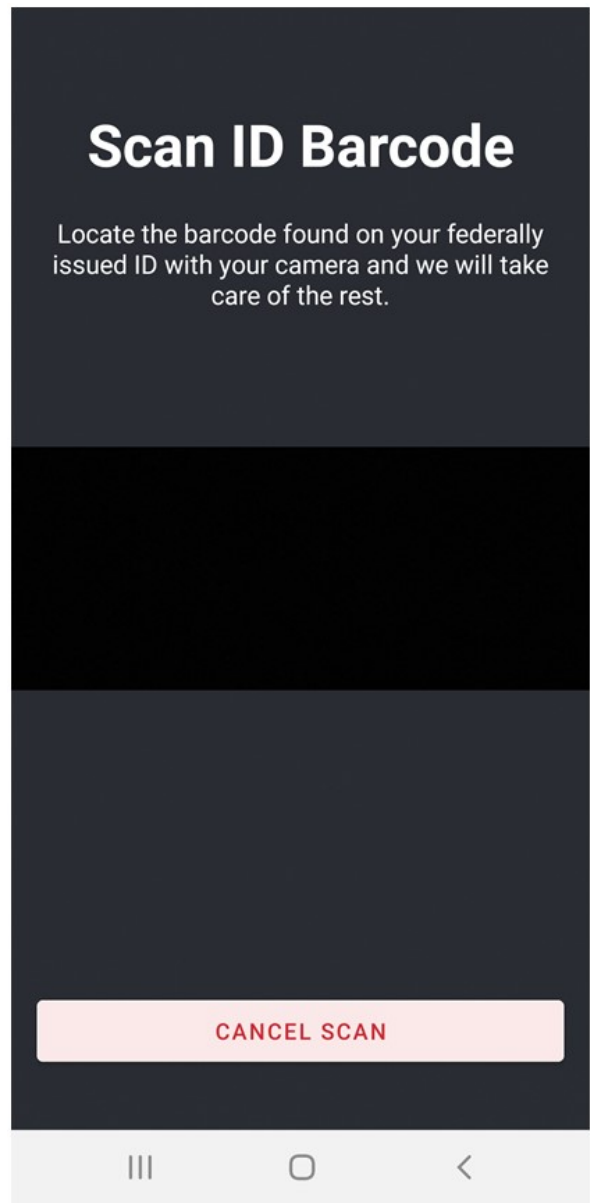
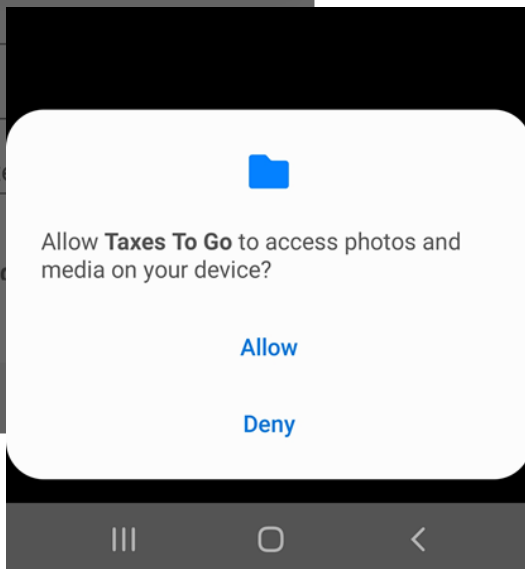
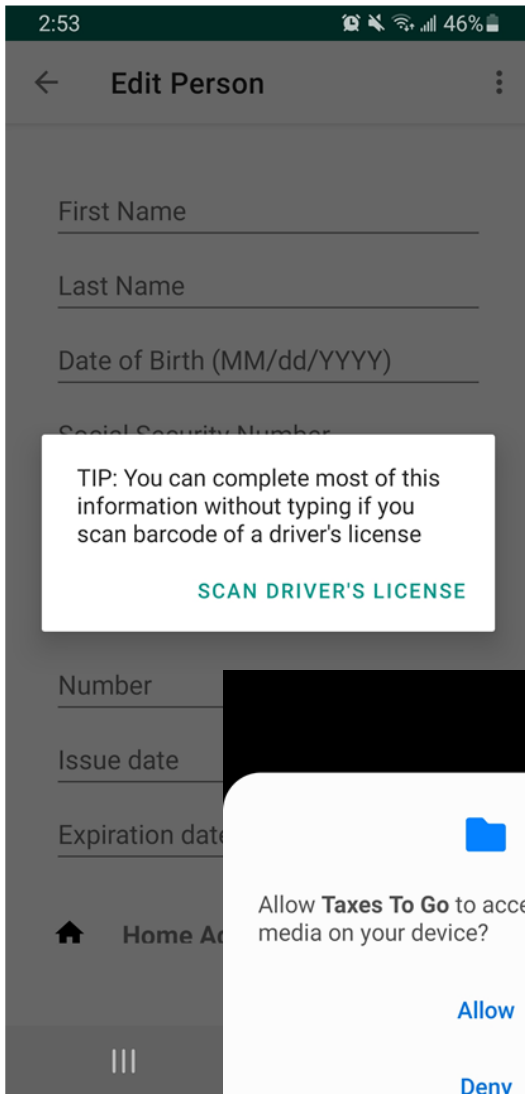
STEP 2 OF 9

NEXT



After the taxpayer clicks on the icon to input information for themselves or their spouse, they will be given the option to scan the back of the driver's license. This will pull the data from the user's license onto the fields.

Please be sure to Allow Taxes to Go access to the phone's camera.



← Edit Person

First Name
Taxpayer

Last Name
Test

Date of Birth (MM/dd/YYYY)
01/01/1980

Social Security Number
123-00-4567

Phone Number
706-123-4567

Driver's License

Number
123456789

Issue date
01/01/2020

Expiration date
01/01/2025

Home Address

SAVE

If the taxpayer chooses not to scan their driver's license, they will need to fill out each field listed.

Once the user clicks SAVE, they will be prompted to upload any tax documents they may have.

