# TaxPass Mobile App Walkthrough and App Breakdown

*Ver. 2018.51207.162, Rev. 12/13/2018*

# TaxPass

## Table of Contents

# TaxPass

## Introduction

As a customer, you have free access to both a Taxpayer mobile app (TaxPass) for your clients as well as an ERO app (ERO Go) for managing your tax offices. These apps work directly with one another to provide you and your taxpayers an unparalleled customer experience.

TaxPass - Taxpayer Mobile App

Your tax business now has its own mobile app for your taxpayers – all with your own name and logo. And you didn't have to spend time or money developing it!

## TaxPass Features:

➢ A user-friendly interface allowing the taxpayer to input their information to facilitate to the tax preparer.
➢ Ability to scan the taxpayer's driver license or state ID to import information into the client data screen(s).
➢ Ability to upload tax documents to send to the tax preparer.
➢ Ability to check the remote signature status of their return.
➢ Ability to chat by sending and receiving messages between the taxpayer and the tax preparer.
➢ Ability to check the status of their return
➢ Ability to view the location of their tax preparers' office.

# TaxPass

## Downloading and Installing the TaxPass Mobile App

➢ In order to use the TaxPass mobile app, the taxpayer will need to first download the app from the App Store (for iOS devices – left image below) or the Play Store (for Android devices – right image below) by searching for "TaxPass."
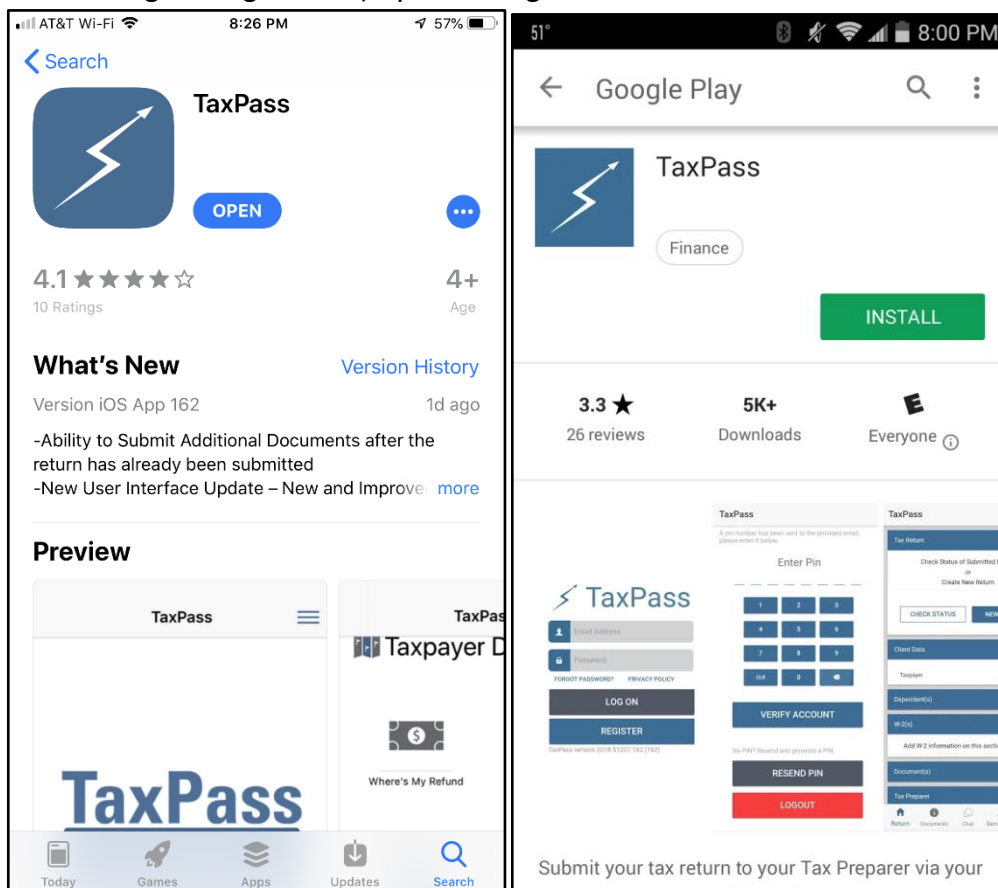


➢ TaxPass will only work on iOS devices running iOS 9.0 or higher and on Android devices running Android 4.1 (Jelly Bean) or higher.
**Note:** TaxPass will run slower on older devices compared to newer devices (for example, TaxPass will run slower on a device running Android 4.4.4 as opposed to a device on the latest version of Android)

➢ Once the taxpayer has downloaded and installed TaxPass to their device, the next step is to create a TaxPass account.

## Registering for a TaxPass Account

➢ When the taxpayer launches the TaxPass app for the first time, a login screen will appear.

# TaxPass

➢ Here the taxpayer has two buttons to click on:
1. **Log On**: Allows the taxpayer log in to their existing account after inputting their email and password above.
2. **Register**: Allows the taxpayer to register for a new account.



➢ If this is the taxpayer first time using TaxPass, they will click on the Register button at the login screen to create a new account.
➢ At the Register Account screen, the taxpayer will enter a valid email address and verify it below.
➢ Beneath the email fields, the taxpayer will enter in a password and verify it below.
**Note:** The created password will need to conform to NIST requirements, which includes:
1. A minimum of 8 characters
2. 1 uppercase letter
3. 1 lowercase letter
4. 1 number
5. 1 special character
➢ Below the password field is the Mobile App ID field. The Mobile App ID is a unique ID consisting of a QR barcode and eight unique characters, generated by the ERO from the ERO Go mobile app or via the web portal. This ID determines where the return will be sent.

# TaxPass

**Note:** The Mobile App ID is not required when the taxpayer registers for a new account. However, it will be required in order to submit the return to their tax preparer. If it is not entered at the Register Account screen, the taxpayer will be able to enter it at a later date within the app (more on that later.)

➢ If the ERO has provided the taxpayer with the Mobile App ID, the taxpayer can enter the code manually in this field or scan the QR code by clicking on the Scan button next to this field. Scanning the QR barcode will automatically populate this field with the eight-character code. Otherwise, they may leave this field blank.

➢ The taxpayer will need to accept the privacy policy by placing a check mark in the proper field and then click on Register to create the account.

**Note:** If there is an existing account with that email, the taxpayer will receive an error indicating that the username already exists.



➢ If the taxpayer entered a Mobile App ID (like in the screenshot above), a pop-up like the one below will appear after clicking on the Register button.
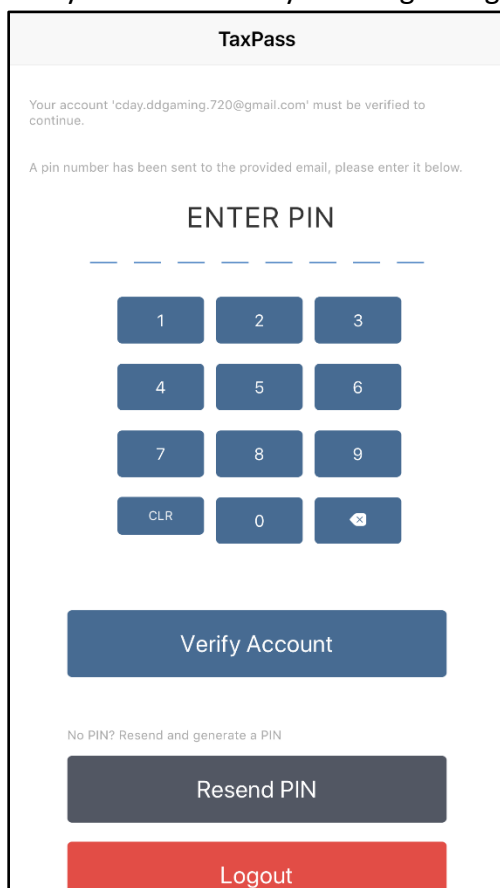
# TaxPass

**Is this the correct ERO?**

Team Kick Taxes * Tracy, CA 95376

| No | Yes |
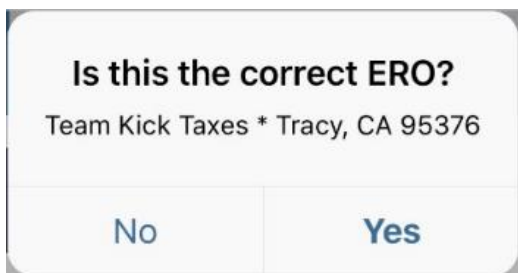
- ➢ The taxpayer will click on Yes to verify that that the scanned code belongs to their tax preparer.
- ➢ Once the taxpayer clicks on Yes on this pop-up OR if they clicked on Register without entering a Mobile App ID, they will then need to verify their email address.

## Verifying the New TaxPass Account

- ➢ After the taxpayer has clicked on Register, they will receive a screen where they will need to verify their account by entering an eight-digit pin number.

**TaxPass**

Your account 'cday.ddgaming.720@gmail.com' must be verified to continue.

A pin number has been sent to the provided email, please enter it below.

**ENTER PIN**

— — — — — — — —

| 1 | 2 | 3 |
| 4 | 5 | 6 |
| 7 | 8 | 9 |
| CLR | 0 | ⌫ |

**Verify Account**

No PIN? Resend and generate a PIN

**Resend PIN**

**Logout**

- ➢ This eight-digit pin will be sent to the email address used to create the account. The taxpayer will need to login to their email to retrieve this unique pin.

# TaxPass

➢ The email containing the Pin will have a subject header "Your TaxPass PIN". Once the taxpayer opens this email, they will see an eight-digit pin number.
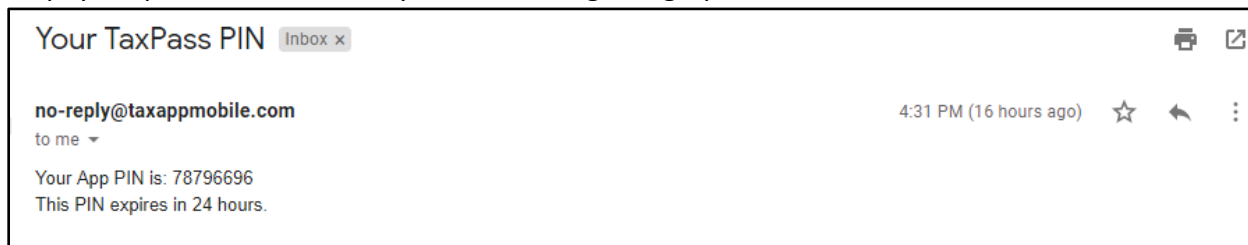


**Note:** If the taxpayer does enter this pin within 24 hours, as indicated in the email, they will need to click on Resend Pin on their next login to receive a new pin number.

➢ The taxpayer will enter this pin in TaxPass and then click on the Verify Account button (left image below.) Once they verify their account, the taxpayer will see the Tax Return menu to start a new return.

# TaxPass

## Logging In/Resetting the TaxPass Account

➢ If the taxpayer has already created a Taxpass account, then they will enter the email address for their account in the Username field and their password in the Password field.

➢ Once the taxpayer has entered their login credentials, they will click on the Log On button, to login to their account.



➢ If the taxpayer does not remember their password for their TaxPass account, they will need to click on the "*Forgot password?*" link underneath the Password field (left image below.)

➢ Once taxpayer clicks on this link, a new screen will appear prompting the taxpayer to enter in their TaxPass account email address. After they enter in their email, they will click on the Submit Email button (right image below.)

# TaxPass
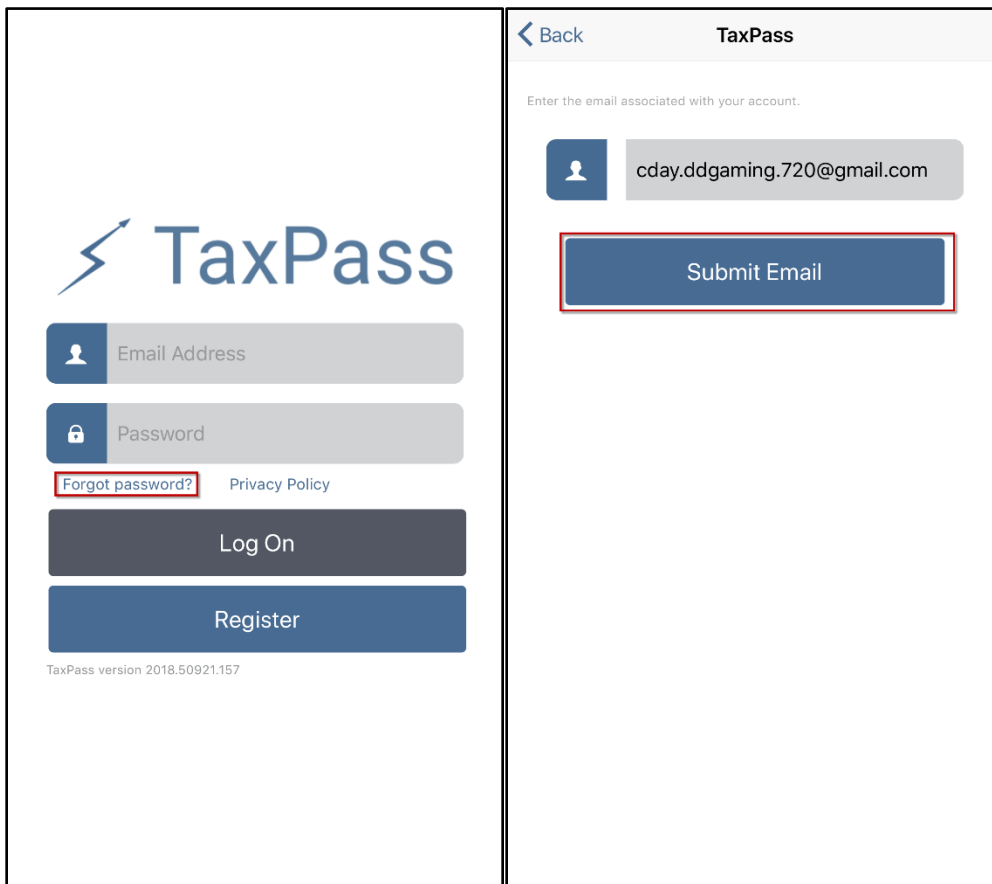


➢ Once the taxpayer clicks on the Submit Email button, an email containing an eight-digit pin will be sent to the email entered here and a new screen will appear in the app, prompting the taxpayer to enter this same pin.
**Note:** This step is like the account verification process when the taxpayer registers for a new account.

➢ After entering this pin, a new password will need to be entered and confirmed. Afterwards the taxpayer will click on the Submit Password button (left image below.)
**Note:** This new password must meet the NIST compliance standards as described in the "Registering for a TaxPass Account" section and cannot be a previously used password.

➢ After clicking on the Submit Password button, the taxpayer will be taken back to the login screen and a message will appear at the bottom of the screen indicating that the password was successfully reset. They can now login with the new password (right image below.)

# TaxPass



➢ After clicking on the Log On button, the taxpayer will see the Return menu screen.

## Return Menu

*Starting a New Tax Return and Scanning the Driver License/State Issued ID (Optional)*

➢ Once the taxpayer successfully creates a TaxPass account, they will click on the "New Return" button or the edit icon next to the Taxpayer field on the Client Data section to start a new return (left image below.)

➢ After clicking on Yes, a pop-up will appear asking the taxpayer if they would like to scan their driver's license or state issued ID barcode (right image below - a device with a camera is required for this step.)
**Note:** This pop-up is optional. The taxpayer is not required to scan their driver's license or state issued ID and may enter in this information manually on the client data screen.

