axAct Professional

Setup Guide

FOR TAX YEAR 2022 VERSION 1.0

TaxAct Professional Support Options

Online Support Center

For the fastest answers, search our online Help Topics.



Account & Software Questions:

- professional@taxactservice.com
- 📞 (319) 731-2682 option 1

Tax Questions:

- protaxhelp@taxact.com
- **(**319) 731-2682 option 2

Support Hours:

Monday – Friday Saturday & Sunday 8am - 5pm Closed

All times are in Central time zone

* Check our <u>support page</u> for in-season hours

Order, Payment & Sales Questions:

- <u>https://www.taxact.com/professional</u>
- prosales@taxact.com
- **(**319) 536-3571

Sales hours:

Monday – Friday

8am - 5pm



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Have a suggestion to improve TaxAct Professional Editions? 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 and Install

TaxAct has simplified the Professional Editions installation process for 2022. 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 online to TaxAct's secure servers.

Be sure to verify the system requirements before installing the software.

Recommended Method:

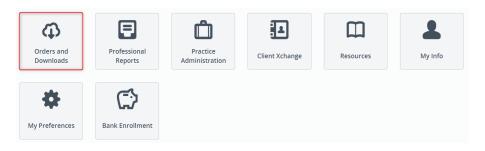
1. Download the TaxAct Professional Installer: <u>TaxActProfessionalSetup.exe</u> (3.08 MB)

Alternative Method: Download Installation File from Practice Manager

- 1. Go to <u>https://www.taxact.com/professional</u> and click the Sign In button in the upper right corner.
- 2. Sign in with your Username and Password.

rt.	S Create an Ac
Sign In	
Username	
TaxAct Username	
Password	
	0
Remember this device	
Forgot username or password?	
Next	
Don't have an account? Create a new one	

3. Click the Orders & Downloads tile.





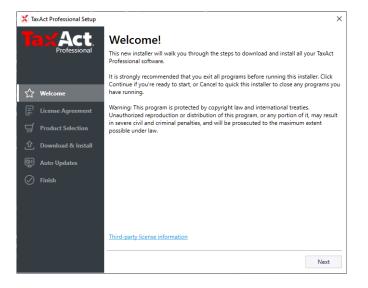
4. Click the **Download** link to the right of the product you wish to download.

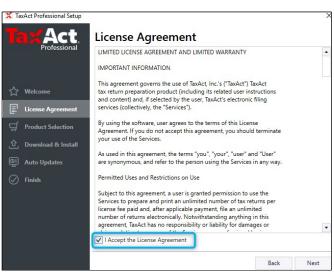
Orders	and Downloads	Practice M	Name:	Practice ID: Add New Product
Order ID	Description	Product Year	Total	
				Download
			10.00	Download

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)







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



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



🗶 TaxAct Professional Setup			>
TaxAct	Select Tax Year to Install		
Professional	2022		
	2021		
☆ Welcome	2020		
License Agreement	2019		
9 Product Selection			
① Download & Install			
9월 Auto Updates			
🧭 Finish			
		Back	Next

Select the year to install.

n Products you would like to install Federal Federal 1040 Federal 1041 Federal 1055 Federal 11205 Federal 11205 Federal 1990 Alabama Alaska Arizona Arkansas	-
Products you would like to install Federal Federal 1040 Federal 1041 Federal 1065 Federal 1120 Federal 1120 Federal 1120 Alabama Alaska Arizona	
Federal Federal 1040 Federal 1041 Federal 1055 Federal 1120 Federal 1120 Federal 1120S Alabama Alaska Arizona	
Federal 1040 Federal 1041 Federal 1065 Federal 1120 Federal 1120 Federal 1120S Federal 990 Alabama Alaska Arizona	
Federal 1040 Federal 1041 Federal 1065 Federal 1120 Federal 1120 Federal 1120S Federal 990 Alabama Alaska Arizona	
Federal 1065 Federal 1120 Federal 1120 Federal 990 Alabama Alaska Arizona	
Federal 1120 Federal 1120S Federal 990 Alabama Alaska Arizona	
Federal 1120S Federal 990 Alabama Alaska Arizona	
Federal 990 Alabama Alaska Arizona	
Alabama Alaska Arizona	
Alaska Arizona	
Arizona	
Arkansas	
California	
Colorado	
Delaware	
Delaware District of Columbia	
Florida	
Georgia	•
	Browse
axAct19\	Browse
on Windows Desktop	
T	TaxAct19\



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

Act	Unavailable Products	
Professional	The following products are not yet available. They may be installed at a later date.	
	Federal 1040	
	Federal 1041	
☆ Welcome	Federal 1065	
License Agreement	Federal 1120	
	Federal 1120S	
딫 Product Selection	Federal 990	
🗘 Download & Install	Alabama 1040	
🖳 Auto Updates	Alabama 1041	
Finish	Alabama 1065	
	Alabama 1120	
	Alabama 1120S	

X TaxAct Professional Setup	×
	Installation Complete 0 of 11 products were installed
∱ Welcome	
License Agreement	Launch TaxAct
9 Product Selection	Close Setup
① Download & Install	
👰 Auto Updates	
✓ Finish	



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

1	2
Ì	2
Ì	1

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

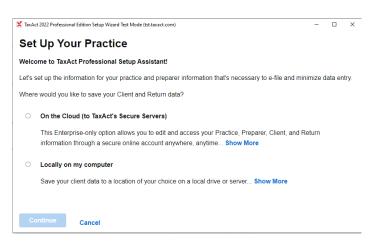


Share Files on a Network (Enterprise Editions Only)

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're 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 <u>Online Networking FAQ</u> 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 <u>Local Networking FAQ</u> 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	https://support.microsoft.com/en-us/products/windows
TaxAct Support – Network installations	https://www.taxact.com/support/22832/
TaxAct Professional Support	taxactprofessional.com/support



Install State Editions

- 1. Open a return, then click **Return > State > Install State**.
- 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 X						
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						
Ta	TaxAct Username: Clear All					
Password:						
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 I	nstall 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	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, click **Return > State > Add/Remove State** to attach or remove the state from a return.

File Edit Preparer	Return Reports Tools Online	Help					
	Basic Information Pro Features	Ctrl+T Ctrl+L	s Tools E-file Print	Bookn	m	Add / Remove State(s)	Х
Search	Federal Q&A	Ctrl+I					
	State	>	Add / Remove State			To add a state to this return select the checkbox for the state you wish to include.	
Basic In	File Return	>	State Q&A Review	>			
Depend Depend Depend	Next Year	Ctrl+R	File State Return	-> VF	F	To remove a state from this return clear the checkbox for	
⊕ - 🔂 Health ⊕ - 🏠 Health	Application for Extension	>	Order State Install State			the state you wish to remove.	
🕀 🛅 Bank A	ccount - Bank Account Information Notes and Explanations - E-Filing Ir	formation	Reset State Data			NOTE: Removing a state will delete all the data you have entered for that state.	
						States Installed	
						Viowa	



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 <u>Windows search</u> 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.

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

Recommended	Minimum
Operating System	Operating System
Windows 10 or 11	Windows 10
Computer Processor	Computer Processor
Intel® Core™ i5 or equivalent AMD processors	Intel® Core™ i3 or equivalent AMD processors
Memory	Memory
8 GB of RAM	4 GB of RAM
Disk Space	Disk Space
2 GB per tax year	600 MB per tax year
Display Resolution (in pixels)	Display Resolution (in pixels)
1920x1080 or higher	1024x768
Internet Access	Internet Access
High-speed internet connection such as DSL, Cable/Broadband.	High-speed internet connection such as DSL, Cable/Broadband.
Additional	

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 <u>TaxAct Support</u>.

Microsoft no longer provide security updates or support for PCs running Windows 7. For the best experience and security of your data, you will need to update your system to Windows 8.1 or 10.



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:

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.	🗙 TaxAct 2022 Professional Edition Test Mode (tst.taxact.com)	_	
Please confirm you're a new user or used a different account last year.	Import Prior Year Master Information		
	We couldn't find any prior year TaxAct data in this account.		
I have data in another account	Please confirm you're a new user or used a different account last year.		
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account			
I have data in another account I am a new TaxAct user			
I have data in another account			
	I have data in another account	am a new TaxAo	t user

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

	t match current practice information. Please review the information carefully bef rom Another Account" or "Skip Import" options.	ore importing, or
Practice ID:	Practice Name / Location:	
Preparers: Select which preparers to	import. You will be able to edit and add additional preparers during setup.	
Add) Add	
	da	
Merge Import and co	ombine with existing preparer information	



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.

Practice Info	Preparer Info	Master Info	Master Forms
	ce's information below. This inforr	nation can be used for each pr	eparer in your practice in t
ext steps to minimize o	data entry.		
ractice Name (yours if s	self-employed) 🛈		
Practice ID 🛈	EIN ()	Check if self-employed)
Address			
Address Line 1		Address Line 2	
City	State	Zip Cod	e
Foreign Address	;		
Country	Province	Postal C	Code
	~		
Contact Informa	ition		
Work Phone	Mobile Phone		
oreign Phone	Fax		



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 <u>Preparer Info menu</u>, later). 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.

Practice Info	Preparer Info	Master Info	Master Forms
you must ensure you're select	ign the Practice Owner with ful ting the correct user.	li admin rights to the accour	it. This cannot be undone, so
Please select one of the Prepa	arers below or click "Add New P	Preparer" to create a new us	er as the Practice Owner.
Add New Preparer			

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.

TaxAct	III A	Practice Manager Sign Out
	Practice Name:	Practice ID:
	Practice Manage	er

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

Practice Edit Your Practice Information	>	Preparer Master Inform	nation: Preparers li	nformation
Proparate		Preparer Name	Invite Status 🛈	Active Status (1)
Preparers Add / Edit / Delete Preparers		/ 1000 1000	Assigned	Practice Owner
		/ Name Tang	Email Sent	Active Inactive
C lient Status Create / Edit / Delete Statuses	>	Add New Preparer		Show Active

Electronic Filing Info Menu- E-Filing Info

An Electronic Filing Identification Number (EFIN) is required to e-file returns. To <u>obtain an EFIN from the</u> <u>IRS</u>, file Form 8633, *Application to Participate in the IRS E-file Program*.

🔀 Edit Preparer Information Test Mode (tst.taxact.com)	- 🗆 ×
Preparer Info	Electronic Filing Info
E-filing Information	
EFIN [®] PIN Type	Practitioner PIN for Electronic Signature ^①
Bank Information (Optional)	
Select banking partner None	
Default Credit Card (Optional)	
Don't have unlimited e-filing? Streamline your filing experience by Enter Credit Card	entering a default credit card to make e-file payments.
Cancel	Back to Step 1 Save and Close

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.

EFIN Verification

- 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

K Edit Preparer Information			- 🗆 X
Preparer Info	Electronic Filing Info	Permissions	Invite
Preparer's Permissions			
User is Practice Administrator			
Practice Administrators can edit prep	arers' permissions, invite prepar	rers, and deactivate preparers.	
User can access Data Management	nt Tool		
The Data Management Tool allows u permission.	sers to permanently delete Clien	t Data for all years. Only the Practice O	wner can manage this
Client Manager			
View All Clients in Practice:	Entire Practice		
Practice and Preparer Information		Client and Return Information	
Edit Practice Information	Allow Deny	Create New Returns	Allow Deny
Edit Preparer Information	Allow Deny	Open Returns	Allow Deny
Edit Client Status Options	Allow Deny	Remove Returns	Allow Deny
Change General Filing Settings	Allow Deny	Import Returns	Allow Deny
Change Miscellaneous Settings	Allow Deny	Export Client Information	Allow Deny
Change Calculation Settings		Print Returns	
enange calculation settings	Allow Deny	- menetamb	Allow Deny
Edit Master Forms	Allow Deny	E-file/Online Backup Returns	Allow Deny
		Edit Client Notes	Allow Deny
			,
Cancel			Finish

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.**

Client Manager

- View All Clients in Practice Choose which clients a preparer can view:
 - Entire Practice
 - Only Assigned Clients

Practice and Preparer Information

- Edit Practice Information Allows user to update the Master Information for the practice
- Edit Preparer Information Allow 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 Allow user to change Filing and Printing options from the General Master Information tab



- Change Miscellaneous Settings Allow user to change Miscellaneous options from the General Master Information tab
- Change Calculation Settings Allow 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
- Delete Returns User can delete client returns that they are authorized to view
- Import Returns User can import client returns from PDF 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 uses your Practice ID.

Note: If you are the practice owner, you do <u>not</u> 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 <u>not</u> 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 **OK**.

Edit Preparer Information			-		×
Preparer Info	Electronic Filing Info	Permissions	Invite		
Preparer Invitation					
purchased), the practice owner must click in order to create his practice owner, you do not need You can email invitations now o invitation emails from your Prac For security purposes, your Prac	r at a later time by clicking Edit ne tice Manager (sign in to your Tax tice ID is not included in the invit rer. To locate your Practice ID, sig	ill invitation. The email will inclu at the account uses the same Pi ext to the user in your Preparer Act Account and click the "Pract ation email, so you'll want to pr	ide a unique link the pr ractice ID. If you are th List. You can also send ice Administration" tile rovide your Practice ID	e d 2).	r
Cancel		Back to Step 3	Finish		
curter		buck to step 5			

Client Status Menu

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

Practice Edit Your Practice Information	>	Preparer Master In	nformati	on: Client Status	
		Client Return Status		Client Pay Status	
Preparers		Add New Status		Add New Status	
Add / Edit / Delete Preparers	>	Amended Return		Not Paid	W
		Billed		Series Paid	Ŵ
Client Status		Filed Electronically		Partially Paid	Ŵ
Create / Edit / Delete Statuses		Filed Extension			
Directories		Filed Paper			
Change Directory Information	>	Imported			
		In Progress	.		
General		New Return			
Change Other Preferences	~	PDF Imported			
		Return Completed			
		Sent Organizer			
		Waiting for Information			
Help					
Setup Guide Cl	ose				



Directories Menu

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

Practice Edit Your Practice Information	Preparer Master Information: Directories
Preparers >	Client Data Directory Browse Restore Default Location
Client Status Create / Edit / Delete Statuses	PDF Directory Browse
Directories Change Directory Information	Log Files Directory Browse
General >	Restore Default Location Auto Backup Directory Browse
	Restore Default Location E-files Directory Browse
	Restore Default Location
Help Setup Guide Close	
Close	

General Menu

The General menu presents options for filing, calculations, and miscellaneous preferences.

Practice Edit Your Practice Information	>	Preparer Master Information: General		
		Filing/Printing Options		
Preparers	<u></u>	□ Print the preparer's name in the Preparer's Signature Field		
Add / Edit / Delete Preparers		□ Print the current date in the Preparer's Signature Date Field		
		Print all capital gain/loss transactions on Form 8949		
Client Status Create / Edit / Delete Statuses	>	U 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)		
Directories		Print Schedule B even if under \$1,500 - (1040 only)		
Change Directory Information	>	Automatically lock returns after E-Filing		
General		Miscellaneous Options		
Change Other Preferences		•		
		Assign invoice # to all new and imported returns Next invoice # 1001 Increment Invoices By		
		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)		
		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		
		C Do not automatically compute state sales or use tax (New York returns only)		
		Copy Calculation Options to Existing Returns		
Help				



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.

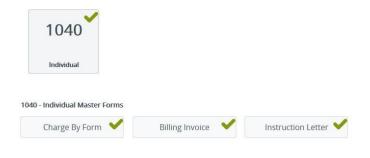
To complete the Master Forms setup:

- 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)

Setup			
Practice Info	Preparer Info	Master Info Maste	er Forms
Some forms have not yet been revie	wed.		
990	1040	104	1
Tax Exempt	Individual	Estates &	Trusts
1065	1120	1120)S
Partnership	C Corporation	S Corpora	
		Setup Guide	Close

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.





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.

Preparer Master I	nformation												;
Charge By Form	Billing Invoice	Instruction Le	etter										
Select Type:	Federal	~											
	FE	DERAL	. MA	STEF	R CH	ARGE	BY	' FO	RM				^
	Complete the I per form' basi returns. If you created, select drop-down me	s. Master Ci would like t Copy Maste	harge B the Mas	By Form i ster Char	nformat ge By Fo	on will tra rm feature	insfei e to b	r to all e used	new o d for re	r imp eturn	orted s alrea		
Form											Ch	arge	
Form 104	10, Individual In	come Tax R	eturn .								. 0		
Form 104	40-SS, U.S. Sel	f-Employme	nt Tax F	Return (P	uerto Ri	:0)						0	
Form 104	ONR, Nonresi	dent Alien Ind	come Ta	ax Returr	n							0	
Form 104	ONR-EZ, Incor	ne Tax Retur	rn for C	ertain No	onreside	nt Aliens W	Vith N	lo Dep	enden	its		0	
Form 104	0ES, Estimate	d Tax Payme	ents									0	
Form 104	0ES (1040NR), Estimated	Tax Pa	yments .								0	
Form 10/	MAMAMA	Tov Return										n	Υ.
Reset All												Prin	t
							E	OK	((Cancel	ŀ	lelp

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

arge By Form	Billing Invoice	Instruction Letter		
		MASTER BILLING INVOID	E	^
and/o any r for ro Prep	or enter the ap new or importe eturns already arerBilling In	ter Billing Invoice below by placing a checkmar plicable amounts. The Master Billing Invoice in de returns. If you would like the Master Billing created, select Copy Master Data to Currently voice drop-down menu or select Copy Master -Master Information drop-down menu.	nformation will transfer to Invoice feature to be used -Open Client from the	
Prepa	ration of 2022	Federal Tax-Exempt Return	0.00	
X	Do not use Cha	arge By Form		
E	Use Charge By	Form but do not attach details on billing invoice.		
	Use Charge By	Form and show details on billing invoice.		
Prepa	ration of 2022	State Tax-Exempt Tax Return	0.00	
X	Do not use Sta	te Charge By Form		
<				>
Reset All				Print



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**.

MASTER INSTRUCTION LETTER Complete the Master Instruction Letter below by selecting the checkbox next to the applicat 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	,
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.	s.
Check the applicable box indicating if you will be printing instruction letters on letterhead paper	er:
X No letterhead paper	
Use own letterhead paper (small logo)	
Use own letterhead paper (large logo)	
Use the following as the letterhead:	
Reset All	Print

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.



Data Conversion

TaxAct now includes the ability to convert previous year 1040 ProSeries client data. Other software programs below can use PDF import:

- ATX[™]
- CrossLink[®]
- Drake[®]
- Intuit ProConnect Online®

- Intuit Lacerte[®]
- Intuit ProSeries Basic[®]
- TaxSlayer Pro[™]

Convert Client Data

To add a new client to convert:

Click File > Add Client Return > Convert Clients to TaxAct Professional

A Remove Client	Return Type								@ Export @ P	Preferences
	Return Type									Terer ences
	Return Type				illers: All Return Statuses	 All Preparers 	¥	All EFINs	 All Return Types 	
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To import a client to convert:

Click File > Import > Convert Clients to TaxAct Professional

		onal Reports	Document Manage	er TaxDome	Notifications						
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When asked: "Would you like to convert your 1040 clients' data from your previous year's software to TaxAct Professional?" chose **Yes**.

A Add Client C) Open R	nturn A Rem	ove Client									G Export O P	references
learch							Filters: All Return Statuses	 All Prepare 	rs ~	All EFINs	 All Return Types 	
Client	Quick Actions	SSN/EIN	Return Type	Return Status	Fed EF Status	Contact Name	Taxpayer Contact #1	Taxpayer Contact #	2 Taxpayer Email	Refund	State Refund	Invoid
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				Can I convert m	iy clients' data? 🖸		No	Yes				

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

Select.	G Export © Prefer						
Client Quick Actions SSNEIN Return Type Return Status Fed EF Status Contact Name Taxpayer Contact #1 Taxpayer Contact #2 Taxpayer Email Return Ouick Actions 1040					nove Olem	am Julia	8. Add Client Di Open Pet
Outck Actions 1040 X Institution to the state from Market	Filters: All Return Statuses v All Preparers v All EFINs v All Return Types						Search
Great! We'll guide you through the process. First, select the tax preparation software you used for 2021	Contact Name Taxpayer Contact #1 Taxpayer Contact #2 Taxpayer Email Refund State Refund	Contact Name	Return Status Fed EF Status	Return Type	SSN/EIN	Quick Actions	Client
Image: Select Software Image: Select Software Image: Select Software Image: Select	× so so s		X TaxAct 2022 Professional Edition Test Mode	1040		Quick Actions	Andre reason and the
TaxSlayer Pro Other	ware you used for 2021	tware you use	the tax preparation sof Our program will use this informat Select Software ATX CrossLink Drake ProConnect Online Intuit ProSeries Professio Intuit ProSeries Basic TaxSlayer Pro				
Cancel Next	Cancel 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.

Client Manager Appoin	ntment Manager	Profess	ional Reports	Document Manage	r TaxDome	Notifications								
은, Add Client 🗇 Open Re	turn 🕹 Ren	nove Client											🕒 Export	OPreferences
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				talk on data will be			Go ba		Alana					
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Browse to the client data you wish to convert (files ending with .21i or .21l extension)

음, Add Client 🕞 Open Re		nove Client		G Export	
Search_	turn 2. Rem	hove Client		Filters: All Return Statuses V All Preparers V All EFINs V All Return Types	trence
Client	Quick Actions	SSN/EIN	Return Type		Invo
	Quick Actions	CONTENT.	1040		\$0.0
				Next, browse to and select your ProSeries client data	
				You can select the entire folder or choose individual files you wish to convert.	
				C\ProWin21\21Data →	
				The default path for your ProSeries data is: CNProWin21121Data	
				Don't have client data files? <u>Try PDF Import</u>	
				Need help? Visit our FAQ page 🖉 Go back Next	

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

Client Manager Appoi	ntment Manager	Profess	ional Reports	Document Manage	er TaxDome	Notifications						
음, Add Client 🗈 Open Re	turn 🕹 Ren	nove Client									🕒 Export	Preferences
Search						1	ilters: All Return Statuses	 All Preparers 	Ý	All EFINs	✓ All Return Ty	/pes
Client	Quick Actions	SSN/EIN	Return Type	Return Status	Fed EF Status	Contact Name	Taxpayer Contact #1	Taxpayer Contact #2	Taxpayer Email	Refund	State Refund	d Invoid
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				Next, brov	vse to and se	lect your ProS	eries client data	a				
				You can select t	the entire folder or	choose individual file	s you wish to convert.					
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				The default path for	your ProSeries data is: C:)	ProWin21\21Data						
				 File Name 	•							
				Need help? Visi	t our FAQ page 🗹		Go back	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.

N/EIN	Return Type	Return Status	Fed EF Status	Contact Name	Taxpayer Contact #1	Taxpayer Contact #2	Taxpayer E
**-1130	1040			onvert your cl	ient file to TaxAd	t ×	awilliams@
			Curren	tly processing •••• Converting 1 file			
		speed. This scr	e a few minutes, de een will automatica will be added to C	ally refresh.	ber of files and your inte	ernet	
		Stop after c	urrent file conversi	on	Cancel Cor	nversion	

· · ·

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.

