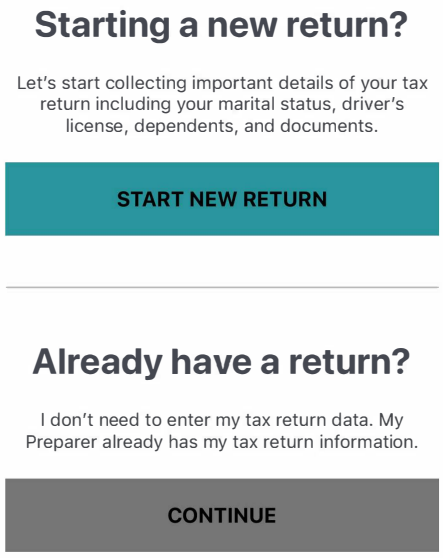
# Uploading your Tax Information

**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.

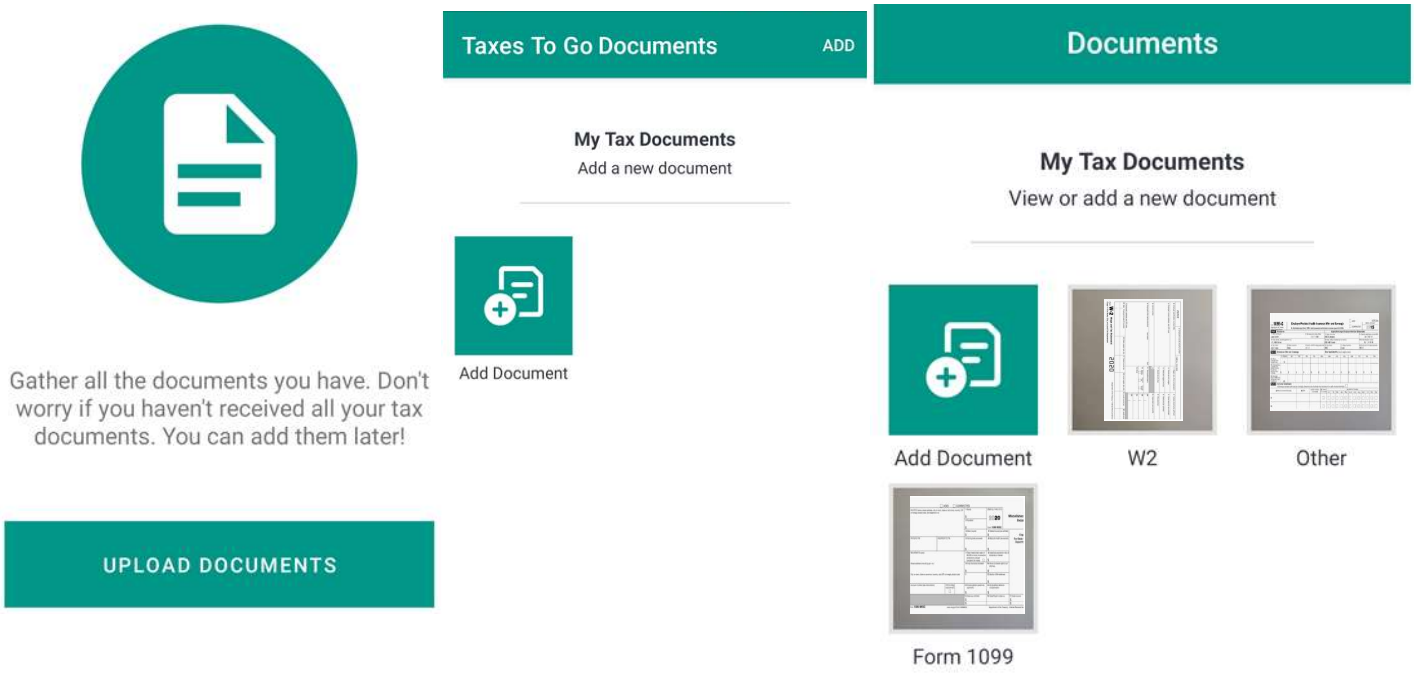
**Already have a Return** - You will only select this option if your Tax Preparer has already started your tax return and currently has all of your Basic Information.