# TaxPass
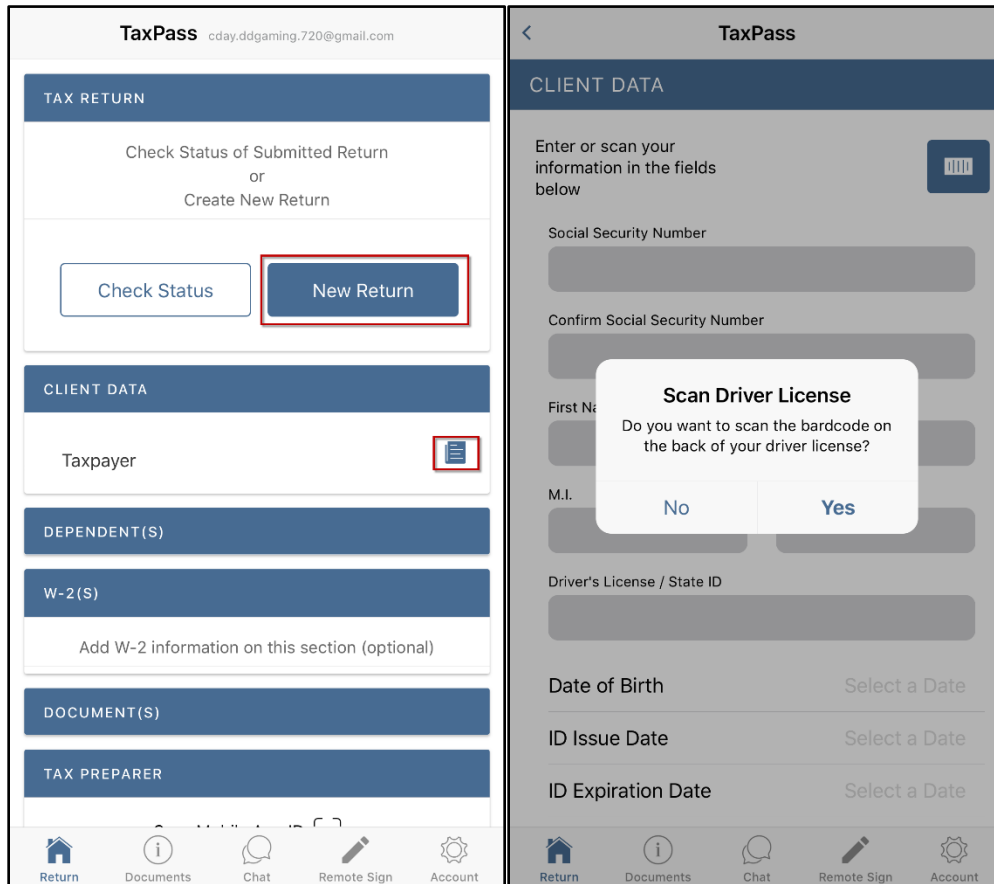


> ➤ If the taxpayer clicks on Yes, the device's camera will launch so that the taxpayer can scan the ID's barcode. Once scanned, the Client Data screen will auto-populate with the information from the scanned ID.

> ➤ If they click on No, then the pop-up will close, and the taxpayer will need to enter in this information manually.

> ➤ The taxpayer can also launch the scan option by clicking on the blue button above the social security number field, if the taxpayer clicked on No during the initial pop-up.

# TaxPass



*Completing the Client Data screen(s)*
- ➢ After the taxpayer has clicked Yes or No on the Scan Driver's License pop-up, they will need to complete the rest of the Client Data screens.
  **Note**: Only the fields with an * are required.
    - a. **Social Security Number***: Input the taxpayer's social security number.
    - b. **Confirm Social Security Number***: Confirm the taxpayer's social security number above.
    - c. **First Name***: Input the taxpayer first name.
    - d. **M.I.**: Input the taxpayer's middle initial or leave blank.
    - e. **Last Name***: Input the taxpayer's last name.
    - f. **Driver's License / State ID**: Input the taxpayer's driver's license or state issued ID.
    - g. **Date of Birth***: Input the taxpayer's date of birth.
    - h. **ID Issue Date**: Input the issue date for the ID in step **f.**
    - i. **ID Expiration Date**: Input the expiration date for the ID in step **f.**
    - j. **License Type**: Select the type of ID in step **f.**
    - k. **License/ID State**: Select the ID state in step **f.**
    - l. **US Address***: Input the taxpayer's main address.
    - m. **City***: Input the city name for the address in step **l.**

# TaxPass

n. **Address State\***: Select the taxpayer's residency state.
o. **Zip\***: Input the taxpayer's zip code for the address in step **l.**
p. Click on **Continue**.



q. **Filing Status**: Select the taxpayers' filing status.
r. **Occupation**: Input the title of the taxpayer's occupation. (Example: Manager, Worker, Retired, Homemaker, Sales, etc.)
s. **Home Phone**: Input the taxpayer's home phone number or leave the field blank.
t. **Work Phone**: Input your taxpayer's work phone number or leave the field blank.
u. **Cell Phone**: Input the taxpayer's cell phone number or leave the field blank.
v. **Text Message**: Check the box if taxpayer agrees to receive text messages from their tax preparer.
w. **Select a Cell Carrier**: Select the cell phone carrier for the cell phone in step **u.**
x. Click on **Continue**.

# TaxPass



y.  **Preferred Contact Method**: Select the taxpayer's preferred contact method.
z.  **Preferred Language**: Input the taxpayers' preferred language. (Example: English, Spanish)
aa. **Referral Type**: Input the taxpayer's referral type.
bb. **Referral Description**: Input the referral method description.
cc. **US Citizen/Residency**: Check the box if the primary taxpayer is a US citizen or resident alien.
dd. **Are you a dependent?** Check the box if the taxpayer can be claimed as a dependent on another person's tax return.
ee. **Are you blind?** Check the box if the taxpayer is blind.
ff. **Are you disabled?** Check the box if the taxpayer is disabled.
gg. **Do you Have a Spouse?** Check the box if the taxpayer has a spouse. If this box is checked, the taxpayer will need to complete the Spouse Data screen.
    **Note:** This box is checked automatically if the selected filing status is MFJ.
hh. Click on **Save** (left image below.)

➢ After the taxpayer clicks on Save, the app will return to the Tax Return menu screen (right image below.)

# TaxPass



**Note:** If the SSN entered on the Client Data screen has already been used in TaxPass, the taxpayer will receive a Service Error indicating so. TaxPass allows only one submission per SSN. Once an SSN has been submitted to a preparer from the app, that SSN is "locked" can cannot be submitted again ("First come, first served.")

# TaxPass



*Completing the Spouse Data screen(s) (if required)*

➢ After completing the Client Data screens, if the taxpayer check-marked the "Do you Have a Spouse?" option, the taxpayer will see a Spouse option below the taxpayer's name. They will click on the edit icon (left image below.)

➢ Once the taxpayer clicks on edit, a pop-up will appear asking the taxpayer to enter in the Spouse information. Click on Yes to continue.

# TaxPass
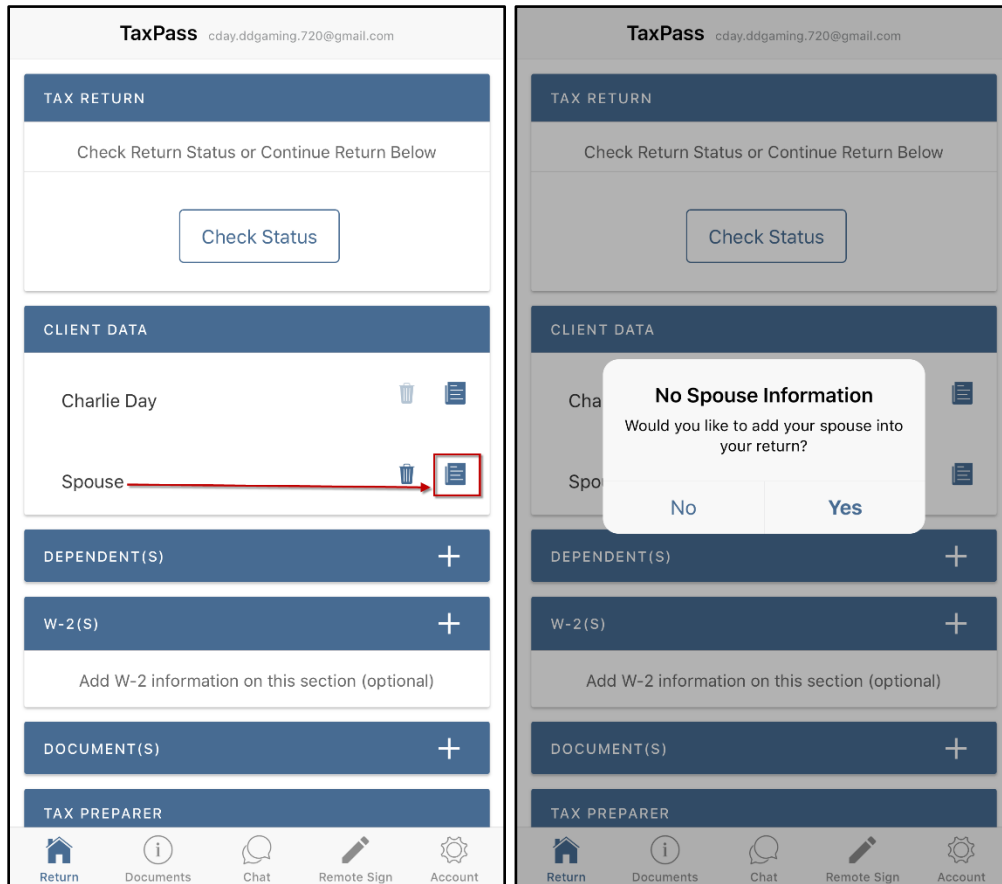


➢ The taxpayer will now need to complete the Spouse Data screens. These screens are similar to the Client Data screens for the taxpayer.
**Note:** It is possible to scan the spouse's driver license or state issue ID, like that of the primary taxpayer. Otherwise, only the fields with an * are required.
   a. **Social Security Number***: Input spouse social security number.
   b. **Confirm Social Security Number***: Confirm the spouse social security number above.
   c. **First Name***: Input spouse first name.
   d. **M.I.**: Input spouse middle initial or leave blank.
   e. **Last Name***: Input spouse last name.
   f. **Driver's License / State ID**: Input the spouse's driver's license or state issued ID.
   g. **License/ID state**: Select the ID's state in step **f.**
   h. **Date of Birth**: Input spouse date of birth.
   i. **ID Issue Date**: Input the issue date for the ID in step **f.**
   j. **ID Expiration Date**: Input the expiration date for the ID in step **f.**
   k. **License Type**: Select the type of the ID in step **f.**
   l. Click on **Continue**.

# TaxPass



m. **Email**: Input the spouse email.
n. **Occupation**: Input the title of the spouse occupation.
o. **Home Phone**: Input the spouse's home phone number or leave the field blank.
p. **Work Phone**: Input the spouse's work phone number or leave the field blank.
q. **Cell Phone**: Input the spouse's cell phone number or leave the field blank.
r. **Text Message**: Check the box if the spouse agree to receive text messages from their tax preparer.
s. **Cell Carrier**: Select the cell phone carrier for the cell phone in step **q.**
t. Click on **Continue.**

# TaxPass



u.  **Preferred Contact Method**: Select the spouse preferred method contact.
v.  **US Citizen/Residency**: Check the box if the spouse is a US citizen or resident alien.
w.  **Are you a dependent?** Check the box if the spouse can be claimed as a dependent in another person's tax return.
x.  **Are you blind?** Check the box if the spouse is blind.
y.  **Are you disabled?** Check the box if the spouse is disabled.
z.  Click on **Save** (left image below.)

➢ After the taxpayer clicks on Save, the app will return to the tax return menu screen (right image below.)

# TaxPass



*Adding a Dependent(s) (Optional)*
- ➢ If the taxpayer has any dependents, click on the plus sign on the Dependent(s) section (left image below.)
- ➢ Once the taxpayer clicks on the plus sign, a new screen will appear to enter the dependent's data. Once completed, the taxpayer will click on the Add button (right image below.)

# TaxPass



> ➢ After the taxpayer has clicked on Add, the dependent's name will appear on the Dependent(s) section. The taxpayer can click on the plus sign to add as many dependents as necessary.

# TaxPass
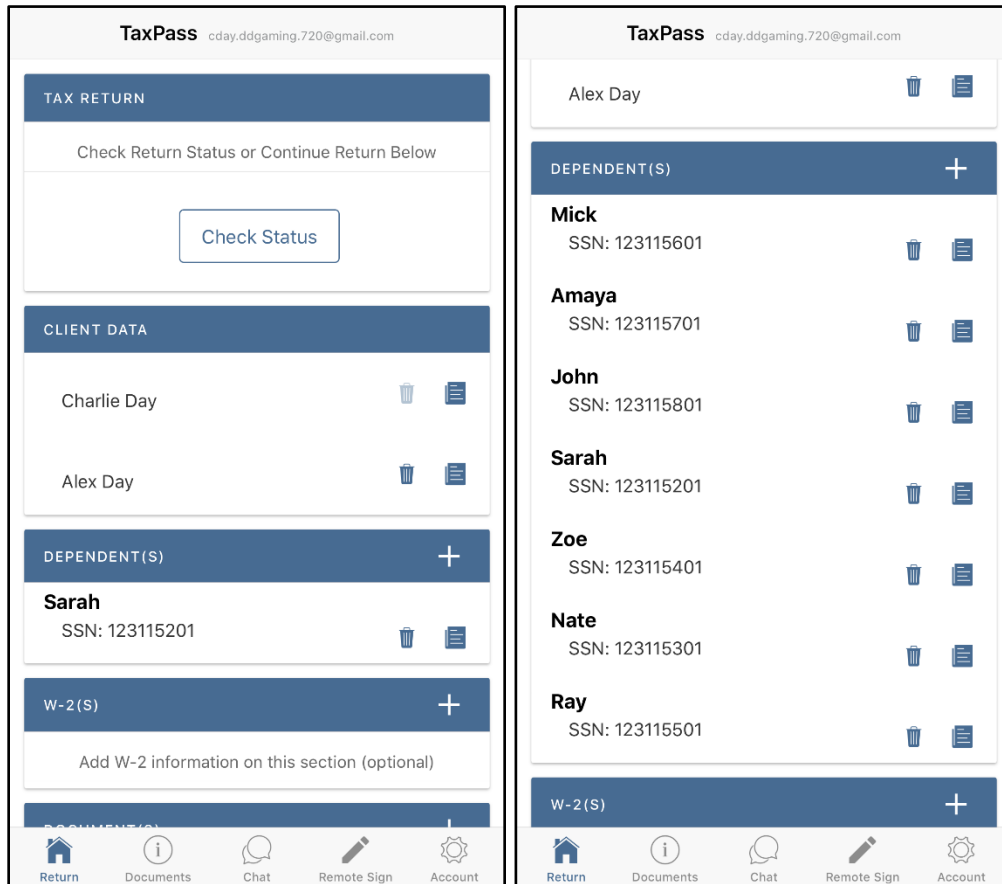


> ➤ If the taxpayer needs to edit a dependent's information, they may click on the edit icon to the right of the dependent's name and SSN (left image below.)
> ➤ The taxpayer can edit the dependent's information and click on Update (right image below.)

