

How To Use The App

Step One

Taxpayer will download "My Tax Office" from the Google Play or IOS App Store

Step Two

Taxpayer will set up an account. You will give them your unique passcode to enter in during their set up process. (This passcode will link every taxpayer to your account)

Step Three

Once the taxpayer has successfully set up their account, they will be able to

- Upload documents
- Send tax preparer messages
- View Status
- View and review Tax Forms
- Agree to allow tax preparer to send return to IRS
- Sign Tax Forms

You will be notified upon login of any tax information that is sent to you via the app. All taxpayers that use the app will have an icon appear next to their file.

Your unique Passcode is _____