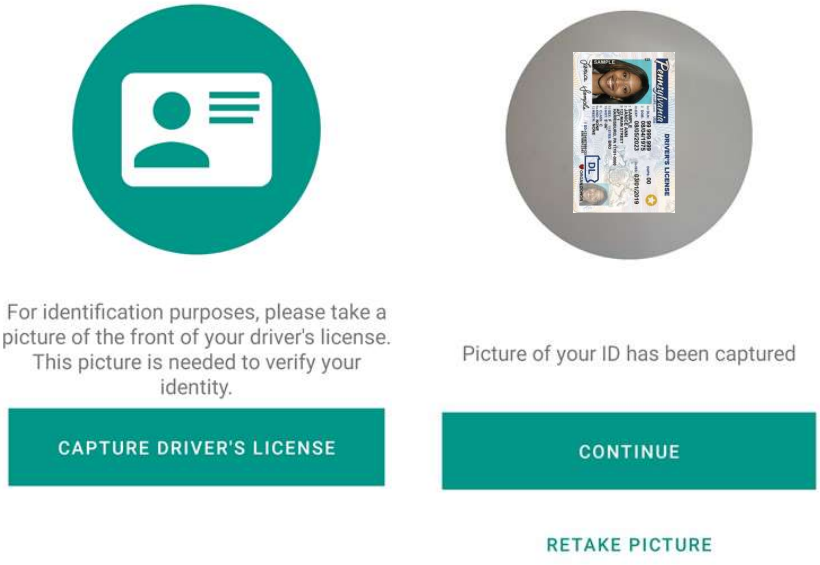

**Step 2:** Click **Let's Get Started** to begin entering in your Basic Information. You will need to enter:

- 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.




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



**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:

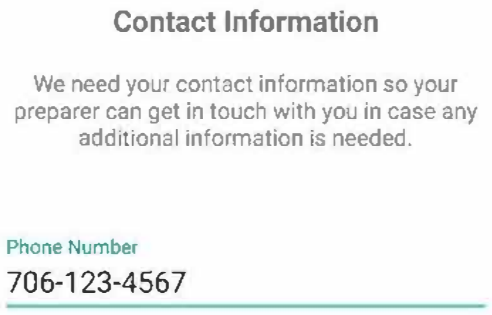
- First and last name
- Social Security Number
- Date of Birth
- Childcare expenses
- Relationship to you

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

ADD DEPENDENTS

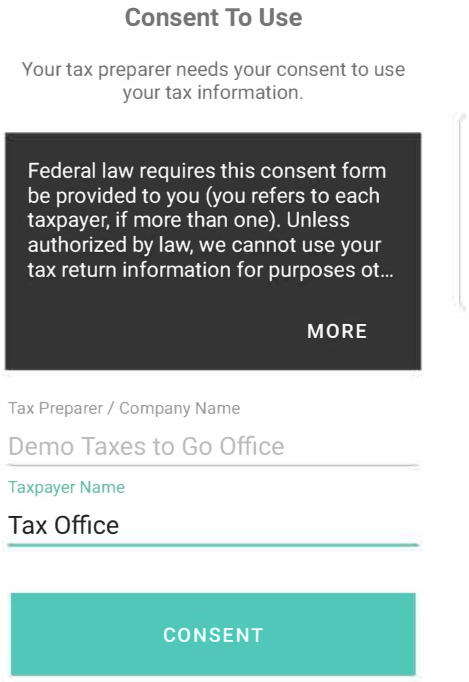
I DO NOT HAVE DEPENDENTS

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



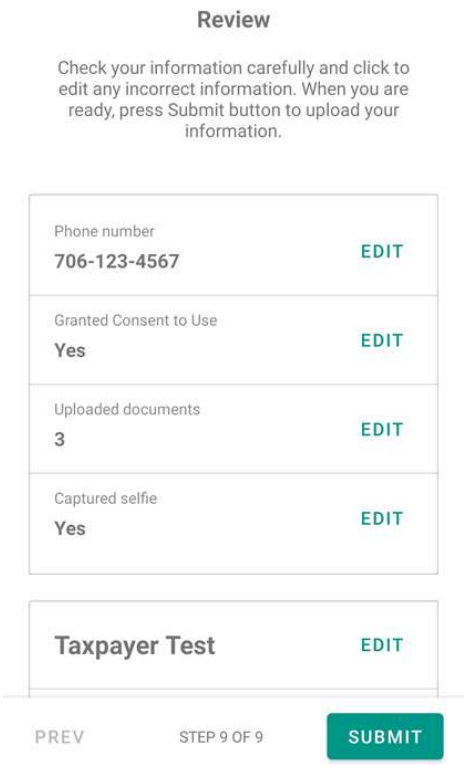

**Step 8:** Sign the Consent to Use.

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

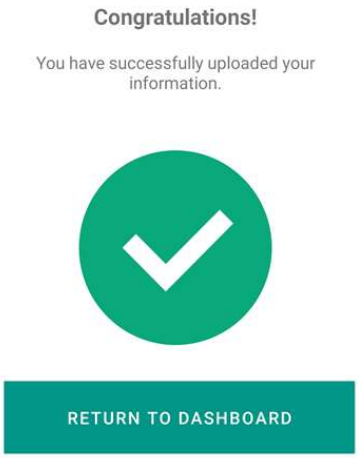


**Step 9:** Review the information that you have added throughout this process. If all information is complete and accurate, Submit your tax information to your Tax Preparer.

