

TaxDome Document Management

Contents

Overview	1
Uploading docs from the TaxDome web client portal	2
Uploading docs from the TaxDome phone app	5

Overview

NOTE: with the implementation of TaxDome, we are no longer using ShareFile. From now on, **all documents must be uploaded in the TaxDome portal.**

Your prior year(s) documents have already been moved to TaxDome, so you can access them there. Also, we are no longer able to accept picture files of tax documents. They will need to be scanned as PDF's and then uploaded into TaxDome. Please do not email, text, Facebook message, etc. your tax documents.

If you download any tax document that is password protected, **you will need to remove the password protection before uploading the file.** See instructions on the last page to remove password protection.

Please wait until you have ALL your tax documents, then upload them all at once into the **Client uploaded documents -> 2023 folder.** You can hold down the “ctrl” key on your keyboard and select multiple documents.

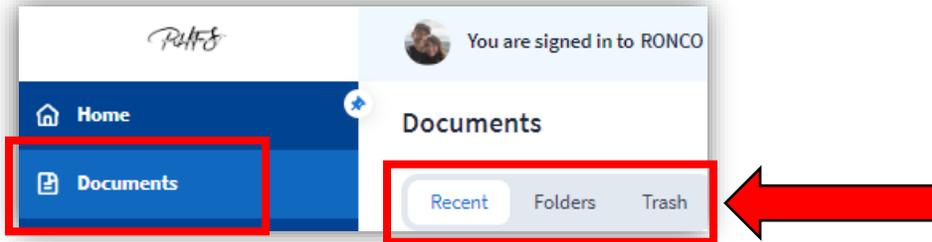
Once you have uploaded **ALL** your tax documents then check **Send “I’m completely done uploading.”** Checking the box sends us an email notification so **please DO NOT send us an additional email to let us know that you have uploaded your documents.** Click the **Save** button when you are done.

You will receive notifications as your return is moved through the completion process so no need to send emails asking about status. **We will not be responding to these emails.**

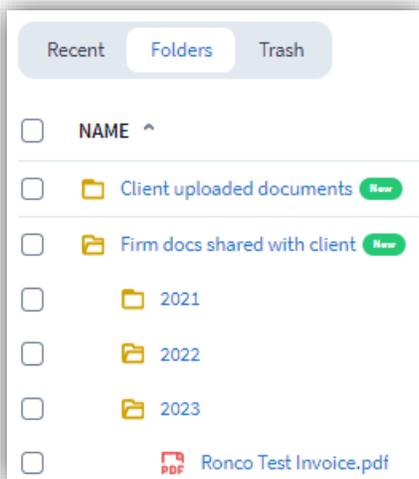
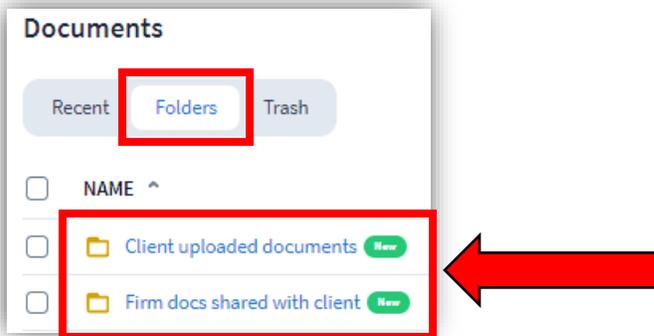
If you need assistance or have questions, please email us at admin@premocpa.com and we will be happy to help! You can also visit <https://client-help.taxdome.com/> for additional information.

Uploading docs from the TaxDome web client portal

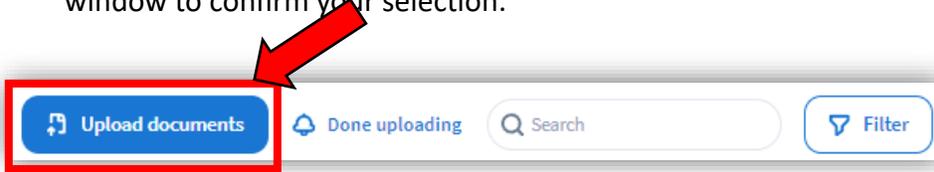
1. Click **Documents** on the left menu. Here you can toggle between **Recent**, **Folders** and **Trash**.