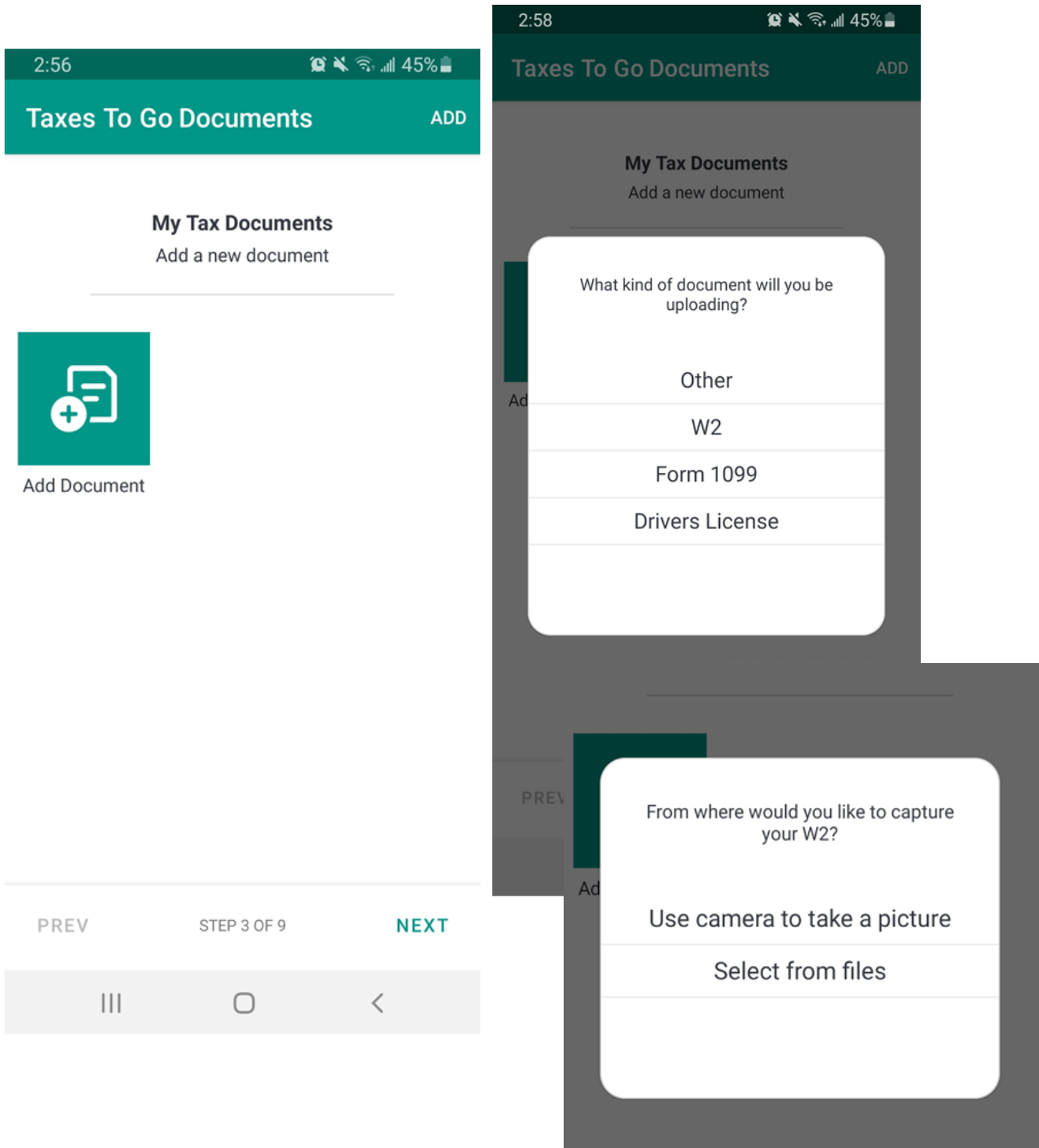
Demo Taxes To Go Office



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

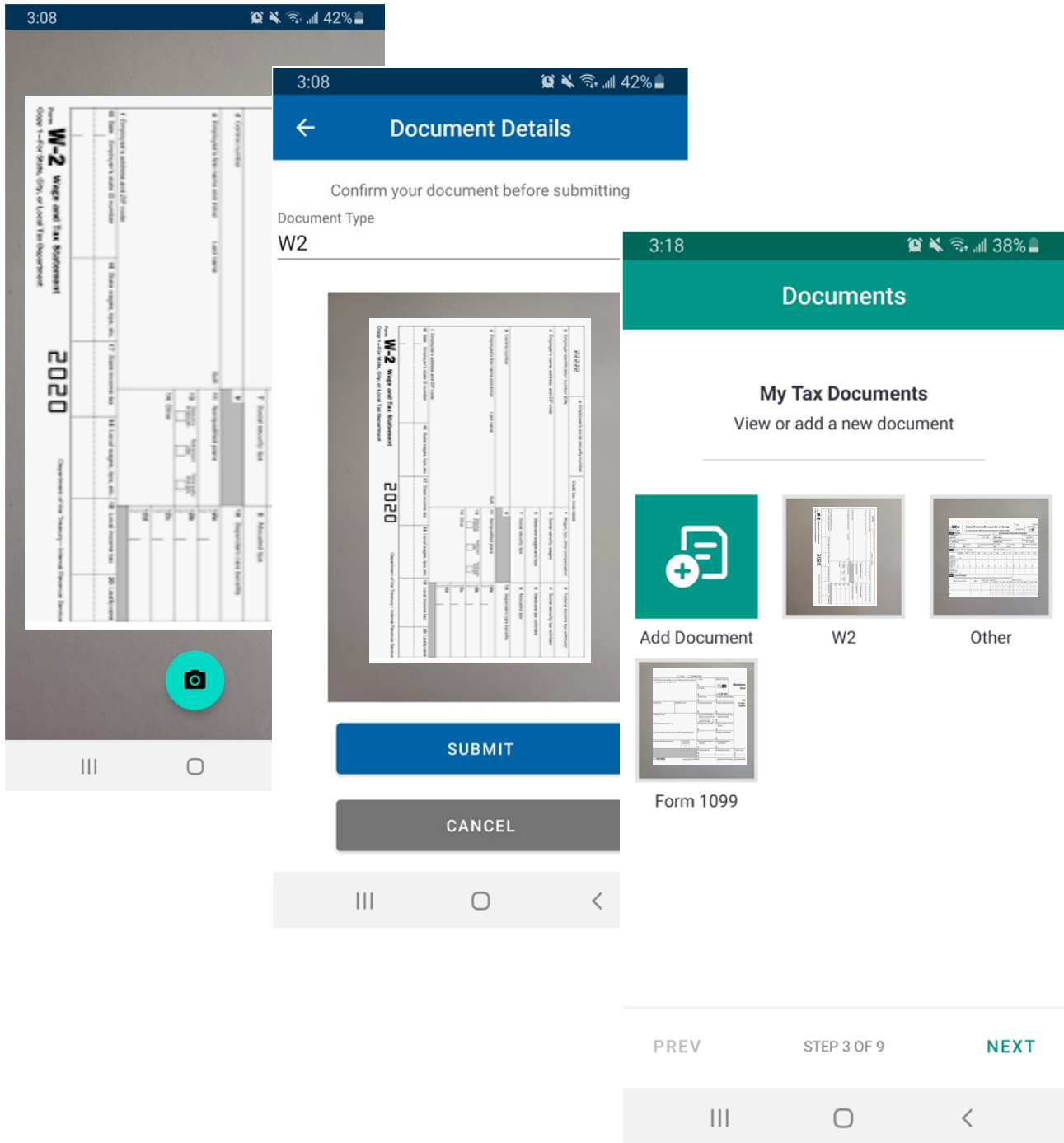
UPLOAD DOCUMENTS

Once the taxpayer clicks Add Document, they will be prompted to select the document type and if they want to take a new photo or select from their gallery.

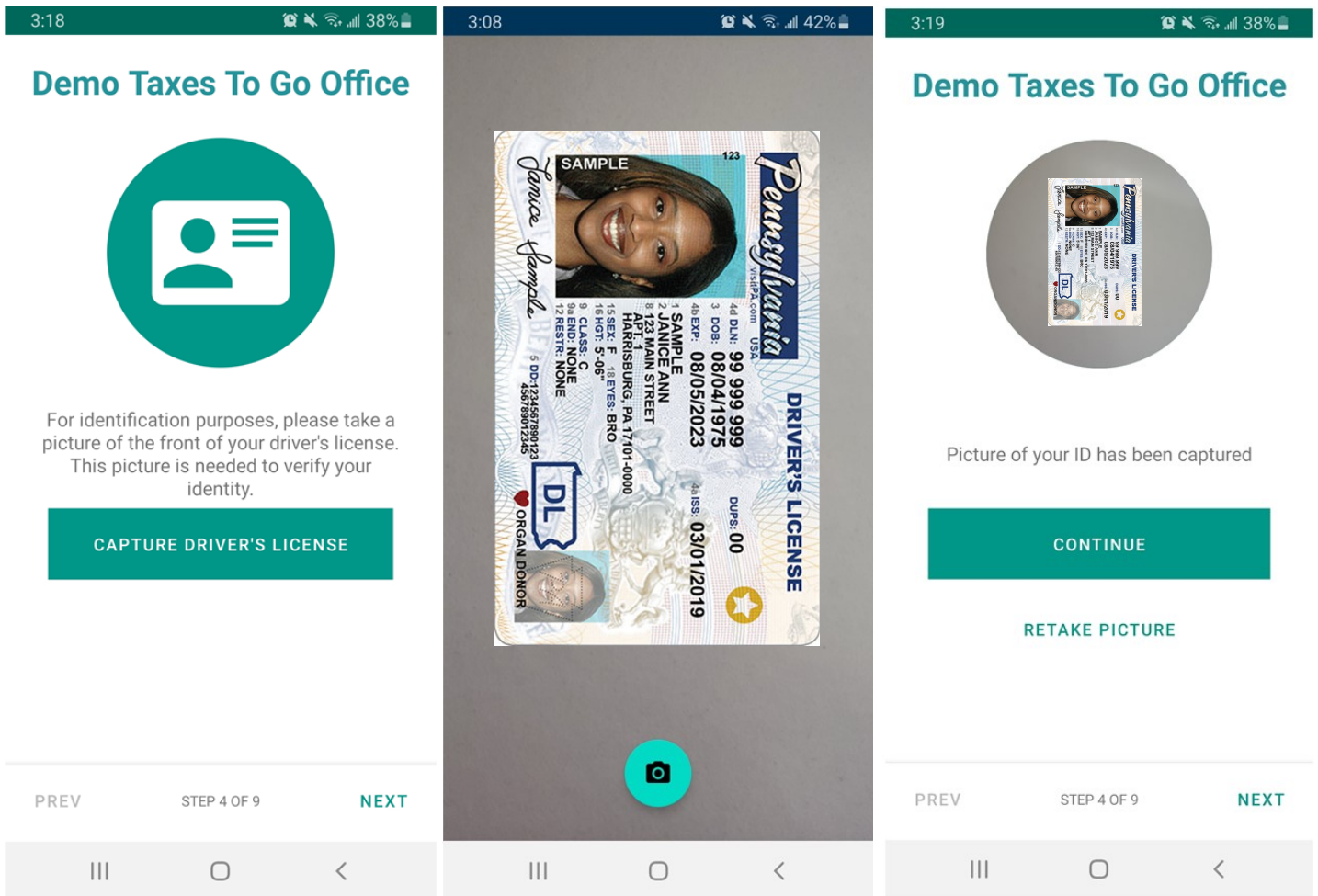


After the photo is taken, the taxpayer will need to choose to either submit or cancel the upload.

As the user uploads photos, they will see the document types listed on this page.



Next, the app will ask for a photo of the taxpayer's driver's license. This will be compared by the preparer to the selfie (added next) for security purposes.



Then the user will take a Selfie

3:19 

Demo Taxes To Go Office



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

PREV STEP 5 OF 9 NEXT

III ○ <

3:20 

Demo Taxes To Go Office



Your selfie has been captured


CONTINUE

RETAKE PICTURE

PREV STEP 5 OF 9 NEXT

III ○ <

Following the selfie, the taxpayer will need to input any information about their dependent (if applicable).

3:21  37%

← **Add Dependent**

First Name
Child

Last Name
Test

Social Security Number
222-00-2222

Date of Birth (MM/dd/YYYY)
03/03/2010

Childcare expenses (\$) **1200**

Was this person a U.S. citizen, U.S. national, or U.S. resident alien? (See Pub. 519 for the definition of a U.S. national or U.S. resident alien) If they were not, you can't claim the child tax credit or the credit for other dependents for this person.

Dependent is a fulltime student

Relationship
Daughter ▼

Months in home

SAVE

III ○ <

3:20  38%

Demo Taxes To Go Office



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

PREV STEP 6 OF 9 **NEXT**

III ○ <

To add more than one dependent, simply click the green plus to Add Dependent.

3:21



Demo Taxes To Go Office

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

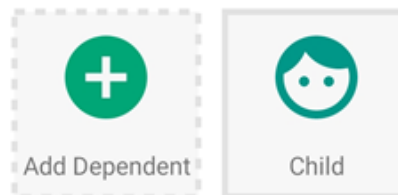
706-123-4567

3:21



Demo Taxes To Go Office

You have 1 dependent



Next, the taxpayer will be asked to put in Contact Information for the preparer. The number should be one the taxpayer uses regularly. The preparer will use this number to contact the taxpayer if necessary.

PREV

STEP 7 OF 9

NEXT



Before the taxpayer can submit their information, they will need to sign the Consent to Use.



Demo Taxes to Go Office

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

PREV

STEP 8 OF 9

NEXT



Demo Taxes to Go Office

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



Consent to use granted

PREV

STEP 8 OF 9

NEXT



Finally, the taxpayer will review their information and submit the app return.

3:23



Demo Taxes To Go Office

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
----------------------	----------------------

PREV

STEP 9 OF 9

SUBMIT



3:24



Demo Taxes To Go Office

Congratulations!

You have successfully uploaded your information.



RETURN TO DASHBOARD



When the app has been submitted, the taxpayer will then be guided back to the main page. This page will update them as to the status of their return. It will show Waiting on Preparer until you have pulled that app return into your program. Once you do, it will update to claimed by preparer.



Demo Taxes To Go Office



My Tax Return

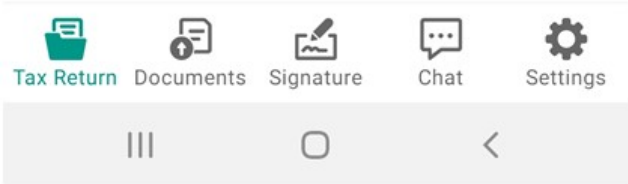
Submitted - 11/02/2020

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?