# TaxPass



- ➤ If the taxpayer would like to delete a dependent, they may click on the trash can icon to the right of the dependent's name and SSN (left image below.)
- ➤ A pop-up will appear asking the taxpayer if the would like to delete the dependent. Click on Yes to delete the dependent (right image below.)
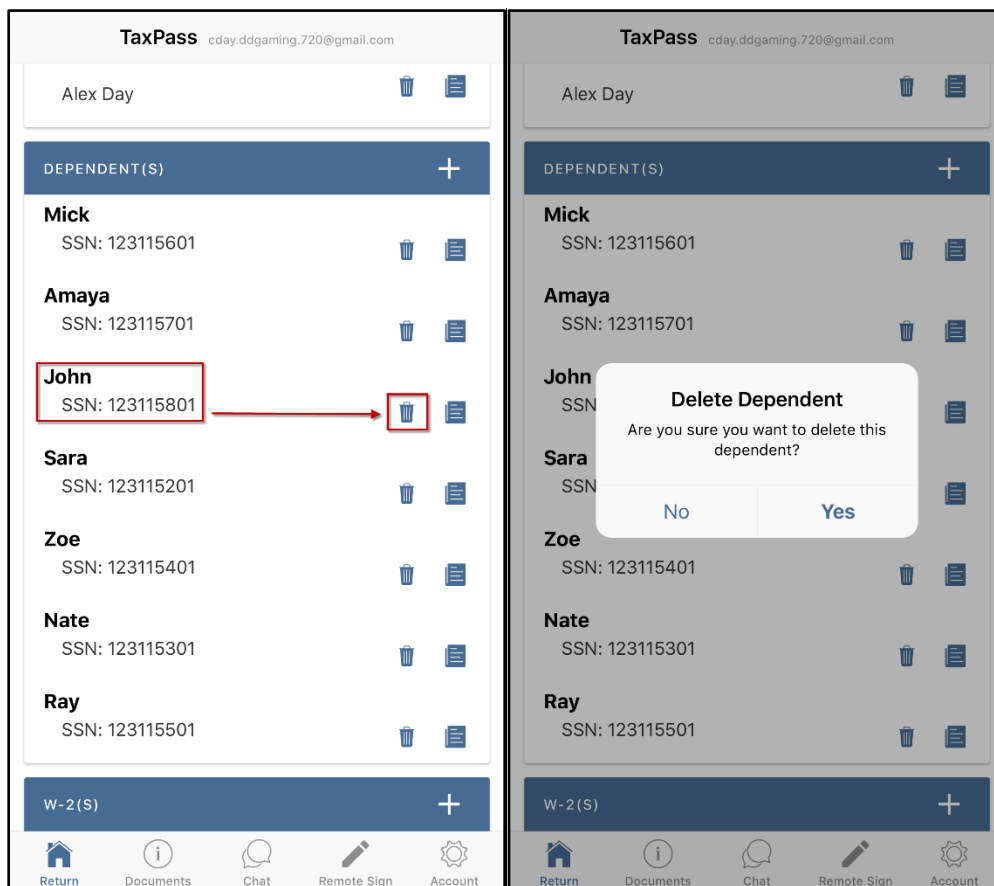
# TaxPass



*Adding a W2(s) (Optional)*
- ➢ If the taxpayer has any W2's they would like to add, clicks on the plus sign on the W2(s) section.

# TaxPass



> ➢ Once the taxpayer clicks on the plus sign, they will need to complete the W2 Form screens. The first screen will require the taxpayer to fill out the employer and employee information section of the W2.
> ➢ Once the taxpayer has completed this section, they will click on Continue.

# TaxPass



**Note:** The taxpayer can select whether the W2 belongs to the Taxpayer or the Spouse at the top of the W2 Form screen. Depending on which is selected, this will automatically fill out the employee portion of the W2 with the appropriate data. By default, the Taxpayer is checked.

# TaxPass



> ➢ On the next screen, the taxpayer will need to complete the federal portion of the W2 form (boxes 1-14). Once this section is completed, they will click on Continue.

# TaxPass

➤ On the final screen, the taxpayer will complete the state portion of the W2 form (boxes 15-20.) Once this section is completed, they will click on Save.



➤ After clicking on Save, the taxpayer will see the W2 they just added in the W2 section. They can add as many W2s as needed to this section.

# TaxPass



> ➢ If the taxpayer needs to edit a W2's information, they may click on the edit icon to the right of the W2 information.

# TaxPass



➢ If the taxpayer would like to delete a W2, they may click on the trash can icon to the right of the W2's name and EIN.

➢ A pop-up will appear asking the taxpayer if they would like to delete the W2. Click on Yes to delete the W2 (right image below.)

# TaxPass
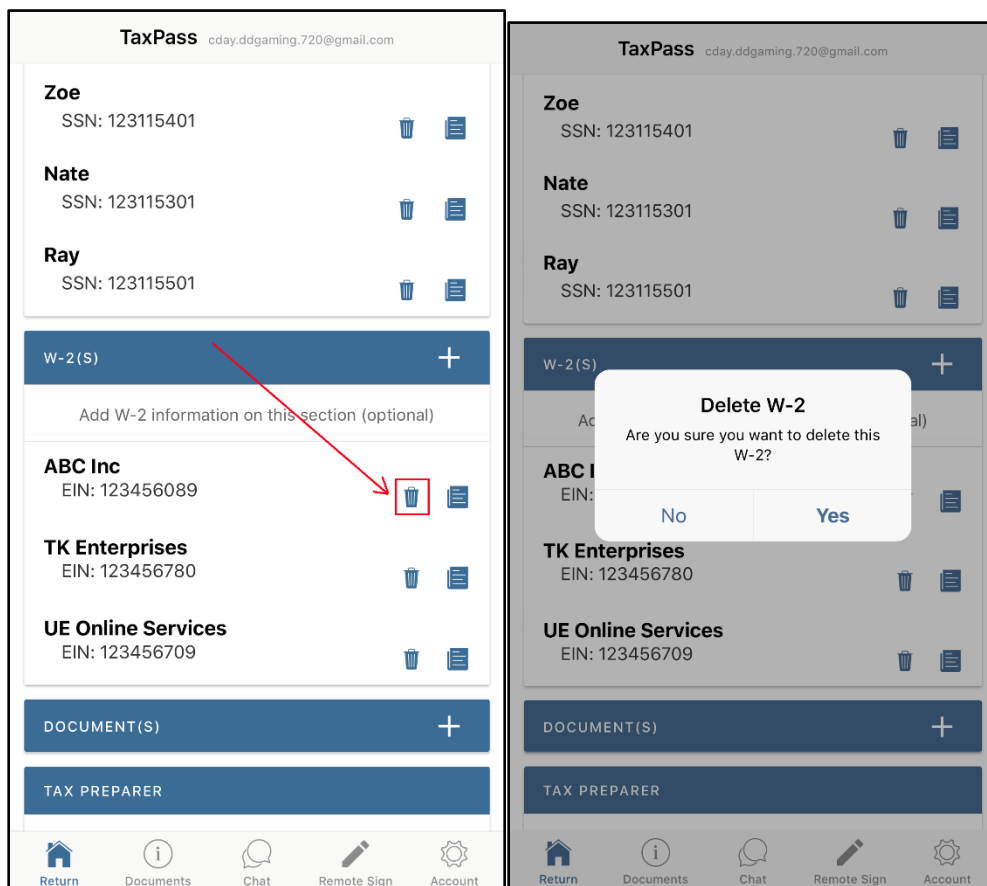


*Uploading Documents (Optional)*
- ➢ If the taxpayer has any documents they would like to add, click on the plus sign on the Document(s) section (left image below.)
- ➢ Alternatively, the taxpayer may also click on the Documents menu at the bottom to upload documents to the return (right image below.)

# TaxPass
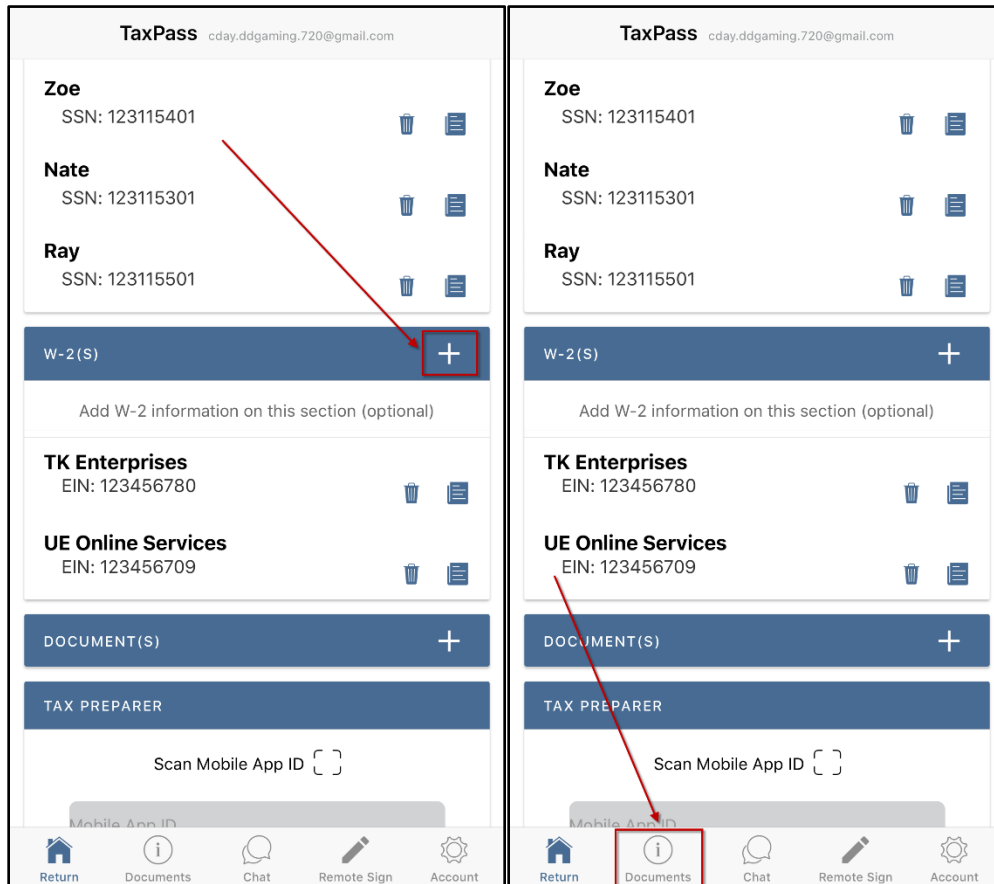


> ➤ After they click on the plus sign or Documents menu, the taxpayer will see the Add Documents screen. They can upload documents into one of the following six sections:
>   - **MISC:** upload any documents that do not fall into one of the categories below.
>   - **TAXPAYER:** upload taxpayer identification documents.
>   - **SPOUSE:** upload spouse identification documents.
>   - **W2:** upload W2 forms.
>   - **1098:** upload 1098 forms
>   - **1099:** upload 1099 forms.

# TaxPass
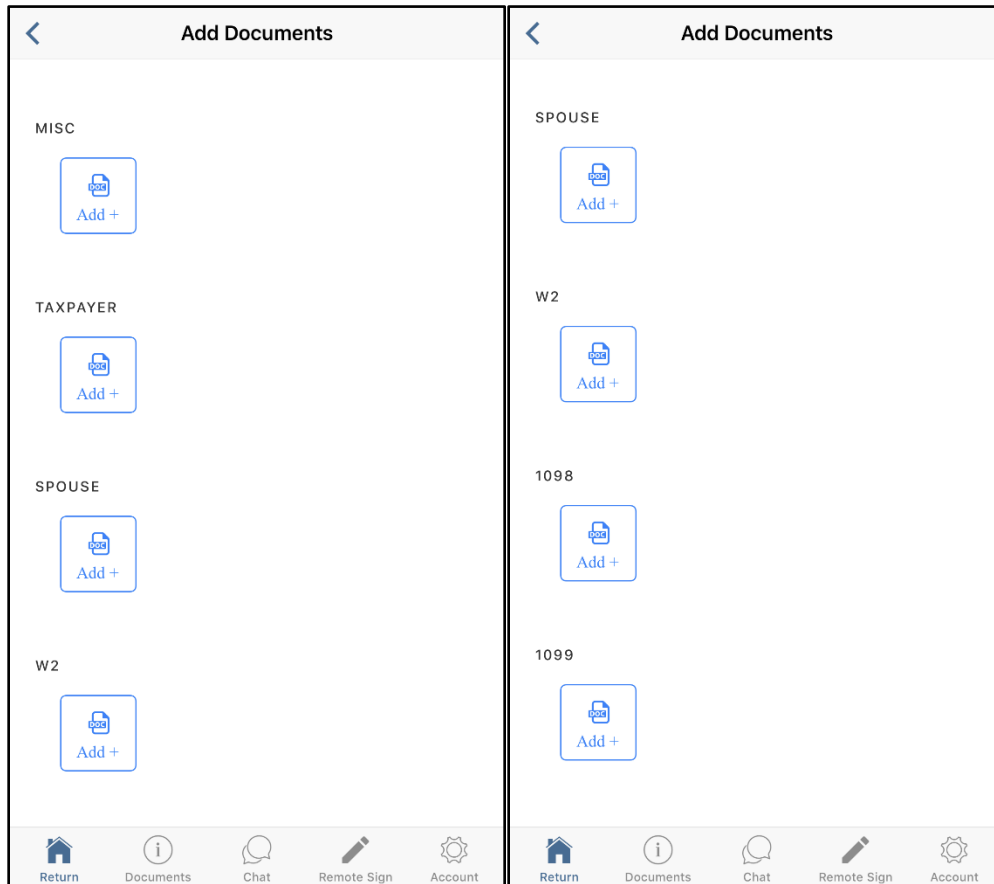


➢ To add a document to the return, the taxpayer will click on the Add button on one of the Document sections. Once they do, a pop-up will appear to add a document to the return one of two way (left image below):

- **Capture Documents:** this will launch the devices camera to take a picture of the document to upload.
- **Add from Gallery:** this will allow the taxpayer to select a saved picture from their device's picture gallery to upload into the app.
  **Note:** Only one image may be uploaded at a time when adding a document from the gallery (cannot select multiple images at once.)

➢ Once a document has been uploaded, the image will be shown in the uploaded section (right image below.)
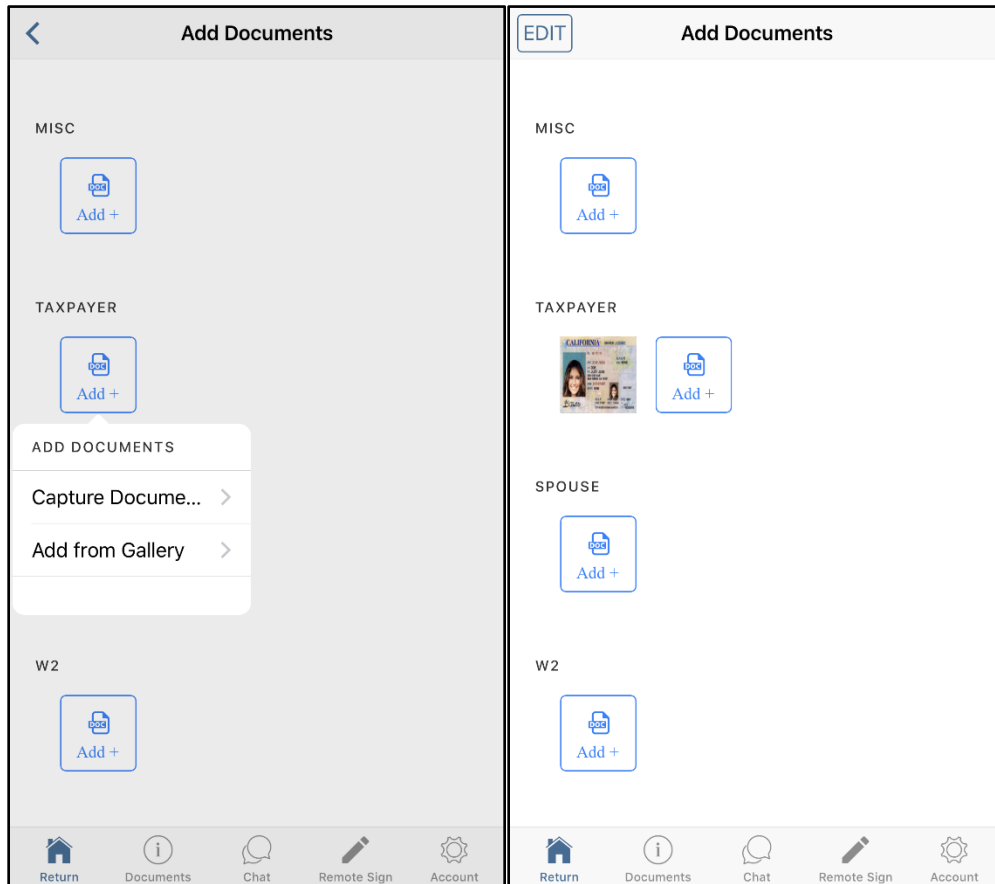
# TaxPass



- ➢ The taxpayer can add as many documents as needed to the Add Documents screen (left image below.)
- ➢ Clicking on an uploaded image will show the taxpayer a clearer image of the document (right image below.)