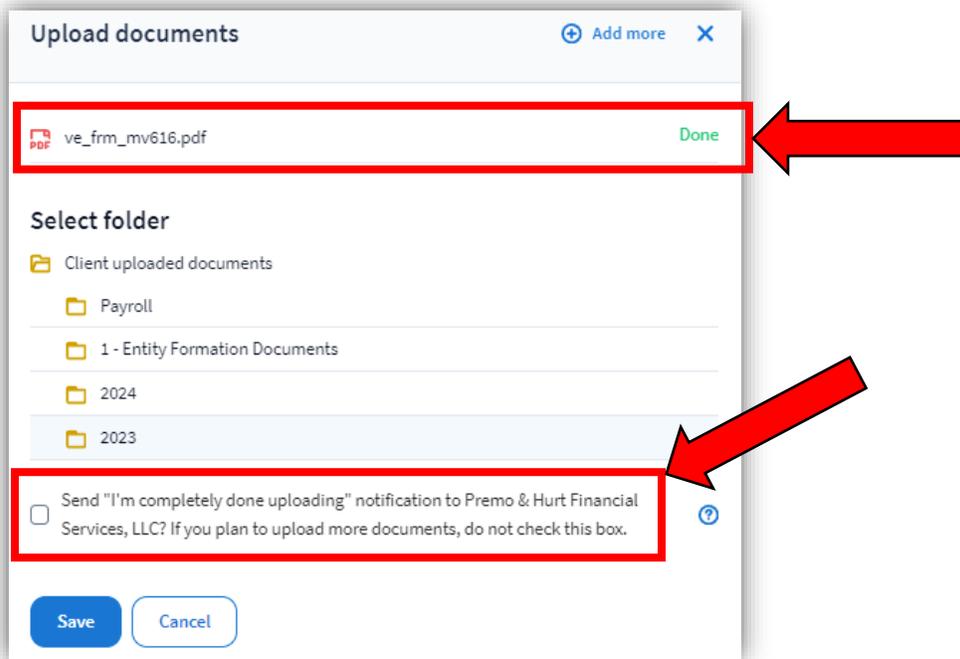
2. **Folders** might be the easiest as you can see documents you uploaded (**Client uploaded documents**) as well as documents we shared with you (**Firm docs shared with client**). Click each folder to see subfolders, like tax years, and docs within each folder.



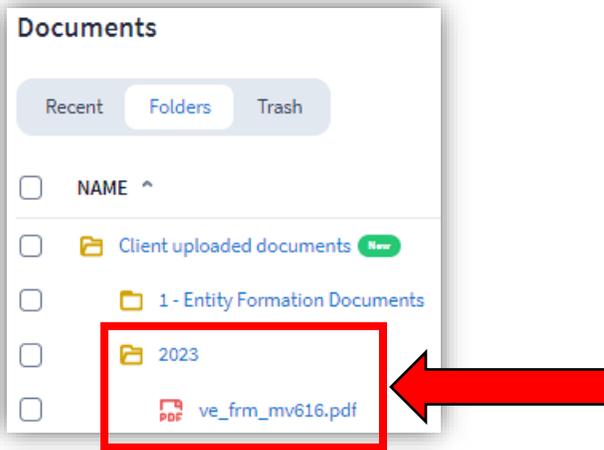
3. Click the **Upload documents** button on the middle-right to upload new docs. Navigate to whatever location the doc(s) are stored. You can select multiple docs by holding the **ctrl** key down and left clicking each one. Click **Open** at the bottom of the selection window to confirm your selection.



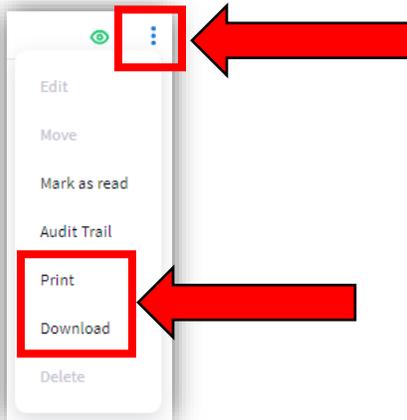
4. A pop-up window appears on the right which shows the doc(s) you intend to upload and allows you to choose the upload folder. Save them in the correct tax year, which is not necessarily the current year.
5. **IMPORTANT**: note the checkbox **Send "I'm done uploading" notification...**, **only check this when you are done uploading ALL your docs**. Otherwise, we incorrectly get a notification that you are finished when in fact you are not.
6. Click the **Save** button when you are finished uploading your doc(s).