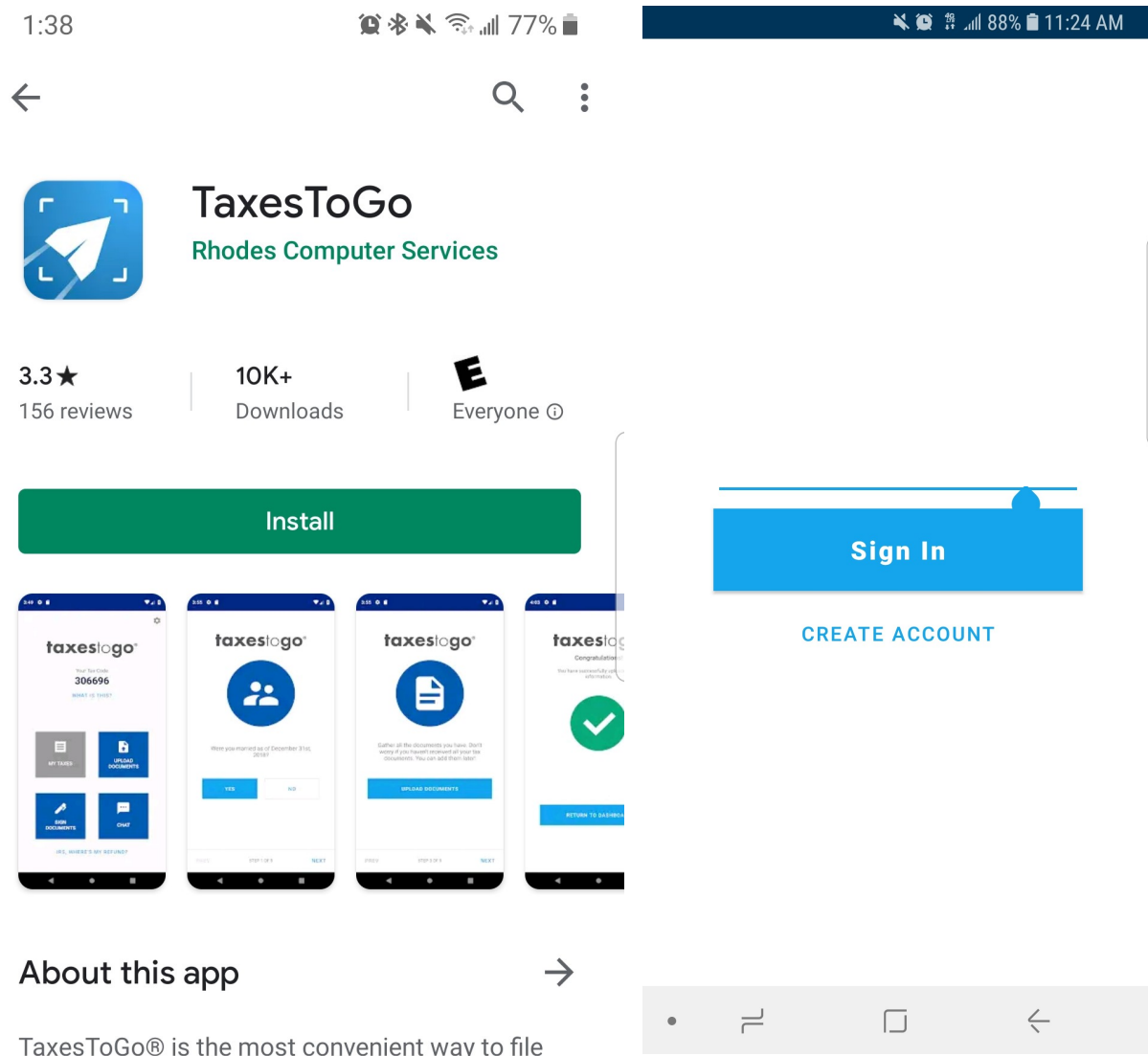


Taxes to Go for Android

Generic App Users

Initial Download

For the generic mobile app, the user will go to the App Store and download Taxes to Go directly. After the install is complete, the user will put in their email address and click Create Account.



2:14

51%

taxestogo®

Next, the taxpayer will be prompted to create a new account with Taxes to Go.

10:03

79%

taxestogo@email.com

7061234567

.....

.....

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

Register

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

||| ○ <

After the account is created, the user will receive a Verification Code to enter into the app.

taxestogo®

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

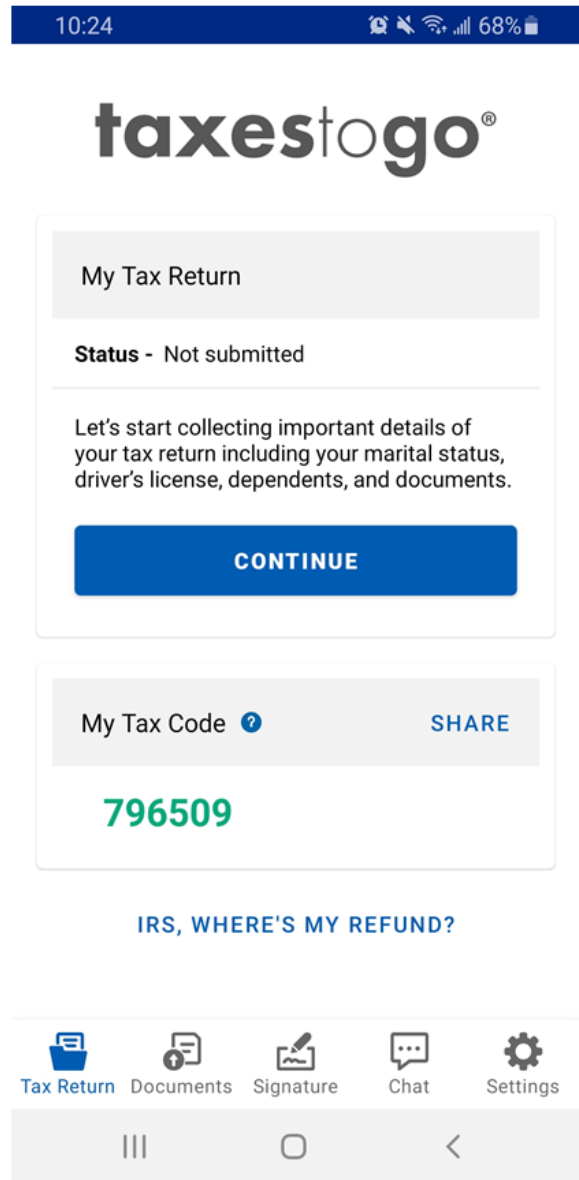
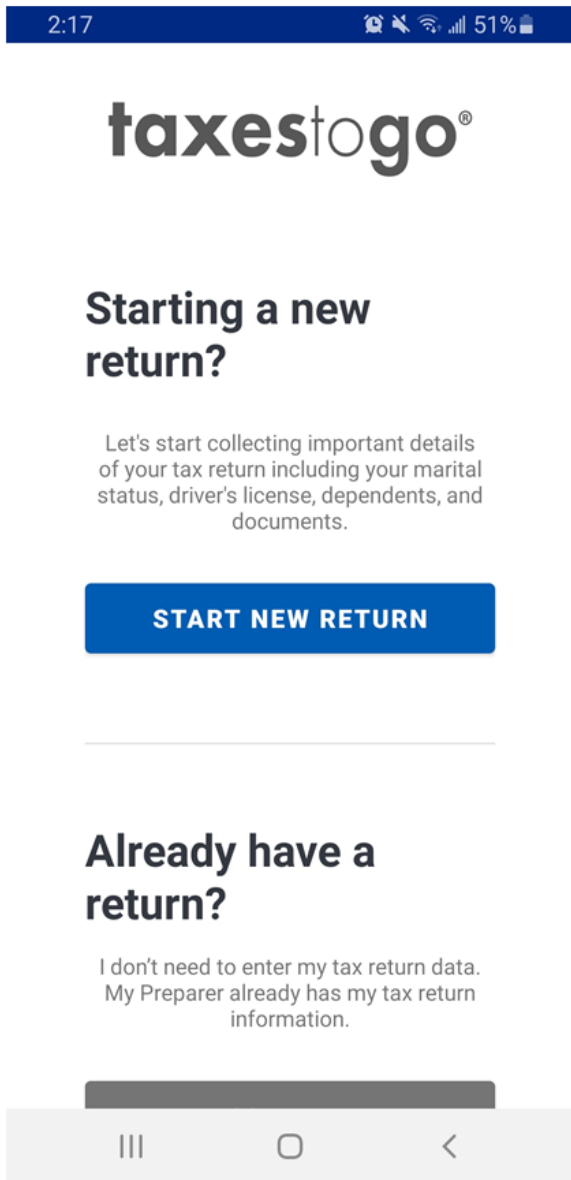
[RESEND CODE](#) [CHANGE USER](#)

Submit

||| ○ <

On the main page of the Generic Taxes to Go app the taxpayer will see a 6 digit code. This code will need to be provided to the preparer for the information to be pulled into the program. This can be given to the preparer by clicking Share.

The Tax Return section for the Generic App is completed exactly as the Branded App is. For reference on this part please see page 31.



App Returns in the Program

ProWeb App Returns

Pulling a Branded App Return into ProWeb

To pull a Branded App Return into ProWeb, you will need to click on the branded app queue from the Welcome page of your ProWeb Account. This will bring up a list of every branded app client you have under your EFIN that has not been claimed in the program.

Welcome to Tax Office

Message Center 0

Rejected Clients 0

TaxesToGo Clients 8

Start New 2018 Tax Return

Create a brand new tax return for a client.

Import App User

Import a user from the Mobile App

Client Search

Edit returns you previously started.

Review Returns

Returns that are currently waiting to be reviewed

Configuration

Setup the configuration options for your office.

In the list, you will have the option to Claim the return. Claiming the return will take you directly into the Personal Information section to begin the tax return. From this point you will complete the return as normal.

TaxesToGo Client List

Search:

Show entries

Showing 1 to 9 of 9 entries

Taxpayer Name	Email Address	SSN	Submit Date	
Taxpayer Test	TestAccount@Gmail.com	111001111	01/16/2019 06:14 PM	Claim Delete

To access the uploaded documents for the user, you will need to select the client's name from inside the tax return and choose Scanned Documents.

Preview Return | Help & Support | TEST RETURN | Logout


3,397 | Refund

- Your Office
- Scanned Documents**
- ¿Sí hablas Español?
- Notes
- Helpful Tools
- Quick File
- Save & Exit Return

From there you can download the documents and use them to complete the tax return.

Scanned Documents

[+ Upload Documents](#)
[Close Window](#)

File name	File Size	Uploaded	
W2.PNG	62 KB	1/22/2019 7:27 PM	 Download

Pulling a Generic App Return into ProWeb

To pull a Generic App Return into ProWeb, you will need to click on Import App User from the Welcome page of your ProWeb Account.

Welcome to Tax Office

Message Center 0

Rejected Clients 0

TaxesToGo Clients 8

Start New 2018 Tax Return

Create a brand new tax return for a client.

Import App User

Import a user from the Mobile App

Client Search

Edit returns you previously started.

