



**TaxAct** Professional

# Setup Guide

Tax Year 2026    Version 2.0



## TaxAct Professional Support Options

### Online Support Center

For the fastest answers, search our online [Help Topics](#).

### Account & Software Questions:

✉ [professional@taxactservice.com](mailto:professional@taxactservice.com)

☎ (319) 731-2682, option 1

### Order, Payment, & Sales Questions:

📁 [www.taxact.com/professional](http://www.taxact.com/professional)

✉ [prosales@taxact.com](mailto:prosales@taxact.com)

☎ (319) 536-3571

### Support Hours:

Monday – Friday  
8:00 a.m. – 5:00 p.m.

Saturday & Sunday  
Closed

All times are in Central  
time zone

Check our [support page](#)  
for in-season hours

Sales hours:  
Monday – Friday  
8:00 a.m. – 5:00 p.m.

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# Have a suggestion to improve TaxAct Professional?

We want to hear from you!

## To submit an idea to our product development team:

1. Click **Online** in the top menu
2. Click **Submit Product Suggestion**
3. You will be directed to our TaxAct Product Suggestion page, where you can describe your idea

## To provide general feedback:

1. Click **Online** in the top menu
2. Click **Submit Product Feedback**
3. You will be directed to our Feedback page, where you can rate your user experience

We continually incorporate your suggestions into TaxAct Professional Editions to help you provide the best possible service to your clients.

# Download & Install

TaxAct has simplified the Professional Editions installation process, starting with 2024. You can now click one link and install all desired products at the same time.

Enterprise Editions files can be shared on a network, either your own local server or on-line to TaxAct's secure servers.

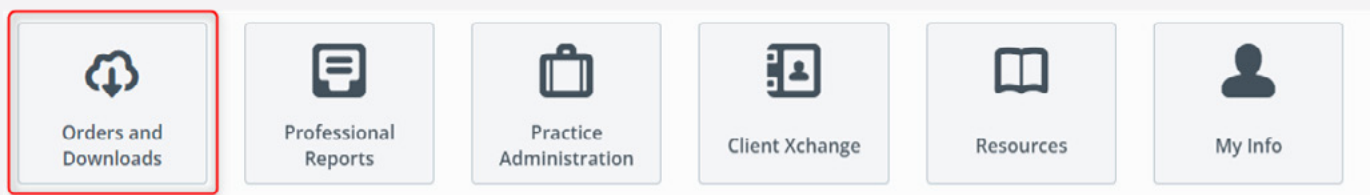
Be sure to verify the [system requirements](#) before installing the software.

## Recommended Method:

Download the TaxAct Professional Installer: [TaxActProfessionalSetup.exe](#) (3.08 MB)

**Alternative Method:** Download Installation File from Practice Manager

- 1 Go to [www.taxact.com/professional](http://www.taxact.com/professional) and click the **Sign In** button in the upper right corner.
- 2 Sign in with your Username and Password.
- 3 Click the **Orders & Downloads** tile.



4

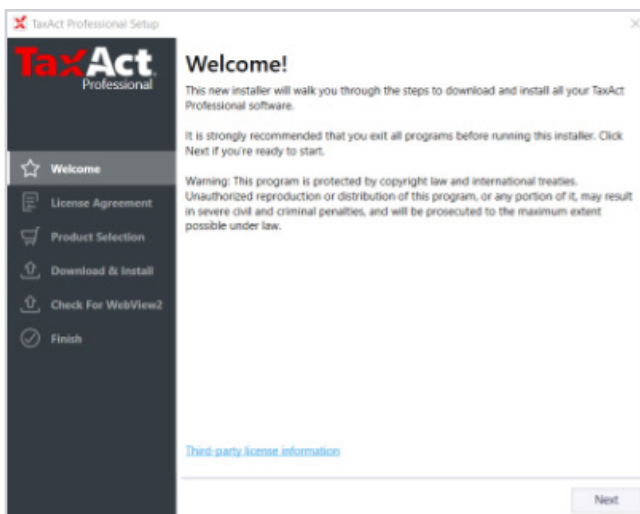
Click the **Download** link to the right of the product you wish to download, or to download multiple products at once click the **Download our simplified installer** link at the top.

5

If the installation does not automatically run, locate and double click the **File** icon to manually install the software.

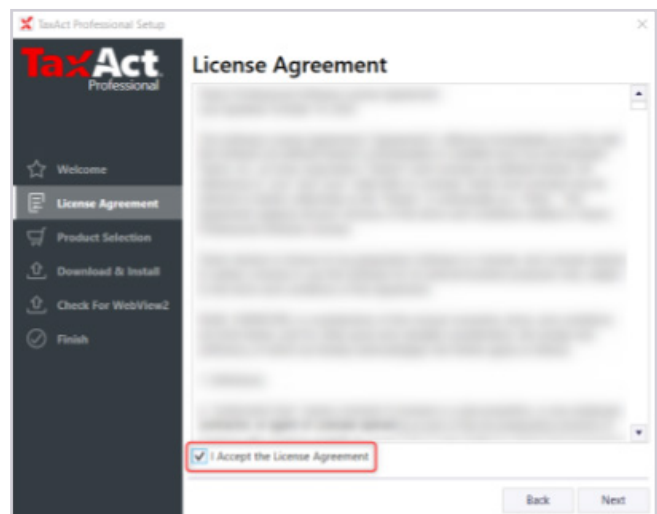
*(Type CTRL+J in Firefox or Chrome to help you locate your downloaded file.)*

## Install Your Software Using Simplified Installer (Recommended)



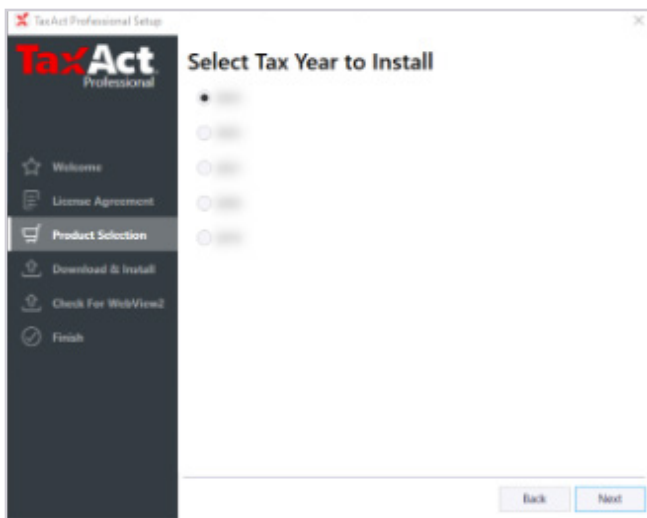
1

Open the downloaded program file. On the initial screen, click **Next** to begin the installation.

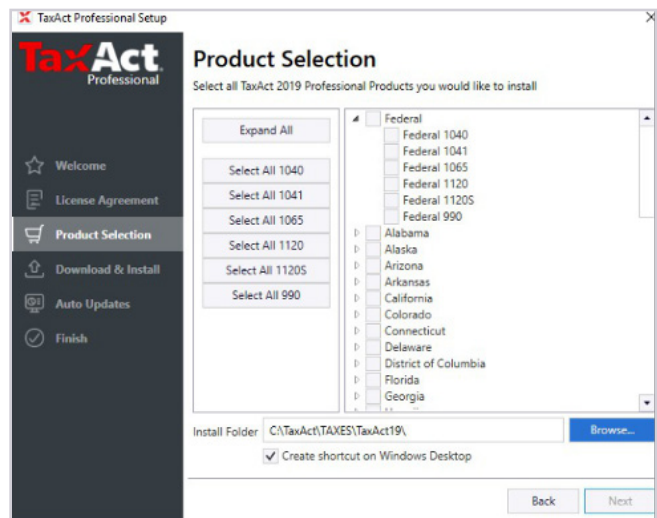


2

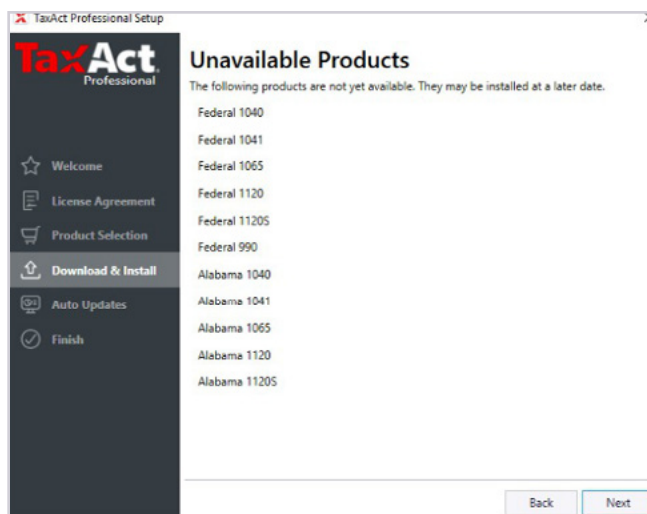
Select the checkbox next to "I Accept the License Agreement", then click **Next**.



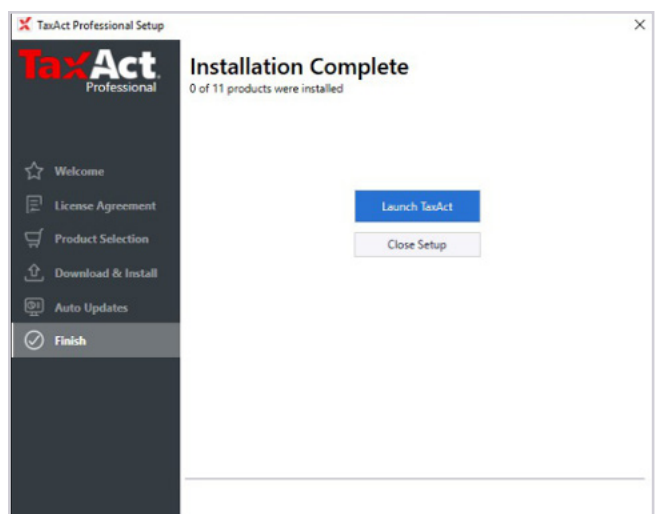
**3** Select the year to install.



**4** Choose the products to install. Click the arrow to expand more options.



**5** Selected products still in development will be listed. You will be notified when they become available.



**6** TaxAct will install all selected products and notify when installation is complete.

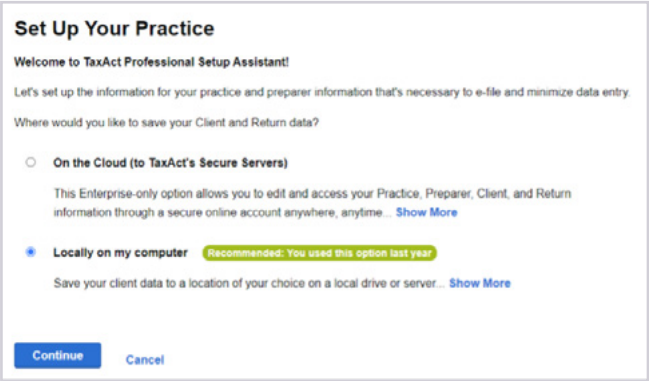
# Share Files on a Network (Enterprise Editions Only)

The first time you launch the program, you'll be prompted to set up your practice. At this point, you need to choose whether to save shared files on your local network, or on TaxAct's secure servers.

- 1

Select the radio button next to the option you prefer. If you are a returning user, we'll remind you which option you used last year.
- 2

Click **Continue**.



## Online Network Option

This is recommended if your practice has multiple preparers or if you want access to returns from multiple locations. See our [Online Networking FAQ](#) for more information.

## Local Network Option

If you choose "Locally on my computer," your client returns will be saved to a location of your choice on a local drive or server. If you wish to share this data with multiple computers, this folder should be in a shared network location. See our [Local Networking FAQ](#) for more information.

Whether storing data online or locally, all users of the software are required to sign in with their TaxAct username and password upon software startup in order to authenticate the account. Each user will need to sign in again after either 30 minutes of inactivity or after 24 hours (whichever is sooner).

Have questions about how to set up a local network? Refer to the Microsoft and TaxAct Support resources below:

|                                        |                                                                                                                 |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Windows Support                        | <a href="https://support.microsoft.com/en-us/products/windows">support.microsoft.com/en-us/products/windows</a> |
| TaxAct Support – Network Installations | <a href="https://taxact.com/support/22832/">taxact.com/support/22832/</a>                                       |
| TaxAct Professional Support            | <a href="https://taxactprofessional.com/support">taxactprofessional.com/support</a>                             |

## Install State Editions

- 1 Open a return, then click **Return > State > InstallState**.
- 2 Select each state you wish to install or **Select All**.
- 3 Click **Auto Install** to add the state modules with recommended settings.

Or, click **Manual Install** to add states to an alternative location or to a network.

**Install State Module**

Before completing a state return, you must download and install the state module. To install your state module, you can use either the Auto Install Method (recommended) or the Manual Install Method.

If you have not yet ordered your state software, you must do so now before installing.

**Order State**

With the Auto Install Method, you must provide your TaxAct Username and Password, and also specify the state you wish to install. With the Manual Install Method, you must first download the state module, then locate the downloaded module in order to run the install. Note: Account information is sent via email upon purchase or registration of products.

**Auto Install Method**

TaxAct Username:  Password:

☐ Alabama ☐ Arizona ☐ Arkansas ☐ California ☐ Colorado

**Select All** **Clear All**

**Auto Install** Click this button to download and install your state module(s). Be sure that you've entered your TaxAct Username, Password, and the state(s) you wish to install.

**Manual Install Method**

**Download** Click this button if you have registered or purchased the state module, but not yet downloaded it. Be sure to take note of the folder name you download the module to, as you will need this information in order to find the downloaded file later.

**Manual Install** Click this button if you have downloaded, but not yet installed, the state module. The dialog that appears will help you find and run the newly downloaded state module.

**Close**

## Adding or Removing States from a Return

1. Once a state has been installed, open the return you wish to add the state to and click **Return > State > Add/Remove State** to attach or remove the state from a return. Or from the left navigation panel select **Add / Remove States**

**All Forms** | **Client's Return**

**Add / Remove State(s)**

We have detected that you have installed a new state. If you would like to include this state in your return, select the checkbox for the state you wish to include and click Save.

To remove a state from this return, clear the checkbox for the state you wish to remove.

**Warning:** Removing a state will delete all the data you have entered for that state.

☐ Iowa

**Help** **Cancel** **Save**

# Installation FAQs

## I downloaded the program file but can't find it on my computer. How do I find it?

Try any of the following:

- Repeat the download process,
- Use keyboard shortcut CTRL+J in your web browser, or
- Find the Downloads menu item or icon on your Web browser.

You can also use [Windows search](#) to locate the installation file on your computer. The TaxAct Professional Installer file name is TaxActProfessionalSetup.exe.

## Why am I getting an error when clicking on the installation file?

A temporary or partial file may have been created during the download process due to connection issues. This is usually designated with something added to the filename, such as “\_part.”

To avoid this problem, check your browser for progress messages, set your browser to run downloads directly, or use a different browser.

## What are TaxAct's system requirements?

Please refer to the minimum and recommended system requirements for TaxAct Professional below. For the best performance, especially for users with large client lists or very complex returns, we suggest exceeding the recommended system requirements where possible.

| Recommended                                                                                                                                                                                                              | Minimum                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <b>Operating System</b><br>Windows 10 or 11                                                                                                                                                                              | <b>Operating System</b><br>Windows 10                                                  |
| <b>Computer Processor</b><br>Intel® Core™ i5 or equivalent AMD processors                                                                                                                                                | <b>Computer Processor</b><br>Intel® Core™ i3 or equivalent AMD processors              |
| <b>Memory</b><br>8 GB of RAM                                                                                                                                                                                             | <b>Memory</b><br>8 GB of RAM                                                           |
| <b>Disk Space</b><br>2 GB per tax year                                                                                                                                                                                   | <b>Disk Space</b><br>600 MB per tax year                                               |
| <b>Display Resolution (in pixels)</b><br>1920x1080 or higher                                                                                                                                                             | <b>Display Resolution (in pixels)</b><br>1920x1080 or higher                           |
| <b>Internet Access</b><br>High-speed internet connection such as DSL, Cable/Broadband.                                                                                                                                   | <b>Internet Access</b><br>High-speed internet connection such as DSL, Cable/Broadband. |
| <b>Additional</b>                                                                                                                                                                                                        |                                                                                        |
| While TaxAct Professional may run on systems not meeting these standards, system performance will be sub-optimal.                                                                                                        |                                                                                        |
| File share and sync services (such as OneDrive and Dropbox) are not supported for data storage, backup, or sharing purposes.                                                                                             |                                                                                        |
| We recommend having your IT resource ensure all systems you're using are properly installed and mapped to the correct drives for all users for proper functionality prior to contacting <a href="#">TaxAct Support</a> . |                                                                                        |
| Microsoft no longer provide security updates or support for PCs running Windows 8.1. For the best experience and security of your data, you will need to update your system to Windows 10 or 11.                         |                                                                                        |

While TaxAct Professional may run on systems not meeting these standards, system performance will be sub-optimal.

# Import Master Information

You can save time by utilizing TaxAct's **Import Prior Year Online Master Information** feature. Practice, Preparer, Client, and General information will be automatically populated based on last year's entries. When you sign into the program for the first time, you will be prompted to import Master Information.

TaxAct will search your local computer for master information files and bring them in once you authorize the import. If no files are found, you will see the following screen:

## Import Prior Year Master Information

We couldn't find any prior year TaxAct data in this account.

Please confirm you're a new user or used a different account last year.

[I have data in another account](#)[I am a new TaxAct user](#)

If you stored Master Information online last year, click the **I used TaxAct's secure servers last year** button.

## Import Prior Year Master Information

We found prior year Preparer data in this account. Would you like to import your Master Information now?

Practice ID:  
123-456789

Practice Name / Location:  
Test Practice

Preparers:  
John Doe

[Skip Import](#)[Import From Another Account](#)[Import Now](#)

# Set Up the Software

The first time you launch the software, the TaxAct Setup Wizard will walk you through steps to set up Master Information, including Practice, Preparers, Client Status, Directories, and General categories. For best results, complete every tab in the setup window before clicking the **OK** button. To access each section individually after the initial setup, click **Preparer > Master Information**

Master Information is stored on TaxAct's Secure Servers, which allows for:

- increased security
- more powerful practice management
- set return-level permissions and assign returns
- see practice invitation status at a glance
- activate or inactivate preparers

## Practice

You can edit and access your Practice, Preparer, Client, and Return information through a secure online account anywhere, anytime. You'll need to sign in to Practice Manager each time you open the TaxAct software, so please ensure you have a stable Internet connection before proceeding.