7. After clicking Save, you are back to the main Documents screen where you can see the doc(s) you just uploaded in the folder you specified.

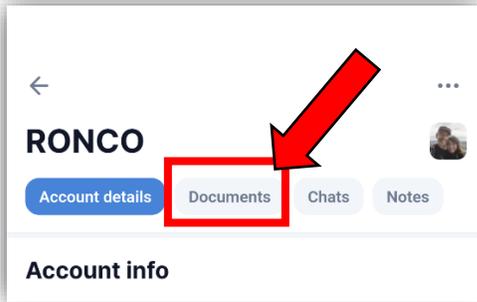


Note: you can download and/or print docs we shared by clicking the **3 buttons** on the right side.

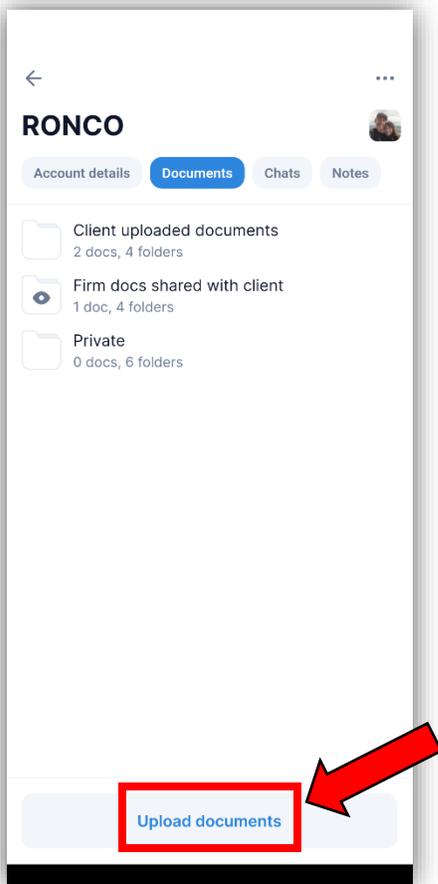


Uploading docs from the TaxDome phone app

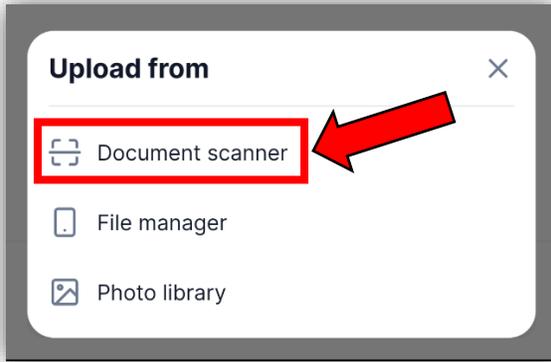
1. Log into the client portal with the email and password you used to activate your account. Click on **Documents** to switch to the documents page.



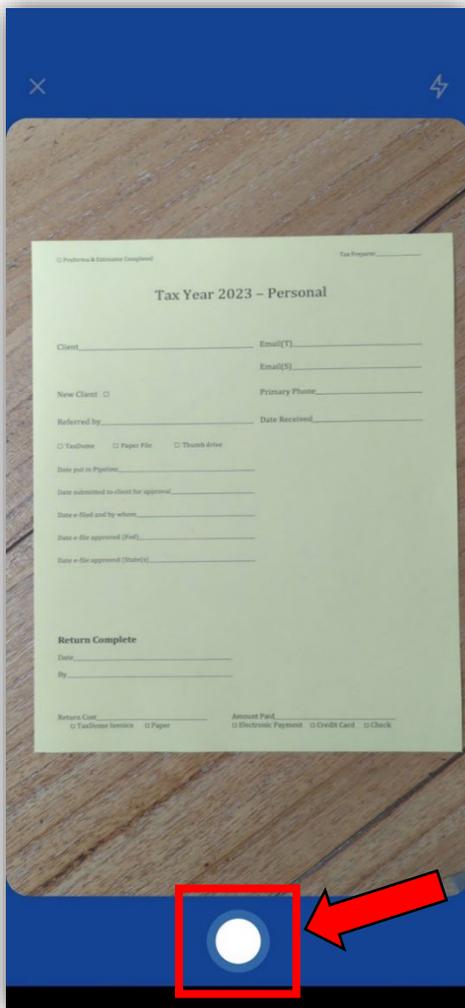
2. Click **Upload documents** at the bottom of the screen.