Review Returns

Returns that are currently waiting to be reviewed

Configuration

Setup the configuration options for your office.

From there you will need to enter the email address and 6 digit Import Code for the client. Once you import app return, you will complete the return as normal.

Enter App User Information

Email
TestEmail@Gmail.com

Import Code (6 Digits)
123456

By using this software in conjunction with the TaxesToGo app you acknowledge that you will abide by all authentication and disclosure requirements to include but not limited to IRS and State requirements as well as bank requirements as they relate to financial products. Use of this integration is subject to the license agreement and terms.

Import App User

To access the uploaded documents for the user, you will need to select the client's name from inside the tax return and choose Scanned Documents.

Preview Return | Help & Support | TEST RETURN | Logout

Your Office
Scanned Documents
¿Sí hablas Español?
Notes
Helpful Tools
Quick File
Save & Exit Return

From there you can download the documents and use them to complete the tax return.

3,397
Refund

Scanned Documents

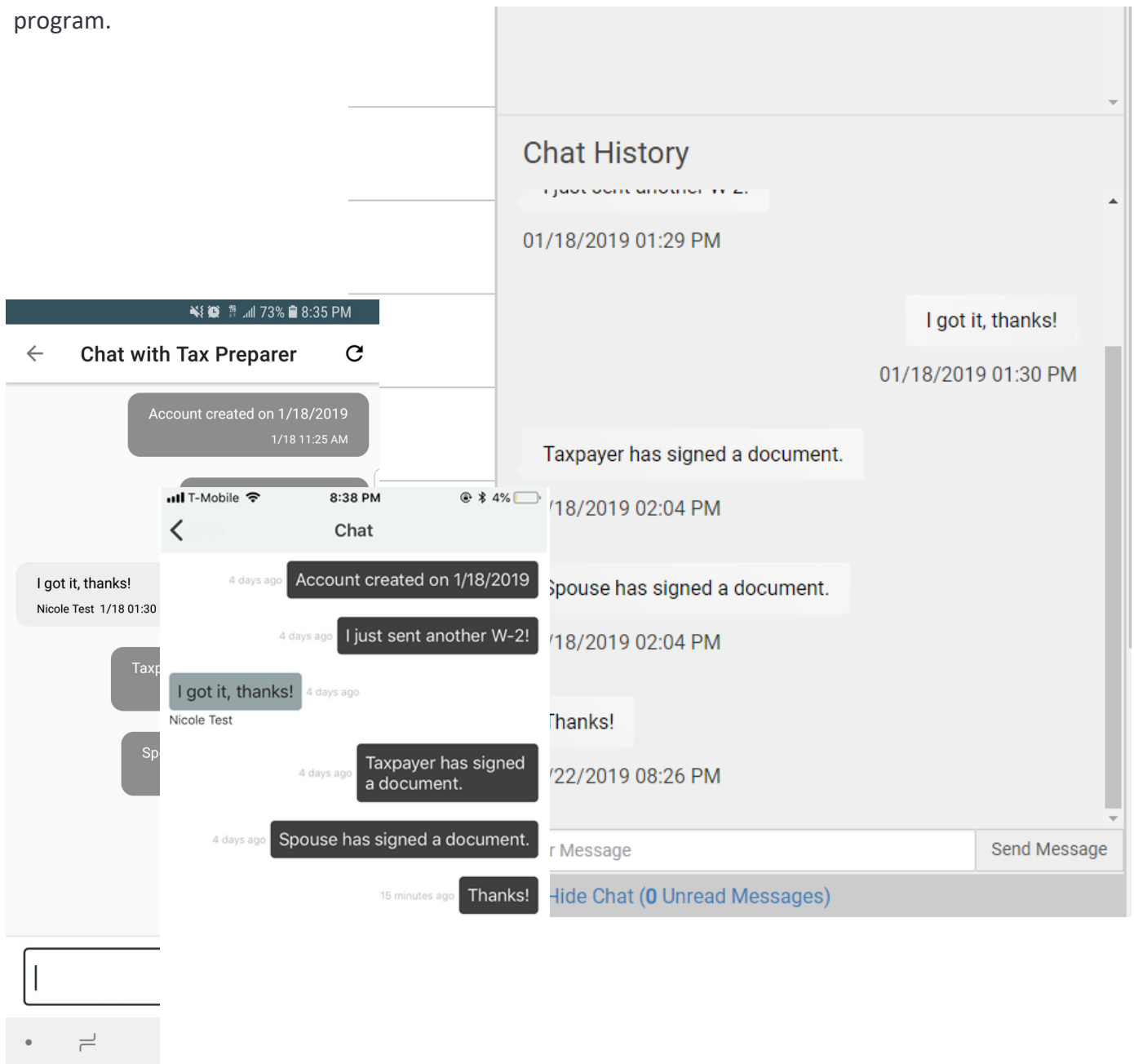
+ Upload Documents | Close Window

File name	File Size	Uploaded
W2.PNG	62 KB	1/22/2019 7:27 PM

↓
Download

Using the Chat Feature in ProWeb

The Chat Feature in ProWeb is available at the bottom of the screen. When there are new chats, it will show as a notification. This feature is only available for the clients once you start the App Return in your program.



Sending Documents to be Signed in ProWeb

On the Submission Page of the tax return, there is an option to send the documents back to the app for the taxpayer to sign. Once you click this button, you will see a notification that the documents have been successfully sent.

Please review all information on this screen. To finalize your return please click on the submit button located below.

One Copy - Federal and State

Print Return

Email Return

Send Tax Return Documents to Mobile Application

Preparer Information

Send Tax Return Documents to Mobile Application



Transfer Completed - Documents are now on Mobile Application

After the documents have been signed by the taxpayer, the signatures will show in the program on the Submission Page. From here you can transmit the return.

Electronic Signature

Taxpayer Signature

Change Signature

Sign

Spouse Signature

Change Signature

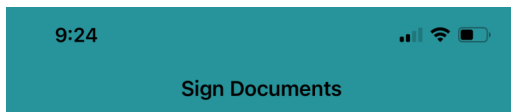
Sign

Signing Documents on iOS

In the app, the taxpayer will see the Sign Documents feature become available.

Please Note: If the taxpayer does not see the icon change or become available, they will need to close and reopen the Mobile App.

When the taxpayer clicks on Sign Documents, they will see an alert that signatures are needed.



Signatures Requested

The following documents require your signature(s):



Tax Documents

 Signature Required

9:24



Demo Taxes To Go Office



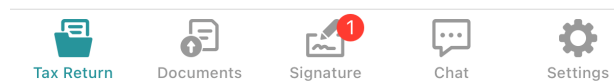
My Tax Return

Submitted - 11/03/2020

Status - Documents ready for your signature

SIGN DOCUMENTS

[IRS, Where's my Refund?](#)



TEST & SPOUSE PERSON
554 TEST DR
EVANS, GA 30809
2018 INCOME TAX RETURN

Add signature for

Test Person

Spouse Person

Cancel

When they select the icon, they will see a PDF of their tax return, as well as a place for both taxpayer and spouse (if applicable) to sign.

Once the taxpayer clicks Save, the signature will be applied to all necessary forms and this information will be sent back to the program.

TaxesToGo - Draw your signature below:

Clear Signature



11/03/2020

CANCEL

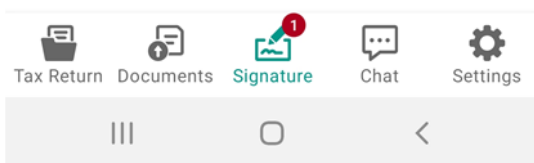
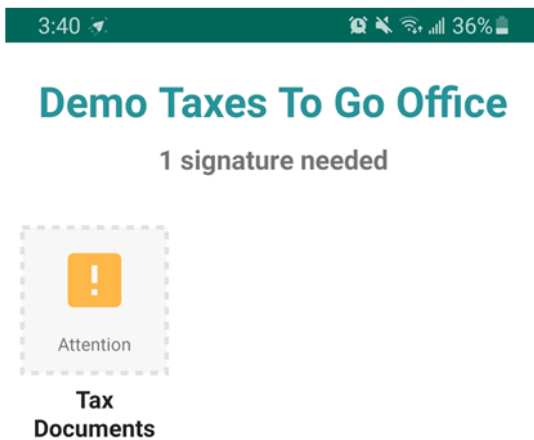
SAVE

Signing Documents on Android

In the app, the taxpayer will see the Sign Documents feature become available.

Please Note: If the taxpayer does not see the icon change or become available, they will need to close and reopen the Mobile App.

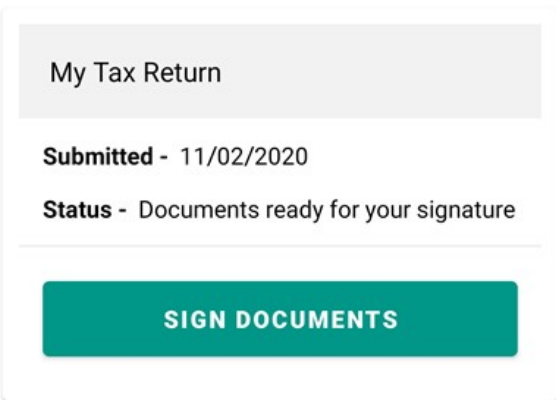
When the taxpayer clicks on Sign Documents, they will see an alert that signatures are needed.



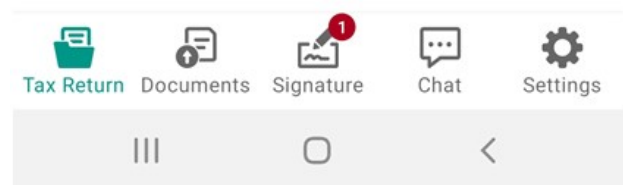
3:40

36%

Demo Taxes To Go Office



IRS, WHERE'S MY REFUND?