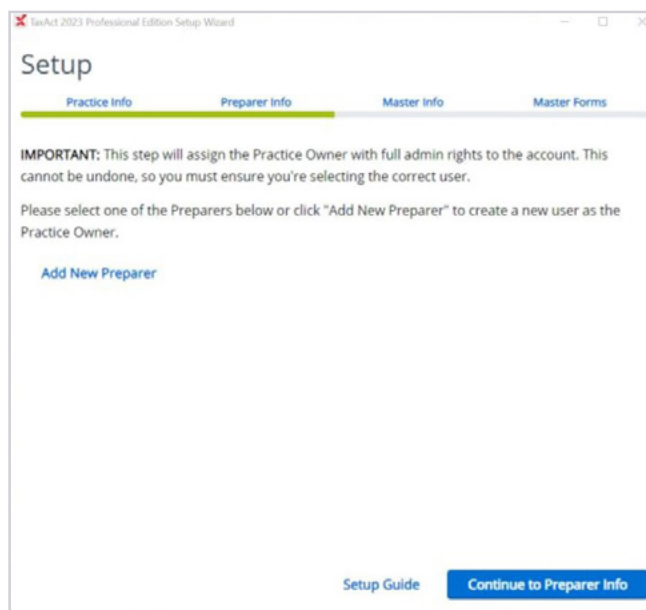
The screenshot shows the 'Setup' window with the 'Practice Info' tab selected. The window has a header with four tabs: 'Practice Info' (active), 'Preparer Info', 'Master Info', and 'Master Forms'. Below the tabs, a message states: 'Please enter your practice's information below. This information can be used for each preparer in your practice in the next steps to minimize data entry.' The form includes the following fields: 'Practice Name (yours if self-employed)' with a help icon, 'Practice ID' with a help icon, 'EIN' with a help icon, and a checkbox 'Check if self-employed' with a help icon. The 'Address' section contains 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu), and 'Zip Code'. The 'Foreign Address' section contains 'Country' (a dropdown menu), 'Province', and 'Postal Code'. The 'Contact Information' section contains 'Work Phone', 'Mobile Phone', 'Foreign Phone', and 'Fax'. At the bottom right, there are two buttons: 'Setup Guide' and 'Continue to Preparer Info'.

Enter your practice information as you want it to appear on tax returns, labels, letters, and other correspondence. The information you enter can also be linked to each preparer (see the Preparers Information menu section below). When finished entering your data, click **Continue to Preparer Information**.

## Preparers

After completing the Practice information, the next step is to enter information for each Preparer in your practice. You must enter at least one preparer in order to continue the setup process. To access the full Preparers menu, click **Add New Preparer**.

**Note:** *The first preparer you add should be yourself.*



## Preparers Information menu

Click **Add New Preparer** to enter information, keeping the following in mind:

- **Note:** *The first preparer you add should be yourself or the default preparer.*
- Check the **Use My Practice Information** box (in the Address section) to link the preparer to the Practice address. Otherwise, enter the preparer's specific contact information.
- In the Basic Information section, selecting the "IRS may discuss..." option will populate the Third Party Designee field on the return with "PREPARER."
- Enter "None" if the IRS has not yet issued a CAF number (you must submit Form 2848, Power of Attorney and Declaration of Representative to the IRS to receive a CAF number).
- Be sure to enter a valid email address for each preparer. This is necessary in order to invite preparers to your online network.

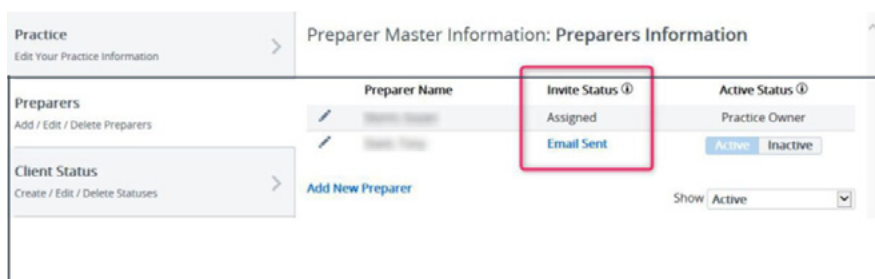
To change the default preparer, select a name from the Default Preparer dropdown menu in the Preparers tab (**Preparer > Master Information > Preparers**). If you delete the Default and close the window, the next preparer in the list will become the Default.

Each practice is assigned a unique alphanumeric identification code called a "Practice ID". If you have multiple preparers in your practice, each preparer will have the same Practice ID. The Practice ID, EFIN and PTIN (or SSN) is synched with your TaxAct Account to streamline the e-file process.

To locate your Practice ID, sign in to your TaxAct Account and look in the upper right corner.



Use the **Invite Status** column to manage preparer invitations.



## Electronic Filing Info Menu – E-Filing Info

An Electronic Filing Identification Number (EFIN) is required to e-file returns. To obtain an EFIN, please see the IRS page [Become an Authorized e-file Provider](#) for more information.

To use your preparer information to receive e-file notifications, the check the box next to **Use preparer information for E-file notifications**. Please make sure if you have checked the box that you have entered your contact information on the Preparer Info screen, or an alert will appear. Both a mobile phone number and an e-mail address are required to receive notifications.

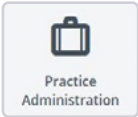
## IRS EFIN Requirements for Tax Professionals & Software Companies

The IRS requires tax software companies to collect and verify EFIN Tracking Numbers from its professional customers. Your Tracking Number appears on the IRS e-Services Summary in your IRS e- Services account.

Please submit a copy of that IRS e-file application summary (including Tracking Number) to TaxAct for verification. Having your EFIN verified prior to the start of tax season will help avoid disruption to your e-filing services. **All EFINs will need to be verified prior to e-filing.**

Generally, professionals who have been verified in a previous year will not need to be re-verified; however, TaxAct may request that you re-verify in order to e-file. You can check your EFIN verification status in your TaxAct Account. If your EFIN is rejected for any reason, we will notify you via email.

To submit your IRS e-file application summary or to check the status of your EFIN Verification:

1. Sign in to your TaxAct Account.
2. Click the **Practice Administration** Tile. 
3. Click **EFIN Verification** to expand. 
4. Enter your EFIN and the Tracking Number found at the bottom of your IRS e-file Application Summary. **Reminder:** To obtain a copy, [sign in to your IRS e-Services Account](#).
5. Click **Choose File** to locate and attach your IRS e-file Application Summary. (PDF is preferred, but .jpg, .bmp and .png files are also accepted.)
6. Check the box to indicate you are authorized to submit this information. Click **Submit**.
7. We will notify you via email if your EFIN information is rejected for any reason, and your verification status will be available in your TaxAct Account within 2 business days.

## Electronic Filing Info tab – Credit Card

Credit card information is only required if you choose to pay e-file fees with each submission (Pay Per Return method). If no credit card information is entered, you will be prompted for credit card and billing information each time you e-file. Credit cards may be used to purchase E-Signatures as well.

If your TaxAct order includes unlimited e-filing or you have prepaid for e-filing, you do not need to enter credit card information. Simply enter your EFIN, then click **OK**.

**Tip:** Double check that you've entered your credit card information correctly so that your e-files are not rejected due to insufficient prepaid funds.

## Permissions Menu

**Practice Administrator** - The first preparer you add to your practice will be the Practice Administrator by default (this cannot be removed).

The Practice Administrator permission can be given to other preparers in the practice by checking the box for “User is Practice Administrator” on the permissions tab in their preparer information.

Anyone with the Practice Administrator permission will be able to:

- Invite other preparers to join the practice
- Modify other preparer’s permissions
- Deactivate (or reactivate) preparers

The screenshot shows the 'Edit Preparer Information' window with the 'Permissions' tab selected. The window has four tabs: 'Preparer Info', 'Electronic Filing Info', 'Permissions', and 'Invite'. Under 'Preparer's Permissions', there are two checkboxes: 'User is Practice Administrator' (checked) and 'User can access Data Management Tool' (unchecked). Below these are three sections: 'Client Manager' with a dropdown menu set to 'Entire Practice'; 'Practice and Preparer Information' with permissions for 'Edit Practice Information', 'Edit Preparer Information', 'Edit Client Status Options', 'Change General Filing Settings', 'Change Miscellaneous Settings', 'Change Calculation Settings', and 'Edit Master Forms'; and 'Client and Return Information' with permissions for 'Create New Returns', 'Open Returns', 'Remove Returns', 'Import Returns', 'Export Client Information', 'Print Returns', 'E-file/Online Backup Returns', and 'Edit Client Notes'. Each permission has 'Allow' and 'Deny' buttons. At the bottom are 'Cancel' and 'Finish' buttons.

**Data Management Tool:** The Data Management Tool allows users to permanently delete Client Data for all years. Only the Practice Owner can manage this permission. Permissions are divided into 3 categories: **Client Manager**, **Practice and Preparer Information**, and **Client and Return Information**.

## Practice and Preparer Information

- **Edit Practice Information** – Allows user to update the Master Information for the practice
- **Edit Preparer Information** – Allows user to update the Preparer Information for any preparers within the practice
- **Edit Client Status Options** – Allows user to edit existing status, add new status, or delete status for Client Return Status and Client Pay Status
- **Change General Filing Settings** – Allows user to change Filing and Printing options from the General Master Information tab
- **Change Miscellaneous Settings** – Allows user to change Miscellaneous options from the General Master Information tab
- **Change Calculation Settings** – Allows user to change Calculation options from the General Master Information tab
- **Edit Master Forms** – Allows user to change Master Forms information, including Charge by Form, Billing Invoice, Instruction Letter, and Schedule K-1 Letter (in application product versions)

## Client and Return Information

- **Create New Returns** – User can create new client returns
  - **Open Returns** – User can open client returns they are authorized to view
  - **Remove Returns** – User can delete client returns that they are authorized to view
  - **Import Returns** – User can import client returns from PDFs or prior year TaxAct data
  - **Export Client Information** – User can export client information in a customized or comprehensive comma separated (.csv) or tab delimited (.txt) file
  - **Print Returns** – User can print client returns, organizers, consent forms, labels, and reports
  - **E-file/Online Backup Returns** – User can e-file client returns or back up returns online (Enterprise Local storage users only)
- 

## Invite Menu

To grant network access to other preparers in your practice, the practice owner must “Invite” them to join your practice via email (instructions below).

The email will include a unique link the preparer must click in order to create his or her own TaxAct Account so that the account will use your PracticeID.

**Note:** *If you are the practice owner, you do not need to invite yourself (you are automatically added to your practice’s network).*

Your invited Preparers will have access to the following areas of Practice Manager (listed by tile name) in their TaxAct Account:

- Orders & Downloads
- Professional Reports
- Practice Administration (EFIN Verification only)
- Client Xchange (if purchased by the Practice)
- Resources
- My Info
- My Preferences

Your invited preparers will not have access to the following tiles in Practice Manager:

- Preparer Invitation

To invite preparers:

- 1 Click the **Practice Administration** tile
- 2 Click **Preparer Invitation**.
- 3 Complete and click the **Send Email Invitation** button.

Once all information in the Preparer Information setup is complete, click **Finish**.

The screenshot shows the 'Edit Preparer Information' window with the 'Invite' tab selected. The window has four tabs: 'Preparer Info', 'Electronic Filing Info', 'Permissions', and 'Invite'. The 'Preparer Invitation' section contains the following text:

In order to share software downloads, unlimited or pre-paid e-filing, reporting, or services (such as Client Xchange if purchased), the practice owner must send each preparer an email invitation. The email will include a unique link the preparer must click in order to create his or her own TaxAct Account so that the account uses the same Practice ID. If you are the practice owner, you do not need to invite yourself.

You can email invitations now or at a later time by clicking Edit next to the user in your Preparer List. You can also send invitation emails from your Practice Manager (sign in to your TaxAct Account and click the "Practice Administration" tile).

For security purposes, your Practice ID is not included in the invitation email, so you'll want to provide your Practice ID separately to each invited preparer. To locate your Practice ID, sign in to your TaxAct Account and look in the upper right corner of your Practice Manager.

At the bottom of the window, there are three buttons: 'Cancel', 'Back to Step 3', and 'Finish'.

## Client Status Menu

Click **Add New Status** to create a custom message to appear in the Return Status and Payment Status columns of Client Manager.

The screenshot shows the 'Preparer Master Information: Client Status' window. On the left is a sidebar with the following sections:

- Practice**: Edit Your Practice Information
- Preparers**: Add / Edit / Delete Preparers
- Client Status**: Create / Edit / Delete Statuses
- Directories**: Change Directory Information
- General**: Change Other Preferences

At the bottom of the sidebar are 'Setup Guide' and 'Close' buttons, and a 'Help' link.

The main area is titled 'Preparer Master Information: Client Status' and is divided into two columns:

- Client Return Status**: Includes an 'Add New Status' link and a list of status options: Amended Return, Billed, Filed Electronically, Filed Extension, Filed Paper, Imported, In Progress, New Return, PDF Imported, Return Completed, Sent Organizer, and Waiting for Information. Each option has an edit icon and a trash icon.
- Client Pay Status**: Includes an 'Add New Status' link and a list of status options: Not Paid, Paid, and Partially Paid. Each option has an edit icon and a trash icon.

# Directories Menu

The Directories menu displays where client documents are stored and allows you to change those locations.

Practice

Edit Your Practice Information

Preparers

Add / Edit / Delete Preparers

Client Status

Create / Edit / Delete Statuses

Directories

Change Directory Information

General

Change Other Preferences

Help

Setup Guide

Close

Preparer Master Information: Directories

Client Data Directory

Browse

Restore Default Location

PDF Directory

Browse

Restore Default Location

Log Files Directory

Browse

Restore Default Location

Auto Backup Directory

Browse

Restore Default Location

E-files Directory

Browse

Restore Default Location

# General Menu

The General menu presents options for filing/printing, calculation, and miscellaneous preferences.

Practice

Edit Your Practice Information

Preparers

Add / Edit / Delete Preparers

Client Status

Create / Edit / Delete Statuses

Directories

Change Directory Information

General

Change Other Preferences

Help

Setup Guide

Close

Preparer Master Information: General

Filing/Printing Options

☐ Print the preparer's name in the Preparer's Signature Field

☐ Print the current date in the Preparer's Signature Date Field

☐ Print all capital gain/loss transactions on Form 9949

☐ When return qualifies, file Form 1040-SR instead of Form 1040 on all returns – (1040 only)

☐ File State "Long Forms" instead of State "Short Forms" on all returns – (1040 only)

☐ Print Schedule B even if under \$1,500 – (1040 only)

☐ Automatically lock returns after E-Filing

☐ Always print Form 7203 for Fed 1120-S

Miscellaneous Options

☒ Assign invoice # to all new and imported returns

Next Invoice #1001Increment Invoices By1

☒ Show message on return open indicating that refund has changed due to an updated or different version of TaxAct

☐ Do not include social security number(s) or direct deposit information on Tax Organizers – (1040 only)

☒ Show warning on return close indicating that others cannot edit this checked out return

Calculation Options

☐ The IRS should compute Form 2210 – Underpayment Penalty (TaxAct will not compute penalty)

☐ States will compute the underpayment penalty (TaxAct will not compute penalty)

☐ Automatically complete Boxes 3-6 of Form W-2 based on Box 1 and Box 12 entries

☐ Automatically complete Box 16 State Wages of Form W-2 based on Box 1 entry

☐ Automatically complete Box 18 Local Wages of Form W-2 based on Box 1 entry

☒ Do not automatically compute state sales or use tax (New York returns only)

Copy Calculation Options to Existing Returns

## Set Master Forms Defaults

Once you make all of your Master Info selections, the Setup Wizard prompts you to set defaults for various forms you use in your practice.

To complete the Master Forms setup:

**1** Click the appropriate program tile.

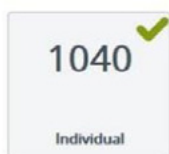
**2** More options appear on the screen, which could include:

- Charge By Form
- Billing Invoice
- Instruction Letter
- Schedule K-1 Letter (applicable product versions only)

The screenshot shows the 'Setup' window with tabs for Practice Info, Preparer Info, Master Info, and Master Forms. The Master Forms tab is active, displaying a message: 'Some forms have not yet been reviewed.' Below this message are six tiles representing different tax forms: 990 Tax Exempt, 1040 Individual, 1041 Estates & Trusts, 1065 Partnership, 1120 C Corporation, and 1120S S Corporation. At the bottom right, there are links for 'Setup Guide' and a 'Close' button.

Once you complete the setup for each form, a green checkmark will appear on the tile so you can easily see which you have not yet completed.

You can return to this section anytime, but keep in mind that setting Master Forms defaults from the beginning will save you time later.



### 1040 - Individual Master Forms

Three buttons are shown for the 1040 Individual Master Forms setup: 'Charge By Form' with a green checkmark, 'Billing Invoice' with a green checkmark, and 'Instruction Letter' with a green checkmark, indicating all three options have been successfully configured.

## Charge by Form

This feature allows you to set default billing rates by form. You can add forms and charges not listed on the blank lines at the bottom of the list. Use the Select Type dropdown menu to switch between federal and state forms.

| Form                                                                                | Charge |
|-------------------------------------------------------------------------------------|--------|
| Form 1040, Individual Income Tax Return                                             | 0.00   |
| Form 1040-SS, U.S. Self-Employment Tax Return (Puerto Rico)                         | 0.00   |
| Form 1040NR, Nonresident Alien Income Tax Return                                    | 0.00   |
| Form 1040NR-EZ, Income Tax Return for Certain Nonresident Aliens With No Dependents | 0.00   |
| Form 1040ES, Estimated Tax Payments                                                 | 0.00   |
| Form 1040ES (1040NR), Estimated Tax Payments                                        | 0.00   |
| Form 1040Y, Amended Tax Return                                                      | 0.00   |

## Master Billing Invoice

This is where you can:

- Assign custom invoices
- Select the Charge by Form method or list a flat preparation fee
- Charge a separate electronic filing fee
- Create custom fees
- List separate charges for preparation of Federal and State returns
- Apply a local sales tax amount

| Preparation of            | Charge |
|---------------------------|--------|
| Federal Income Tax Return | 0.00   |
| State Income Tax Return   | 0.00   |

## Master Instruction Letter

From here, you can set preferences for the formatting and content of your filing instruction letters, including:

- Letterhead
- Date parameters
- How to refer to your practice (e.g., “me” or “us”)
- Whether to include your name in the signature area

To access Master Form Data, click **Preparer > Master Information > Master Form Data**.