3. Click on **Document scanner**.



4. Position the document as best as you can and click the **white button** at the bottom to take the pic.



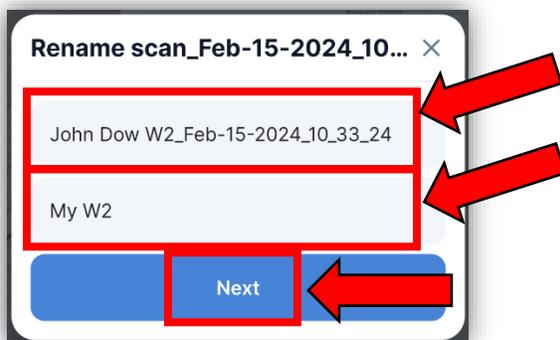
5. Click **Save** at the bottom of the screen.



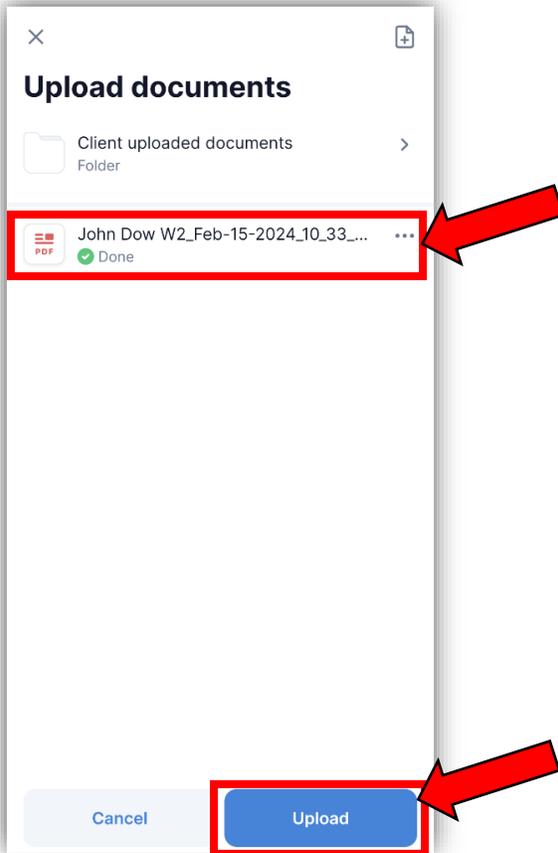
6. If you have other documents to scan, you can follow steps 4 and 5 to position the document and click the white button to take the pic. When you are done scanning all your documents, click at the bottom of the screen.



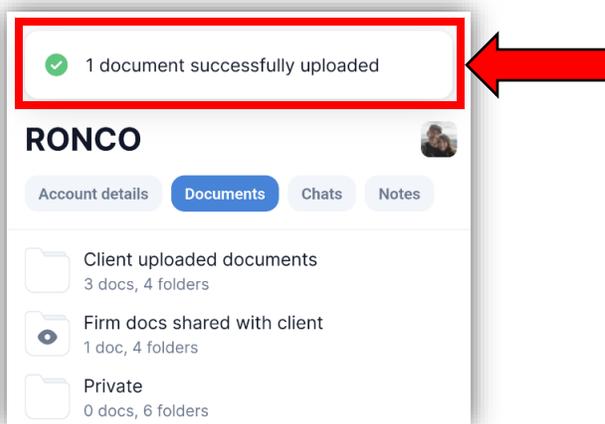
7. **Name** the document something descriptive. You can also add a **Description** in the second box, but that's not necessary if the file name is descriptive. Click **Next** when finished.



8. The next screen will show the document(s) for uploading. Click the **Upload** button to upload the document(s) into TaxDome.



9. You will then see a confirmation screen indicating the document(s) were successfully uploaded.



10. Lastly, you can see your documents in the **Client uploaded documents** folder:

