

Uploading your Tax Information

Step 1: Select if you are either starting a new return with your tax preparer or adding documents to an existing return your tax preparer already has.

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

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

Starting a new return?

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

START NEW RETURN

Already have a return?


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

CONTINUE

Step 2: Click **Let's Get Started** to begin entering in your Basic Information. You will need to enter:

- Your marriage status for the last tax year (married or not)
- Your personal information (including name, date of birth, social, address, and driver's license number)
- Your spouse's personal information (if applicable)

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




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

UPLOAD DOCUMENTS

Taxes To Go DocumentsADD


My Tax Documents
Add a new document




Add Document

Documents


My Tax Documents
View or add a new document




Add Document



W2




Other




Form 1099

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



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

CAPTURE DRIVER'S LICENSE



Picture of your ID has been captured

CONTINUE

RETAKES PICTURE

Step 5: Take a selfie.



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

TAKE A SELFIE



Your selfie has been captured

CONTINUE

RETAKE PICTURE

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

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



Do you have any Dependents? Qualifying dependents greatly lower your tax bill, helping you get the biggest refund possible.

ADD DEPENDENTS

I DO NOT HAVE DEPENDENTS

Step 7: Provide the best phone number for your Tax Preparer to contact you.

Contact Information

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

Phone Number

706-123-4567

Step 8: Sign the Consent to Use.

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

Consent To Use

Your tax preparer needs your consent to use your tax information.

Federal law requires this consent form be provided to you (you refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes ot...

MORE

Tax Preparer / Company Name

Demo Taxes to Go Office

Taxpayer Name

Tax Office

CONSENT

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

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

Review

Check your information carefully and click to edit any incorrect information. When you are ready, press Submit button to upload your information.

| | |
|-------------------------------|------|
| Phone number 706-123-4567 | EDIT |
| Granted Consent to Use Yes | EDIT |
| Uploaded documents 3 | EDIT |
| Captured selfie Yes | EDIT |
| Taxpayer Test | |
| EDIT | |

PREV


STEP 9 OF 9

SUBMIT

You will receive confirmation once the submission has been successful.

Congratulations!

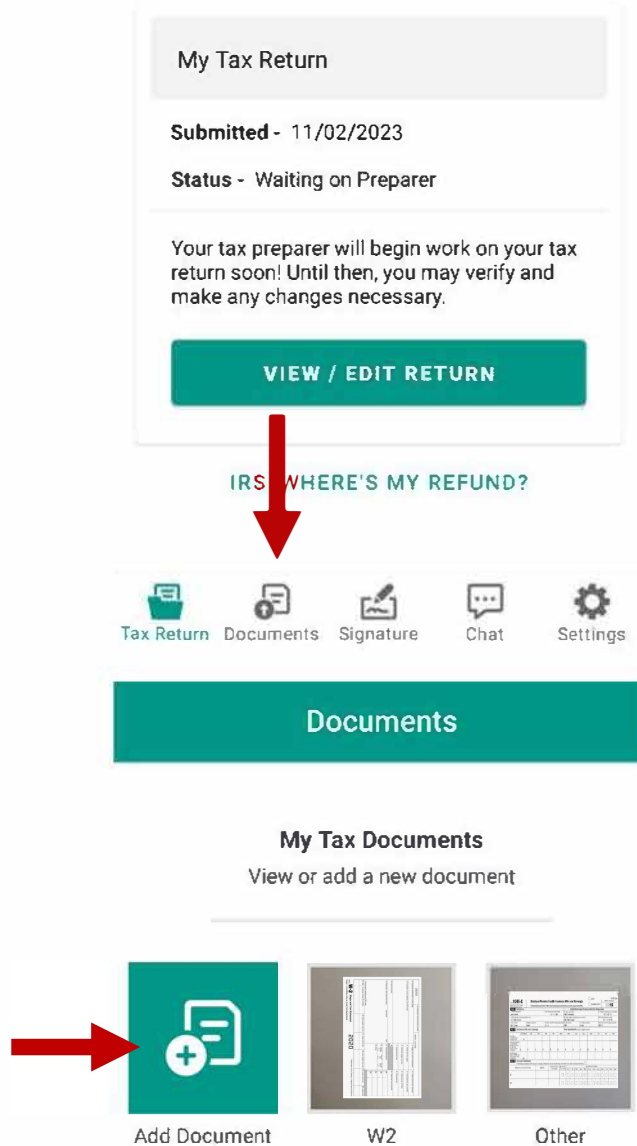
You have successfully uploaded your information.



RETURN TO DASHBOARD

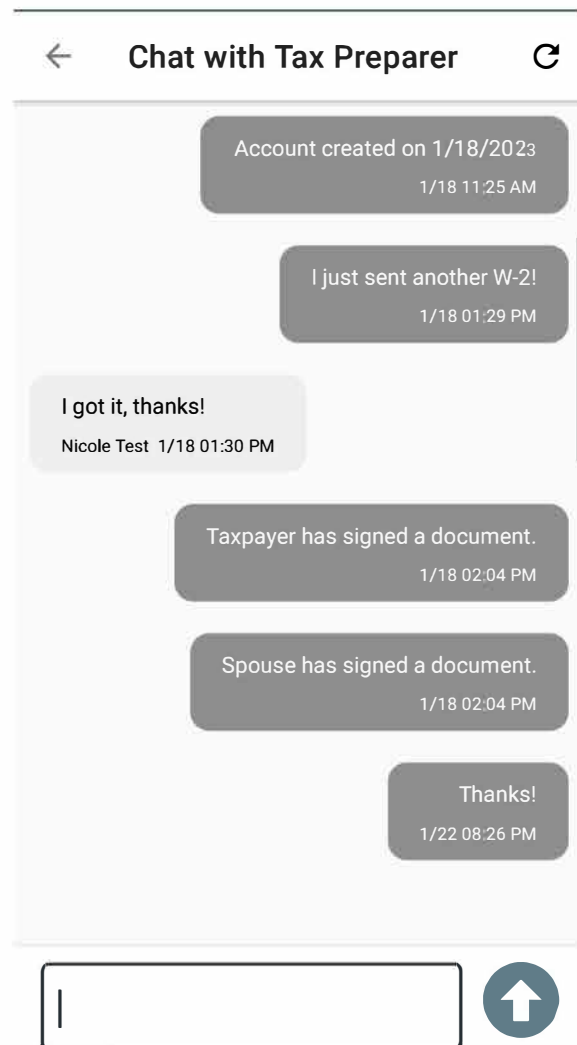
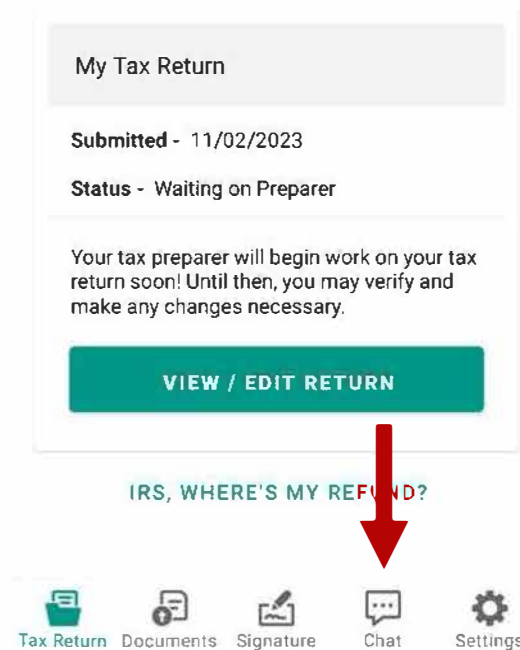
Uploading Additional Documents

From the Dashboard of your Taxes to Go app, you can upload additional documents to your Tax Preparer by clicking on the Documents tab along the bottom. From there, you can upload additional documents by clicking the Add Document option.



Chatting with your Tax Preparer

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



Signing Tax Documents

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

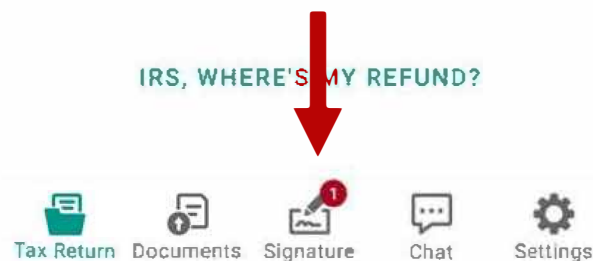
My Tax Return

Submitted - 11/02/2023

Status - Documents ready for your signature

SIGN DOCUMENTS

| | |
|--|--|
| 1040 U.S. Individual Income Tax Return | 19 Social Sec. Tax (W-2) \$ |
| Filing Status (See instructions) <input type="checkbox"/> Single <input checked="" type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Head of household <input type="checkbox"/> Qualifying surviving spouse If you checked the MFJ box, enter the name of your spouse (if you checked the HOM or QHS box, enter the child's name if the qualifying person is a child) (See instructions) | |
| Your first name and middle initial Last name TAXPAYER 123-00-4567 Enter name, address, and ZIP code of your main residence Social Security number SPOUSE 765-00-4321 Enter name, address, and ZIP code of your main residence Social Security number CHILD 1 Age: 10 Enter name, address, and ZIP code of your main residence 123-00-4567 AUGUSTA, GA 30906 | |
| City, town or post office, state, and ZIP code. If you have a foreign address, complete columns below (see instructions). Foreign government or territory Foreign postal code Foreign country Foreign postal code | |
| Standard Deduction Someone can claim you. You are a dependent. <input type="checkbox"/> Standard deduction <input type="checkbox"/> Someone claims a first through sixth child credit <input type="checkbox"/> You are a dependent | |
| Age/Blindness You are blind before January 1, 1983. <input type="checkbox"/> Age/Blindness <input type="checkbox"/> You are blind before January 1, 1983 <input type="checkbox"/> You are blind | |
| Dependents (see instructions) (If 2 qualify for tax credits) <input type="checkbox"/> Social security number <input type="checkbox"/> Social Security number <input type="checkbox"/> Social Security number | |
| CHILD TEST Last name 222-00-2222 DAUGHTER X Social Security number | |
| 1 Wages, salaries, tips, etc. Attach Form W-2 1 90000 2 Tax-exempt interest 2a 3 Qualified dividends 3a 4 IRA distributions 4a 5 Pensions and annuities 5a 6 Social security benefits 6a 7 Capital gain or loss. Attach Schedule D if required or not required. Check box 7 8 Other income from Schedule K-1 8 9 Adjustments to income from Schedule 1 9 10 Adjustments to income from Schedule 1 10 11 Qualified business income from Schedule K-1 11 12 Qualified business income from Schedule K-1 12 13 Qualified business income from Schedule K-1 13 14 Qualified business income from Schedule K-1 14 15 Qualified business income from Schedule K-1 15 16 Qualified business income from Schedule K-1 16 17 Qualified business income from Schedule K-1 17 18 Qualified business income from Schedule K-1 18 19 Qualified business income from Schedule K-1 19 20 Qualified business income from Schedule K-1 20 21 Qualified business income from Schedule K-1 21 22 Qualified business income from Schedule K-1 22 23 Qualified business income from Schedule K-1 23 24 Qualified business income from Schedule K-1 24 25 Qualified business income from Schedule K-1 25 26 Qualified business income from Schedule K-1 26 27 Qualified business income from Schedule K-1 27 28 Qualified business income from Schedule K-1 28 29 Qualified business income from Schedule K-1 29 30 Qualified business income from Schedule K-1 30 31 Qualified business income from Schedule K-1 31 32 Qualified business income from Schedule K-1 32 33 Qualified business income from Schedule K-1 33 34 Qualified business income from Schedule K-1 34 35 Qualified business income from Schedule K-1 35 36 Qualified business income from Schedule K-1 36 37 Qualified business income from Schedule K-1 37 38 Qualified business income from Schedule K-1 38 39 Qualified business income from Schedule K-1 39 40 Qualified business income from Schedule K-1 40 41 Qualified business income from Schedule K-1 41 42 Qualified business income from Schedule K-1 42 43 Qualified business income from Schedule K-1 43 44 Qualified business income from Schedule K-1 44 45 Qualified business income from Schedule K-1 45 46 Qualified business income from Schedule K-1 46 47 Qualified business income from Schedule K-1 47 48 Qualified business income from Schedule K-1 48 49 Qualified business income from Schedule K-1 49 50 Qualified business income from Schedule K-1 50 51 Qualified business income from Schedule K-1 51 52 Qualified business income from Schedule K-1 52 53 Qualified business income from Schedule K-1 53 54 Qualified business income from Schedule K-1 54 55 Qualified business income from Schedule K-1 55 56 Qualified business income from Schedule K-1 56 57 Qualified business income from Schedule K-1 57 58 Qualified business income from Schedule K-1 58 59 Qualified business income from Schedule K-1 59 60 Qualified business income from Schedule K-1 60 61 Qualified business income from Schedule K-1 61 62 Qualified business income from Schedule K-1 62 63 Qualified business income from Schedule K-1 63 64 Qualified business income from Schedule K-1 64 65 Qualified business income from Schedule K-1 65 66 Qualified business income from Schedule K-1 66 67 Qualified business income from Schedule K-1 67 68 Qualified business income from Schedule K-1 68 69 Qualified business income from Schedule K-1 69 70 Qualified business income from Schedule K-1 70 71 Qualified business income from Schedule K-1 71 72 Qualified business income from Schedule K-1 72 73 Qualified business income from Schedule K-1 73 74 Qualified business income from Schedule K-1 74 75 Qualified business income from Schedule K-1 75 76 Qualified business income from Schedule K-1 76 77 Qualified business income from Schedule K-1 77 78 Qualified business income from Schedule K-1 78 79 Qualified business income from Schedule K-1 79 80 Qualified business income from Schedule K-1 80 81 Qualified business income from Schedule K-1 81 82 Qualified business income from Schedule K-1 82 83 Qualified business income from Schedule K-1 83 84 Qualified business income from Schedule K-1 84 85 Qualified business income from Schedule K-1 85 86 Qualified business income from Schedule K-1 86 87 Qualified business income from Schedule K-1 87 88 Qualified business income from Schedule K-1 88 89 Qualified business income from Schedule K-1 89 90 Qualified business income from Schedule K-1 90 91 Qualified business income from Schedule K-1 91 92 Qualified business income from Schedule K-1 92 93 Qualified business income from Schedule K-1 93 94 Qualified business income from Schedule K-1 94 95 Qualified business income from Schedule K-1 95 96 Qualified business income from Schedule K-1 96 97 Qualified business income from Schedule K-1 97 98 Qualified business income from Schedule K-1 98 99 Qualified business income from Schedule K-1 99 100 Qualified business income from Schedule K-1 100 | |





Taxpayer signature required


ADD SIGNATURE


Spouse signature required


ADD SIGNATURE

 Tax Return

 Documents

 Signature

 Chat

 Settings