Preparer Master Information

Charge By Form Billing Invoice Instruction Letter

**MASTER INSTRUCTION LETTER**

Complete the Master Instruction Letter below by selecting the checkbox next to the applicable items. The Master Instruction Letter information will transfer to all new or imported returns. If you would like the Master Instruction Letter feature to be used for returns already created, select Copy Master Form Data to Client(s) from the Preparer -- Master Information drop-down menu.

• Check the applicable box indicating if you will be printing instruction letters on letterhead paper:

☒ No letterhead paper

☐ Use own letterhead paper (small logo)

☐ Use own letterhead paper (large logo)

☐ Use the following as the letterhead:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Reset All Print OK Cancel Help

## Copy Master Information to Client Returns

TaxAct allows you to apply Master Information changes to an individual return or to all returns. You can choose to select by form type or by clients.

Click **Preparer > Master Information > Copy Master Form Data to Clients(s)**. Click **Copy Master Form Data** to apply changes. Changes to Master Information can be applied to select returns or all existing returns.

# Set Up the Software

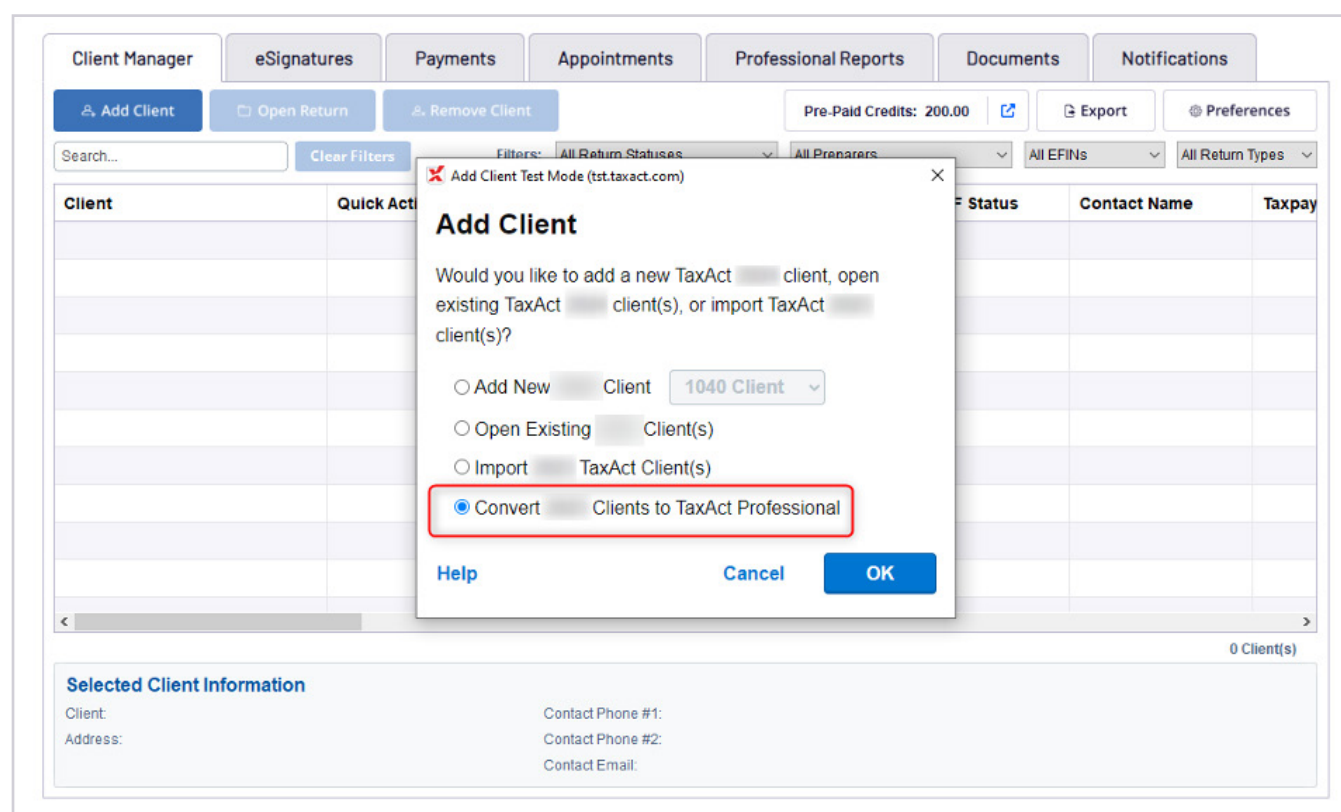
TaxAct now includes the ability to convert previous year 1040 ProSeries, TaxSlayer Pro™, and Taxwise® client data. Other software programs below can use PDF import:

- CrossLink®
- Intuit Lacerte®
- Drake®
- Intuit ProConnect Online®
- ATX™
- UltraTax®

## Convert Client Data

To add a new client to convert:

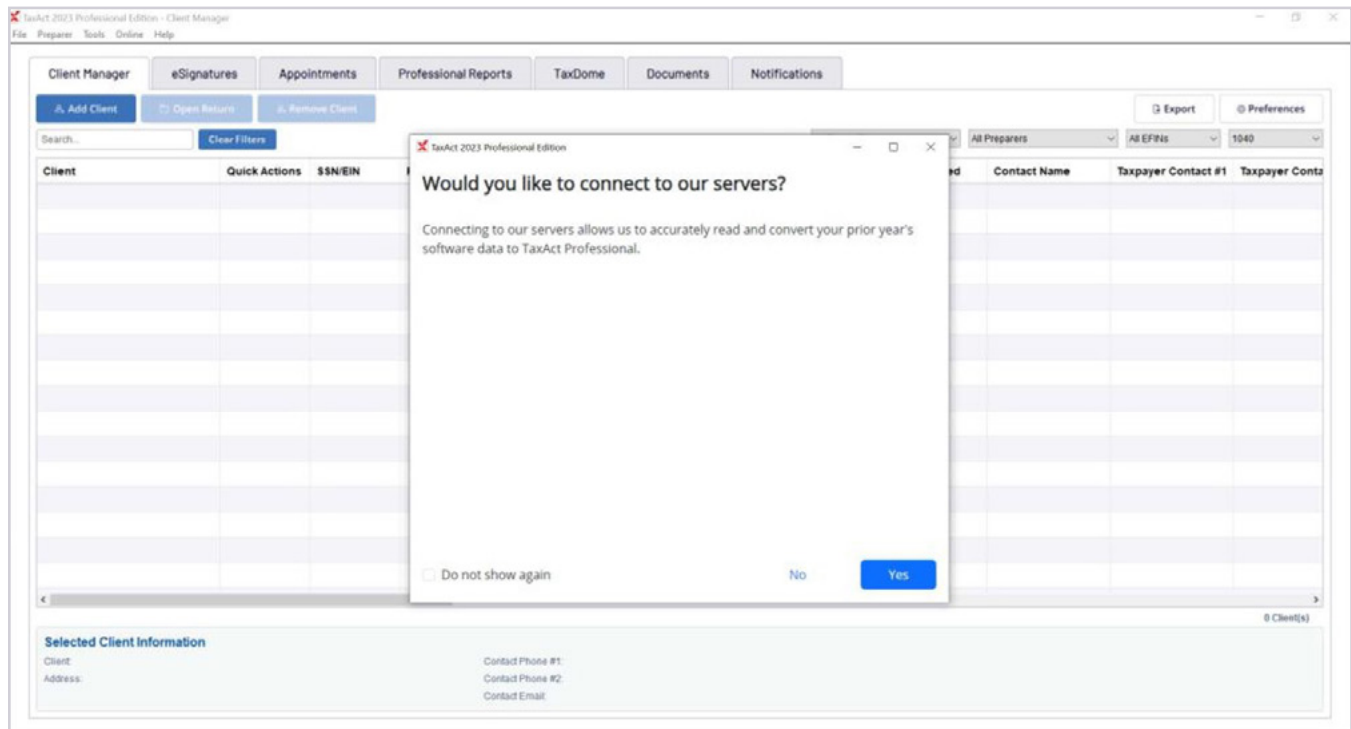
Click **Client Manager > Add Client > Convert Clients to TaxAct Professional**



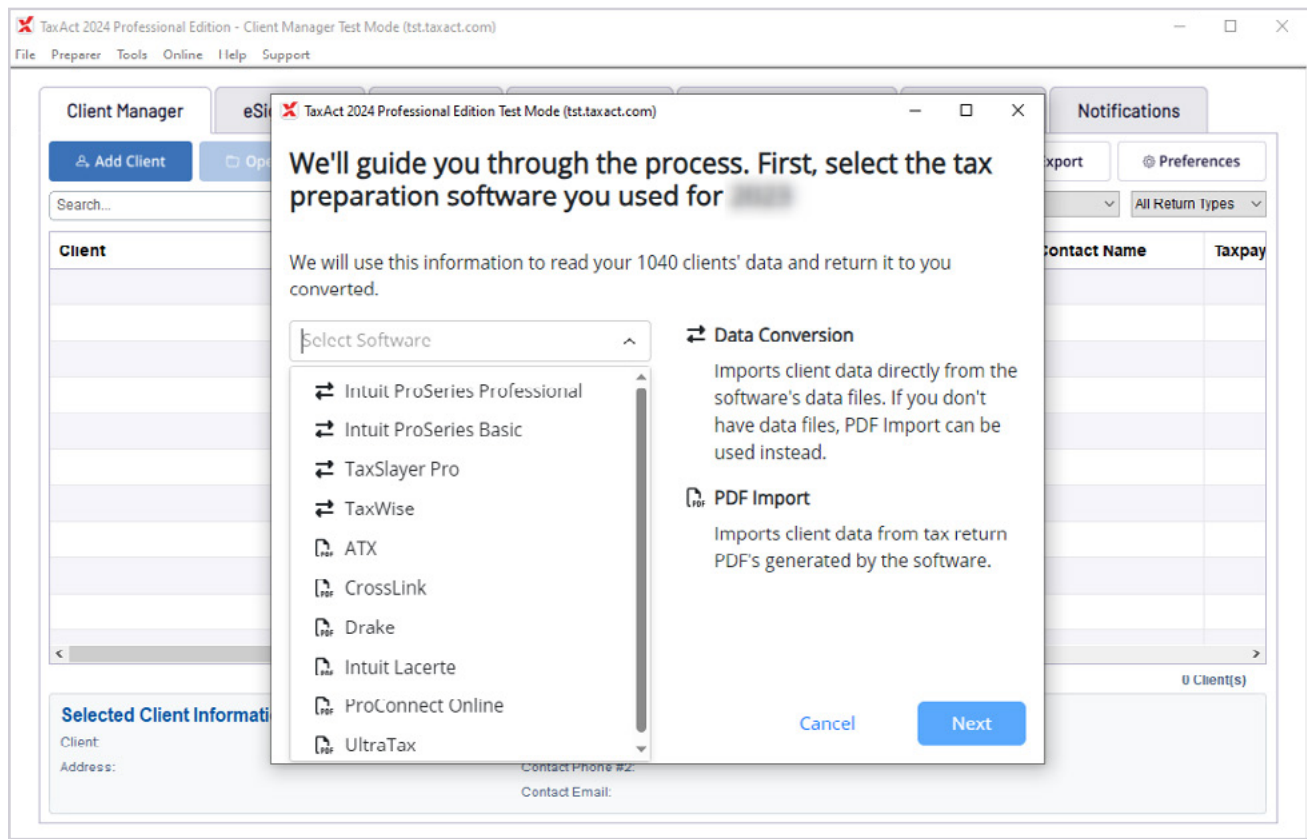
To import a client to convert:

Click **File > Import > Convert Clients to TaxAct Professional**

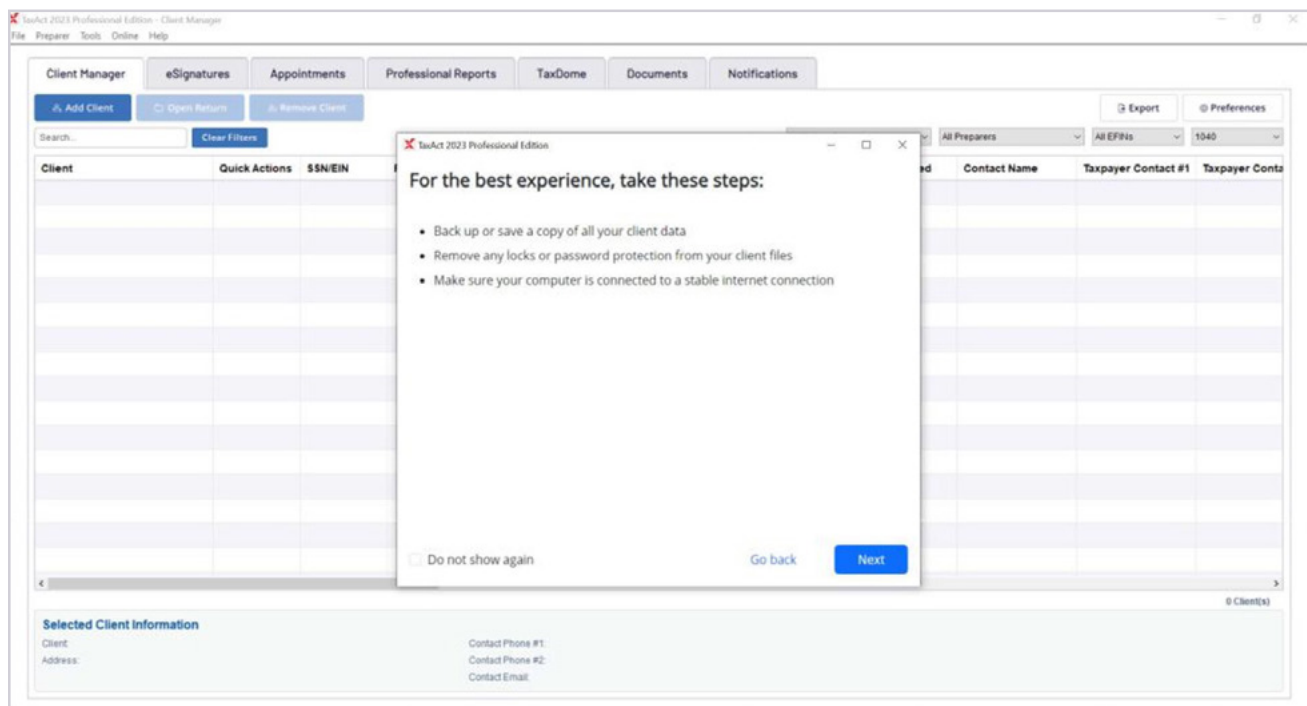
When asked: “Would you like to convert your 1040 clients’ data from your previous year’s software to TaxAct Professional?” chose **Yes**.



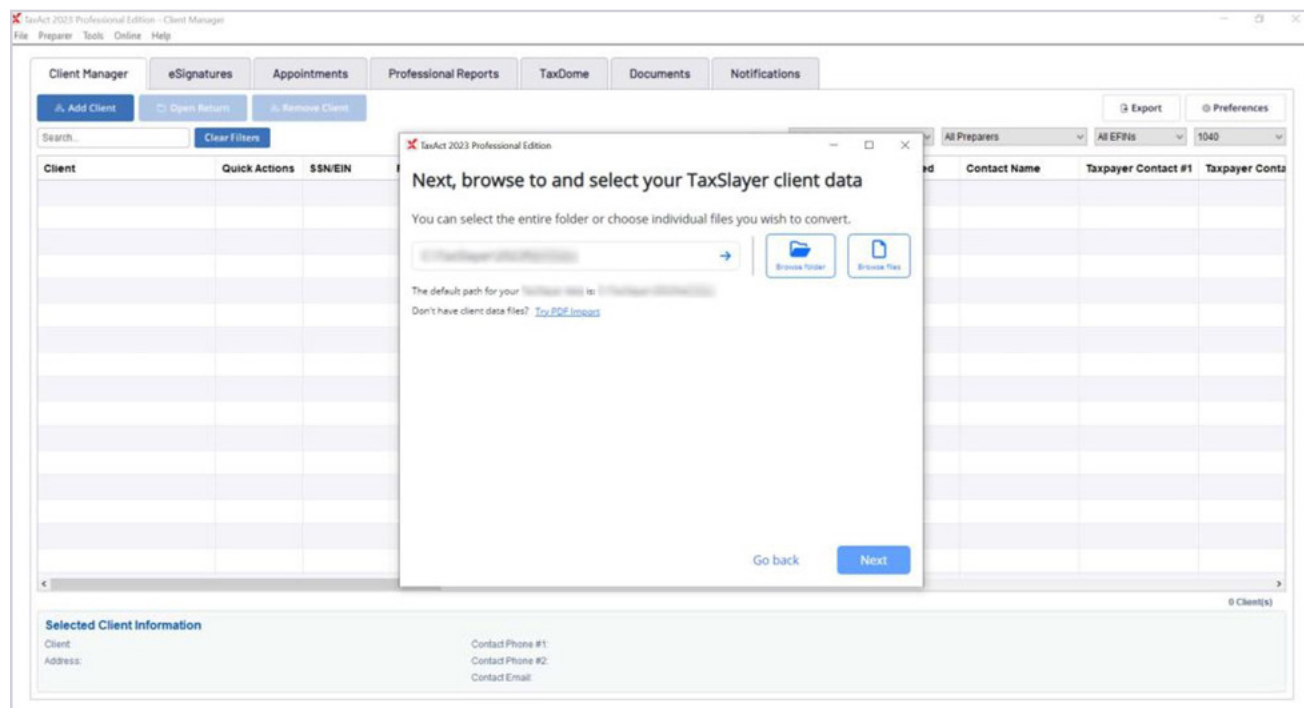
Next, select the ProSeries software you used the previous year and click **Next**.



