



taxestogo[®]

Taxes to Go guide for Taxpayers

2023 Tax Year

Are you using the Branded Taxes to Go?

Before downloading Taxes to Go, you must get the Referral Link from your tax preparer.

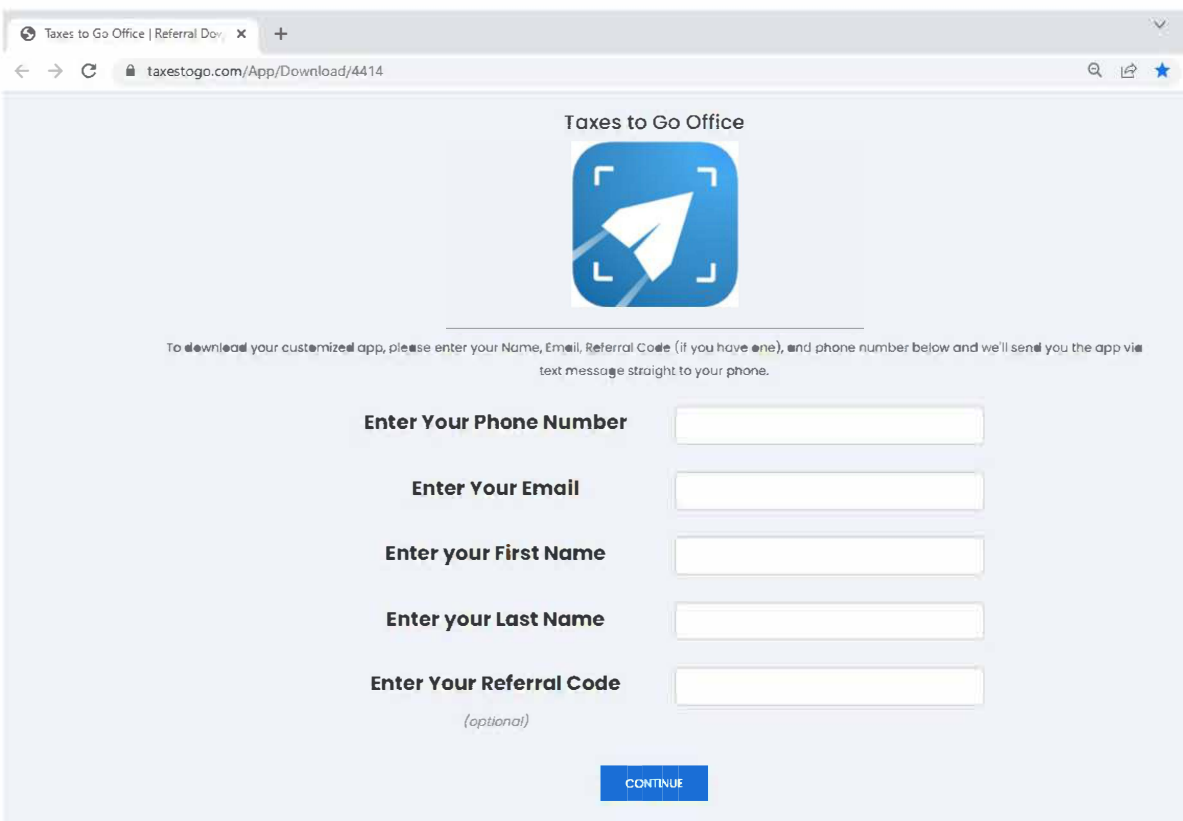
In order to get the Branded Taxes to Go app, you must start by using the Referral Link provided by your preparer. This referral link will open to a website where you will need to fill out your

- Cellphone number
- Email address
- First name
- Last name
- (Optional) the Referral Code provided by your tax preparer

NOTE: The Taxes to Go app requires a new download each tax season. The prior year app will not work with the current tax year. Please be sure to install the new version each tax year.

Once the necessary information has been filled out, click **Continue**.

Once you click Continue, you will receive a text message with a direct link to your App Store/Google Play Store to download Taxes to Go.