# TaxPass
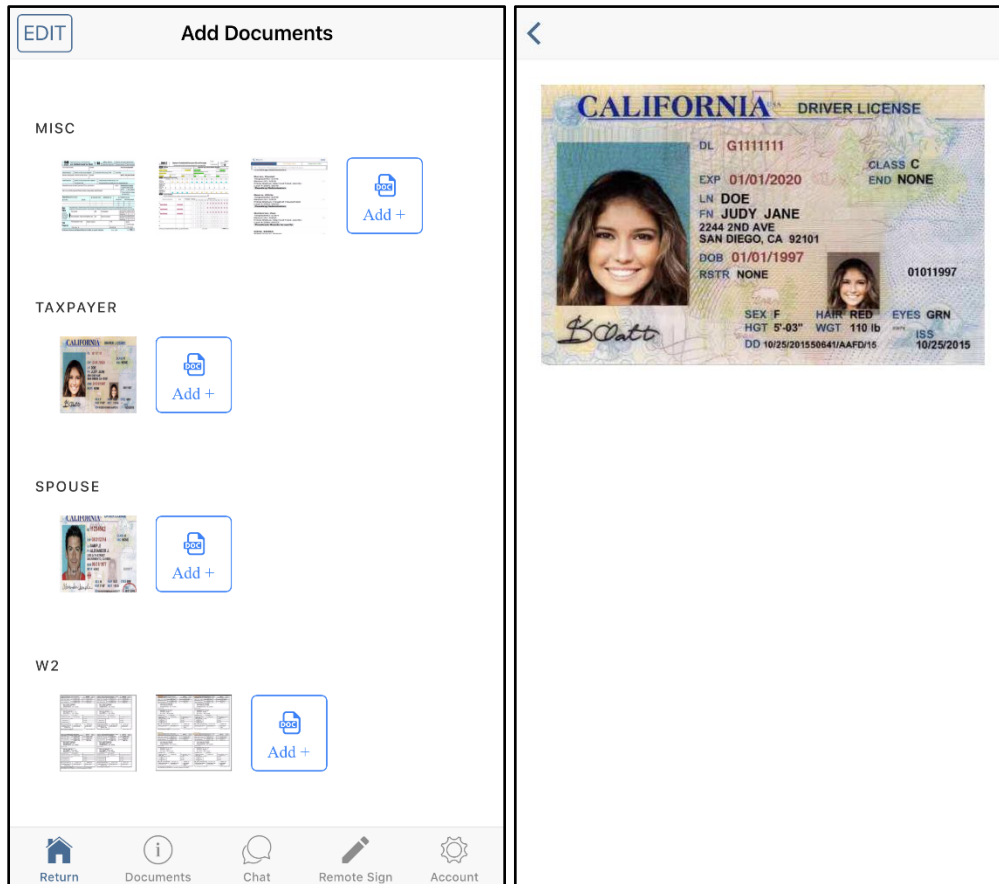


> ➤ On the upper left-hand corner of the Add Documents screen, the taxpayer also has an Edit button (left image below.)
> ➤ If the taxpayer clicks on the Edit button, they can then select a document (or multiple documents) by clicking on it. This will place a checkmark on the selected document (right image below.)
> ➤ Once an image has been selected, they can do one of two things:
>   - Move the uploaded document
>   - Delete the uploaded document

# TaxPass
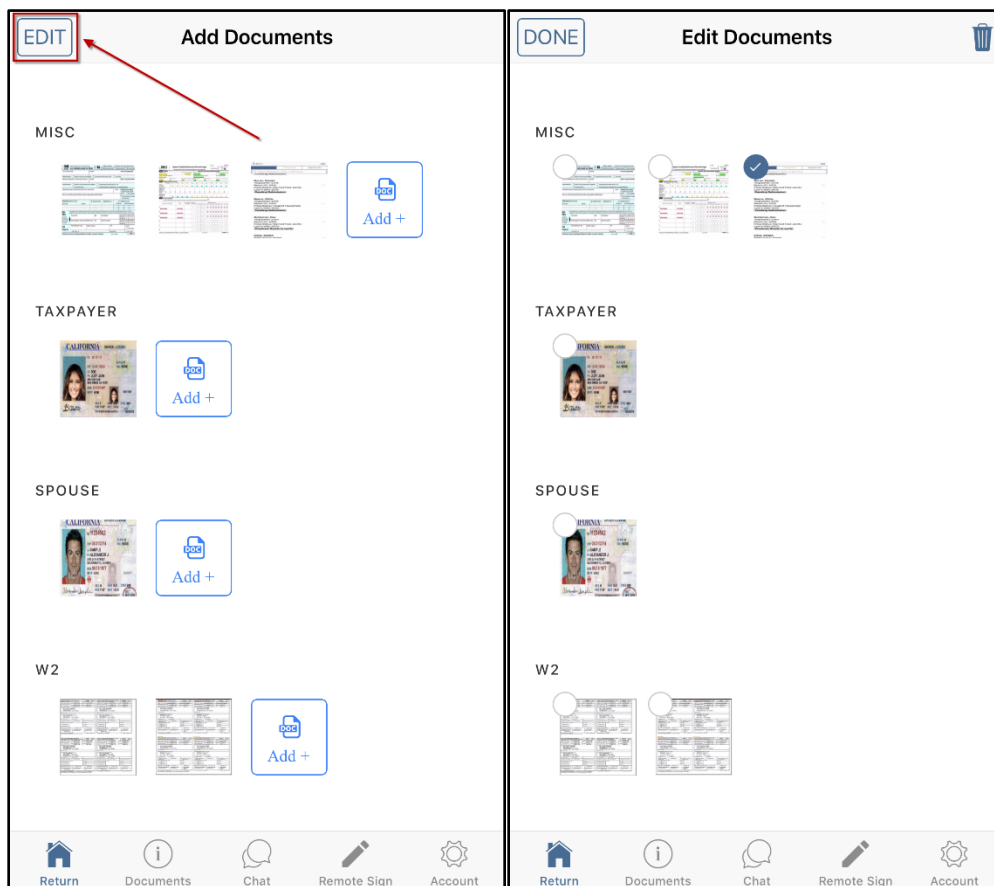


- ➢ To move a document, the taxpayer will scroll to the bottom of the page where they will see a Move button (left image below.)
- ➢ Once the taxpayer clicks on the Move button, a pop-up will appear asking the taxpayer to select the section they would like to move the selected document(s) to (right image below.)

# TaxPass
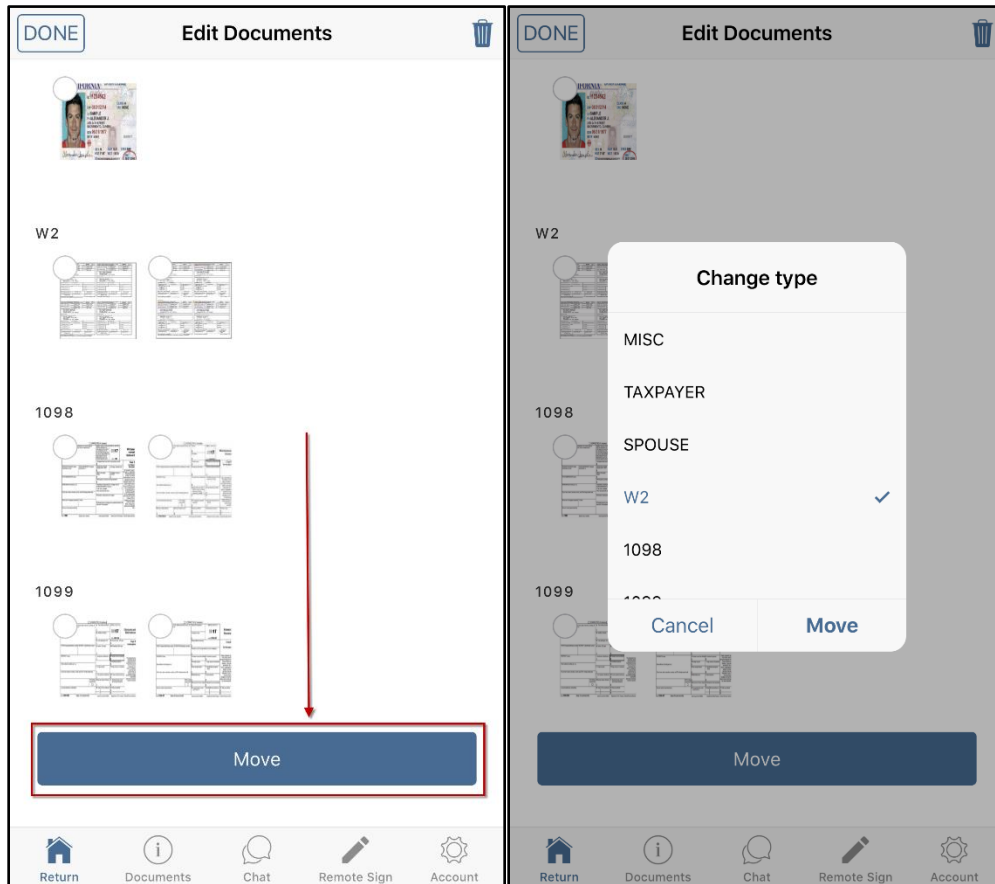


- ➢ To delete a document, the taxpayer will click on the trash can icon on the upper right hand corner of the screen (left image below.)
- ➢ Once the taxpayer clicks on the icon, a pop-up will appear asking the taxpayer if they would like to delete the selected document(s) (right image below.)

# TaxPass
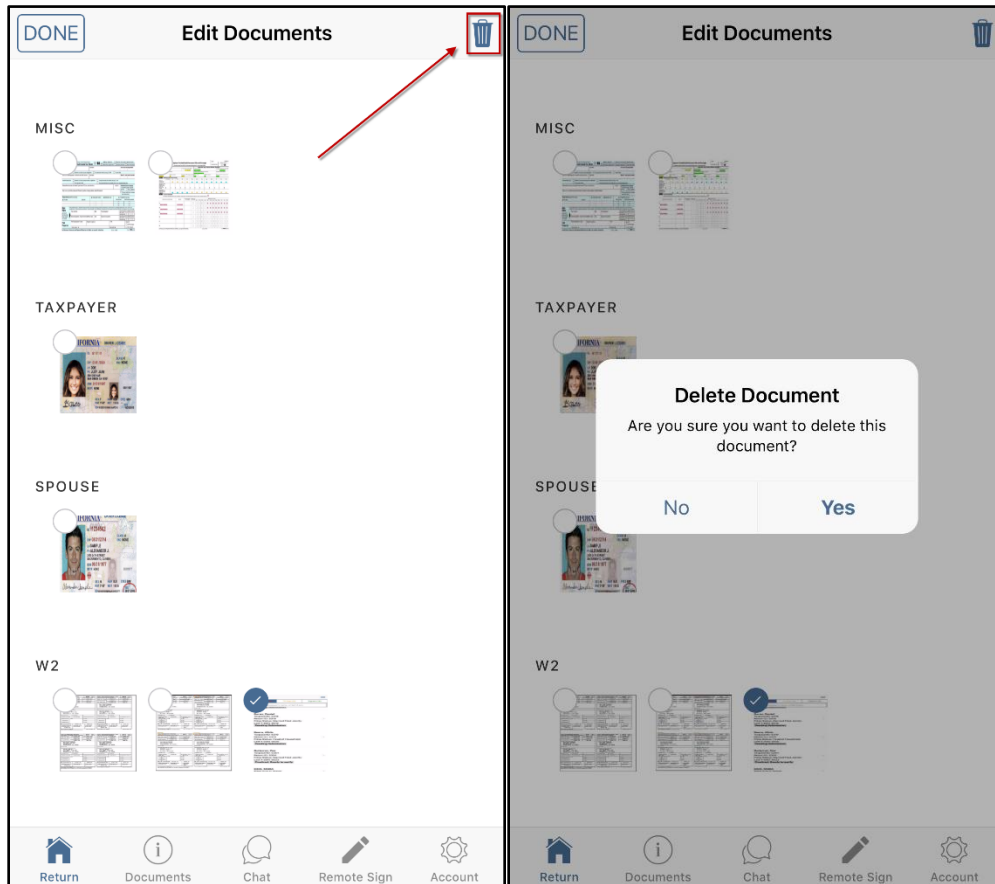


- ➢ Once the taxpayer has finished uploading all the documents they would like to add to the return, they will click on the Upload button at the bottom of the Add Documents screen (left image below.)
- ➢ A pop-up will appear to confirm the upload (right image below.) Click on Upload to add the documents to the return.

# TaxPass
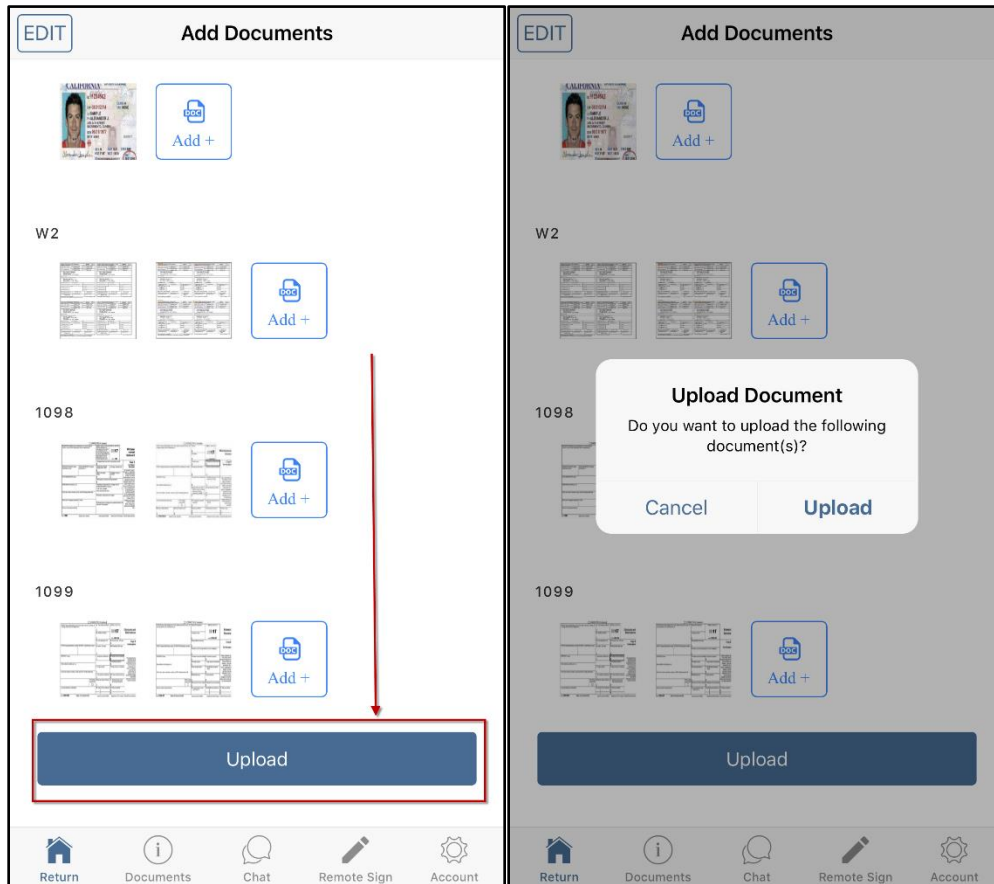


> ➢ Once the documents have been uploaded to the document, the app will return the taxpayer to the Return menu and a pop-up will appear indicating that the upload was successful.

# TaxPass
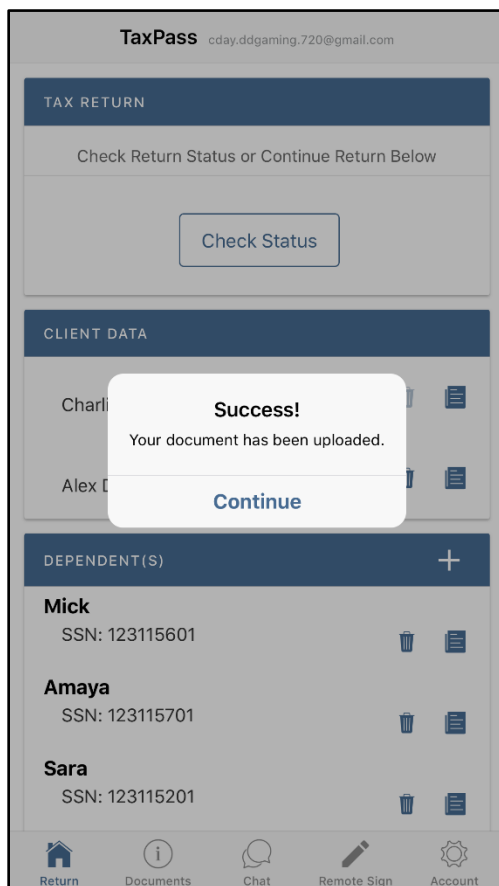


**Note:** The upload documents process may take a while based on the number of documents uploaded and device used (Uploading documents on an older Android 4.4.1 device will take longer compared to one running the latest version.)

# TaxPass
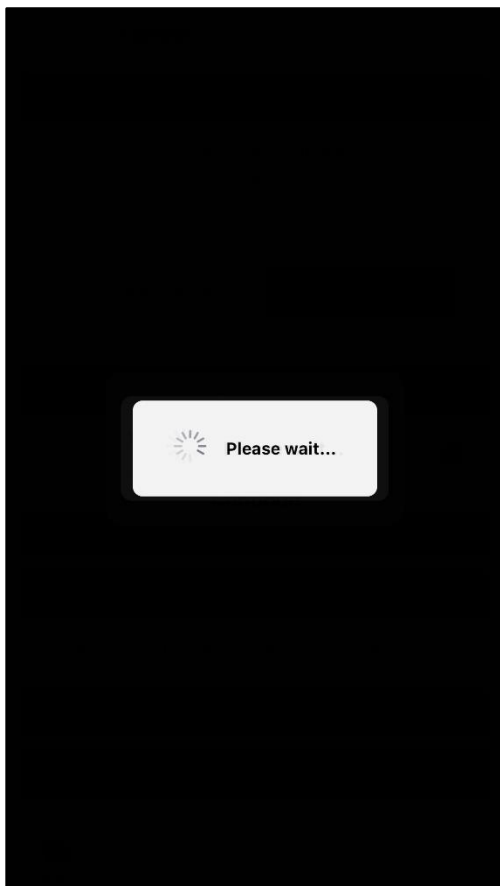


➤ The taxpayer may then scroll down to the Documents section to view a list of all the uploaded documents. These documents are sorted by the date they were uploaded to the return.

# TaxPass
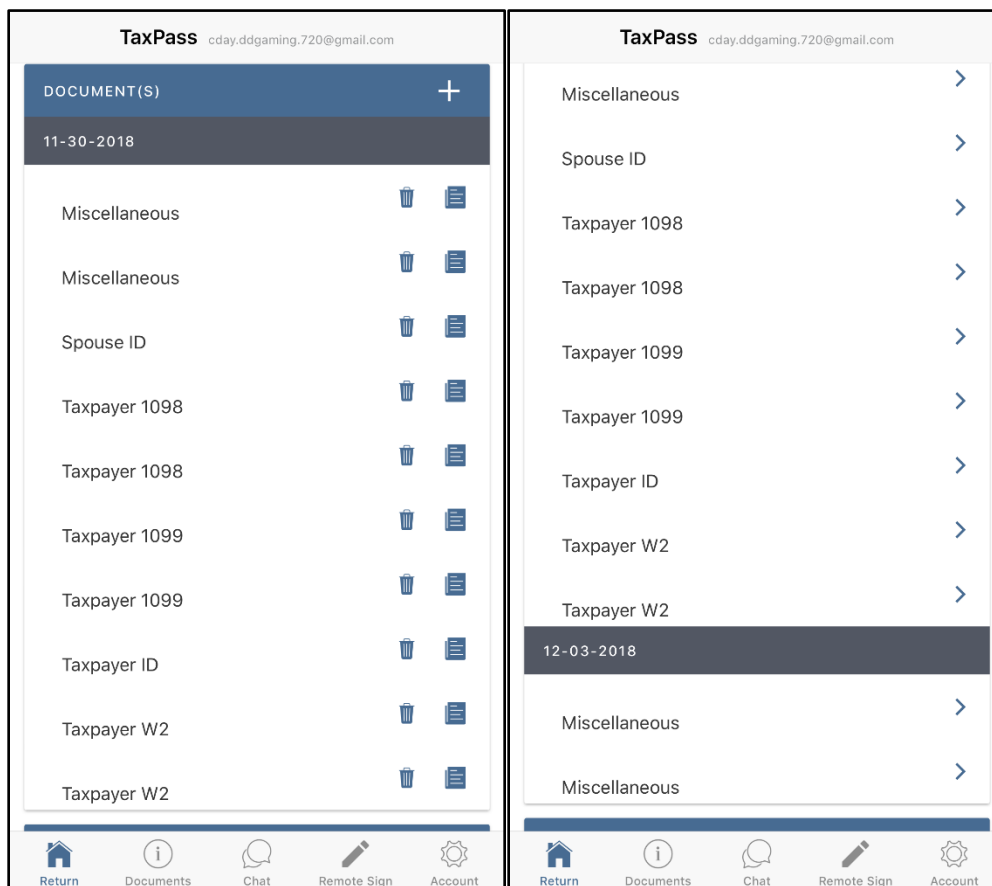


**Note:** Beginning in the 2019 season, the taxpayer can now submit documents for their return **AFTER** the return has been submitted. This will need to be done from the Documents menu at the bottom.

*Entering the Mobile App ID and Submitting the Return to the Tax Preparer*

➢ If the taxpayer did not enter the Mobile App ID during the account registration, the taxpayer will need to enter it in the Tax Preparer section. The taxpayer can enter in this code manually in the Mobile App ID field or they can scan the Mobile App ID barcode by clicking on the scan button (left image below.)

➢ If they click on the scan button, a pop-up asking the taxpayer if they would like to scan their tax preparer's Mobile App ID barcode (right image below.)
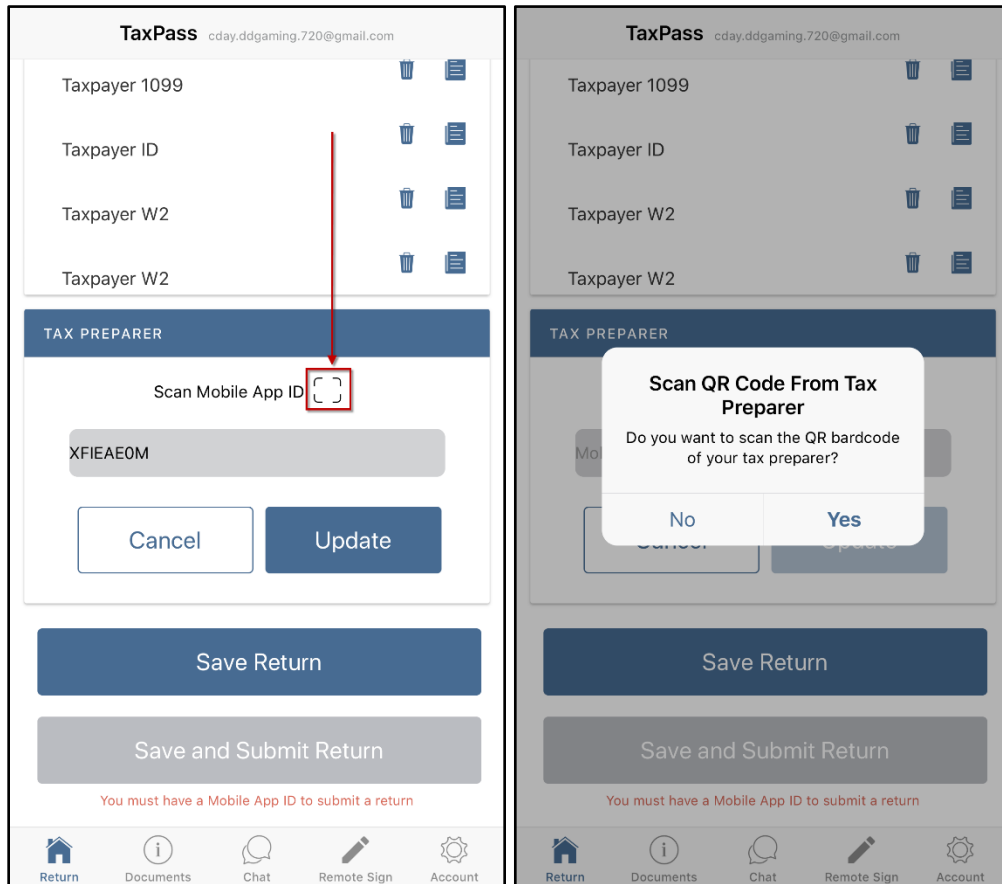
# TaxPass



- ➢ Once the taxpayer enters or scans the Mobile App ID into TaxPass, click on the Update button (left image below.)
- ➢ Just like at the account registration, a pop-up will appear asking the taxpayer to confirm that the Mobile App ID entered belongs to their tax preparer (right image below.) Click on Yes to update the Mobile App ID.
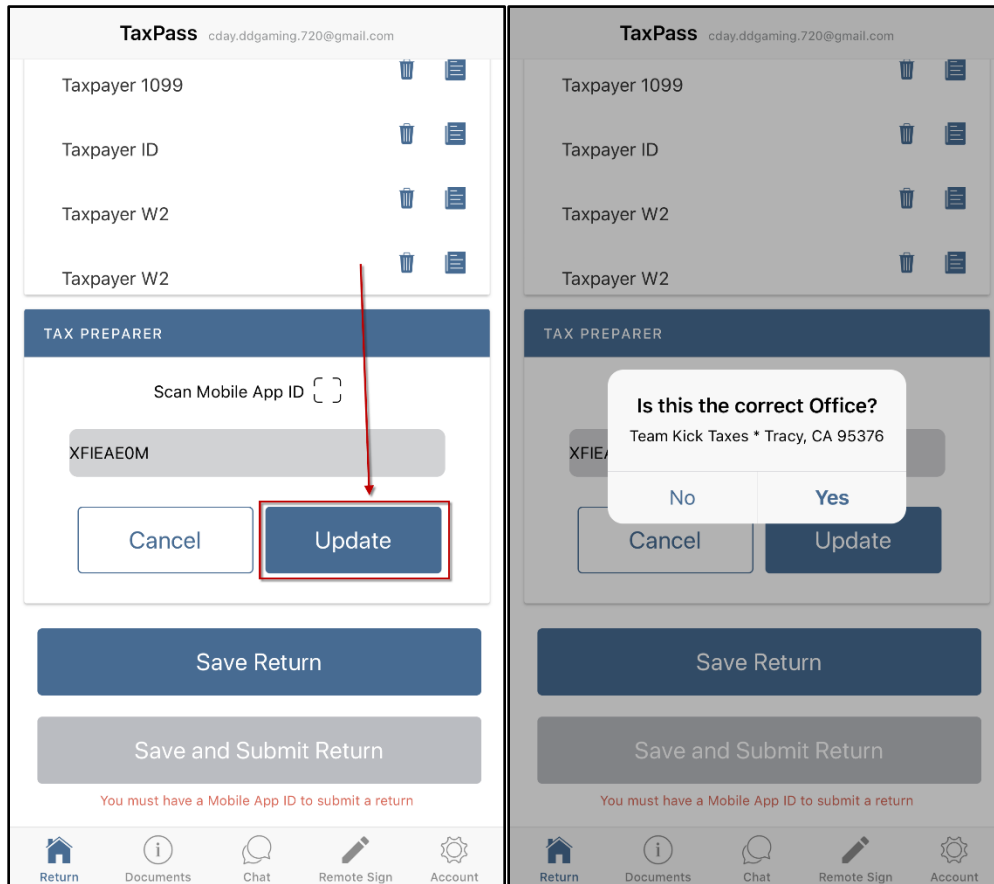
# TaxPass



- ➢ A pop-up will appear once the Mobile App ID has been successfully updated (left image below.)
- ➢ The taxpayer will now see their tax preparer's information in the Tax Preparer section (right image below.)

# TaxPass



➢ After the taxpayer has entered the Mobile App ID, the may click on one of two buttons:
   1. Save Return
   2. Save and Submit Return
➢ Clicking on the Save Return will save all the return information entered above without submitting the return to the tax preparer.

# TaxPass
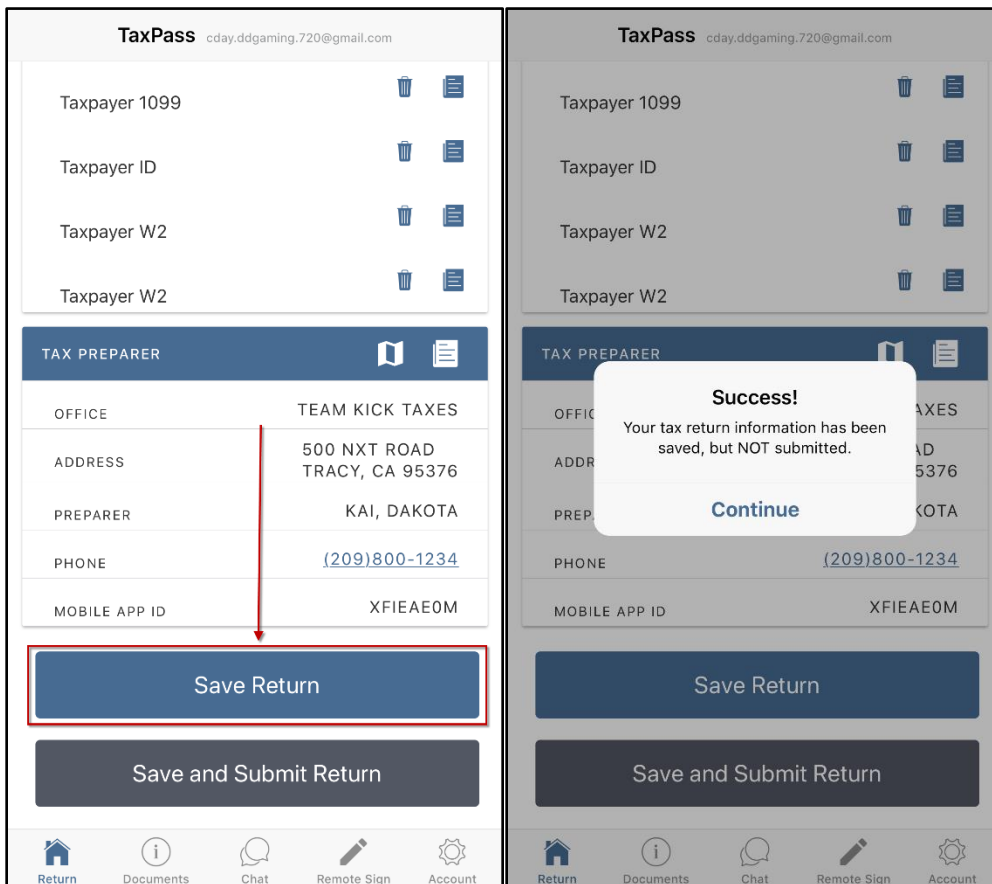


> ➤ Clicking on the Save an Submit Return button will submit all the entered information in the Return menu to the tax preparer.
> **Note:** If the taxpayer has not entered their tax preparer's Mobile App ID, then this button will be greyed out and the taxpayer can only Save the return. A message in red below the Save and Submit Return button indicates that the tax return cannot be submitted without the Mobile App ID.

# TaxPass



> ➢ Once the taxpayer enters clicks Save and Submit button, a pop-up will appear asking the taxpayer if they are certain that they would like to submit the return to the tax preparer (right image below.)
> ➢ **IMPORTANT:** Once a return has been submitted to the tax preparer the return is locked, and the taxpayer cannot add or edit any of the information on the data entry screens. However, they may still upload and submit documents after the return submission from the Documents menu.

# TaxPass
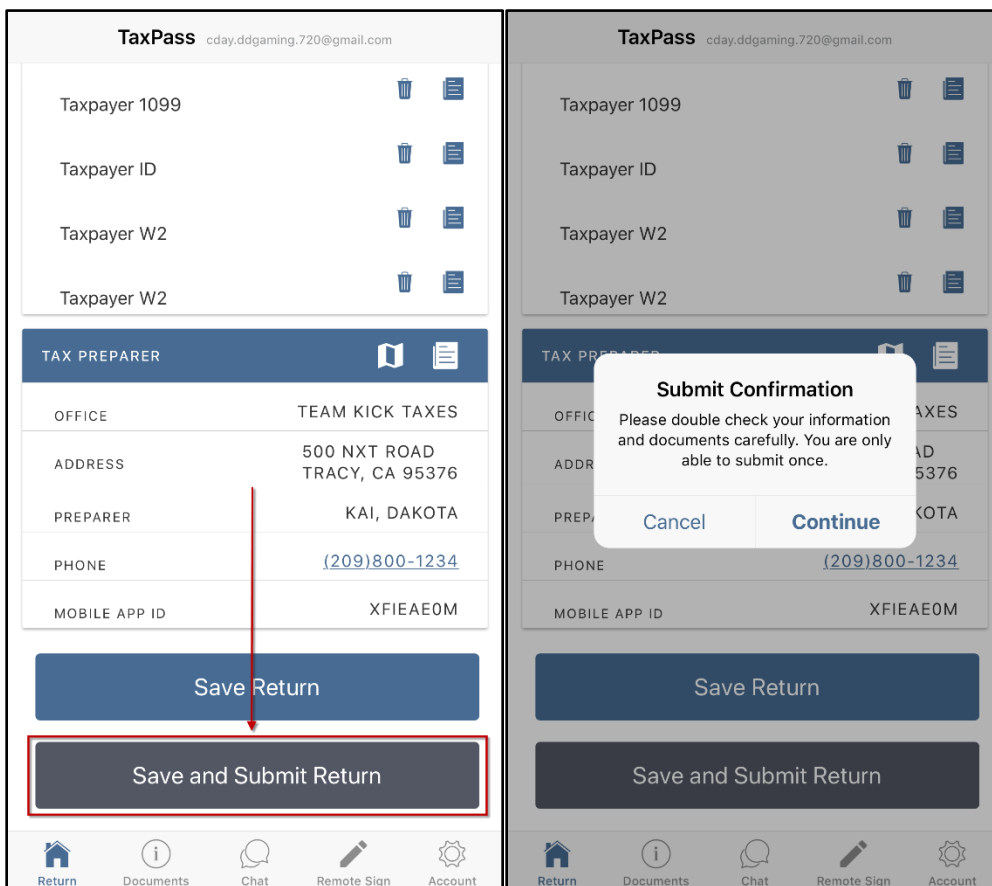


➢ Once the taxpayer clicks on Continue on the Submit Confirmation pop-up above, the return will then be submitted to the tax preparer (left image below.)

➢ Once submitted, all of the sections in the Return menu become read-only/view-only fields (right image below.)

# TaxPass
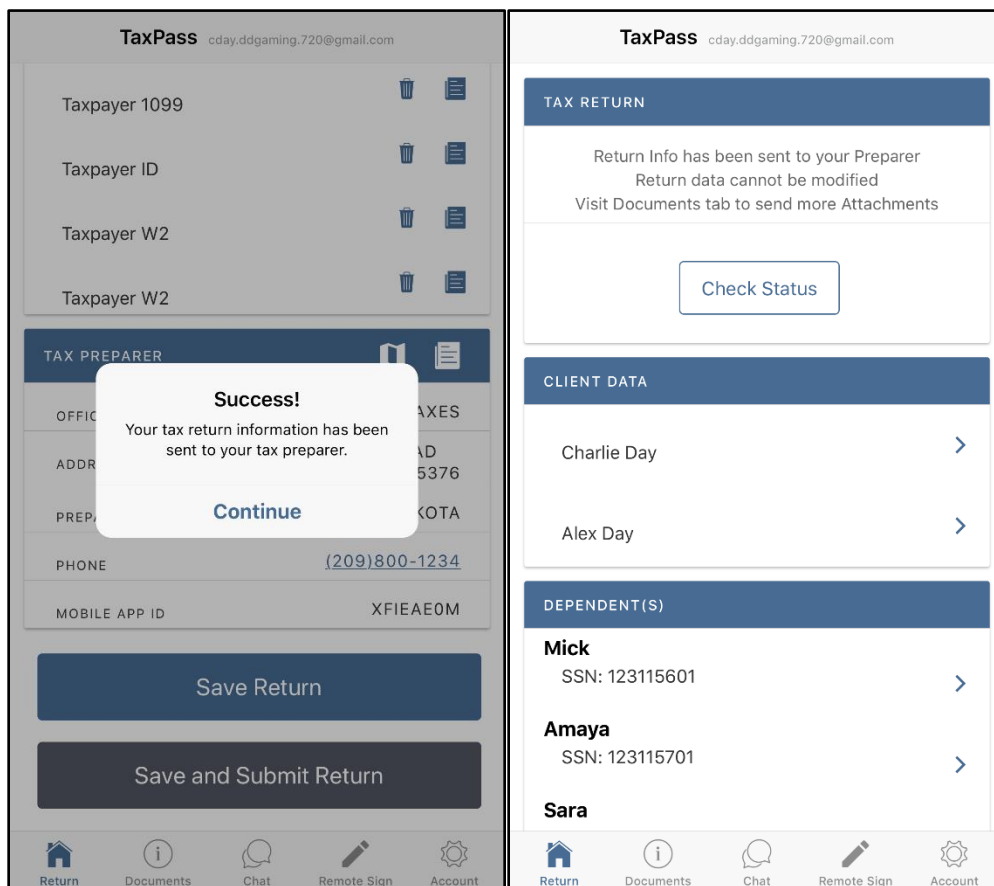


> If the taxpayer clicks on the arrow button next to the Taxpayer's name (as an example), they will be able to view the information entered and submitted to the tax preparer.
> **Note:** Notice that all these fields are greyed out, if they click on any one of these sections. Remember, once the taxpayer submits their return information to the tax preparer, they cannot change any of this information and will be view-only.

# TaxPass



> ➢ Additionally, the tax payer may also resubmit their tax return to a different office by changing the Mobile App ID. To do this, they will click on the Edit button in the Tax Preparer section (left image below.)
> ➢ After clicking on the Edit button, the taxpayer will enter or scan the Mobile App ID for the new office/tax preparer (right image below.)
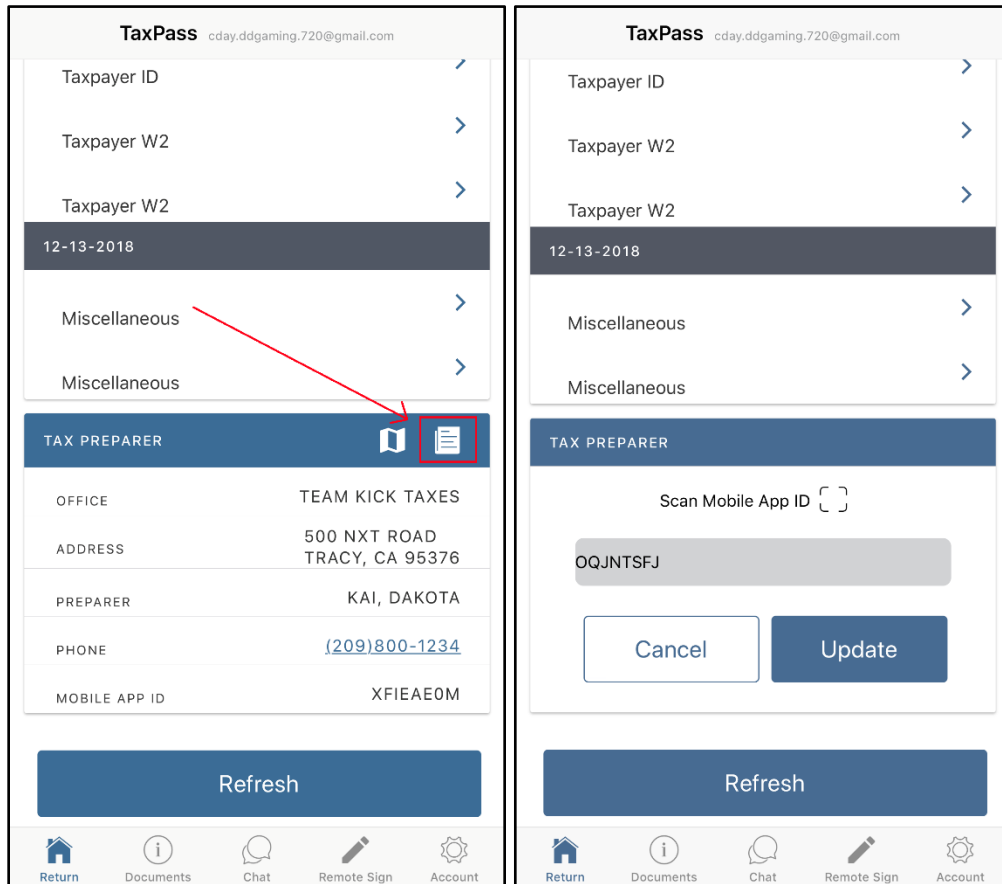
# TaxPass



> ➢ Like before when entering the Mobile App ID for the first time, a pop-up will appear asking the taxpayer if the entered Mobile App ID is correct. The taxpayer will click on Yes on this pop-up to change the Mobile App ID.

# TaxPass
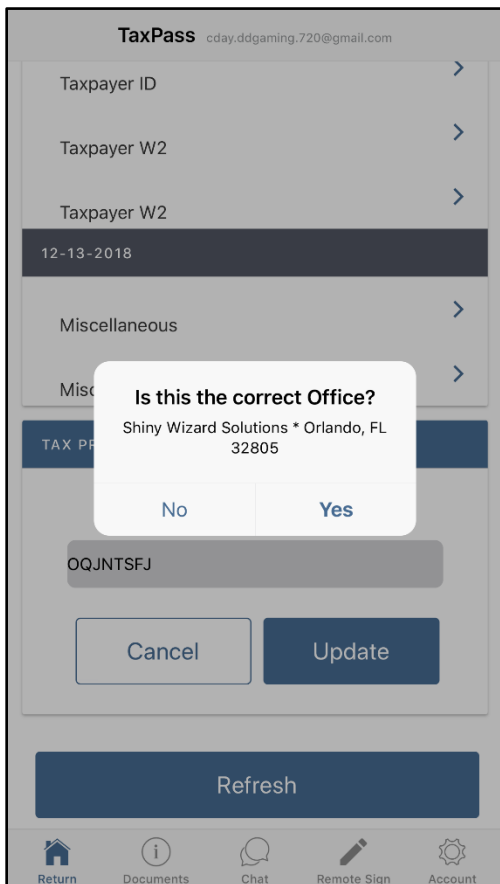


> Once the Mobile App ID has been changed, another pop-up will appear letting the taxpayer know that the Mobile App ID has been changed (left image below.) A second pop-up will appearing letting the tax preparer know that the tax return has been resubmitted to the new office (right image below.)
> **Note:** When changing the Mobile App ID after the return has already been submitted, the return will automatically be submitted to the new office (return CANNOT be edited.) Afterwards, the return will no longer be available under TaxPass Mobile App Retrieval in the 2019 software for office one and will only be available for office two (the returns is essentially moved.)

# TaxPass
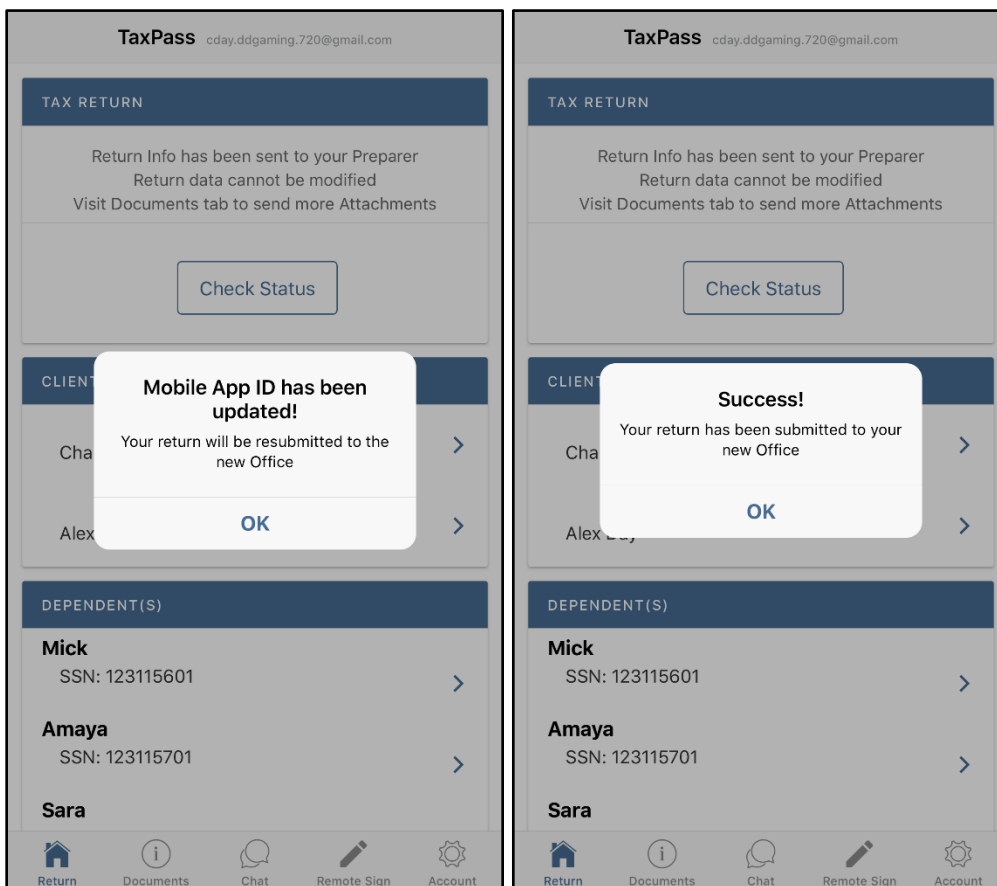


> ➤ The taxpayer may also scroll down to the Tax Preparer section to view the new office's information.

# TaxPass



*Check Status Button*

➢ The Check Status button is used to check the status of the taxpayer's tax return once it has been e-filed by the tax preparer.

# TaxPass
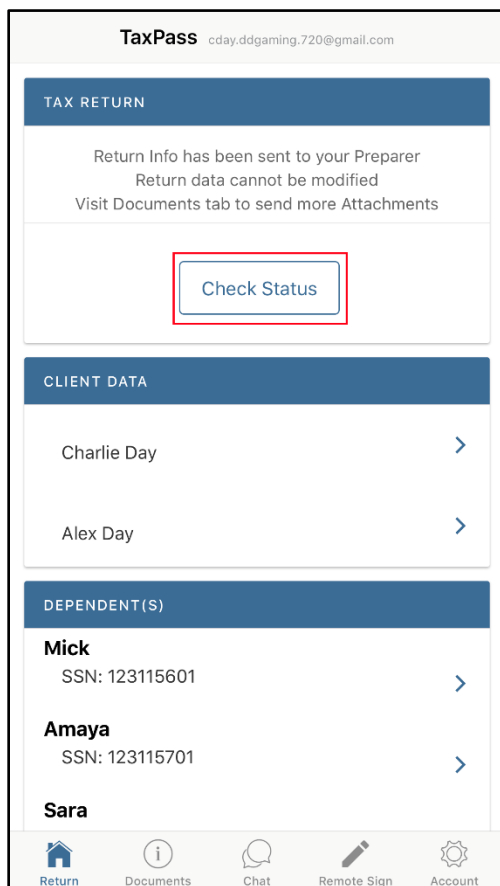


> ➢ If the taxpayer clicks on the Check Status button after they have submitted their return, but the preparer has not e-filed the return, a service error will appear indicating no e-filed information could be found.

# TaxPass

| Return Status | Return Status |
|---|---|
| FEDERAL | FEDERAL |
| RETURN STATUS            N/A | RETURN STATUS            N/A |
| DATE ACKNOWLEDGED        N/A | DATE ACKNOWLEDGED        N/A |
| REFUND AMOUNT            N/A | REFUND AMOUNT            N/A |

**Fetch Error Refund**

No information found. Please try again later or contact your tax preparer

**OK**

Return  Documents  Chat  Remote Sign  Account

Return  Documents  Chat  Remote Sign  Account
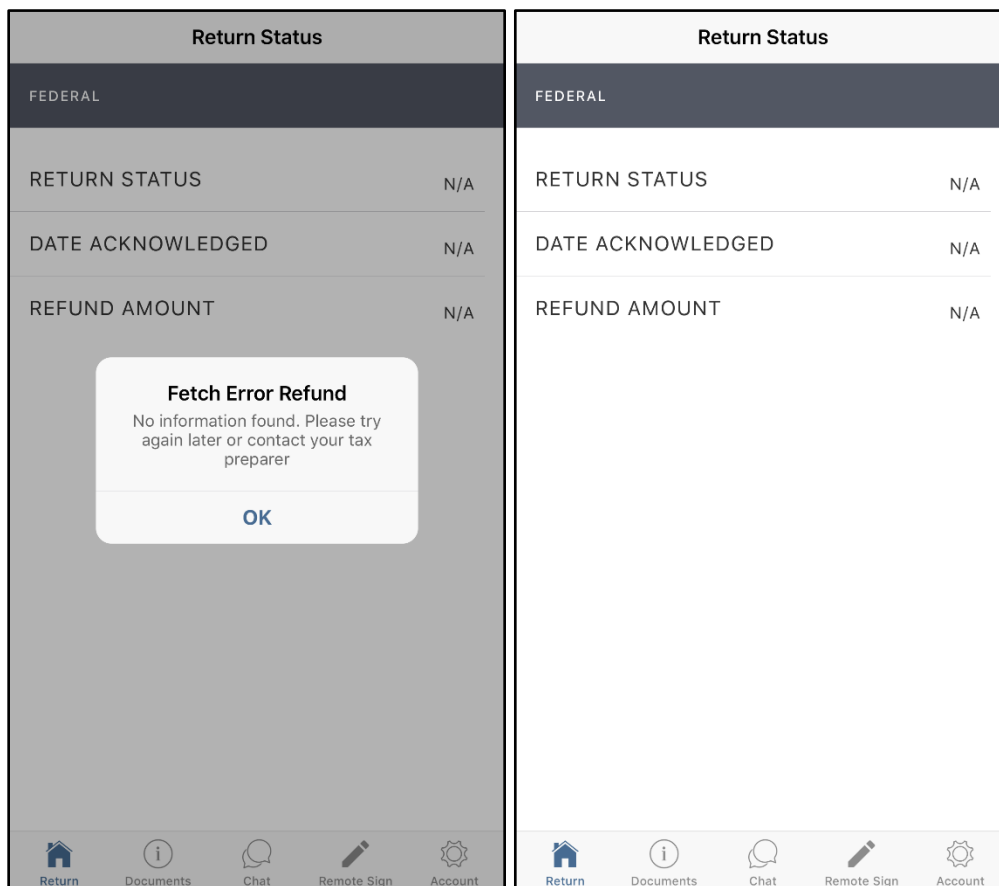
➢ If the taxpayer clicks on the Check Status button after they have submitted their return and the preparer has e-filed the return, the taxpayer should be able to view the current status of their return.

**Note:** The example below is of a return submitted from TaxPass version 1 for Tax Year 2017 since the IRS is not accepting Tax Year 2018 returns at the time this document was created. In the previous TaxPass version, this was known as the Where's My Refund Menu.

# TaxPass



> ➢ If the taxpayer clicks on the Check Status button but has not submitted a return from TaxPass, a pop-up will appear indicating that no submitted return was found with this username (right image below.) Instead, they may enter the information of the tax return e-filed to the IRS (left image below.)

# TaxPass



➢ If they click on Yes, the taxpayer will need to enter the SSN, Last Name and Filing Status of the return status they want to check and click on Submit. This will pull the tax return's refund status from the Central Site, if it was e-filed.

# TaxPass



## Documents Menu

➢ The Documents menu is used to upload pictures of documents that the taxpayer would like to send to their tax preparer along with their tax return or after the return has been submitted.

# TaxPass
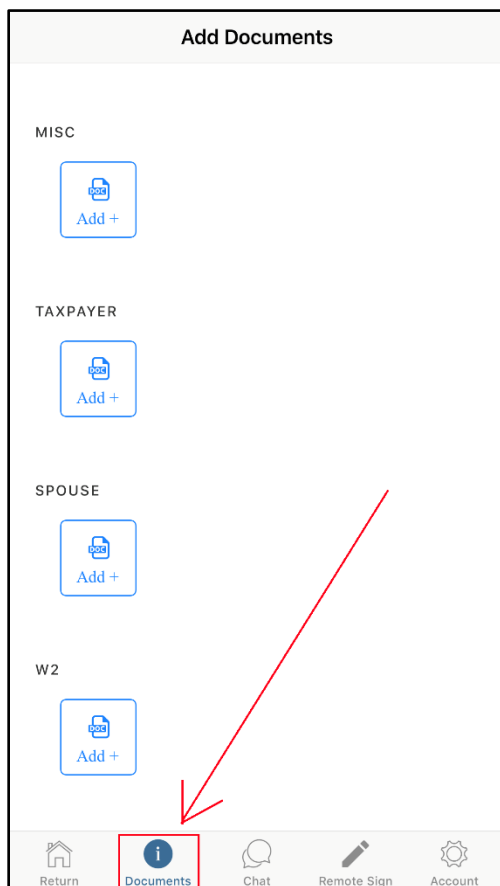


- ➢ The process of uploading documents through this menu is the same as uploading documents from the Return menu screen – see *Uploading Documents (Optional)*
- ➢ This menu can only be accessed after entering the taxpayer information on the Client Data screens. If the taxpayer clicks on this menu before doing so, they will receive the message below.

# TaxPass

**Add Documents**

Client Data section must be
filled out before documents are
able to be uploaded to your
preparer.

| | | | | |
|---|---|---|---|---|
| Return | Documents | Chat | Remote Sign | Account |
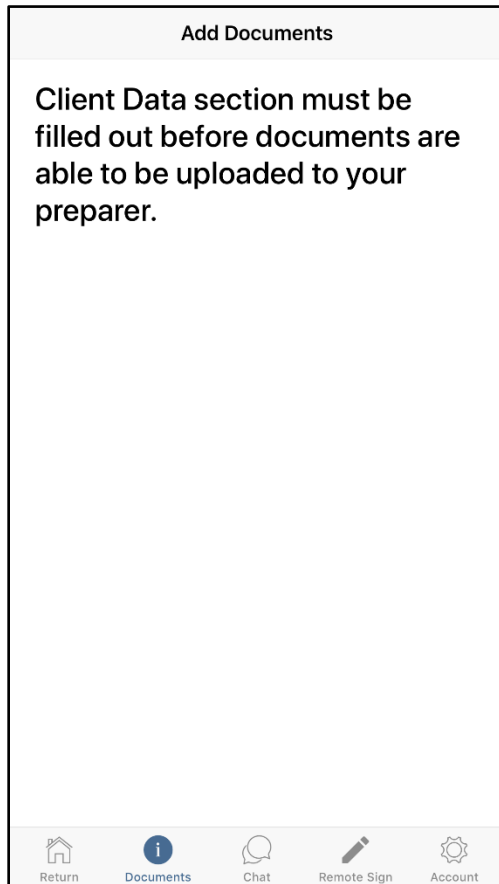
➢ If the taxpayer has submitted their tax return to the tax preparer but would like to submit additional documents, then the taxpayer must submit these from the Documents menu, as they will be unable to do so from the Return menu.

# TaxPass



➤ When submitting documents from the Documents menu, click on the upload button at the bottom of the screen and then the Upload button again on the pop-up. This will upload and submit the documents to the tax preparer **BUT** will not close out the Upload pop-up.
**Important:** If the taxpayer uploads documents from this menu and then clicks on one of the other menus (such as the Return menu) without clicking on the Upload button, at the bottom then the uploaded documents will disappear and will need to be re-uploaded.
**Note:** Any documents uploaded **AFTER** the return has been submitted to the tax preparer will automatically be submitted.

# TaxPass
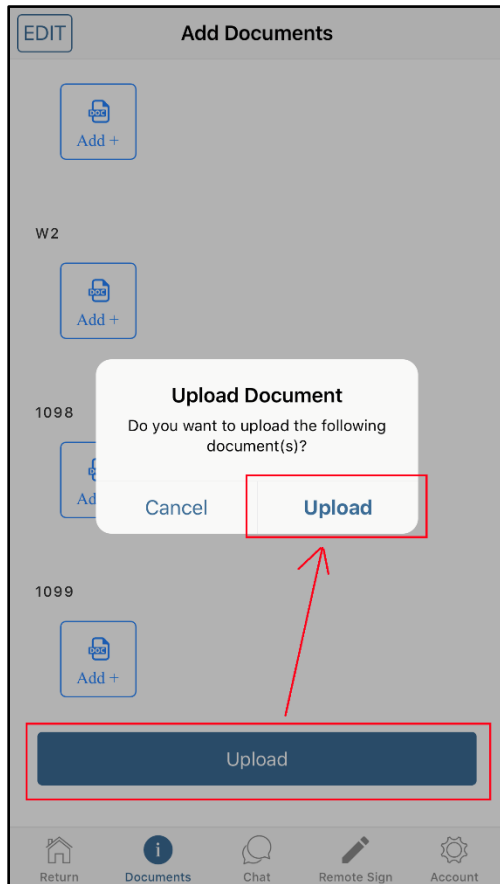


➢ After clicking on Upload on the pop-up once, the taxpayer can click on Cancel on the pop-up and then click on the Return menu to view the uploaded documents.

➢ The taxpayer will then need to click on Save or Refresh button at the bottom of the Return menu (depending if the taxpayer has already submitted their return to the taxpayer or not) to refresh the screen and view the uploaded documents.

# TaxPass
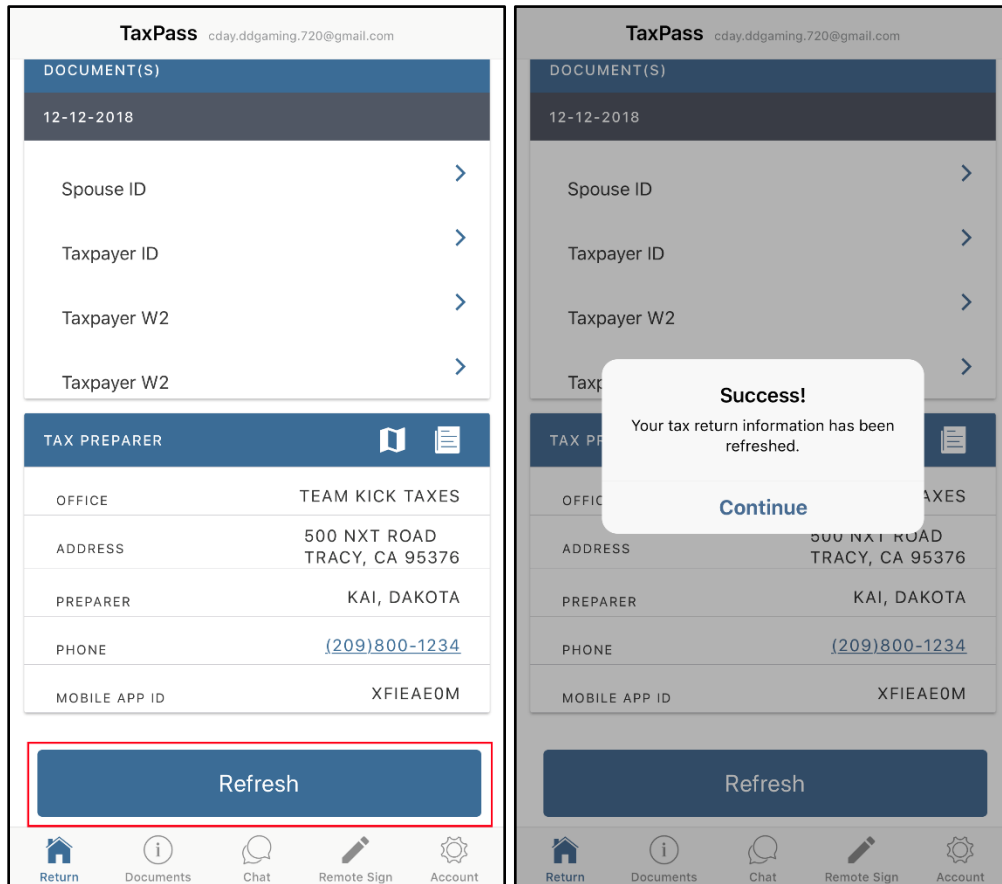


➢ The date the documents were submitted to the tax preparer will be displayed as well.

# TaxPass
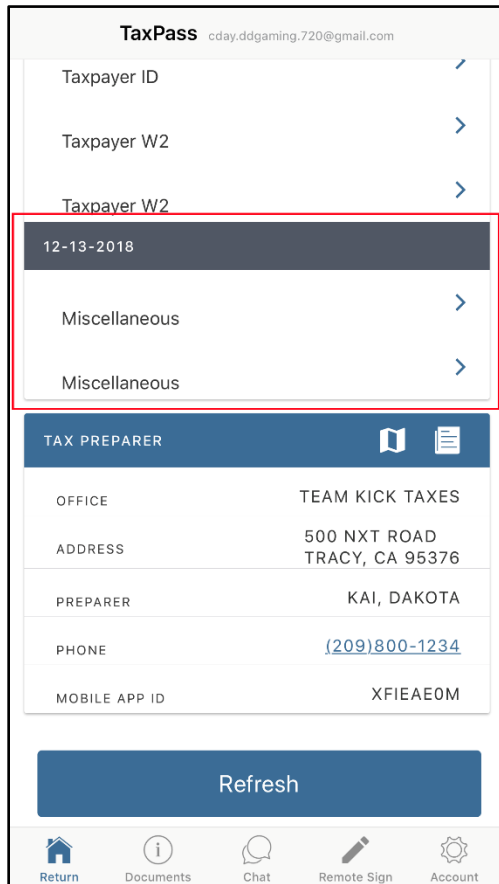


## Chat Menu

➢ The Chat menu allows the taxpayer to communicate with their tax preparer via text message, similar to a phone's standard text messaging app.

➢ When they click on this menu, they will see a message preview window. Click on the blue plus sign on the lower right hand corner to select a recipient (left image below).

➢ Once they click on the plus sign, the taxpayer will need to select a recipient who they want to send a message to (the tax preparer – right image below.)

# TaxPass
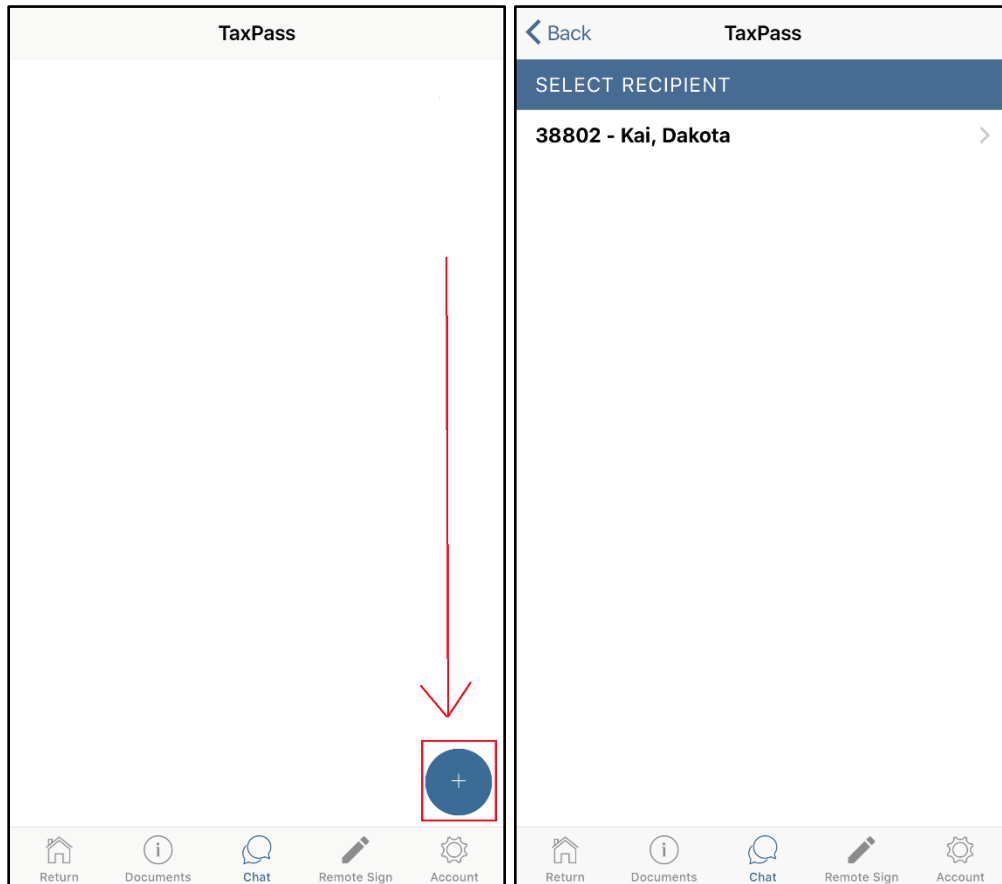


> ➤ Click on the Preparer's Name to compose a new message. Once the taxpayer has typed in the message they want to send to the preparer they will click on Send Message (left image below).
> ➤ Once they click on Send Message, they will see the Messages menu screen, along with a preview of the message they sent (right image below).