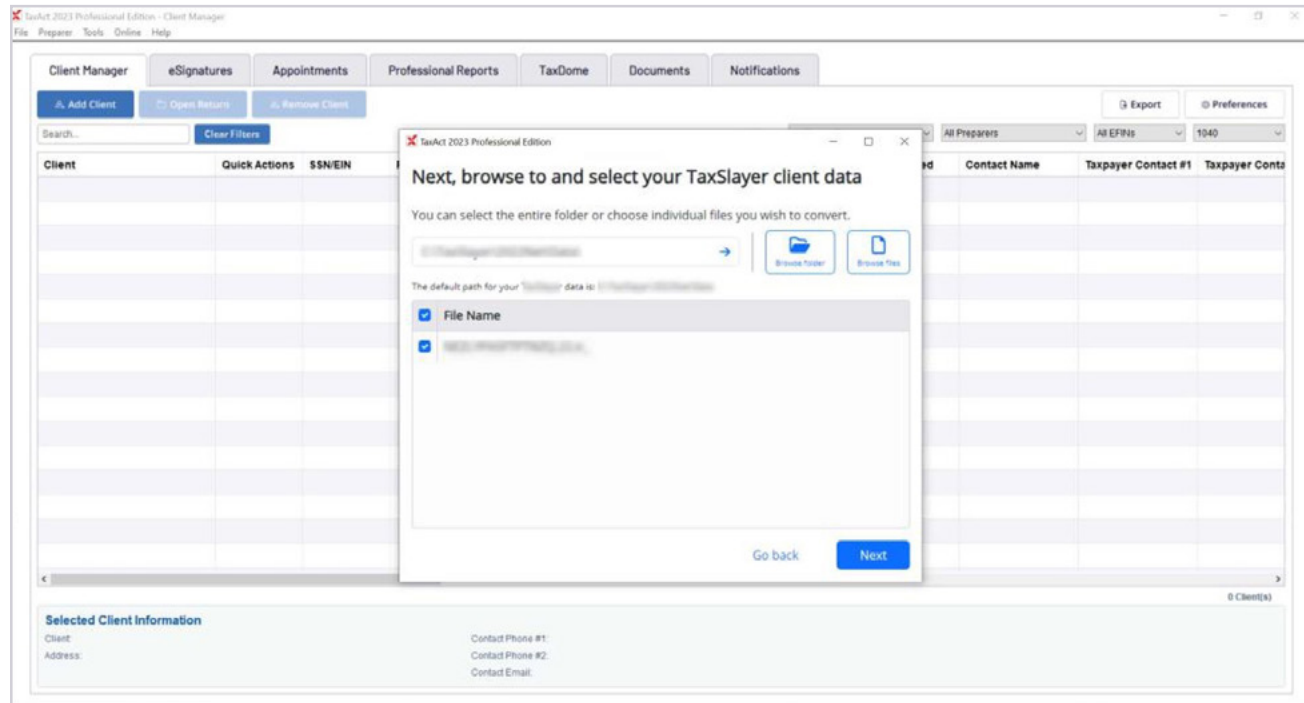
Be sure to save or back up all your client data, and to remove any locks or password protection from your client files before continuing.



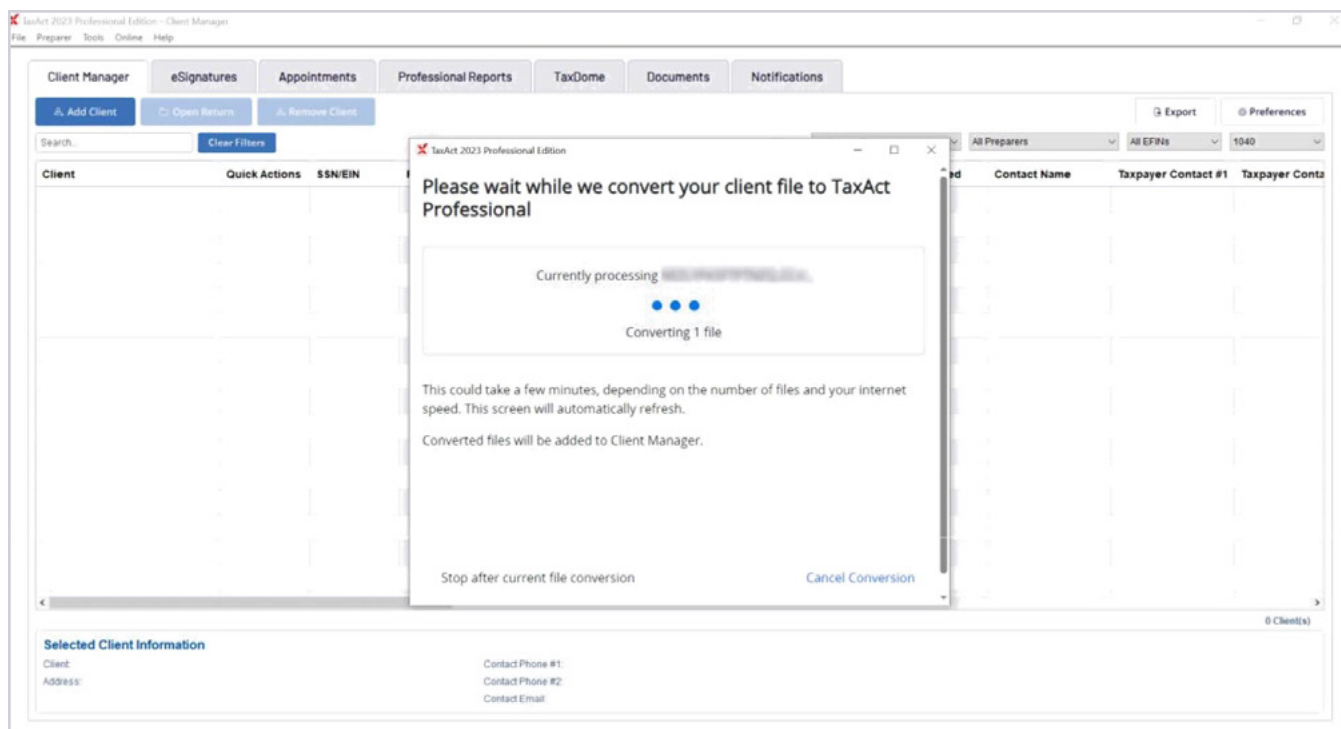
Browse to the client data you wish to convert.



Select the client data you wish to convert and click **Next**.



The client data will then be converted to TaxAct Professional files. This may take a few minutes depending on internet speed and the number of files to convert.



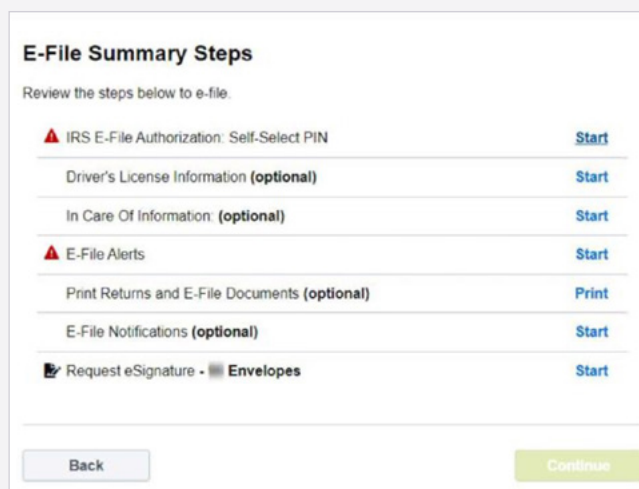
After the client data has been converted, the files will be added to Client Manager. Please see [Data Conversion Frequently Asked Questions](#) for any further questions.

# Integrated eSignatures

TaxAct now offers Integrated eSignatures, backed by DocuSign®, making it easier for you and your clients to get the signatures you need to e-file. Integrated eSignatures are only available for 1040 returns, state supported signature forms, and on applications for bank products. Files must be a PDF or JPEG, with a 25MB per envelope size limit.

## Request new eSignatures

To request a new eSignature you can do so in the filing steps or the eSignature tab: Find **Request eSignatures** on the E-File Summary Steps, and click **Start**.



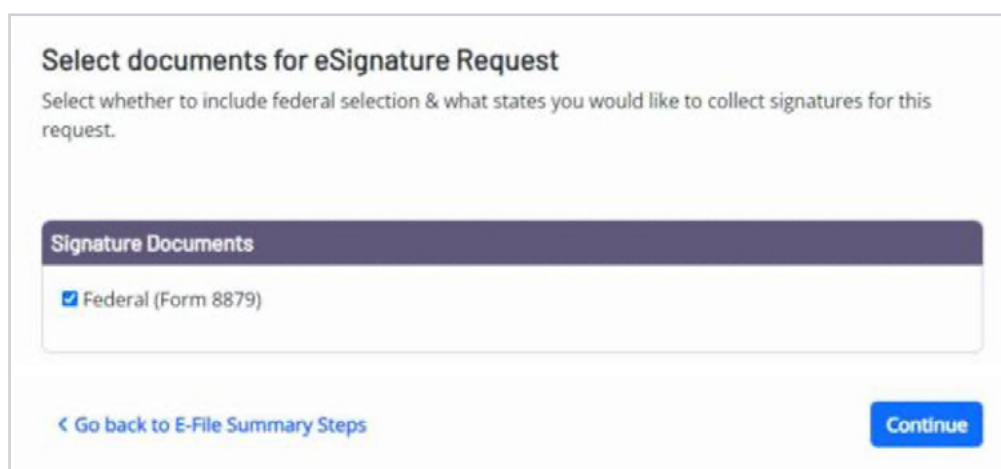
**E-File Summary Steps**

Review the steps below to e-file.

|                                                                                                                                                                                                        |                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| ▲ IRS E-File Authorization: Self-Select PIN                                                                                                                                                            | <a href="#">Start</a> |
| Driver's License Information (optional)                                                                                                                                                                | <a href="#">Start</a> |
| In Care Of Information (optional)                                                                                                                                                                      | <a href="#">Start</a> |
| ▲ E-File Alerts                                                                                                                                                                                        | <a href="#">Start</a> |
| Print Returns and E-File Documents (optional)                                                                                                                                                          | <a href="#">Print</a> |
| E-File Notifications (optional)                                                                                                                                                                        | <a href="#">Start</a> |
|  Request eSignature -  Envelopes | <a href="#">Start</a> |

[Back](#) [Continue](#)

Select which documents you would like to eSign, and click **Continue**.



**Select documents for eSignature Request**

Select whether to include federal selection & what states you would like to collect signatures for this request.

**Signature Documents**

☒ Federal (Form 8879)

[← Go back to E-File Summary Steps](#) [Continue](#)

If you do a custom eSignature request, simply click the **Send Custom** button on the **eSignature** tab.

Client Manager eSignatures Payments Appointments Professional Reports Documents Notifications

Track, manage, edit and view tax year 2024 eSignature envelopes

Search fields [Need Help?](#)

Send Custom 194 Available Get More

| Client Name | Return Type | Status | Date Created | Next Reminder | Expiration Date | Documents |
|-------------|-------------|--------|--------------|---------------|-----------------|-----------|
|-------------|-------------|--------|--------------|---------------|-----------------|-----------|

To customize your request, add Sender and Recipient details, and set reminders and expirations. After you have customized your request, click **Continue to Payment**.

**Note:** If you are sending a custom request, you are required to add a new eSignature.

Customize your request

Documents

Federal (Form 8879) • 1 Pages Requesting Signature Upload

Sender

Sender Name Sender Email Why do I need to enter my email address?

Notify me once all recipients have signed!

Recipient(s)

Taxpayer Name Taxpayer Email Identity Verification

KBA

Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

Set reminders and expirations

Give this request an expiration date 30 days from now, expiring on 11/8/2023

Send a warning to the recipient 4 days prior to request expiration

Send a reminder to the recipient in 7 days

Send a follow up reminder to the recipient every 3 days, after the first reminder

Go back to document selection Continue to Payment

If you have a current balance, check **I Accept** to use your available balance.

Use My Balance for eSignature Envelopes

Acknowledgement of Use My Balance

Current Envelope Balance: \$

New Envelope Balance: \$

☒ I Accept By checking this box you are agreeing to the new envelope balance shown

Use Credit Card

If there is no available balance, click **Use Credit Card**. Choose **Use Saved Credit Card** to use an existing credit card, or **New Card** to enter a new or different card. After your payment information has been entered, click **Continue**.

### Credit Card for eSignature Envelope

#### eSignature envelope creation charges

Please review the information below to make sure it accurately represents what you are wishing to purchase.

**Charges:**

eSignature Envelope (must be used by JAN/01/2024) \$0.00

Sales Tax: \$0.00

Order Total: \$0.00

☐ **Use Saved Card**

VISA ending in XXXX

[Go back to request customization](#)

### Credit Card Information

Enter your payment information below. This credit card will be used for the purchase of your products.

Billing Address 1

Billing Address 2 (optional)

City  State  Zip Code

Country

Name on Card  Expiration Date  01-Jan  2023

Card Number  Security Code

**NOTE:** Your credit card will not be processed yet.

Confirm your charges and payment method, and click **Review Envelope**.

### Order Summary - eSignature Envelope

#### Confirm charges to selected credit card

Please review the information below to make sure it accurately represents what you are wishing to purchase.

**Charges:**

eSignature Request \$0.00

Sales Tax: \$0.00

Order Total: \$0.00

**Payment Method**

Credit Card: VISA card ending in XXXX

You will review your eSignature request on the next page prior to sending. Your payment method will not be charged until you have sent the request.

[Go back to request customization](#)

Review your request. TaxAct supplies you with a default Subject Line and Message, but if you would like to customize either, uncheck **Use Default Subject** and/or **Use Default Message** to enter your own.

**Review before sending**

**eSignature Request**

Who is receiving this request?

| Taxpayer | Email               |
|----------|---------------------|
| John Doe | john.doe@taxact.com |

What is the subject line?

☒ Use Default Subject

Hi, it's [Taxpayer Name]! Time to review and sign your taxes.

What would you like to say?

☒ Use Default Message

[Preparer Name] wrote:

Thank you for being a valued client of [Firm Name].

It's time to review and sign your completed tax return.

All you need to do is:

1. Click the Review Document(s) link above
2. Sign where specified and submit

Thank you for your business!

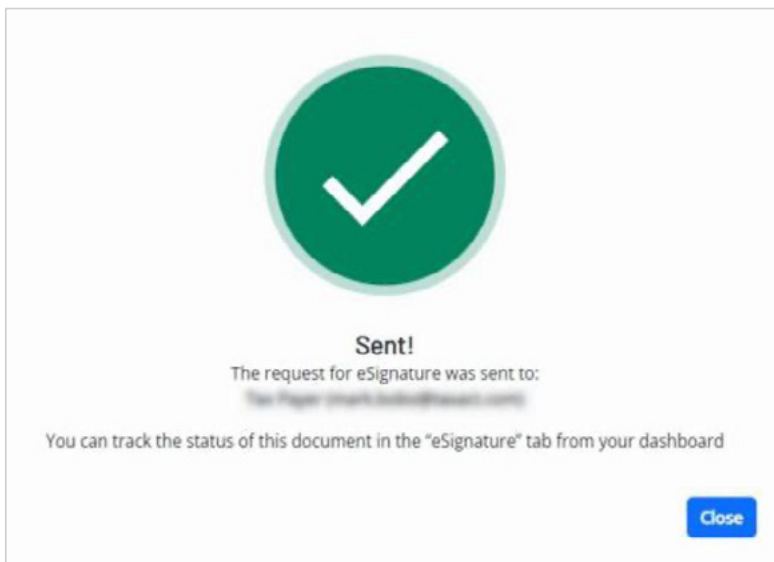
- [Preparer Name]

What documents are included in this request?

Federal (Form 8879) • 1 Pages Requesting Signature

[Go back to Payment](#) [Send Request](#)

After you have reviewed your message and included documents, click **Continue** to send your request.



## Add new eSignatures

To add a new eSignature:

Click **Upload** to launch dialog window, and click **Add Signature**.

The left screenshot shows the 'Customize your request' dialog. Under the 'Documents' section, 'Federal (Form 8879) • 1 Pages' is listed with a 'Requesting Signature' dropdown and an 'Upload' button. Below this is the 'Sender' section with fields for 'Sender Name' and 'Sender Email'. The 'Recipient(s)' section has fields for 'Taxpayer Name', 'Taxpayer Email', and 'Identity Verification' (set to 'KBA'). A note at the bottom states: 'Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.' Navigation buttons at the bottom are '< Go back to document selection' and 'Continue to Payment'.

The right screenshot shows the same dialog with an 'Add Signatures' modal open. The modal asks 'Do you want to add signatures to blank.pdf?' and includes a warning: 'By adding your own signature requests onto documents you upload, you acknowledge your role in staying compliant with state and U.S. federal laws, as well as IRS requirements.' The modal has 'Skip this step' and 'Add signatures' buttons. The background dialog is dimmed.

Click the **Add Signature** drop-down menu, then click the Signature rectangle and drag it to the desired location. After you have placed your signature, click **Save and Close**.

The left screenshot shows the 'Add or Edit Signatures' dialog. It has 'Add Signature' and 'Edit' buttons at the top. The main area is a large rectangle labeled 'Signature'. At the bottom, it says '< Page 1 / 1 >' and has 'Cancel' and 'Save and Close' buttons.

The right screenshot shows the same dialog with two signature boxes. The first box is labeled 'Taxpayer Signature' and the second box is labeled 'Taxpayer Date Signed'. The rest of the dialog is the same as the left screenshot.

Click the dotted menu and then **Edit Signatures** to return to the menu.

## Customize your request

Documents

 Federal (Form 8879) • 1 Pages

Requesting Signature

 [redacted].pdf

Requesting Signature

View

Edit Signatures

Remove



Upload

Sender

Sender Name

Sender Email

Why do I need to enter my email address?

Recipient(s)

Taxpayer Name

Taxpayer Email

Identity Verification

KBA 

 Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

[Go back to document selection](#)

[Continue to Payment](#)

## eSignature Dashboard

The eSignature Dashboard is where you will be able to view, track, manage, and edit your eSignature documents.

Track, manage, edit, and view your envelopes containing eSignature requests

[Buy More Envelopes](#)

Purchased: 
Remaining:

[Need Help?](#)

| Client Name           | Return Type | Status | Date Created | Next Reminder | Expiration Date | Documents    |
|-----------------------|-------------|--------|--------------|---------------|-----------------|--------------|
| Online Storage Client | 1040        | Voided | 10/9/2023    | N/A           | 11/8/2023       | US Form 8879 |
| Tax Paper             | 1040        | Sent   | 10/11/2023   | N/A           | 11/10/2023      | US Form 8879 |

To view the Options menu for your documents, click the dotted menu next to the entry you wish to access.