Taxes to Go Office

To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

Enter Your Phone Number

Enter Your Email

Enter your First Name

Enter your Last Name

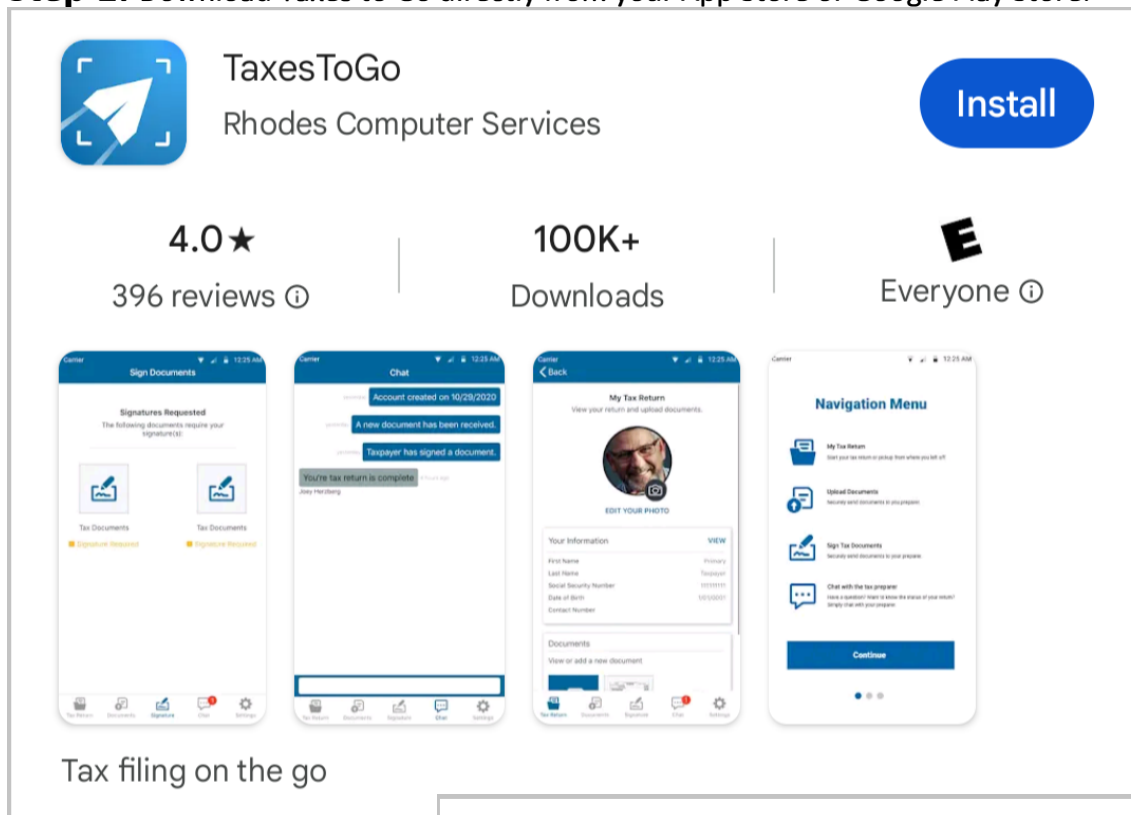
Enter Your Referral Code
(optional)

CONTINUE

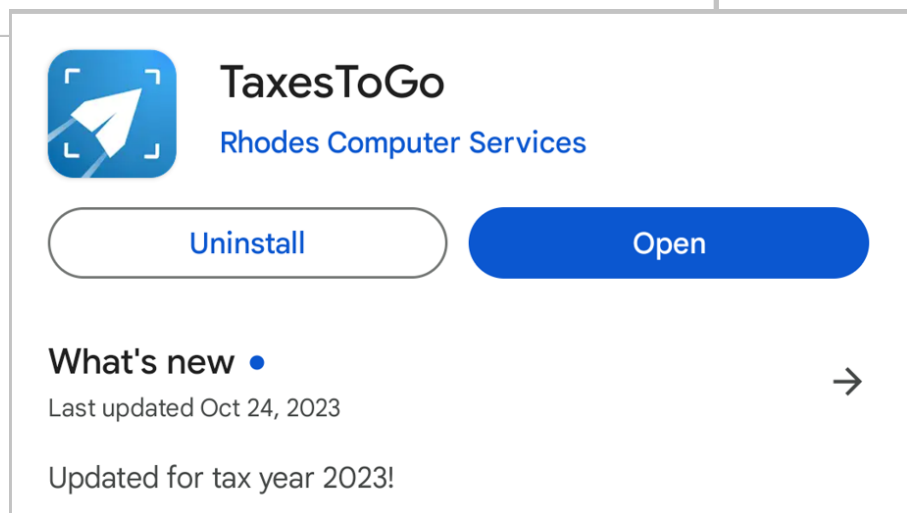
Downloading and Setting Up Taxes to Go

If you are using a Branded Taxes to Go app, please be sure to complete the information on the Referral Link prior to installing the app.