**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.**

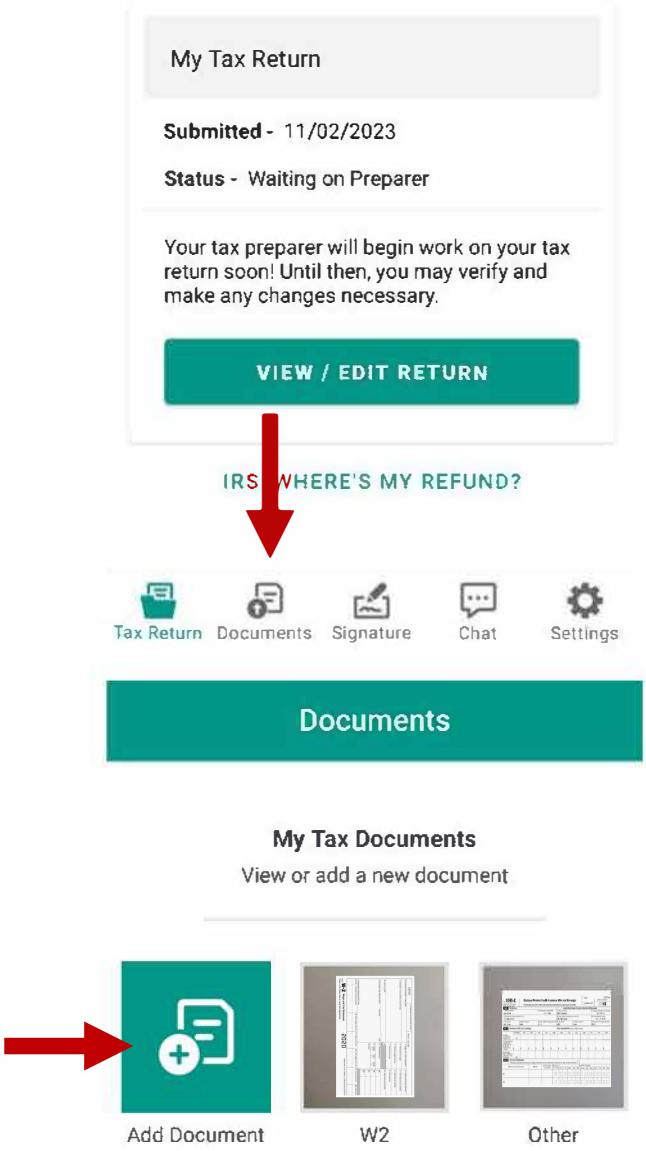



You will receive confirmation once the submission has been successful.