Track, manage, edit, and view your envelopes containing eSignature requests

Search fields [Need Help?](#) [Buy More Envelopes](#) Purchased: 100 Remaining: 0

| Client Name                 | Return Type | Status | Date Created | Next Reminder | Expiration Date | Documents    |
|-----------------------------|-------------|--------|--------------|---------------|-----------------|--------------|
| Online Storage - Client ... | 1040        | Voided | 10/9/2023    | N/A           | 11/8/2023       | US Form 8879 |
| Tax Payer                   | 1040        | Sent   | 10/11/2023   | N/A           | 11/10/2023      | US Form 8879 |

- Edit Request
- Send Reminder
- View History
- Download Forms
- Void Request

To customize your request, click **Edit Request** to bring up the Editing Request screen. Here, you will be able to edit your request email by clicking on the **Edit Email** tab, or set reminders and expirations under the **Customize Request** tab.

Track, manage, edit, and view your envelopes containing eSignature requests

Search fields [Need Help?](#) [Buy More Envelopes](#) Purchased: 100 Remaining: 0

Client Name

Online Storage - Client ...

Tax Payer

Editing Request for Tax Payer - Last Sent 9:49 AM on 10/11/2023

Edit Email Customize Request

Recipient(s)

Taxpayer Name Taxpayer Email Identity Verification

Tax Payer [Email Address] KBA

Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

Message

What is the subject line?

Hi, it's [Name]! Time to review and sign your taxes.

Cancel Send

Track, manage, edit, and view your envelopes containing eSignature requests

Search fields [Need Help?](#) [Buy More Envelopes](#) Purchased: 100 Remaining: 0

Client Name

Online Storage - Client ...

Tax Payer

Editing Request for Tax Payer - Last Sent 9:49 AM on 10/11/2023

Edit Email Customize Request

Documents

Federal (Form 8879) Requesting Signature

Set reminders and expirations

Give this request an expiration date 30 days from now, expiring on 11/10/2023

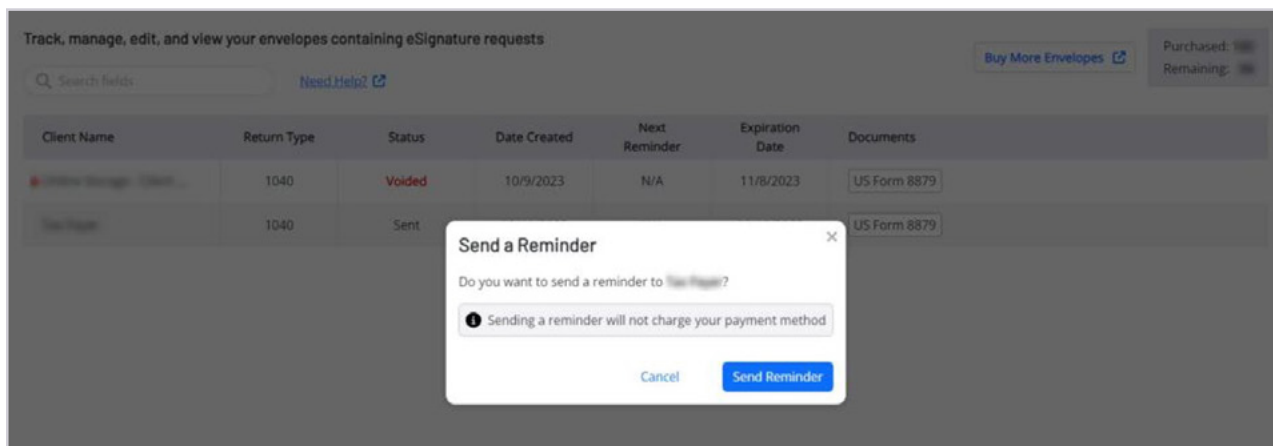
☐ Send a warning to the recipient 4 days prior to request expiration

☐ Send a reminder to the recipient in 7 days

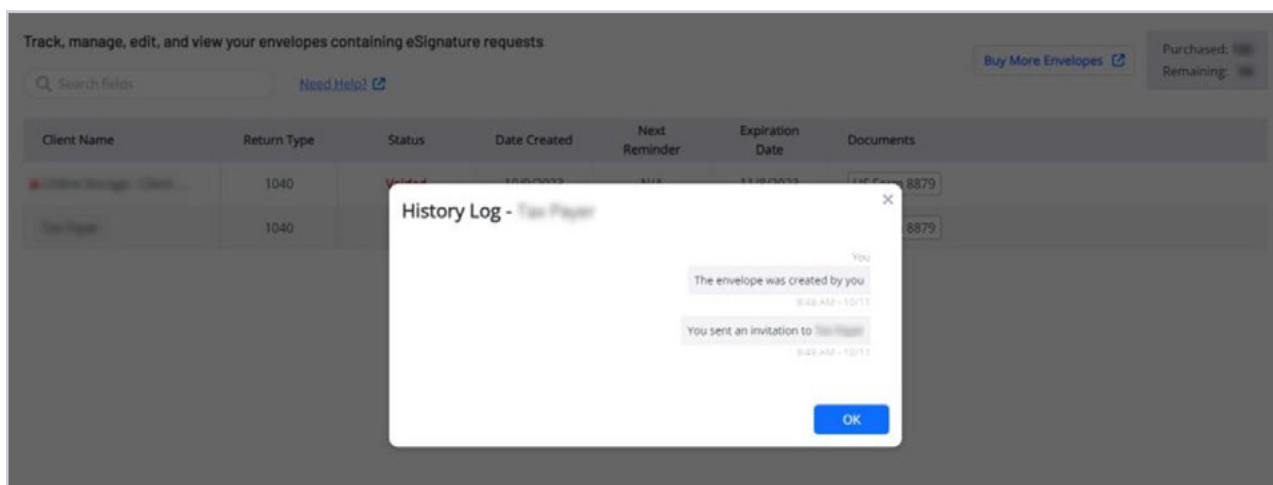
☐ Send a follow up reminder to the recipient every 3 days, after the first reminder

Cancel Send

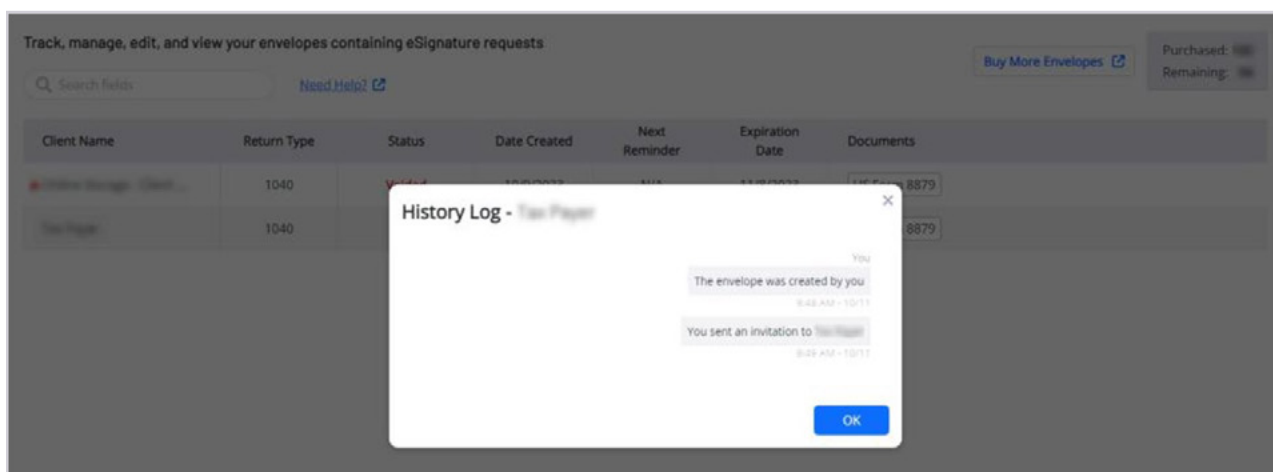
To send a reminder email to your recipient, click **Send Reminder**.



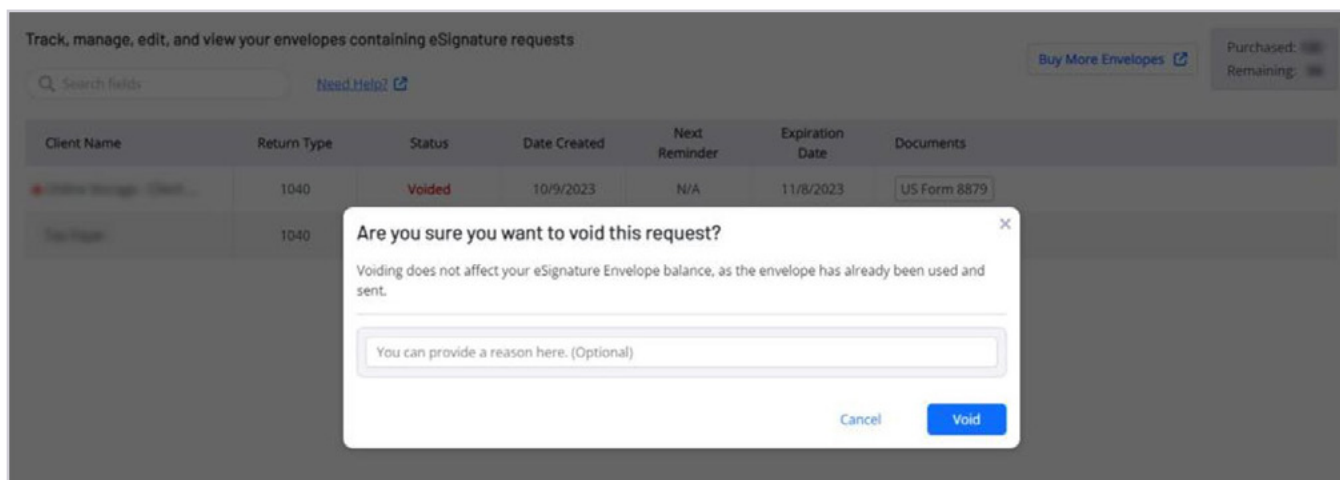
To view your entry's previous statuses in the History Log, click **View History**.



To download forms that have been sent for that entry, click **Download Forms**, select the document you would like to download, and click **Download**.

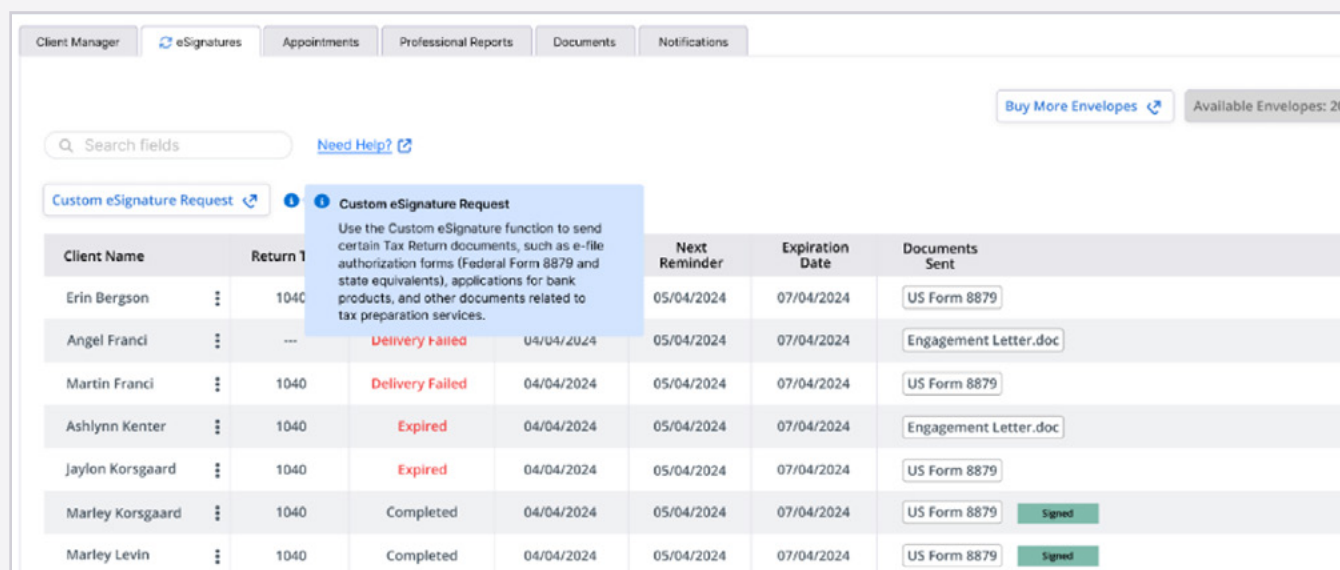
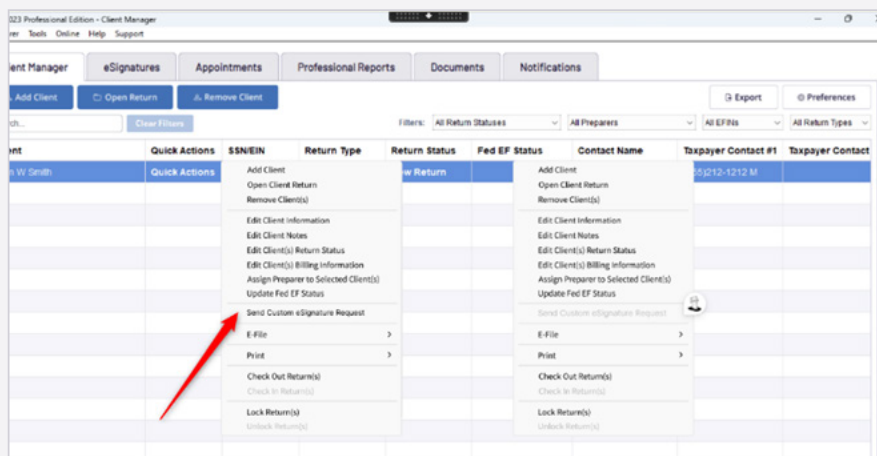


To void your entry, click **Void Request**. Enter a reason for voiding the request if you wish, and click **Void**.



## Custom eSignature Requests

To create a custom eSignature request, click send custom eSignature request



**Customize your request**

**Add Personal Documents**

No Documents Selected

Drag and drop files here or [Browse to select](#)

**Sender**

Sender Name: PracticeOne Owner

Sender Email: [Redacted]

☒ Notify me once all recipients have signed!

**Recipient(s)**

Taxpayer Name: [Redacted] Value is required

Taxpayer Email: [Redacted] Value is required

Identity Verification: KBA

! Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

[Continue to Payment](#)

Next, select the documents you want for the eSignature Request by clicking **Browse to select**

If you select a PDF file, you will then be automatically prompted to add a signature to your document. If you later want to add or edit this signature, click the three-dot menu next to **"Requesting signature"** at the top of your page and then click **"Add signatures"**

**Customize your request**

**Add Personal Documents**

PDF [Redacted]

Drag and drop files here or [Browse to select](#)

**Sender**

Sender Name: PracticeOne Owner

**Recipient(s)**

Taxpayer Name: [Redacted] Value is required

Taxpayer Email: [Redacted] Value is required

Identity Verification: KBA

! Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

[Continue to Payment](#)

**Add Signatures**

Do you want to add signatures to [Redacted]

! By adding your own signature requests onto documents you upload, you acknowledge your role in staying compliant with state and U.S. federal laws, as well as [IRS requirements](#).

[Skip this step](#) [Add signatures](#)

To add a taxpayer signature to the document, click **"Add Signature"** and then **"Taxpayer Signature"**

Customize your request

### Add or Edit Signatures

**Add Signature** **Edit**

Taxpayer Signature  
Taxpayer Date Signed  
Spouse Signature  
Spouse Date Signed

**Prior Year Comparison**  
File for your records

|                                                                   | 2022          | 2023          | BBN or RIN<br>333-44-4512<br>Difference |
|-------------------------------------------------------------------|---------------|---------------|-----------------------------------------|
| Interest and dividend income                                      | 10,000        | 80,000        | 70,000                                  |
| Pensions and IRA distributions                                    |               |               |                                         |
| Social Security benefits                                          |               |               |                                         |
| Gains or losses                                                   |               | -222          | -222                                    |
| Taxable state tax refunds                                         |               |               |                                         |
| Alimony received                                                  |               |               |                                         |
| Business income or loss                                           |               |               |                                         |
| Rental real estate, royalties, partnership<br>farm income or loss |               |               |                                         |
| Unemployment compensation                                         |               |               |                                         |
| Other income                                                      | 10,000        | 79,778        | 69,778                                  |
| <b>Total income</b>                                               | <b>10,000</b> | <b>79,778</b> | <b>69,778</b>                           |
| <b>Adjustments to income</b>                                      | <b>10,000</b> | <b>79,778</b> | <b>69,778</b>                           |
| <b>Adjusted gross income</b>                                      | <b>12,950</b> | <b>1,123</b>  | <b>-11,827</b>                          |
| Standard deduction or itemized deductions                         |               |               |                                         |
| Medical and dental expenses                                       |               |               |                                         |
| Taxes                                                             |               | 1,123         | 1,123                                   |
| Interest                                                          |               |               |                                         |
| Gifts to charity                                                  |               |               |                                         |
| Casualty and theft losses                                         |               |               |                                         |
| Other deductions                                                  |               |               |                                         |
| Qualified business income deduction                               |               |               |                                         |
| <b>Taxable income</b>                                             | <b>78,655</b> | <b>78,655</b> |                                         |
| Tax                                                               | 9,001         | 9,001         |                                         |
| Alternative minimum tax                                           |               |               |                                         |
| Excess advance premium tax credit repayment                       |               | 9,001         | 9,001                                   |
| Income tax                                                        |               |               |                                         |
| Child tax credit                                                  |               |               |                                         |
| Foreign tax credit                                                |               |               |                                         |
| Nonrefundable credit for child and dependent care                 |               |               |                                         |
| Education credits                                                 |               |               |                                         |
| Retirement savings contributions credit                           |               |               |                                         |
| Residential energy credit                                         |               |               |                                         |
| Energy efficient home improvement credit                          |               |               |                                         |

< Page 1 / 1 >

Cancel **Save and Close**

Customize your request

### Add or Edit Signatures

**Add Signature** **Edit**

Energy efficient home improvement credit

Other credits

**Other taxes**

**Total tax**

Federal income tax withheld

Estimated tax payments

Earned income credit

Additional child tax credit

Refundable education credit

Net premium tax credit

Amount paid with request for extension

Excess social security and tier 1 RRTA

Fuel tax credit

Other payments or refundable credits

**Total payments**

**Estimated tax penalty**

**Balance due**

**Refund**

**Effective tax rate**

**Taxpayer Signature**

< Page 1 / 1 >

Cancel **Save and Close**

Fill out sender and recipient information and select an expiration date.