Step 1: Download Taxes to Go directly from your App Store or Google Play Store.



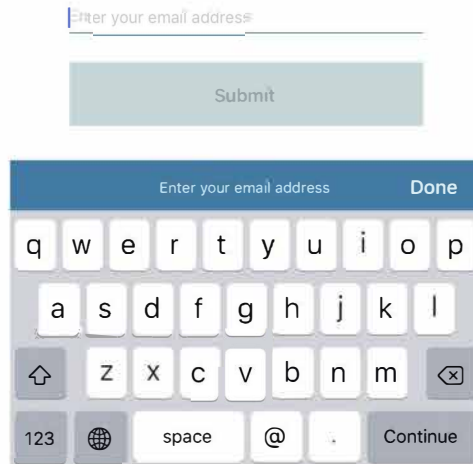
The screenshot shows the Google Play Store listing for the TaxesToGo app. At the top left is the app icon, a blue square with a white paper airplane. To its right, the app name "TaxesToGo" is displayed in a large, bold font, with the developer name "Rhodes Computer Services" below it. On the far right is a blue "Install" button. Below the app name, three statistics are shown: "4.0★" with "396 reviews" and an information icon, "100K+ Downloads", and an "E" rating for "Everyone" with an information icon. Below these are four preview images of the app's interface: "Sign Documents" showing a list of documents to sign, "Chat" showing a conversation with a tax preparer, "My Tax Return" showing a profile and tax information, and "Navigation Menu" showing various app options. At the bottom left of the preview area, the text "Tax filing on the go" is written.



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Step 2: Open the application and enter your email address.

Branded Taxes to Go users must use the same email address that was used on the Referral Link page.



The image shows a web form with a text input field containing the placeholder text "Enter your email address". Below the input field is a light blue "Submit" button. A mobile keyboard is overlaid on the bottom half of the form, showing a standard QWERTY layout with a "Continue" button on the right.

Step 3: Complete the Taxes to Go registration. You will need to provide your cellphone number and create a password for your account.

taxestogo[®]

taxestogo@email.com

7061234567

I agree to the terms [Privacy Policy](#)
[License Agreement](#)

Register

Already have an account? [SIGN IN](#)

Step 4: Complete the MFA (multi-factor authentication) to gain access to your new account.

taxestogo[®]

We sent you a 6 digit code.
Please enter it in the text field
below.

[RESEND CODE](#) [CHANGE USER](#)

Submit

Step 5: Read the Navigation Menu, My Tax Code, Push Notifications pages for more information on each of those areas of the Taxes to Go app.

Navigation Menu



My Tax Return

Start your tax return or pickup from where you left off.



Upload Documents

Securely send documents to your preparer.



Sign Tax Documents

Securely sign documents from your preparer.



Chat with the tax preparer

Have a question? Want to know the status of your return? Simply chat with your preparer.

My Tax Code



Share your unique code with the tax preparer. The preparer will use this code to gain access to your tax return information

Push Notifications



By enabling push notifications, your preparer can keep you up to date on your return status as well as any information needed to complete your return.

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 Documents ADD

Documents

My Tax Documents
Add a new document

My Tax Documents
View or add a new document

Add 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

RETAKE 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
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PREV

STEP 9 OF 9

SUBMIT

You will receive confirmation once the submission has been successful.

Congratulations!

