

Taxes To Go App





- Store Steps -



CUSTOMER SCANS THE QR CODE IN STORE

*FILING YOUR TAXES
IS EASIER THAN EVER*

4 SIMPLE STEPS FROM START TO FINISH

SCAN THE CODE	CREATE AN ACCOUNT	UPLOAD FORMS (W2, 1099s, receipts, etc)	E-SIGN TO FILE
			

SCAN HERE TO START





Main Menu

Client Status

IRS website

e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions,
and Fill-In Forms

ATS Website

Step by Step Guide

Audit Pro Agreement

Refund Calculator

AFTER THE TAXPAYER SUBMITS A TAXES TO GO APP YOU WILL SEE A NUMBER HERE

Welcome to SUN LOAN 73

Message Center 0

Rejected Clients 0

TaxesToGo Clients 1

Start New 2020 Tax Return

Create a brand new tax return for a client.

Select

Client Search

Edit returns you previously started.

Select

IF YOU HAVE 1 OR MORE CLICK TAXES TO GO CLIENTS BUTTON



Main Menu

Client Status

IRS website

e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions, and Fill-In Forms

ATS Website

Step by Step Guide

Audit Pro Agreement

Refund Calculator

TaxesToGo Client List

[← Back](#)

Search:

Show entries

YOU MUST CLICK "CLAIM" TO START THE RETURN

Previous **1** Next

Showing 1 to 1 of 1 entries

Taxpayer Name	Email Address	SSN	Submit Date		
Charles Taylor	k.flach@yahoo.com	490885522	10/22/2021 10:32 AM	Claim	Delete

[← Back](#)



Main Menu

Client Status

IRS website

e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions,
and Fill-In Forms

ATS Website

Step by Step Guide

Audit Pro Agreement

Refund Calculator

accuratetax.cloudtaxoffice.com says

Make sure you get your 7216 Consent to Use Tax Return Information signed before starting a new tax return!

OK

TaxesToGo Client List

[← Back](#)

Search:

Show entries

CLICK OK

Previous Next

Showing 1 to 1 of 1 entries

Taxpayer Name	Email Address	SSN	Submit Date		
Charles Taylor	k.flach@yahoo.com	490885522	10/22/2021 10:32 AM	Claim	Delete

[← Back](#)



2020

[Preview Return](#)

[Help & Support](#)

[Charles Taylor](#)

[Save & Exit](#)

Form Finder

Enter the form number...

Basic Information

Filing Status

Personal Information

Dependents/Qualifying Person

IRS Identity Protection PIN

Recovery Rebate Credit

Federal Section

Health Insurance

State Section

Summary/Print

E-file

2020 Amended Return

Your Office

Help & Support

Personal Inform

FILING STATUS

1. CLICK CONTINUE TO ENTER THE RETURN

CANCEL

CONTINUE

Taxpayer Information

Primary taxpayer first name *

Charles

MI

Last name *

Taylor

Suffix (Jr, Sr, etc.)

SSN *The IRS requires your Social Security Number for e-filing.**

490 - 88 - 5522

Date of Birth *

8 / 10 / 1970

Occupation

- Taxpayer can be claimed as a dependent on someone else's return.
- Taxpayer was over age 18 and a full-time student at an eligible educational institution.
- Taxpayer is blind.
- Taxpayer is deceased.

YOU WILL NOW COMPLETE THE RETURN AS NORMAL



2020

[Preview Return](#)

[Help & Support](#)

Charles Taylor [Save & Exit](#)

Form Finder

Enter the form number...

[Basic Information](#)

Federal Section

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

[Health Insurance](#)

[State Section](#)

[Summary/Print](#)

[E-file](#)

[2020 Amended Return](#)

[Your Office](#)

[Help & Support](#)

Income

W-2 (Most Common)

Wages and tax statements

Form 1099-G Box 2

State or local income tax refunds, credits, or offsets

1099-INT, DIV, OID

Interest income, dividends, and distributions

1099-R, RRB-1099, RRB-1099-R, SSA-1099

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

Form 1099-G Box 1

Unemployment Compensation

1099-MISC

Miscellaneous income

1099-NEC

Nonemployee compensation

Profit or Loss from Business

Reported on Schedule C

Form 1099-K

Payment card and third-party network transactions

CLICK HERE TO RETRIEVE THE SCANNED DOCUMENTS FROM THE TAXPAYER

- Your Office
- Scanned Documents
- ¿Si hablas Español?
- Notes
- Helpful Tools
- Quick File
- Save & Exit Return

Collapse Menu >>

RETURN SUMMARY

AGI	\$0
Federal	\$0
State - GA	\$0

Scanned Documents

- + Upload Documents
- + Download All
- Close Window

File name	File Size	Uploaded	
Drivers License_1.png	1 MB	10/22/2021 10:29 AM	Download
TTG_Selfie.png	2 MB		Download
W2_1.png	4 MB	10/22/2021 10:29 AM	Download

1. CLICK DOWNLOAD
2. OPEN THE PDF
3. PRINT THE PDF





Main Menu

Client Status

IRS website

e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions,
and Fill-In Forms

ATS Website

Step by Step Guide

Audit Pro Agreement

Refund Calculator

Welcome to SUN LOAN 73

Message Center 0

Rejected Clients 0

Start New 2020 Tax Return

Create a brand new tax return for a client.

Select

Client Search

Edit returns you previously started.

Select

2021 A

**YOU CAN CHAT WITH THE
TAXPAYER THROUGH THE APP**

Show Chat (1 Unread Messages)



2020 Tax Program

Main Menu

Client Status

IRS website

e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions,
and Fill-In Forms

ATS Website

Step by Step Guide

Audit Pro Agreement

Refund Calculator

Welcome to SUN LOAN 73

Message Center 0

Rejected Clients 0

Start New 2020 Tax Return

Create a brand new tax return for a client.

Client Search

Edit returns you previously started.

Filter App Users

Charles Taylor

Chat History

10/22/2021 10:26 AM

Hi did you receive my information?

10/22/2021 10:39 AM

Test

10/22/2021 10:41 AM

Yes

10/22/2021 10:48:21 AM

We have all your information and will let you know when your return is done and you need to sign using the app. Thank you!

10/22/2021 10:49:25 AM

Enter Message

[Send Message](#)

Hide Chat (0 Unread Messages)

**YOU CAN SEND MESSAGES
BACK AND FORTH**

Sending Documents to be Signed in ProWeb

On the Submission Page of the tax return, there is an option to send the documents back to the app for the taxpayer to sign. Once you click this button, you will see a notification that the documents have been successfully sent.

Please review all information on this screen. To finalize your return please click on the submit button located below.

One Copy - Federal and State

Print Return

Email Return

Send Tax Return Documents to Mobile Application

**ON THE SUBMISSION SCREEN
YOU CAN SEND SIGNATURE
DOCUMENTS TO THE TAXPAYER**

Preparer Information

Send Tax Return Documents to Mobile Application



Transfer Completed - Documents are now on Mobile Application

After the documents have been signed by the taxpayer, the signatures will show in the program on the Submission Page. From here you can transmit the return.

Electronic Signature

Taxpayer Signature

Change Signature

Sign

Spouse Signature

Change Signature

Sign