**Customize your request**

**Add Personal Documents**

Drag and drop files here or [Browse to select](#)

**Sender**

Sender Name

Sender Email 

☒ Notify me once all recipients have signed!

**Recipient(s)**

| Taxpayer Name                         | Taxpayer Email                              | Identity Verification                                                                   |
|---------------------------------------|---------------------------------------------|-----------------------------------------------------------------------------------------|
| <input type="text" value="John Doe"/> | <input type="text" value="fake@email.com"/> | KBA  |

 Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

[Continue to Payment](#)

**Customize your request**

☒ Notify me once all recipients have signed!

**Recipient(s)**

| Taxpayer Name                         | Taxpayer Email                              | Identity Verification                                                                     |
|---------------------------------------|---------------------------------------------|-------------------------------------------------------------------------------------------|
| <input type="text" value="John Doe"/> | <input type="text" value="fake@email.com"/> | KBA  |

 Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.

**Set reminders and expirations**

Give this request an expiration date  days from now, expiring on **9/22/2024**

☐ Send a warning to the recipient  days prior to request expiration

☐ Send a reminder to the recipient in  days

☐ Send a follow up reminder to the recipient every  days, after the first reminder

[Continue to Payment](#)

Confirm your envelope balance and proceed with payment.

The screenshot shows a web browser window titled "TaxAct Professional 2023 Test Mode (tst.taxact.com)". The main heading is "Use My Balance for eSignature Envelopes". Below this is a blue bar with the text "Acknowledgment of Use My Balance". The interface displays two balance values: "Current Envelope Balance: 96" and "Remaining Envelope Balance: 95". A checkbox is present with the text "By checking this box, you are agreeing to the new envelope balance shown above." Below the checkbox is a button labeled "Use Credit Card". At the bottom left is a link "< Go back to Customize Request", and at the bottom right is a button labeled "Review Request".

## For further information

Please see the following links:

- [Integrated eSignatures](#)
- [eSignatures Frequently Asked Questions](#)

# Import Last Year's Client Returns

TaxAct Professional Editions include the ability to import information from last year's returns into the current year's program.

- You can import:
- Prior year returns created with TaxAct
  - PDFs from other supported tax preparation software.

## Import TaxAct Returns

1. Click **File > Import > TaxAct 2024 Client Return(s)**.
2. Click **Select All** to import all returns in the directory, then click **Import**.

You will receive a message when the import process is complete. The return(s) will be added to the Client Manager with a status of "Imported."

### Import Prior Year Client Data

To import your prior year client data, please select where your 2023 data is stored. If we have detected any stored client data, we have defaulted that selection below.

- ☐ Locally on my PC or network
- ☐ On TaxAct's Secure Servers

Cancel

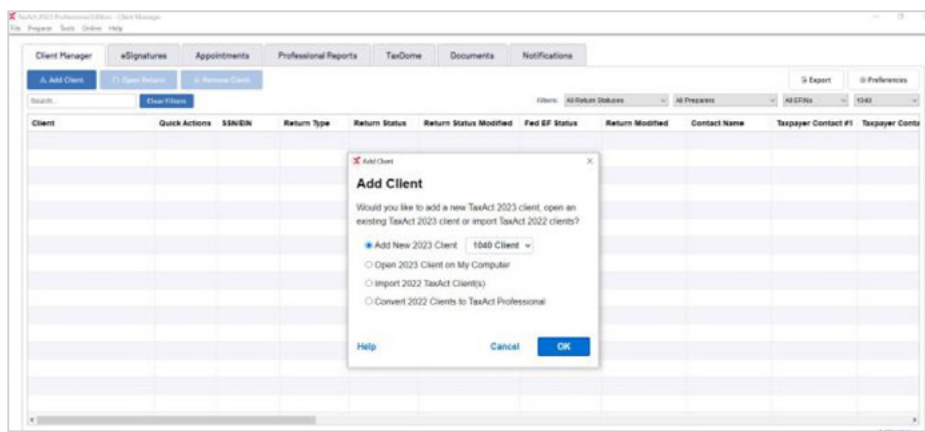
Import

# Add/Edit Client Returns

You can add, edit, and delete client records in the Client Manager, which displays all current client information and the status of each return.

To access Client Manager after the initial setup process, click **Preparer > Client Manager**.

From within a return, click the **Clients** button.



## Import TaxAct Returns

The information fields in Client Manager will populate as you add returns.

To open a return, double click the desired client record. To add or edit a client's information or return, click the client name in Client Manager. Once the record is selected, you can find additional menu items in two ways:

1. Right click the client record to access the menu, or
2. Use the Quick Link buttons:
3. Add a Client
4. Open Currently-Selected Client Return
5. Edit Currently-Selected Client Information
6. Delete Currently-Selected Client Return
7. Search for a Client
8. Open Client Manager Print Center
9. View Preferences



## Add a Client (and associated return)

- 1** Click the Add a Client button. If you didn't complete the Master Forms section of the setup process, you may be prompted to do so. Fill out all Master Forms prior to adding clients.
- 2** Select Add New 2025 Client to complete the new client contact and basic information portion of the return, then click OK.
  - a. Click Client and fill out the basic information for the client.
  - b. Click Preparer to assign a preparer, set the Return Status and Payment Status, and make any related notes.
  - c. Click OK to save the client record and create a new return. (Turn on auto-save if prompted).

**Add Client**

Would you like to add a new TaxAct client, open existing TaxAct client(s), or import TaxAct client(s)?

☒ Add New Client 1040 Client ▼

☐ Open Existing Client(s)

☐ Import TaxAct Client(s)

☐ Convert Clients to TaxAct Professional

[Help](#) [Cancel](#) [OK](#)

## Edit Existing Client Return

- 1** Click the client record in Client Manager.
- 2** Double click the client record. The return opens in Forms Explorer, where you may edit or review forms directly. To switch to the Q&A interview method, click the **Q&A** button in the toolbar near the top of the page.

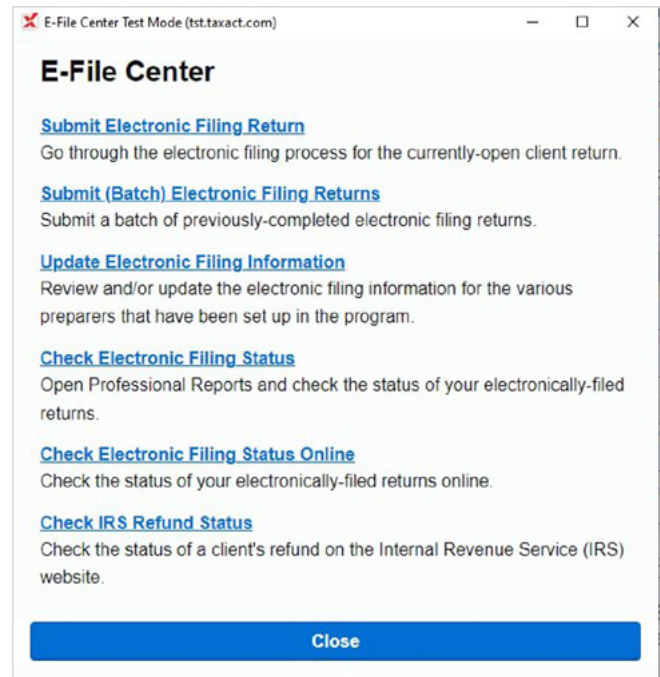
## E-file Client Return(s)

### E-file Center

When you're ready to e-file a client return, we recommend using the E-file Center, where you can submit single or multiple returns.

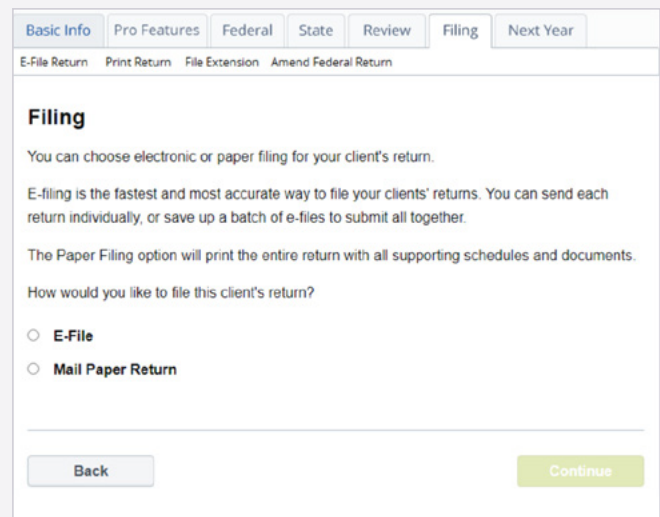
From here, you can also view e-filing information for other preparers in your practice and navigate to e-file and refund status reports.

To access the E-file Center, you must be in a client's return. Click on the **E-file** button in the navigation menu.



### E-file a single return

- 1 From the E-file Center, click the first link, **Submit Electronic Filing Return**. This will open to a screen in the Q&A.
- 2 Select **E-File** and click **Continue**.
- 3 **When e-filing your first 2025 return:** If you have not entered your Practice ID, EFIN or PTIN (or SSN) in [Preparer Info](#), you will be prompted to confirm or enter the missing information. You will also need to have your [EFIN verified](#), and confirm that you are the responsible party for verifying your EFIN, before you can proceed through the e-filing steps.



**4** If you've enrolled in [Protection Plus Audit Assistance](#), you will also indicate whether you want to purchase Protection Plus for your client and complete the subsequent entry screens.

**5** A screen titled E-Filing Summary will appear, where you can navigate to specific e-file topics (see list below). You can return to this screen at any time by clicking "Back" or continuing through all the screens for a topic.

The list of topics is client-specific and depends on the details of that client's return, such as whether there is a refund or liability. Topics include:

- **IRS E-file Authorization: Self-Select PIN** – In this required step, choose Self-Select PIN or Practitioner PIN via [Form 8879](#), then enter related information.
- **IRS Refund Method: Direct Deposit** – If client is receiving a refund, you must choose bank products, direct deposit or check, then enter the required information for the refund method. If client owes money to the IRS or state, you must choose how they will pay – direct withdrawal, credit card (pay now or pay later), or paper check.
- **Driver's License Information (optional)** - Enter or confirm drivers license information.
- **In Care of Information (optional)** – Enter In Care Of information here.
- **E-File Alerts** – These alerts must be fixed for a valid e-file as required by the IRS.
- **Print Returns and E-File Documents (optional)** – From here, you can print your client's federal and/or state return and filing instructions. You can also print state forms from here, including Form 8453 and other e-file signature documents.
- **E-File Notifications (optional)**
  - Sign up for E-File Notifications.
- **Request E-Signature** – Request an E-Signature. For more information see [Electronic Tax Signing](#).

| E-File Summary Steps                            |                        |
|-------------------------------------------------|------------------------|
| Review the steps below to e-file.               |                        |
| ✓ IRS E-File Authorization: Self-Select PIN     | <a href="#">Review</a> |
| ✓ IRS Refund Method: Direct Deposit             | <a href="#">Review</a> |
| ✓ Driver's License Information (optional)       | <a href="#">Review</a> |
| In Care Of Information: (optional)              | <a href="#">Start</a>  |
| ✓ E-File Alerts                                 | <a href="#">Review</a> |
| ✓ Print Returns and E-File Documents (optional) | <a href="#">Print</a>  |
| E-File Notifications (optional)                 | <a href="#">Start</a>  |
| ✗ Request eSignature                            | <a href="#">Start</a>  |

[Back](#) [Continue](#)

- 6** After completing the E-Filing Summary, complete the screens to “sign” your client’s return. (Information required for signature depends on whether Self-Select PIN or Practitioner PIN was chosen.)
- 7** Then begin TaxAct Alerts, which checks the return for potential errors, omissions and tax-saving opportunities. Make any necessary changes to the return.
- 8** If your client’s return has any associated fees, the E-filing – Payment Method screen will appear. You must select whether to pay the client’s fees from your prepaid account (see instructions below) or by credit card. **Note:** *if you purchased a bundle that includes unlimited e-filing, you will not be prompted for payment.*
- 9** Continue through the next screens to submit the e-file.

To set up a prepaid account, you must enter the information in Preparer Master Information. (Click **Preparer** in the main menu, select **Master Information**, then **Preparers**. Click **Edit** next to the preparer name. In the Edit Preparer Information window, click the **Electronic Filing Info** tab and enter the credit card information.)

## E-file multiple returns as a batch

Batch e-filing allows you to complete client returns while you wait for receipt of payment.

In order to batch e-file client returns, prepare returns for submission by completing steps 1 through 8 above for each return. Any fees associated with returns for batch submission must be paid when completing step 8 above for each return.

1. Complete steps 1-8 above (for [e-filing a single return](#)).
2. Continue through the “Submit Return” screen.
3. On the “Create and Submit” screen, choose “Submit Later” in order to place that return into a holding directory.

When you are ready to submit a batch of returns:

1. Click **Preparer** in the main menu, then **Submit Client E-files**. (You can also navigate here from the E-file Center by clicking the second link, **Submit (Batch) Electronic Filing Returns**.)
2. A popup window with all client returns ready for submission will appear. Check the returns you would like to submit.

**Note:** You can also “delete” a return pending transmission in this window. Deleting simply removes the file from the holding directory – it does not delete the return or alter the information in the return. If you delete a file from the holding directory, you must again complete steps 1-8 above for [e-filing a single return](#).

3. After selecting at least one return, the **Submit** button will be enabled. Click Submit to transmit the selected returns.
4. When submission is complete, a confirmation window will appear. You should also receive an email notification from TaxAct indicating the returns have been received.

## Other Return Actions

### Remove a Client Return

1. Click the client record in Client Manager.
2. Click the **Remove Selected Return** button.
3. Click **Yes** to delete BOTH the tax return file and the client information stored in Client Manager. Click **No** to cancel.

### Search for a Client

Click the **Search** button and enter text. Click **Next**.

### Print Information in Client Manager

Click the **Open Client Manager Print Center** button. (See [Print Returns, Labels, Reports, and Invoices](#), later).

### View Preparer Preferences

1. Click the **View Preferences** button.
2. Choose settings for your Client Manager, Electronic Filing Manager, and specify general preferences.

### Work on Files Offline (Local storage only)

All users will be required to authenticate themselves upon initial software startup by signing in with their TaxAct Account username and password with an active Internet connection. After the initial sign-in, local storage users may work offline. When an Internet connection is not detected by the software, you will see a window with a work offline option available. Some features will not be available while working offline. To access those features, you may need to close your software and re-open to sign in online.

# Protect, Backup, and Restore

TaxAct offers several methods for you to keep your client returns safe and secure, including:

- Password protection
- Full backup and restore features

Your practice is issued a TaxAct Account and the practice administrator can set individual permissions for each preparer.

Enterprise Editions Online Networking users: All data you enter is backed up automatically, so there is no need to run manual backups on your client data files.

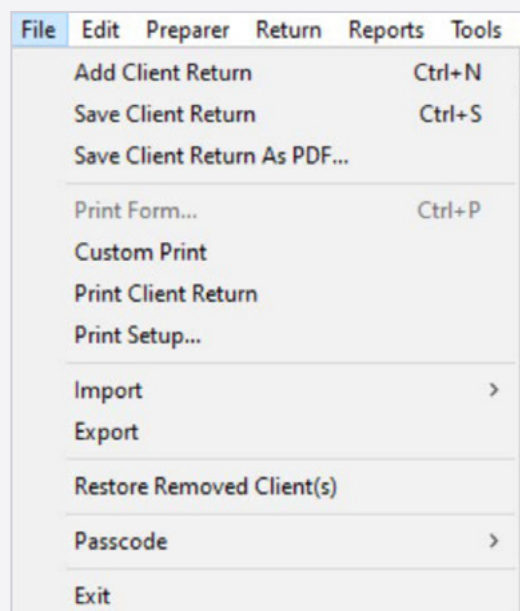
## Password-Protect Client Returns

In Client Manager, double click to open return.

1. In the main menu, click **File > Passcode > Add**.
2. Enter a passcode in the fields provided, then click **OK**.

**Reminder:** Document all of your passcodes in a safe location.

If you choose not to add a passcode to the return, click **Cancel** to exit.



## Set Individual Usernames, Passwords & Permissions

You will be required to sign in each time you open the software and after 30 minutes of inactivity on your PC, or every 24 hours (whichever comes first).

The IRS Security Summit's requirements apply to all professional tax products across the industry, including TaxAct Professional's solutions. For more information, view our FAQ on [TaxAct Professional, IRS and State Agencies Expand ID Theft Safeguards](#).

Use the [Preparer's Permission menu](#) to limit which returns each preparer can access.

**Note:** Make sure to document all passwords for future reference.

## Back Up Client Returns to Your Local Computer

Performing regular backups of client information, returns, and preparer information is important. To utilize TaxAct's backup and restore functions, follow these easy steps.

1. Click **File > Backup > Client Return(s)**.
2. Select **Local** and click **Next**.
3. Check the box next to the return(s) you want to back up and click **Next**. (Notes: Click **Select All** to check all returns. Choose by return type in the drop-down list.)
4. To change the backup file location, select **Browse** and choose the location using the directory tree.
5. Click **Finish**. A confirmation message will appear when files are backed up.

To back up Preparer Info, click **File > Backup > Preparer's Information > Local**, specify a backup directory and click **Select Folder**. When performing future backups, you will be prompted to overwrite the files that already exist. Be sure to save the most recent versions.

## Enterprise Editions: Back Up Client Returns on TaxAct's Secure Servers

Networking online? No need to back up your data – it's automatically saved to TaxAct's secure servers!

Networking locally? We recommend backing up your data both on your computer (following the above instructions) **and** on TaxAct's secure servers as an extra level of protection:

1. Click **File > Backup > Client Return(s)**.
2. Choose **Online**, then click **Next**.
3. Enter your TaxAct Account username and password.
4. Select the return(s) you want to back up. (Notes: Click **Select All** to check all returns. Sort by return type in the drop-down list.)
5. To back up preparer information, check the box next to Backup Preparer Master Information.
6. Click **Finish** to upload the files. A confirmation message will appear when files are backed up.

You may be prompted to overwrite any files of the same name that exist. Be sure you are restoring from the correct file before proceeding. A confirmation message will appear when files have been restored.