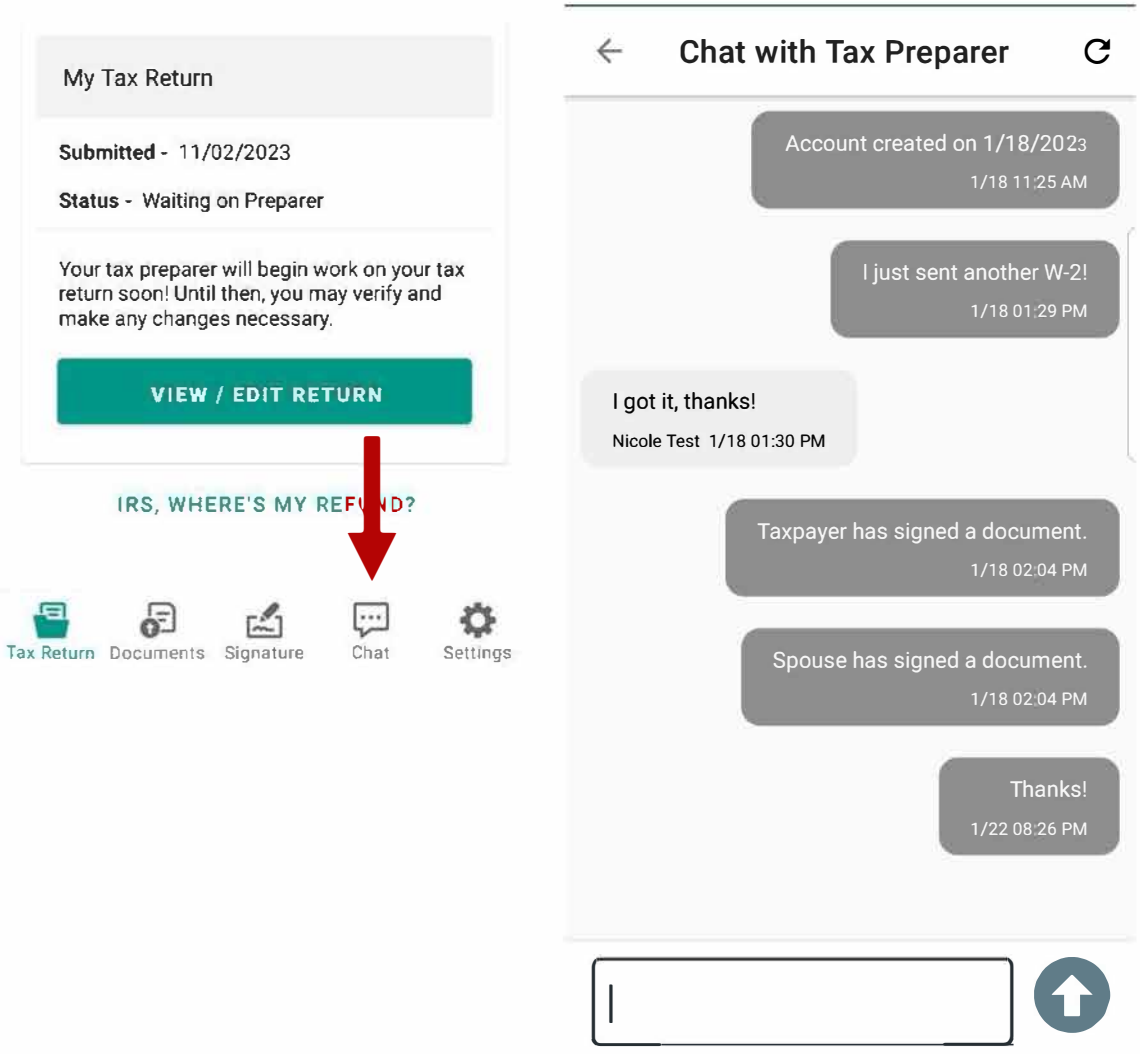
# Uploading Additional Documents

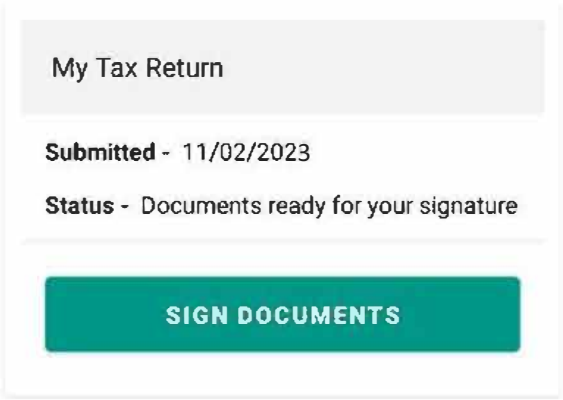
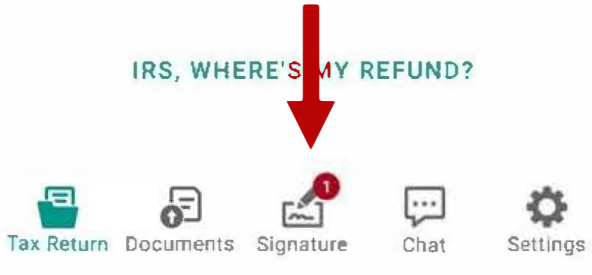
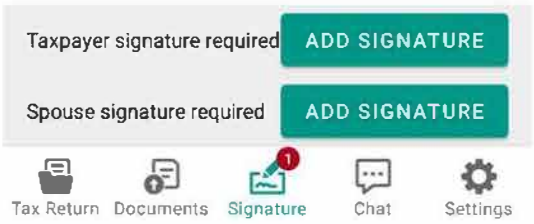
From the Dashboard of your Taxes to Go app, you can upload additional documents to your Tax Preparer by clicking on the Documents tab along the bottom. From there, you can upload additional documents by clicking the Add Document option.



# 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.