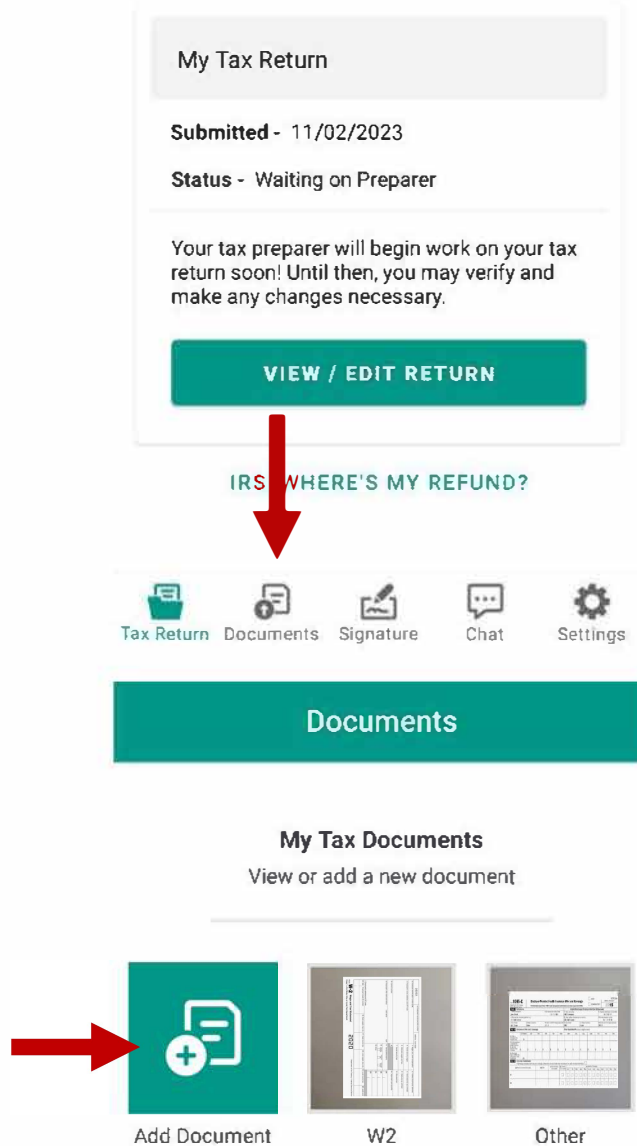
You have successfully uploaded your information.



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.

The image shows two screenshots from the Taxes to Go app. The left screenshot displays the 'My Tax Return' card with the following details: Submitted - 11/02/2023, Status - Waiting on Preparer, and a 'VIEW / EDIT RETURN' button. Below the card is a navigation bar with icons for Tax Return, Documents, Signature, Chat, and Settings. A red arrow points from the 'VIEW / EDIT RETURN' button to the 'Chat' icon. The right screenshot shows the 'Chat with Tax Preparer' interface with a message history: 'Account created on 1/18/2023' (1/18 11:25 AM), 'I just sent another W-2!' (1/18 01:29 PM), 'I got it, thanks!' (Nicole Test 1/18 01:30 PM), 'Taxpayer has signed a document.' (1/18 02:04 PM), 'Spouse has signed a document.' (1/18 02:04 PM), and 'Thanks!' (1/22 08:26 PM). At the bottom is a text input field and a send button.

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 2019

Filing Status: Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er)

Your first name and middle initial: TAXPAYER TEST
Last name: TEST
Your social security number: 123-00-4567

SPOUSE TEST
Last name: TEST
Spouse's social security number: 765-00-4321

Home address (number and street): 123 TEST
Apt. No.:
Foreign address (number and street):
Foreign postal code:
Foreign country name:

Standard Deduction: Someone can claim you as a dependent Your spouse as a dependent Spouse benefits on a separate return or you were a dual status alien

Agreements: Yes No None born before January 2, 1982 Yes No None born before January 2, 1982 Yes No None

Dependents (see instructions):
CHILD TEST
Last name: TEST
SSN: 222-00-2222
Relationship: DAUGHTER
Age: 0
DOB: 00/00/00

1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	90000
2a	Tax-exempt interest	2b	
3a	Qualified dividends	3b	
4a	IRA distributions	4b	
5	Pensions and annuities	6	
7a	Capital gain or loss. Attach Schedule D, if required. If not required, check here	7b	
8	Other income from Schedule 1, line 8	9	90000
10	Adjusted gross income	11	90000
12	Standard deduction or itemized deductions from Schedule A	13	24400
14	Qualified business income deduction. Attach Form 8882 or Form 8882-A	15	
16	Adjusted taxable income	17	24400
18	Taxable income	19	24400

IRS, WHERE'S MY REFUND?

Tax Return Documents **Signature** Chat Settings

Taxpayer signature required **ADD SIGNATURE**

Spouse signature required **ADD SIGNATURE**

Tax Return Documents **Signature** Chat Settings