# TaxPass
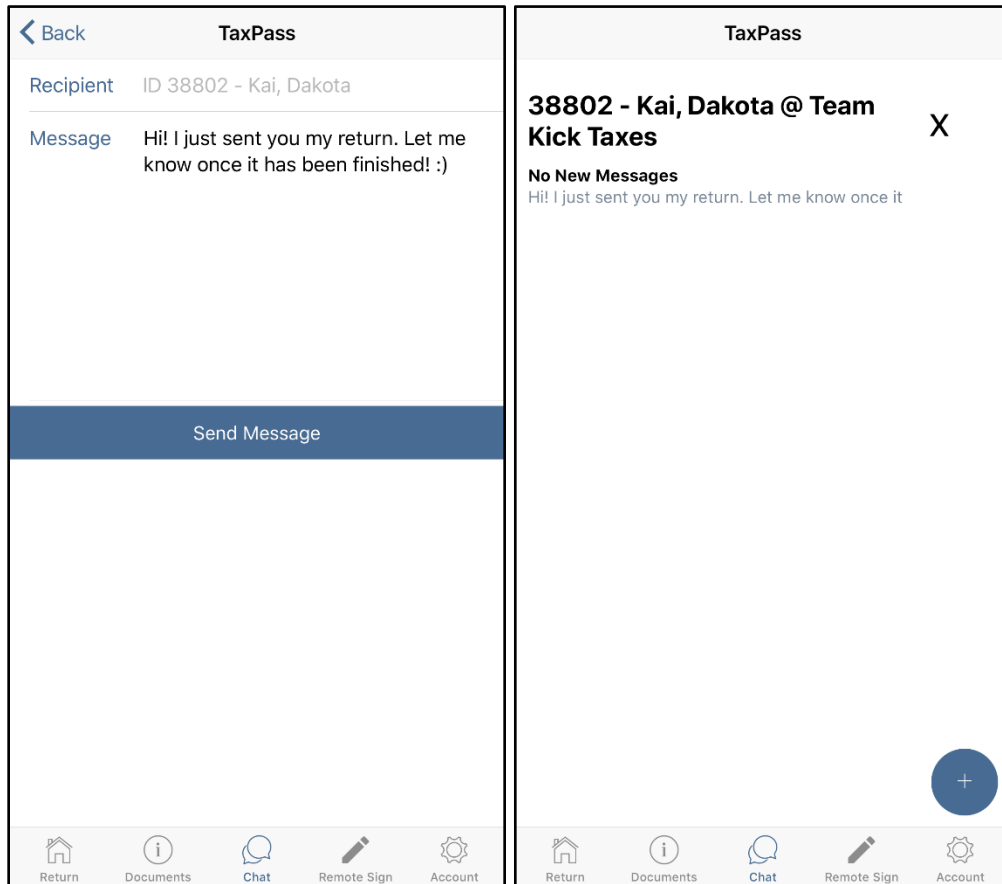


> ➢ Once the taxpayer clicks on the Chat menu after receiving a new message, they will see a notification of it underneath the preparers' office name (left image below.)
> ➢ The taxpayer can then click on the preparers name to view the new message, along with the entire message thread (right image below.)

# TaxPass

| TaxPass | |
|---|---|
| **38802 - Kai, Dakota @ Team Kick Taxes** | X |
| **New Messages:** 1 | |
| No problem. I'll complete the return soon! | |

‹ Back      TaxPass

> Hi! I just sent you my return. Let me know once it has been finished! :)
> 12/13/18, 11:58 PM
> **Seen**

No problem. I'll complete the return soon!
12/14/18, 12:00 AM

Type a message...

Return   Documents   Chat   Remote Sign   Account

Return   Documents   Chat   Remote Sign   Account
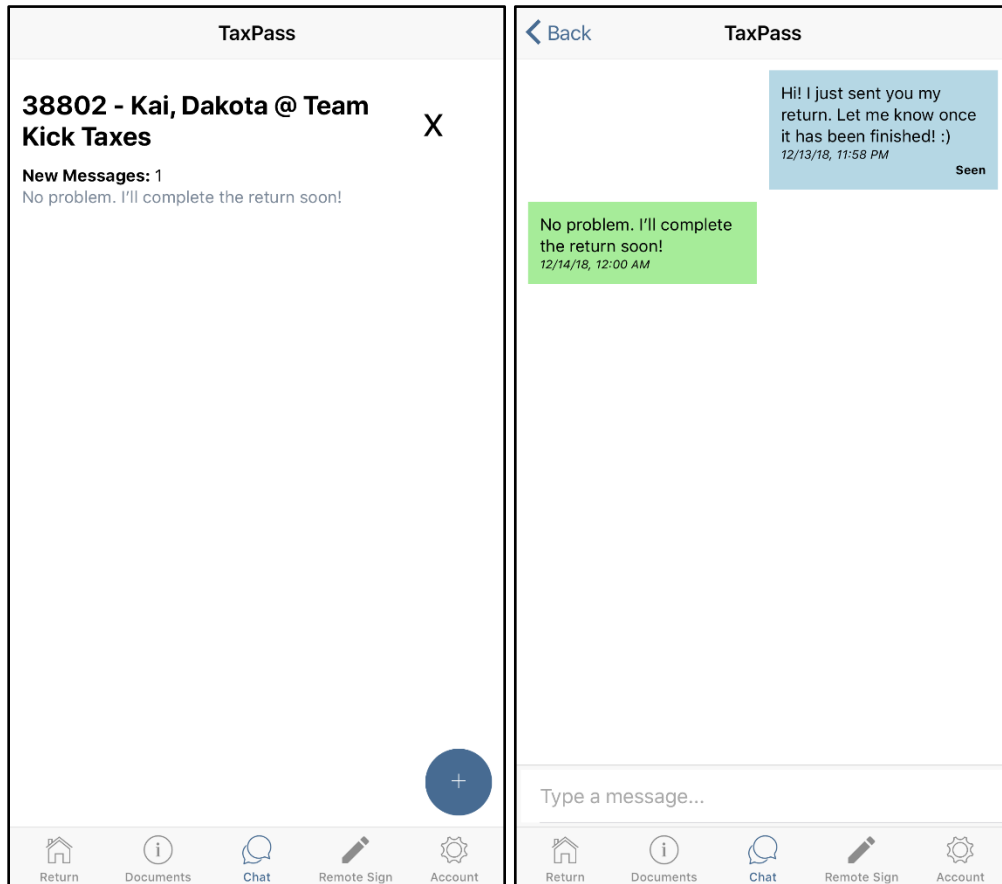
➢ The taxpayer can then respond by sending a new message and continuing the message thread or create a new message thread by clicking on the blue plus sign again (this is like a phones standard text messaging app.)

# TaxPass
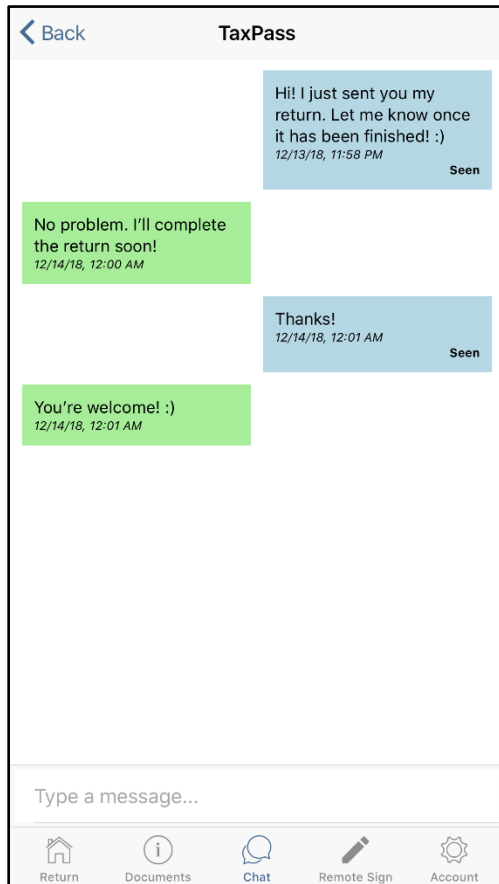


## Remote Sign Menu

➢ The Remote Signature menu allows the taxpayer to view the remote signature status of their tax return (left image below.)

➢ Clicking on the tax return will show the tax return information as completed by the tax preparer, in addition to the status of the return at the top (right image below.)
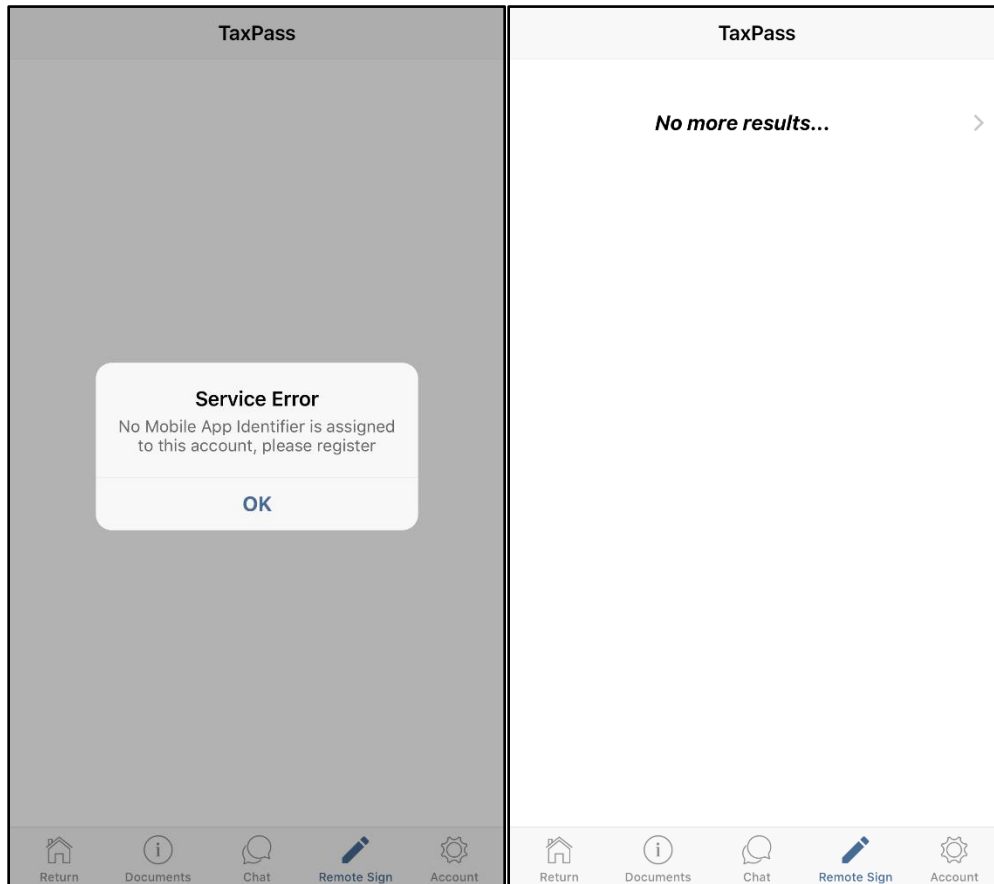**Note:** In the two images below, the taxpayer has submitted their tax return to the tax preparer, but the tax preparer has not yet completed the return (hence the Waiting on preparer status.)

# TaxPass
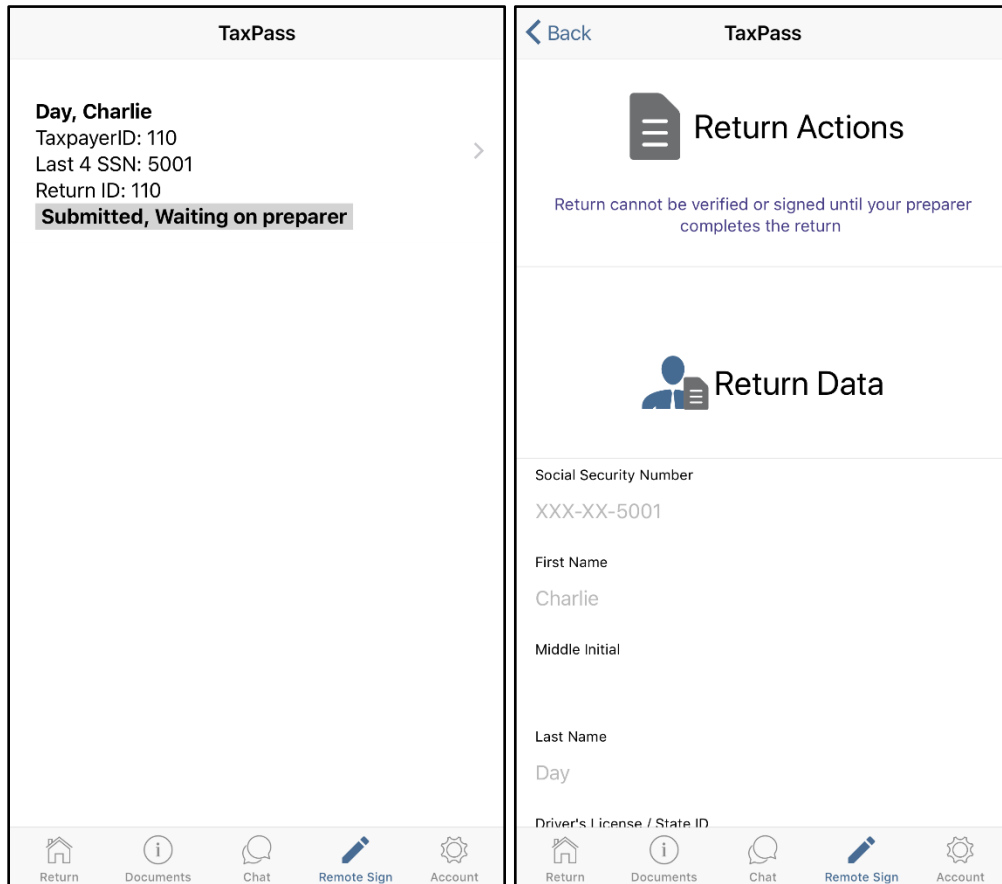


> ➢ If the taxpayer clicks on this menu but has not submitted their return to their tax preparer and has not entered a Mobile App ID, a service error will appear (left image below.)
> ➢ If the taxpayer clicks on this menu and has not submitted their return their tax preparer but has entered a Mobile App ID, a screen with no results will appear (right image below.)

# TaxPass

| TaxPass | TaxPass |
|---------|---------|
|  | *No more results...*  > |
| **Service Error**<br>No Mobile App Identifier is assigned<br>to this account, please register<br><br>**OK** |  |
| Return  Documents  Chat  **Remote Sign**  Account | Return  Documents  Chat  **Remote Sign**  Account |

## Account Menu

➢ The Account menu allows the taxpayer to view their account settings. This menu is broken down to four sections:

1. Personal: displays the taxpayers name and SSN (the first 5 numbers are masked.)
2. Account: displays the taxpayers' username (email) and tax preparers Mobile App ID.
3. Admin: allows the taxpayer to change their password.
4. Logout: contains a Logout button that will log the taxpayer out of TaxPass.
   **Note:** The Information displayed in the Personal and Account sections is view-only information and cannot be edited from this menu.

# TaxPass



➢ As mentioned above, the taxpayer can change their password by clicking on the Change Your Password option from the Admin section.

➢ The taxpayer will enter a new password and confirm it underneath. Afterwards, they will click on the Confirm button to change the password for their TaxPass account.

# TaxPass



> ➢ If the taxpayer clicks on the Logout button, a pop-up will appear asking them if they would like to log out of the TaxPass app. Clicking on Yes logs the taxpayer out of the app.

# TaxPass