1040 U.S. Individual Income Tax Return **19**

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

TAXPAYER Last name: TEST Year social security number: 123-00-4567

SPOUSE Last name: TEST Spouse's social security number: 765-00-4321

Home address (number and street): 123 TEST Apt. no.: Foreign postal code: AUGUSTA, GA 30906

Standard Deduction You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you enter a dual status alien

Dependents (see instructions):

(A) First name	(B) Social security number	(C) Relationship to you	(D) <input type="checkbox"/> Child for credit	(E) <input type="checkbox"/> Credit for other dependents
CHILD TEST	222-00-2222	DAUGHTER	<input checked="" 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** Dividend distributions Attach Form 1099-DIV **2d** Other income from Schedule 1, line 9 **90000**

3 Add lines 1, 2a, 2b, 2c, 2d, 3a, 3b, 3c, 3d, 3e, and 3f. This is your **total income** **90000**

4 Adjustments to income from Schedule 1, line 12 **5** Subtract line 4a from line 3b. This is your **adjusted gross income** **90000**

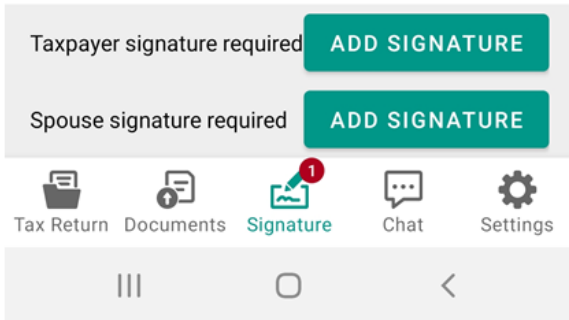
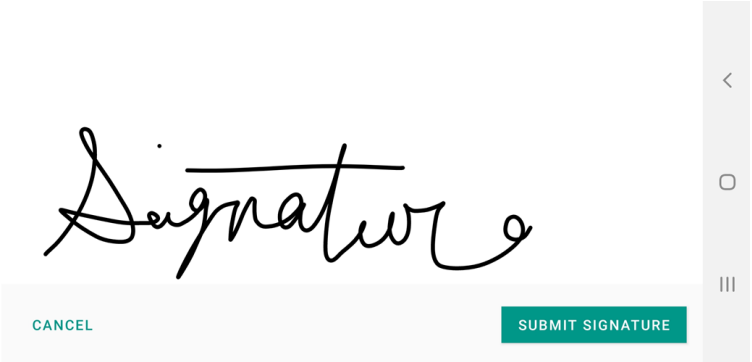
6 Standard deduction or itemized deductions (from Schedule A) **24400**

7 Add lines 5 and 6 **65600**

8 Taxable income. Subtract line 7 from line 6b. If zero or less, enter -0- **24400**

When they select the icon, they will see a PDF of their tax return, as well as a place for both taxpayer and spouse (if applicable) to sign.

Once the taxpayer clicks Submit Signature, the signature will be applied to the forms.

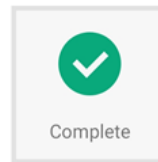
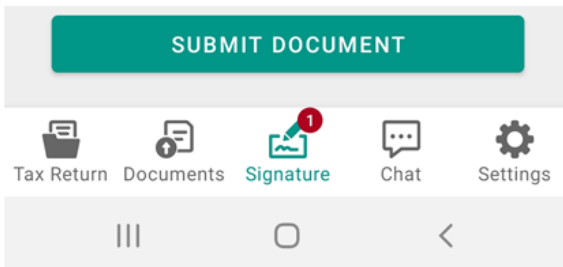


When ready, the taxpayer will select Submit Document to send the signature documents back to you. Once this is done, the signature documents will show completed with a checkmark.



Demo Taxes To Go Office

All documents signed



Tax Documents

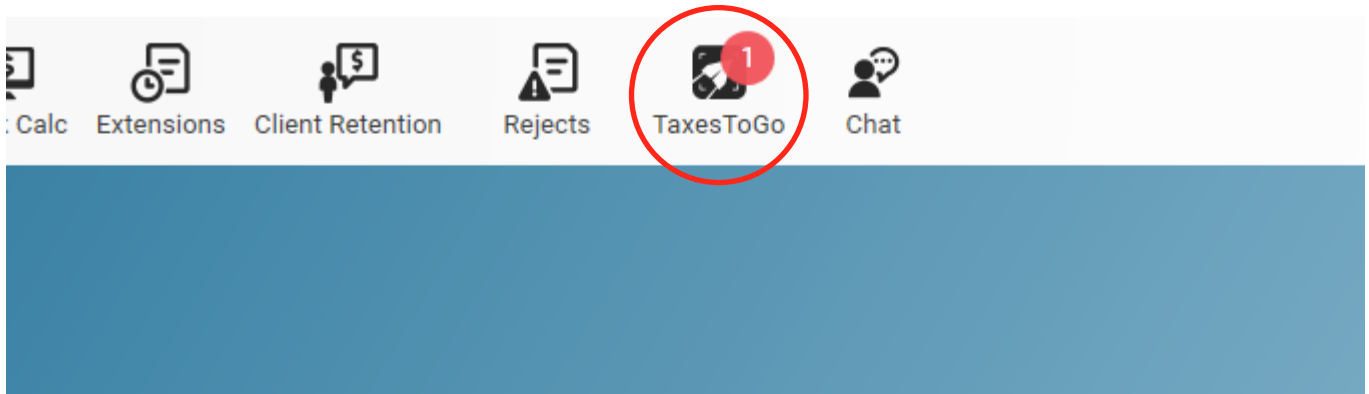
App Returns in the Program

Desktop App Returns

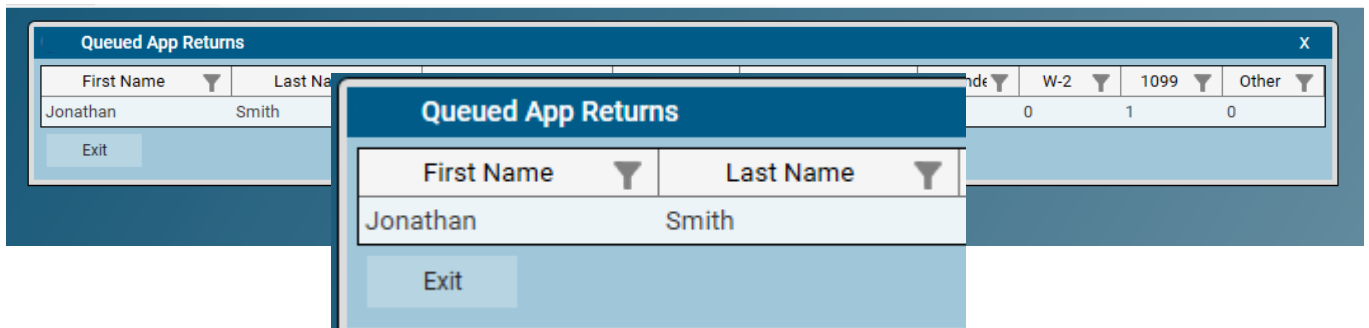
Pulling a Branded App Return into Desktop

To pull a Branded App Return into Desktop, you will need to click on the TaxesToGo icon at the top of the main page of your program. This will generate a list of all branded app clients that have not been claimed in the program.

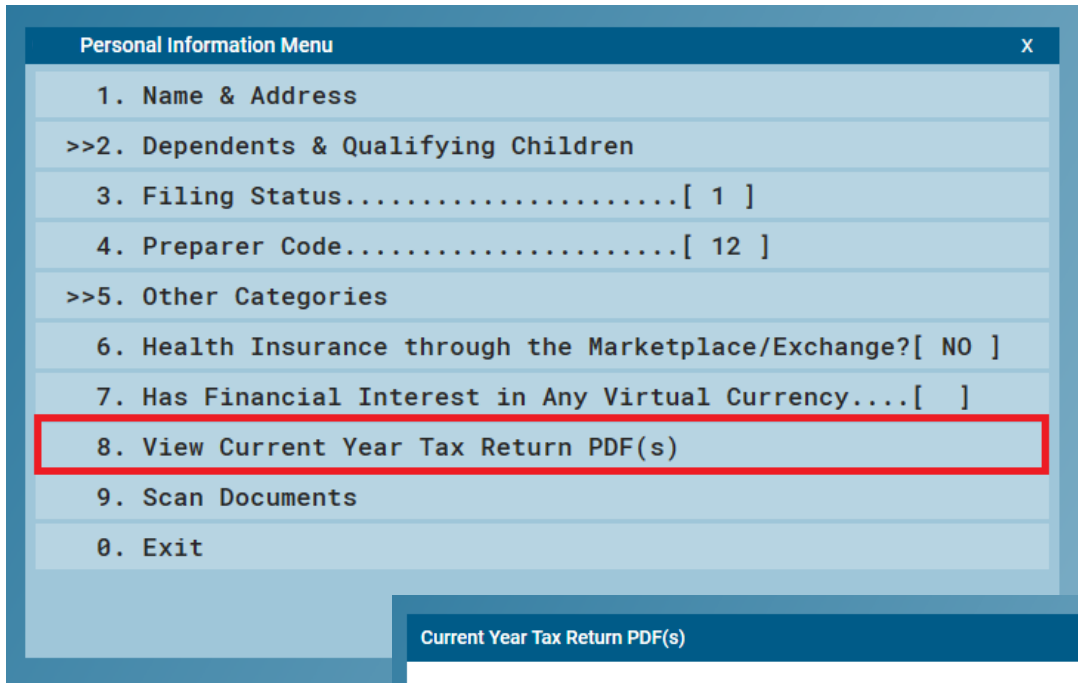
To begin a return, double-click on the client from the list. From there you will complete the return as normal.



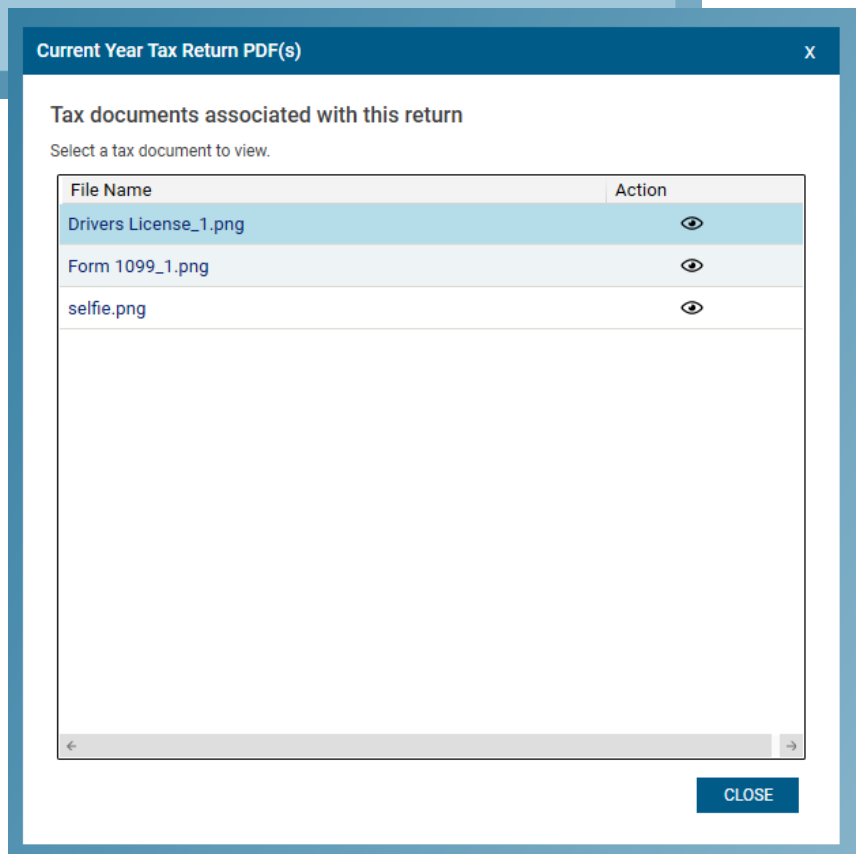
Edit or start a new return



To access the uploaded documents from the mobile app, you will need to go into Personal Information and select View Current Year Tax Return PDF(s).

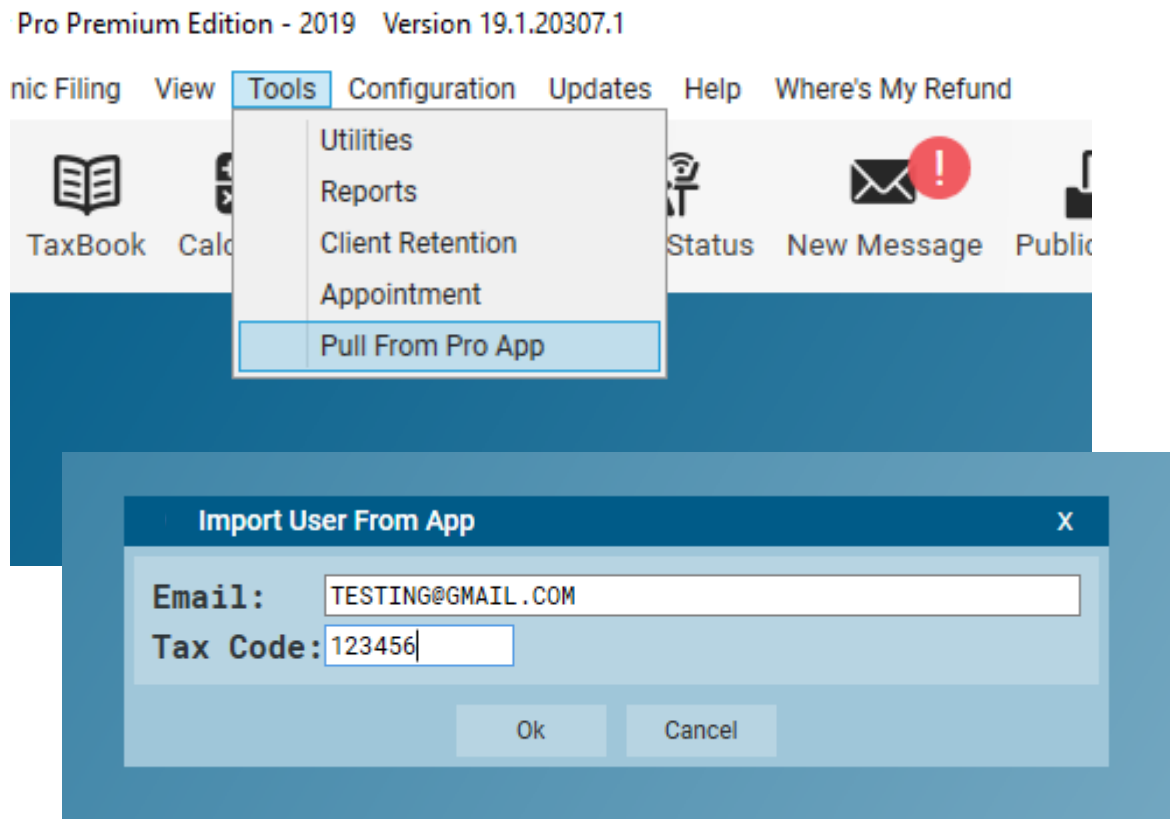


This will open a PaperCut window with all the uploaded documents from the app. To open, you will need to double-click to open each file.



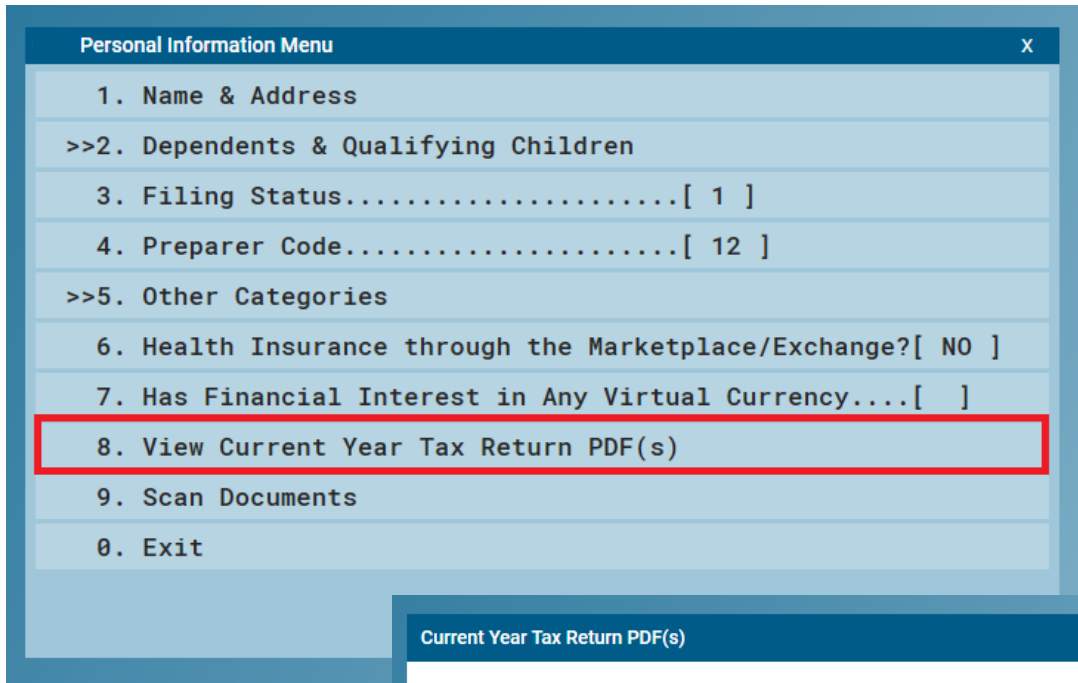
Pulling a Generic App Return into Desktop

To pull a Generic App Return into Desktop, you will need to click on the Tools drop down from the main page of the program. From there, click on the Pull From Pro App option.

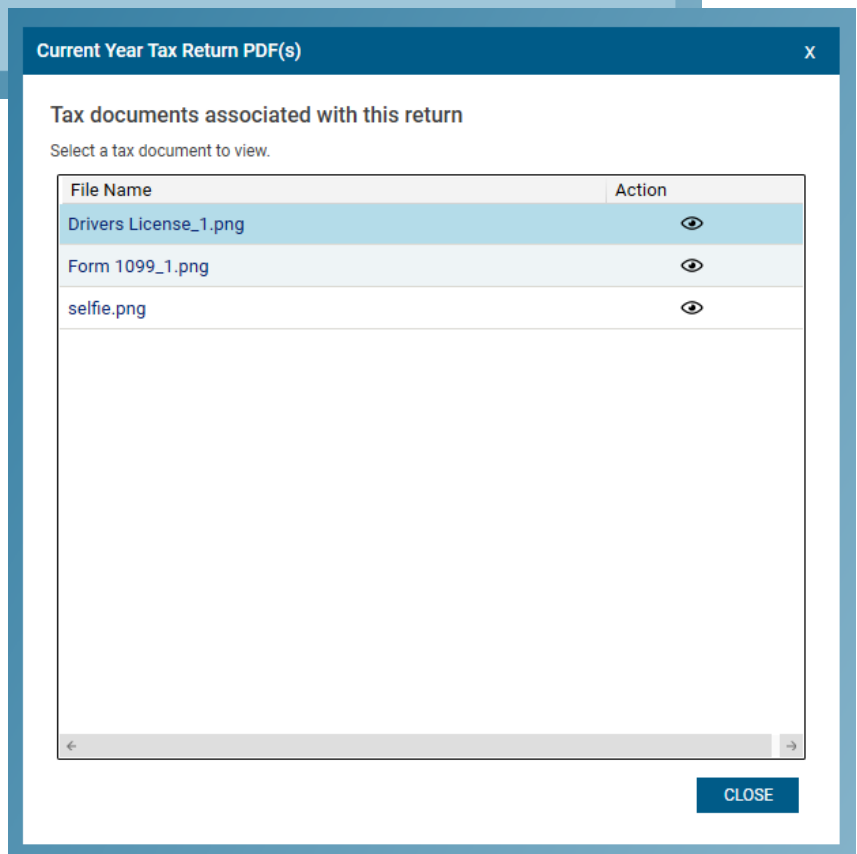


This screen will prompt you to put in the taxpayer's email address and 6 digit code that was provided to them inside the app. After you click OK you will complete the return as normal.

To access the uploaded documents from the mobile app, you will need to go into Personal Information and select View Current Year Tax Return PDF(s).