## Restore Client Returns from Backup Files Saved Locally

1. Click **File > Restore > Client Return(s)**.
2. Choose **Local**, then click **Next**.
3. Browse to your backup location to choose the files to restore. To restore all returns, click **Select All**. Click **Next**.
4. Browse to the restore location. Default is **C:\TaxAct\TaxAct 2025 Professional Edition\ Client Data\[Practice ID]**. Click **Finish**.

A confirmation message will appear when files have been restored.

## Restore Client Returns from Backup Files Saved on TaxAct Servers (Enterprise Editions Only)

1. Click **File > Restore > Client Return(s)**.
2. Select the Online radio button, then click **Next**.
3. Sign in to your TaxAct Account.
4. Select the return(s) you want to restore. To restore all returns, click **Select All**.
5. To restore Master Information at the same time as client returns, check the **Restore Preparer Master Information** box, then click **Next**.
6. Click the Authorize button. This will send an email to the address associated with your account.

7. Leaving the TaxAct Restore Wizard open, click the link in the e-mail. Follow the steps to enter the authorization information into TaxAct and submit.
8. Return to the TaxAct program and click **Next**.
9. Browse to the restore location. Default is **C:\TaxAct\TaxAct 2025 Professional Edition\Client Data\[Practice ID]**. Click **Finish**.

You may be prompted to overwrite any files of the same name that exist. Be sure you are restoring from the correct file before proceeding. A confirmation message will appear when files have been restored.

## Print Returns, Labels, Reports, & Invoices

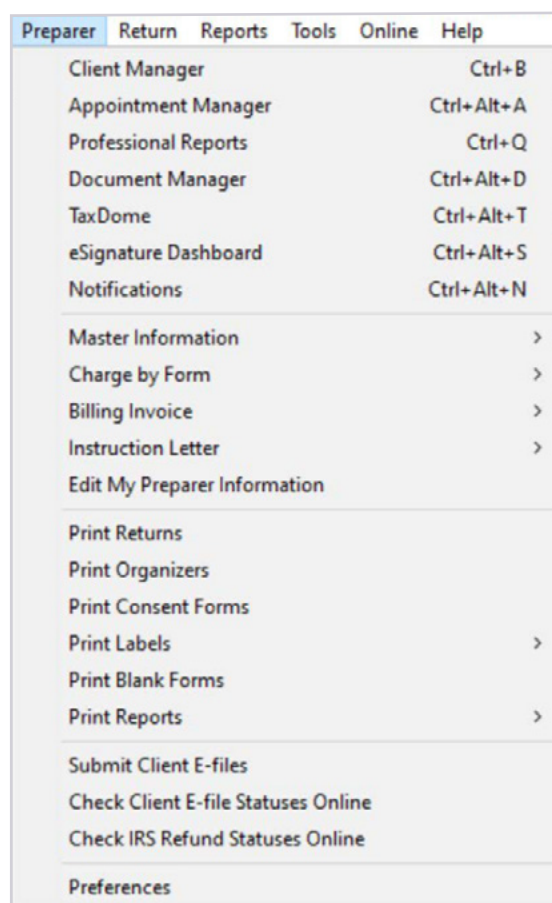
### The Print Center

The Print Center offers multiple printing options in one convenient place. Multiple documents can be printed in one job.

The Print Center also consolidates the printing of client returns, organizers, consent forms, labels, and blank forms.

You can access the Print Center in any of the following ways:

- Select any Print command under the **Preparer** top menu,
- From within a return, click the **Print** button found in the toolbar under the main menu.
- From within a return, click **File > Print Client Returns**



## Print a Client Return

Before printing, make sure to set your printer preferences by following these steps:

1. Click **File > Print Setup**.
2. Select printer and modify property settings if needed (default printer settings will generally allow you to successfully print documents from TaxAct), then click **OK**.

When printer preferences are set, continue with printing:

1. Click **Preparer > Print Returns**. This will open the Print Center window.
2. Click the **Client Returns** tab. Select the return(s) to print, or click **Select All** to print all returns at once.
3. Enter quantities for each desired document.
4. Click **Select States** or **Select Reports** to print related materials, then click **Print**.

## Print Consent Forms

TaxAct's bank partners require taxpayers to sign an agreement document before transactions can be processed. To print the document(s) with client returns:

1. Click **Preparer > Print Consent Forms**.  
The Print Center window opens.
2. Click the **Consent Forms** tab.
3. Select the Client and Bank.
4. Enter the desired number of copies, then click **Print**.

The screenshot shows the 'Print Center' window with the 'Consent Forms' tab selected. The window has a top navigation bar with tabs: 'Returns', 'Organizers', 'Consent Forms' (active), 'Labels', 'Blank Forms', and 'Reports'. A 'Help' link is in the top right. Below the tabs, there are two sections for selection. The first section, labeled 'Select All', contains a checkbox for 'Tax Return' which is checked. The second section, also labeled 'Select All', contains a list of banks with checkboxes: 'Republic Bank', 'TPG Bank', 'Protection Plus', 'VPS', and 'Avantax Wealth Management'. Below these sections is a 'Number of Copies' field with a value of '1'. At the bottom right, there are 'Cancel' and 'Print' buttons.

## Print Client Organizers

### What is a Client Organizer?

The Client Organizer is a portfolio of client return information designed to help you obtain tax information in advance. Imported returns will include prior year tax information to compare with the current tax year.

The Client Organizer portfolio includes:

- A Cover Sheet
- Personal Information
- Income
- Deductions
- Payments

To print Organizers, click **Preparer** in the top menu, then **Print Organizers**.

1. Select the clients for whom you want to create Organizers.
2. Select the **Print Applicable Organizers** radio button to print only the documents that directly apply to the client's return. To choose specific Organizer documents to print, select **Print Selected Organizers** instead.
3. Select the items to include in the organizer, then click the **Print** button.

The screenshot shows the 'Print Center' window with the 'Organizers' tab selected. At the top, there are navigation links: Returns, Organizers, Consent Forms, Labels, Blank Forms, and Reports. A 'Help' link is in the top right. Below the tabs, there is a 'Select All' section with a checkbox labeled 'Select All' and a list of client names. Below this, there are two radio buttons: 'Print Applicable Organizers' (selected) and 'Print Selected Organizers'. There is also a checkbox for 'Mask private data'. Below these options, there is another 'Select All' section with a list of organizer items: Cover Sheet, Personal Information Organizer, Income Organizer, Business Income and Expenses Organizer, Farm Income and Expenses Organizer, and Rent and Royalty Income and Expenses Organizer. At the bottom, there is a 'Number of Copies' field set to 1. The bottom right corner has 'Cancel' and 'Print' buttons.

## Print Labels

From the Print Center, click the Labels tab. You have three options:

- **Print Client Labels**
- **Print Preparer Labels**
- **Print Other Labels.**

### Client Labels

1. Select the client(s).
2. Select **Show All Clients** or **Show Federal Estimated Tax Payment Clients**.
3. Choose options for printing Married Filing Joint clients.

### Preparer Labels

To print return address labels:

1. Choose the preparer.
2. Edit the address shown if needed.

### Print Other Labels

You can customize address labels for other uses, such as paper-filed returns, tax payments, and personal messages to include on client correspondence.

### Setting Label Properties

To format labels, click **Label Properties**.

1. Set the print job based on your printer type and label size.
2. Click **Set Font** to access a list of available fonts and modify the text style and size.
3. Once you have set your preferences for the labels to print, click **Print**.

The screenshot shows the 'Print Center' window with the 'Labels' tab selected. The interface includes a top navigation bar with 'Returns', 'Organizers', 'Consent Forms', 'Labels', 'Blank Forms', and 'Reports'. A 'Help' link is in the top right. The main content area is titled 'Print Client Labels' and contains a 'Select All' button and a list box with one item, 'Tax Preparer', which is selected. Below the list box are three radio button options: 'Show All Clients' (selected), 'Show Federal Est. Tax Payment Clients', and 'Print Married Filing Joint clients as:'. Under the last option are three more radio buttons: 'Mr. and Mrs.', 'Taxpayer Name', and 'Both Client Names' (selected). Further down are two more radio button options: 'Print Preparer Labels' and 'Print Other Labels'. At the bottom, there is a 'Number of Copies' field with the value '1'. The bottom right corner has 'Cancel' and 'Print' buttons.

## Print Reports From Preparer Menu

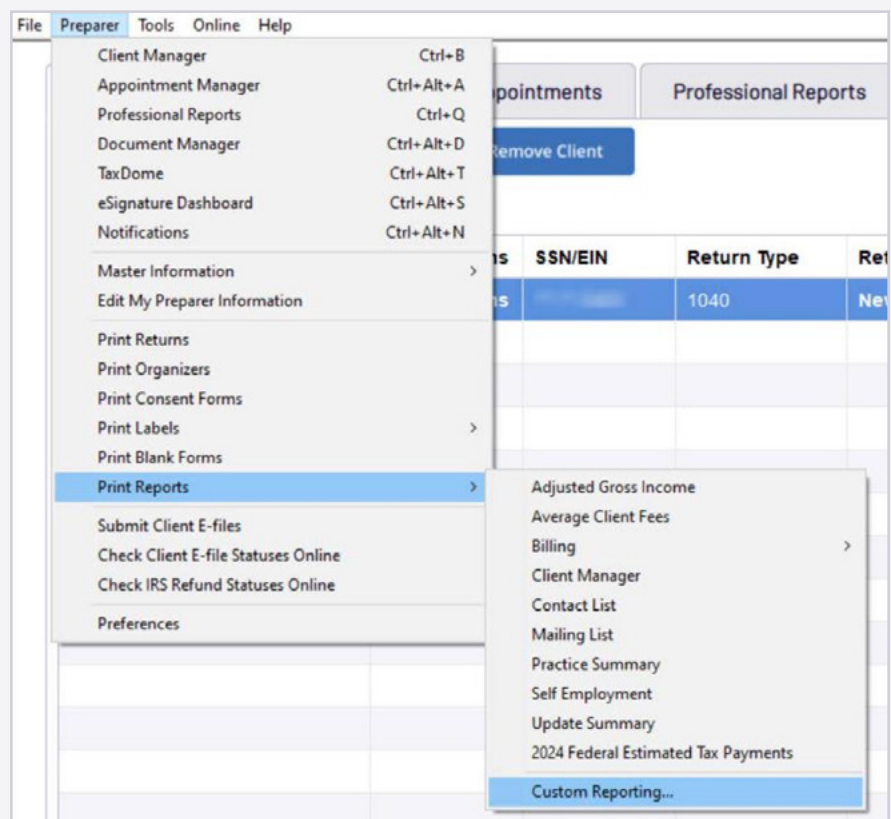
You can print any of the following reports in the Print Reports menu:

- Adjusted Gross Income
- Average Client Fees
- Billing
- Client Manager
- Contact List
- Mailing List
- Practice Summary
- Self-Employment
- Update Summary
- 2025 Federal Estimated Tax Payments
- Custom Reporting

### Custom Reporting

Choose this option to select which clients and information fields you'd like to export to a CSV file.

To change the display order, click the appropriate field name within the **Fields Included** box. Then click on **Move Up** or **Move Down** until the fields are in your preferred order.



## Print Invoices and Billing Statements from Client Reports Tab

Available reports include:

- Adjusted Gross Income
- Average Client Fees
- Billing – Paid
- Billing – Unpaid
- Billing – All
- Client Manager
- Contact List
- Mailing List
- Practice Summary
- Self Employment
- Update Summary
- 2025 Estimated Payments

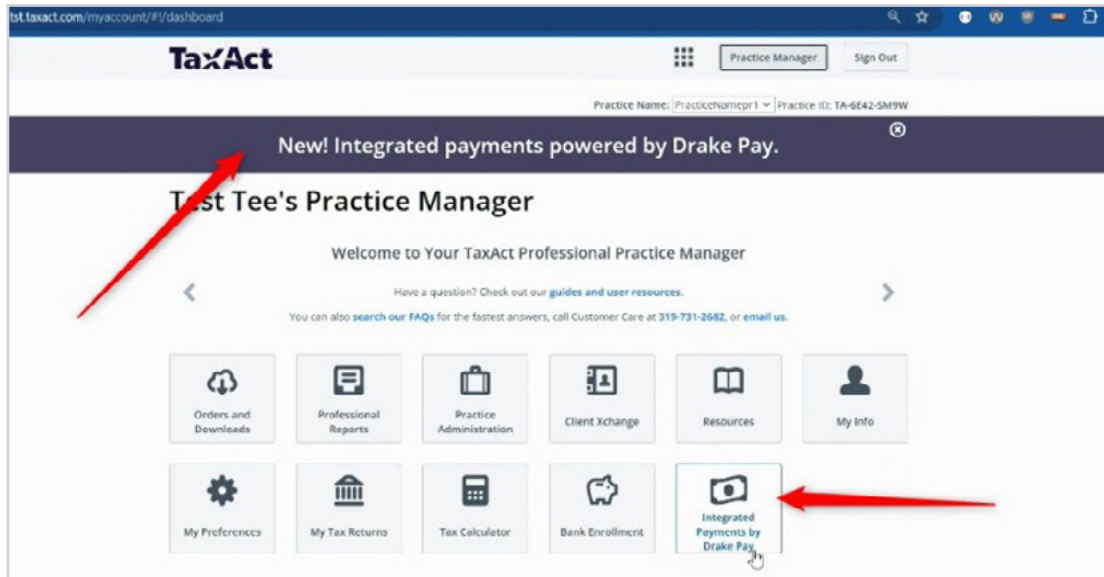
1. From within Client Manager, select a client. and right click.
2. Click Print and then select the desired report.

| Client | Quick Actions | SSN/EIN  | Return Type | Return Status |
|--------|---------------|----------|-------------|---------------|
|        | Quick Actions | # 770905 | 1041        | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | Imported      |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | In Progress   |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | New Return    |
|        | Quick Actions |          |             | Returns       |
|        | Quick Actions |          |             | Organizers    |
|        | Quick Actions |          |             | Consent Forms |
|        | Quick Actions |          |             | Labels >      |
|        | Quick Actions |          |             | Blank Forms   |
|        | Quick Actions |          |             | Reports >     |

# Integrated Payments

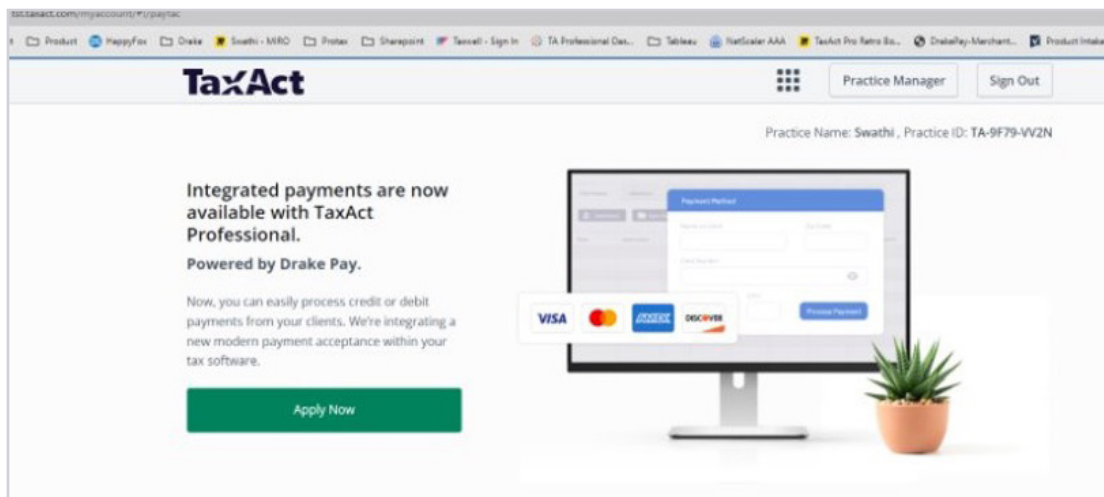
## TaxAct Practice Manager

In your TaxAct Professional Account, under “Practice Manager”, there is a button called “Integrated Payments by Drake Pay”



## Applying for Integrated Payments

After clicking the button, select “Apply Now”



Follow the instructions on the top of the page to complete the application. You may receive a follow up email to complete your application or to supply any additional needed information.

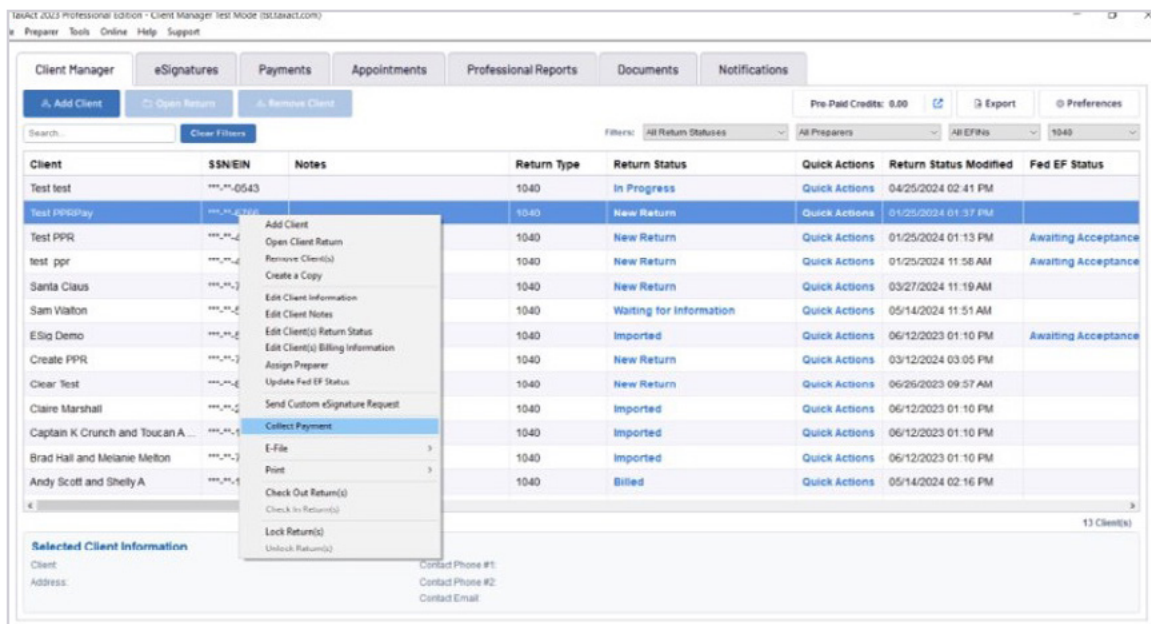
The screenshot shows the TaxAct DrakePay application interface. At the top, the TaxAct logo is on the left, and 'Practice Manager' and 'Sign Out' buttons are on the right. Below the logo, the title 'DrakePay' is centered. A message states: 'Start your application now. If you do not have all the information requested, you can still submit your application by clicking on the "Submit and Finish Later" button. If you submit your application via the "Submit and Finish Later" button, you will receive a follow-up email that will walk you through any additional information needed to complete your application within the Drake Pay Back-Office Portal.' Below this message are four tabs: '1. Business Information', '2. Owner Information', '3. Banking Information', and '4. Processing Information'. The '1. Business Information' tab is selected and highlighted. The form fields under this tab include: 'Merchant email address' (with the value 'chuck.kroemer@taxact.com'), a note 'An email will be sent to this email address to complete your onboarding.', 'Legal business name' (with the value 'Mystery, Inc.'), 'DBA name', 'Location name (city, number, etc.)', 'Taxpayer ID or Tax Identification Number (TIN) of Legal Business Entity', 'Street address (no P.O. Box)' (with the value '123 Mystery Lane'), 'Address (cont.)', 'City' (with the value 'Asheville'), and 'State' (with a dropdown menu showing 'North Carolina').