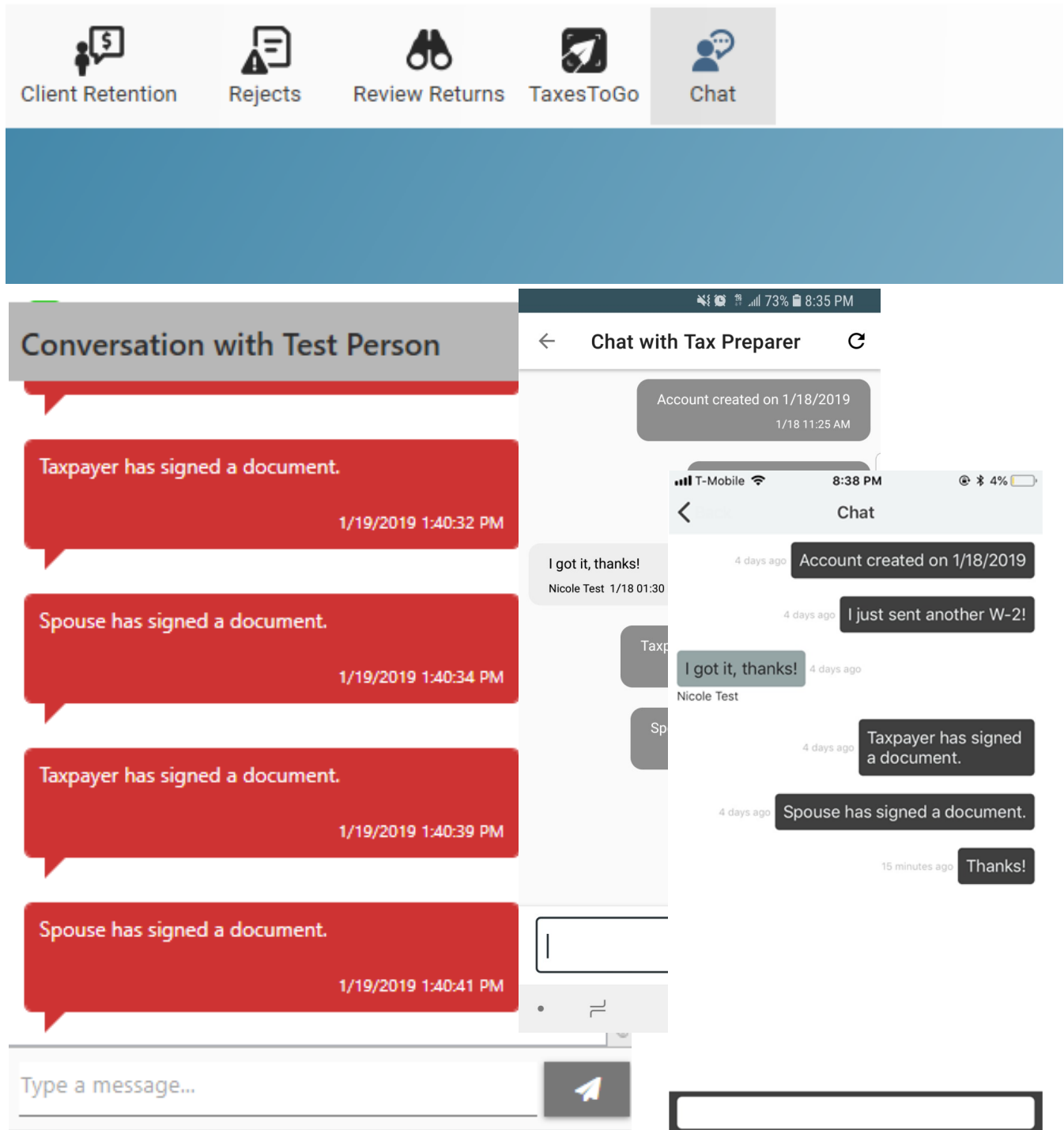


This will open a PaperCut window with all the uploaded documents from the app. To open, you will need to double-click to open each file.



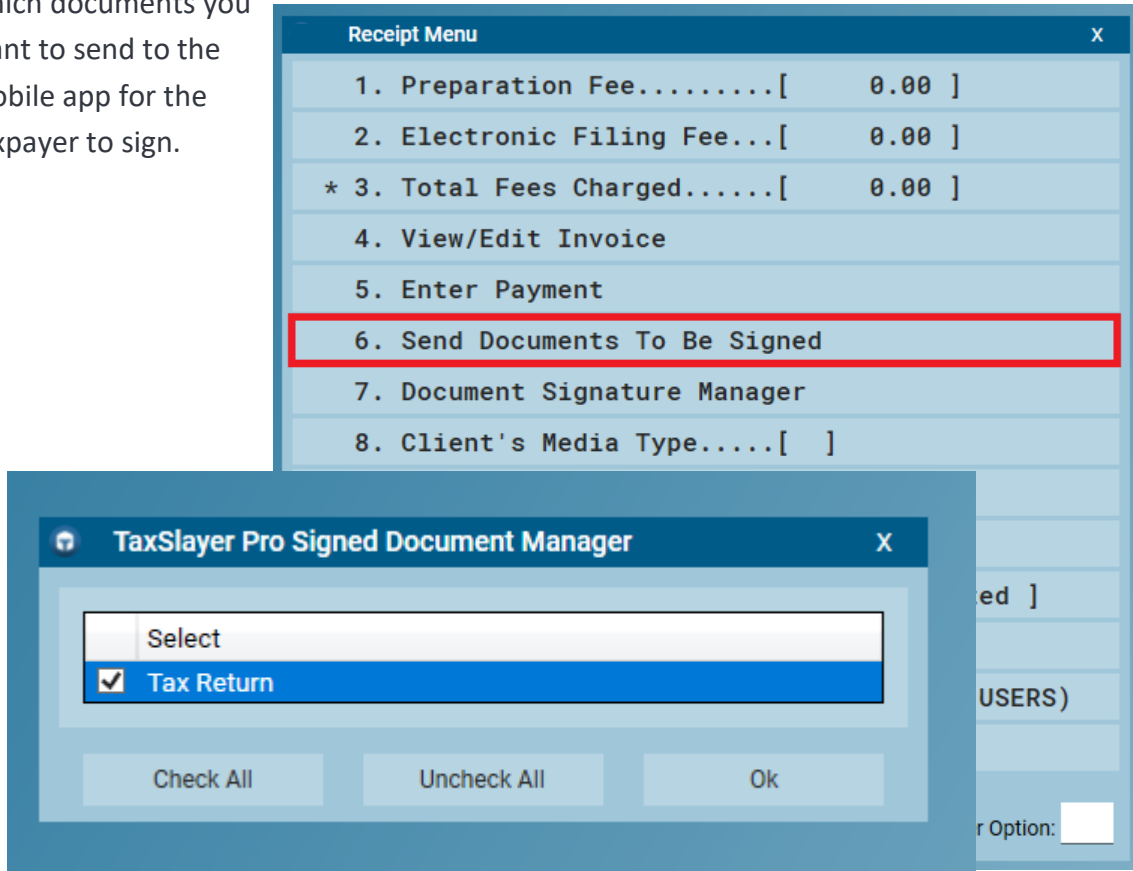
Using the Chat Feature in Desktop

The Chat Feature in Desktop is available at the top of the program by clicking on the Taxes to Go Chat icon. When there are new chats, it will show as a notification. This feature is only available for the clients once you start the App Return in your program.

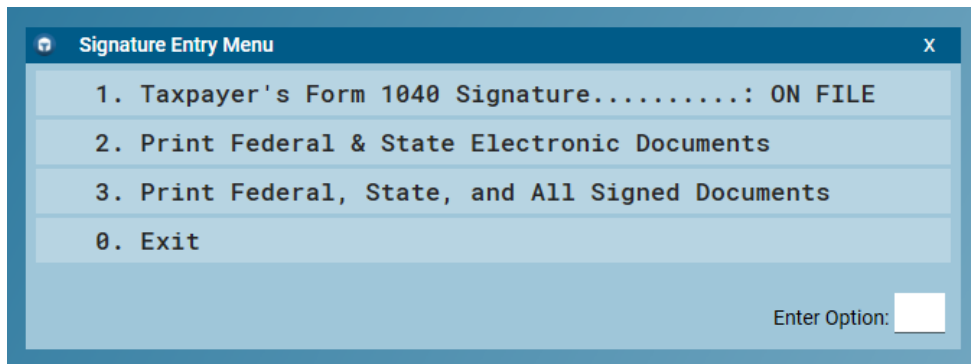


Sending Documents to be Signed in Desktop

On the Receipt Menu when exiting the tax return, there is an option to send the documents back to the app for the taxpayer to sign. Once you click this button, you will need to select which documents you want to send to the mobile app for the taxpayer to sign.



After the taxpayer signs the documents, the program will show the signature On File. From here you can transmit the return.

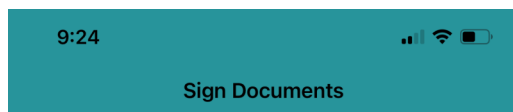


Signing Documents on iOS

In the app, the taxpayer will see the Sign Documents feature become available.

Please Note: If the taxpayer does not see the icon change or become available, they will need to close and reopen the Mobile App.

When the taxpayer clicks on Sign Documents, they will see an alert that signatures are needed.



Signatures Requested

The following documents require your signature(s):



Tax Documents

 Signature Required

9:24



Demo Taxes To Go Office



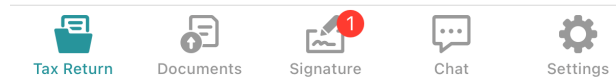
My Tax Return

Submitted - 11/03/2020

Status - Documents ready for your signature

SIGN DOCUMENTS

[IRS, Where's my Refund?](#)



TEST & SPOUSE PERSON
554 TEST DR
EVANS, GA 30809
2018 INCOME TAX RETURN

Add signature for

Test Person

Spouse Person

Cancel

When they select the icon, they will see a PDF of their tax return, as well as a place for both taxpayer and spouse (if applicable) to sign.

Once the taxpayer clicks Save, the signature will be applied to all necessary forms and this information will be sent back to the program.

TaxesToGo - Draw your signature below:

Clear Signature



11/03/2020

CANCEL

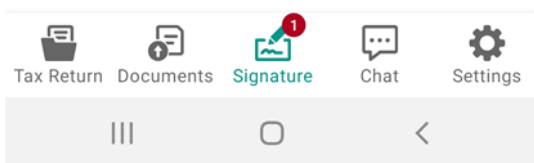
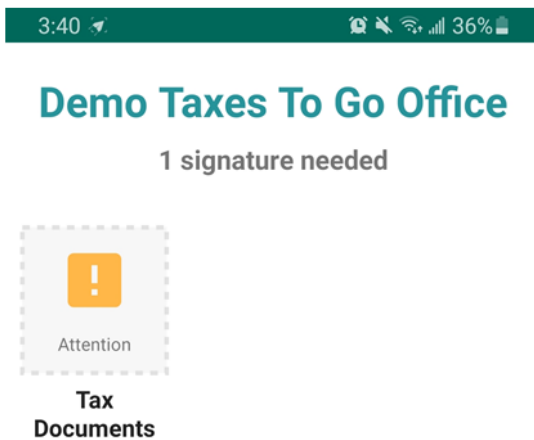
SAVE

Signing Documents on Android

In the app, the taxpayer will see the Sign Documents feature become available.

Please Note: If the taxpayer does not see the icon change or become available, they will need to close and reopen the Mobile App.

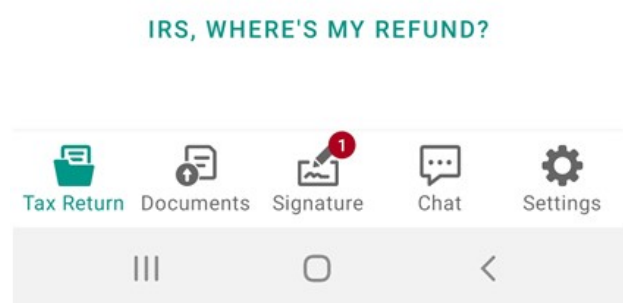
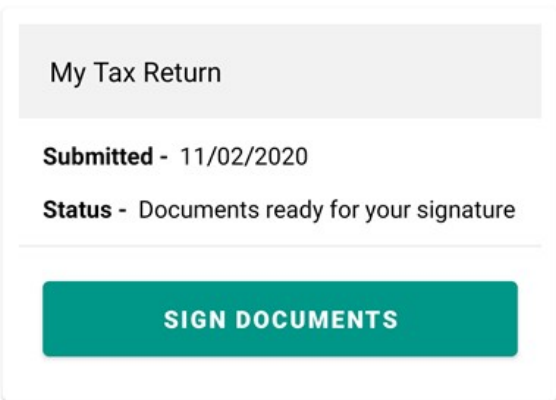
When the taxpayer clicks on Sign Documents, they will see an alert that signatures are needed.



3:40

36%

Demo Taxes To Go Office



1040 U.S. Individual Income Tax Return **19**

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

TAXPAYER Last name: TEST, First name and middle initial: TEST, Year social security number: 123-00-4567

SPOUSE Last name: TEST, First name and middle initial: TEST, Spouse's social security number: 765-00-4321

Home address (number and street): 123 TEST, City, town or great office, state, and ZIP code: AUGUSTA, GA 30906

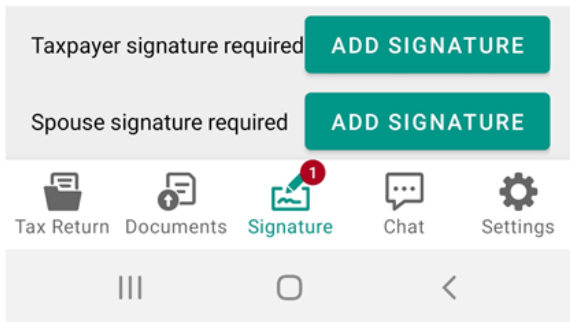
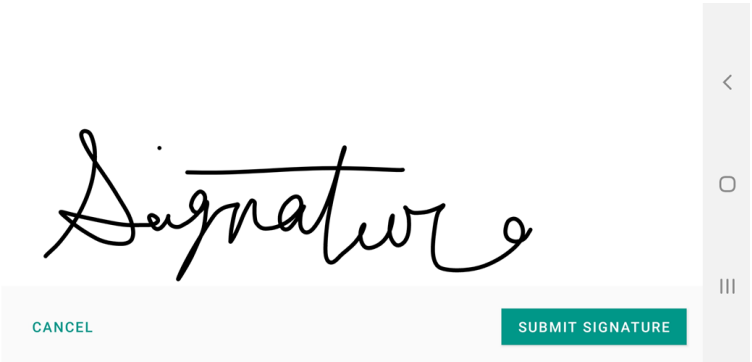
Standard Deduction You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you enter a dual status alien

Dependents (see instructions): CHILD TEST, Social security number: 222-00-2222, Relationship to you: DAUGHTER

1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	90000
2a	Tax-exempt interest	2a	
2b	Qualified dividends	2b	
3	Capital gain or loss. Attach Schedule D if required. If not required, check here	3	
4	IRA distributions	4	
5	Pensions and annuities	5	
6	Social security benefits	6	
7	Other income from Schedule 1, line 9	7	
8	Add lines 1, 2a, 2b, 4a, 4b, 5, 6, and 7. This is your total income	8	90000
9	Subtract line 8a from line 7b. This is your adjusted gross income	9	90000
10	Standard deduction or itemized deductions (from Schedule A)	10	24400
11	Qualified business income deduction. Attach Form 8885 or Form 8885-A	11	
12	Subtract line 10 from line 9. This is your taxable income	12	65600
13	Other taxes	13	
14	Refund of the estimated tax	14	
15	Other payments	15	
16	Subtract line 14 from line 13. Add line 15 to line 12. This is your total tax	16	
17	Non-refundable credits	17	
18	Refundable credits	18	
19	Subtract line 16 from line 17. Add line 18 to line 19. This is your refund	19	
20	Subtract line 19 from line 16. This is the amount you owe	20	
21	Payments on your behalf	21	
22	Subtract line 21 from line 20. This is the amount you owe, if any	22	

When they select the icon, they will see a PDF of their tax return, as well as a place for both taxpayer and spouse (if applicable) to sign.

Once the taxpayer clicks Submit Signature, the signature will be applied to the forms.

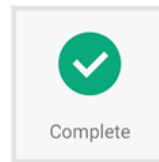
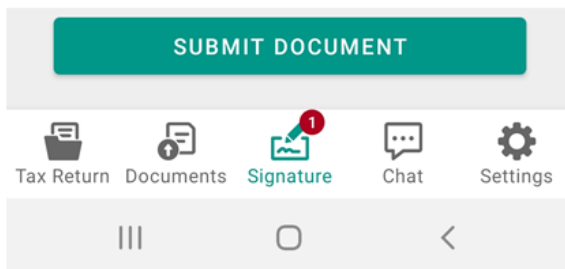


When ready, the taxpayer will select Submit Document to send the signature documents back to you. Once this is done, the signature documents will show completed with a checkmark.



Demo Taxes To Go Office

All documents signed



Complete

Tax Documents

Associating App Returns in the Program with Existing Returns

If you have already started your client's tax return in your program, the taxpayer can still use the Mobile App to send you their information and to sign documents.

Associating App Returns with Existing Returns 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.

In order to connect the two, your client will need to download the Taxes to Go app. Once the taxpayer has downloaded the Mobile App (whether Branded or Generic), you will need to get the email address and Tax Code from them. For Branded App users, their Tax Code will be available from the settings menu inside the app.

Associate App Return in Desktop

To Associate an App Return with an Existing Return in Desktop, you will want to open the return and click on Personal Information and then Other Categories:

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu lists 11 items, with '1. Personal Information' highlighted by a red box. The main content area is titled 'Form' and contains a 'Personal Information Menu' with 10 items. Item '>>5. Other Categories' is highlighted by a red box. At the bottom right of the main content area, there is an 'Enter Option:' label followed by a small white input box.

Navigation Menu	Personal Information Menu
1. Personal Information	1. Name & Address
2. Income Menu	>>2. Dependents & Qualifying Children
3. Adjustments Menu	3. Filing Status.....[1]
4. Itemized Deductions Menu	4. Preparer Code.....[1]
5. Tax Computation Menu	>>5. Other Categories
6. Credits Menu	6. Full-year minimum essential health care coverage?.[YES]
7. Other Taxes Menu	7. Health Insurance through the Marketplace/Exchange?[NO]
8. Payments, Estimates & EIC	8. Scan Documents
9. Miscellaneous Forms	0. Exit
10. State Return	
11. View Results	

From Other Categories, you will see the option Associate with Pro App Return.

The screenshot shows a menu titled "Other Categories Menu" with a close button (X) in the top right corner. The menu contains the following options:

- 1. Allow Another Person to Discuss Return With IRS... [No]
- * 2. Third Party Designee Name..... []
- * 3. Third Party Designee Phone..... [- -]
- * 4. Third Party Designee PIN..... []
- 5. Disaster Designation..... []
- 6. Military Processing..... []
- 7. Attach PDF Document..... []
- 8. Print Date..... []
- 9. Force Itemized Deductions or Dual-Status Alien.... []
- 10. Print English or Spanish Forms..... [English]
- 11. Are you a non-paid preparer?..... [No]
- 12. Print organizer for client next year..... [No]
- 13. Mark Return as Private..... [NO]
- 14. Associate with Pro App Return?**
- 0. Exit

At the bottom right of the menu, there is a label "Enter Option:" followed by a small white input box.

In Desktop, you will need to ensure the email address used for the Taxes to Go account has already been added under Basic Information for the taxpayer. Once the email has been added, you can select Associate with Pro App Return. Selecting it will bring up another menu for you to enter the taxpayer’s Tax Code. (The Tax Code and the Security Code are the same thing.)

The screenshot shows a blue-bordered box containing the text "Security Code" followed by a white input field with a blue border.

After the Tax Code is added, both returns will be successfully linked.

Associate App Return in ProWeb

To Associate an App Return with an Existing Return in ProWeb, you will need to navigate to the Client Search list of your program. Once you find the client you want to associate with an App Return, select the Tools drop-down and choose Sync Return with Mobile App.

The screenshot shows a table of client search results. The table has columns for FIRST, LAST, PHONE, PREPARER, and STATUS. The first row contains the following data: Pro, Web, (850) 776-8044, In Progress. A 'Tools' dropdown menu is open, and the option 'Sync Return with Mobile App' is highlighted with a red box. Other options in the dropdown include Scanned Documents, Email Return, Client Status, Privacy Settings, Change Preparer, Deactivate, and App Chat History. A 'Select' button is visible next to the 'Tools' dropdown. Below the table, there are navigation buttons: '< Back' and 'Create 2019 Return >'. The page also shows pagination controls: 'Previous 1 Next'.

This will bring you to a page where you will need to enter the taxpayer's Email Address and Tax Code. (The Tax Code and the Security Code are the same thing.)

Sync Return with Existing App

Email Address

Security Code

Save

After the Tax Code is added, both returns will be successfully linked.

Taxes to Go FAQ

How do my customers get the branded app?

Your customers will get your branded app by using the custom Referral Link that is created in your Account Hub. After they put their information on the Referral Link website, their email address will be associated with your branded app. When they login to the app with this email address, it will show your branding.

How long does it take for a return to show in my branded app queue after it's submitted?

This process is nearly instantaneous. If a user sends you their documents and you don't see it in your program, please close and reopen the program. If the problem persists please call our Customer Support team for assistance.

Why don't I see my branded app in the app store?

Your branded app will not be shown in the app store. The branding is just a filter over the base Taxes to Go app. The branding is applied when the user logs into the app with the information entered on the Referral Link website.

Will information from last year's app pull forward into this year?

No. For security purposes, every year we discard the data from the prior year's app. Any information entered by the user into the app is only specific to the current year.

Does the information from the documents automatically upload into the data fields in the program?

The information from the documents will not automatically pull into the programs. You will need to view/print the documents to fill out the information for the tax return.

Can I create a new app account with the same email and phone number?

Taxes to Go accounts are created based on email address. You cannot use the same email for more than one account. You can, however, use the same phone number.

I pulled the app return into the program, but I need to restart. Can I pull it again?

Yes! In both programs if you delete/deactivate the return it will go back into the queue for you to pull again. For branded apps you will see it back in the list available to claim. For generic apps you will use the same email address and 6 digit code to repull.

My customer accidentally downloaded the generic app. Can I switch it to branded?

In order for the Mobile App to be branded, the taxpayer will need to start on the Referral Link Website from your Account Hub. Unfortunately, once the account has been created there isn't a way to switch from generic to branded. The user will need to uninstall the app and create a new account with a different email using your referral link.