It may take 1-3 business days for your application to be processed once complete. You can check the status of your application in the Practice Manager dashboard, or by visiting the new "payments" tab in the TaxAct Professional Software.

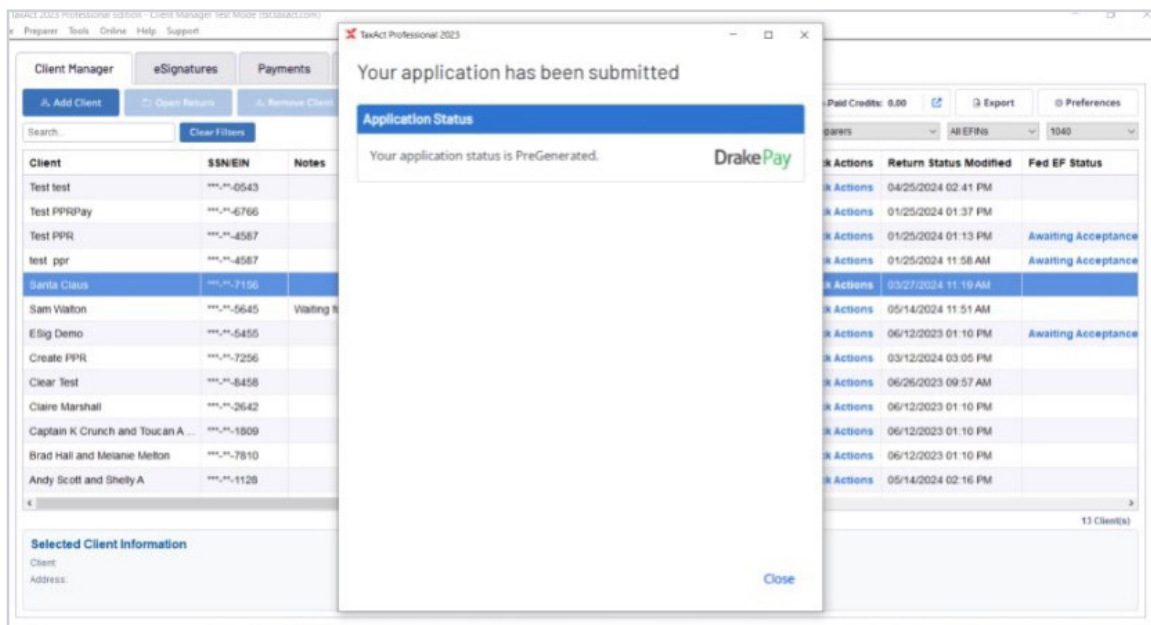
The screenshot shows the 'Application Status' page in the TaxAct Professional Software. The top menu bar includes 'File', 'Preparer', 'Tools', 'Online', 'Help', and 'Support'. Below the menu bar are four tabs: 'Client Manager', 'eSignatures', 'Payments', and 'App'. The 'Payments' tab is selected and highlighted. The main content area has the title 'Application Status' and the text 'Your application status is: PreGenerated.'

## Collecting Payments

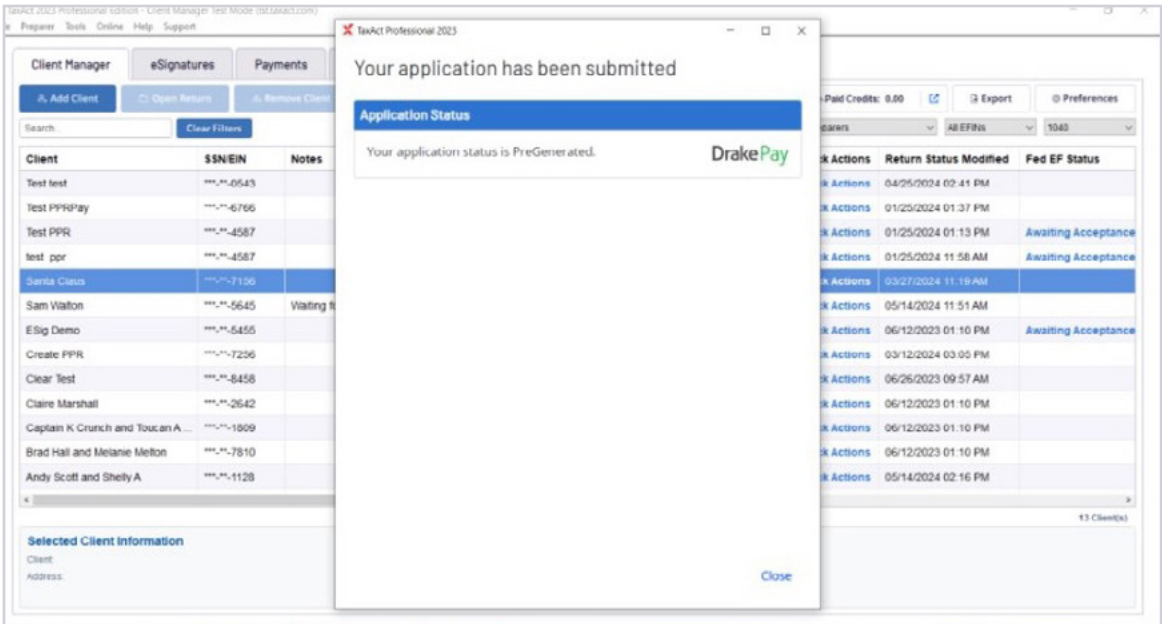
To collect a payment from a client with a balance due, go to the “client manager” tab and right click on a client. Then click the “Collect payment” option.



If your application hasn't been completed yet, this option will display your application status.

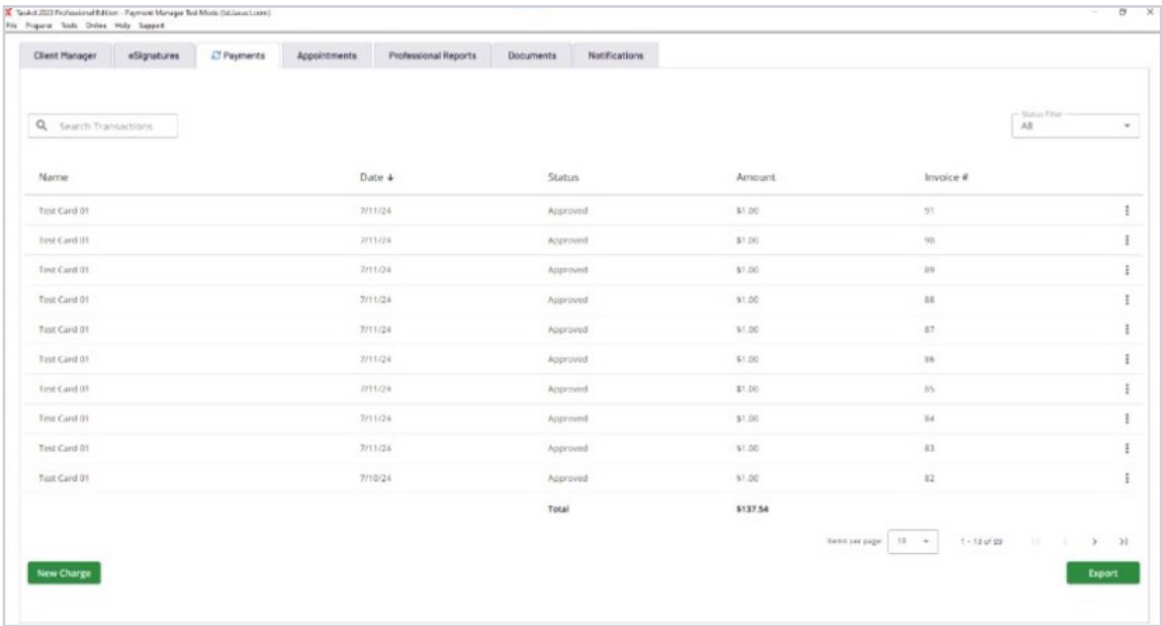


Assuming your application has been accepted and approved, simply fill out the client card information including the Amount to Pay, which is the amount that will be charged. Then, press “Process Payment”.

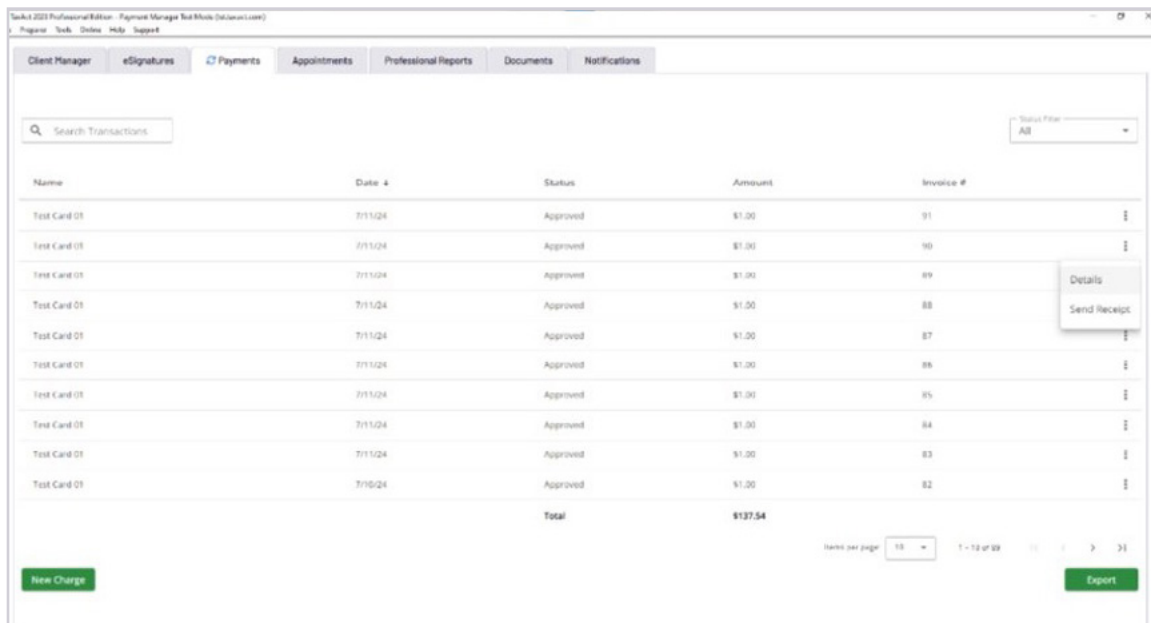


## Payments Tab

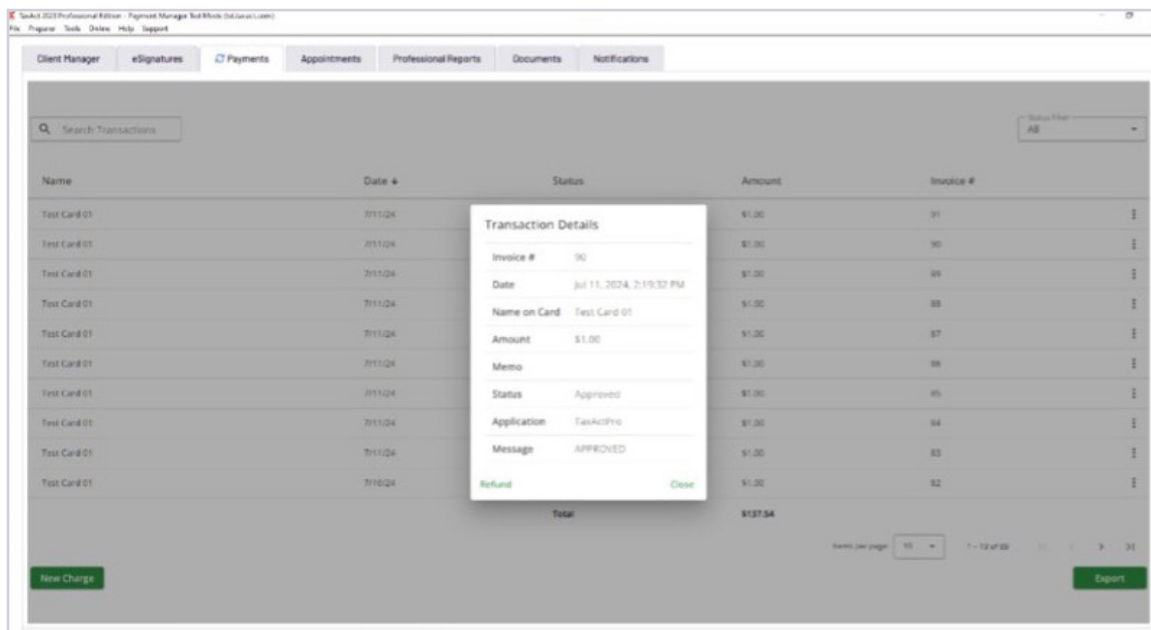
A successful payment will be displayed in the Payments Tab. Here, you can view all previous payment history.



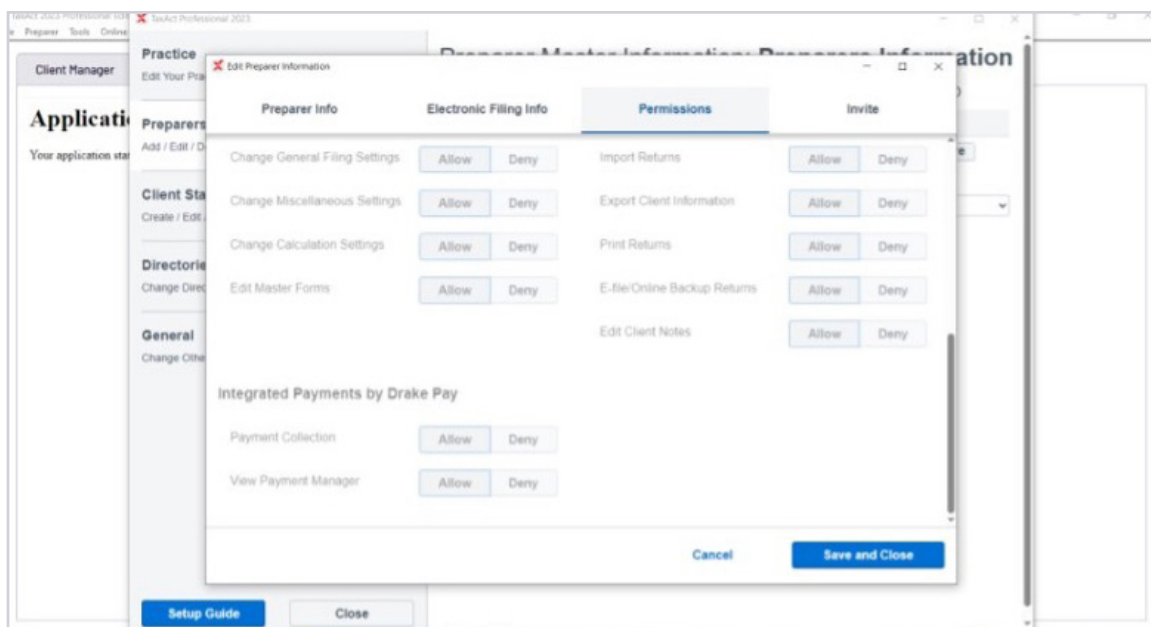
To refund a payment, click the 3 dots next to the desired payment and click “Details”.



Here, you can view details about the payment, as well as send a client refund by clicking the “refund” option.



To allow your preparers to access Integrated Payments, go to the navigation bar at the top of the screen and click Preparer > Master Information > Preparers. Then, click the Pencil icon next to the preparer name to edit permissions for that preparer under the Permissions tab. At the bottom, select “Allow” for both Payment Collection and View Payment Manager, then click Save and Close. Now, this preparer will be able to use all the features of Integrated Payments.



# Additional Resources

 [www.taxact.com/professional](http://www.taxact.com/professional)

 [professional@taxactservice.com](mailto:professional@taxactservice.com)

 (319) 371-2682

## Professional Reports

TaxAct Professional Reports are accessible from your TaxAct Account (Practice Manager) or from within your Professional Edition software. TaxAct Professional Reports provides you with summary and detailed information about e-files by status, EFIN, PTIN, and settlement type.

Refer to the [Professional Reports Guide](#) to learn how to access the reports and navigate through the system.

## Client Portals

With Client Portals, you can provide your clients with a secure, branded online experience that simplifies document collection, communication, and tax return delivery. You can securely request and receive documents, track missing information with automated checklists, exchange messages, collect payments, and deliver completed returns—all in one centralized location. Integrated with your tax workflow, Client Portals helps you reduce administrative work, improve efficiency, enhance data security through encrypted file sharing and storage, and create a more streamlined, professional experience for your clients from onboarding through return completion.

If you are a single-preparer office, [sign in](#) to your account and select the Client Portals tile to purchase. If you are part of a multi-preparer practice, speak with your practice owner about purchasing Client Portals. To ensure all preparers in the practice have access, Client Portals must be purchased by the practice owner.

Refer to this [Quick Start Guide](#) for information on setting up your Client Portals website, inviting clients, and managing files.

## Bank Products

TaxAct Professional offers tax-related Bank Products such as Refund Transfers, Cash Advances, and Software Purchase Assistance. See [taxact.com/professional/bank-products](http://taxact.com/professional/bank-products) for more information.