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 2021 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."

X TaxAct 2022 Professional Edition Test Mode (tst.taxact.com)			×
Import Prior Year Client Data			
To import your prior year client data, please select where your 2 have detected any stored client data, we have defaulted that se		d. If we	
Locally on my PC or network			
○ On TaxAct's Secure Servers			
	Cancel	mport	

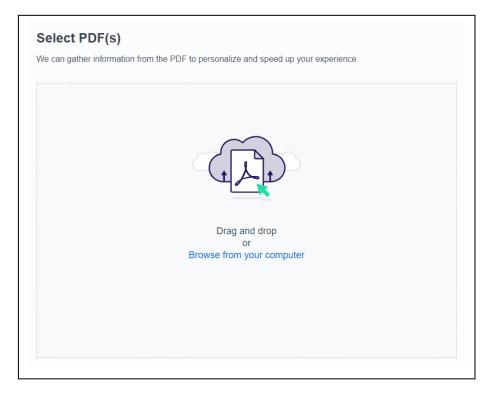
Import from Portable Document Format (PDF)

TaxAct imports key data from PDFs of 1040 returns prepared by many software programs:

- ATX[™]
- CrossLink®
- Drake®
- Intuit® Tax Online
- Intuit Lacerte®

- Intuit ProSeries®
- TaxAct Preparer's Editions
- TaxSlayer Pro[™]
- TaxWise®
- UtraTax





To import returns in PDF form:

- 1. Click File > Import > Prior Year 1040 PDF Data > Import > TaxAct 2021 Client Returns
- 2. Locate the file on your hard drive. Select the PDF files you'd like to import.
- 3. Use the "Select All" button to import all of last year's returns.

4. Click **Import**. The client's Basic Information is shown. Review the information and make any necessary corrections, then click **OK**.

You will receive confirmation when the import process is complete. The return(s) will appear in Client Manager with a status of "Imported."



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.

ave 1 new notification. Clic											_
Client Manager	Appointment	Manager	Prof	essional Reports	Document Ma	nager	TaxDome	Notificati	ons		
ය. Add Client	🗅 Open Return	a. Ren	nove Client						Export	© Prefere	nces
Search			Filters:	All Return Statuses	 All Preparet 	s v	All EFINs	~	All Return	Types	,
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				OK	Cancel	Help					
¢											
										1 Cli	ent(s)
Selected Client Info	ormation			Contact Phone #1:							

Navigating Client Manager

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:
- 1. Add a Client
- 2. Open Currently-Selected Client Return
- 3. Edit Currently-Selected Client Information
- 4. Delete Currently-Selected Client Return
- 5. Search for a Client
- 6. Open Client Manager Print Center
- 7. View Preferences

욕 Add Client	🗅 Open Return	ి. Remove Client							🕒 Export
arch			Filters:	All Return Statuses	~	All Preparers	~	All EFINs	 All Return



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 2022 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	\times
Would you like to add a new T an existing TaxAct 2022 client clients?	
Add New 2022 Client	1040 Client 🗸 🗸
Open Existing 2022 Client	
O Import 2021 TaxAct Client(s	5)
O Convert Clients to TaxAct F	Professional 🔬
	<u> </u>
OK Cance	l Help

Edit Existing Client Return

- 1. Click the client record in Client Manager.
- 2. Click the **Open Client Return** button or menu listing, or 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) (Available in January, 2023)

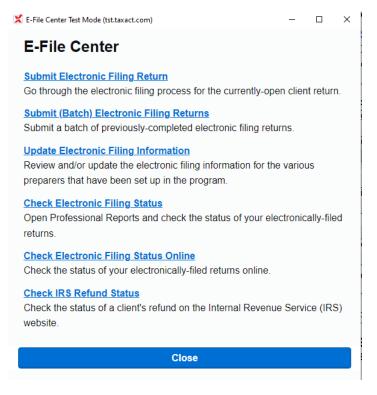
E-file Center

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.

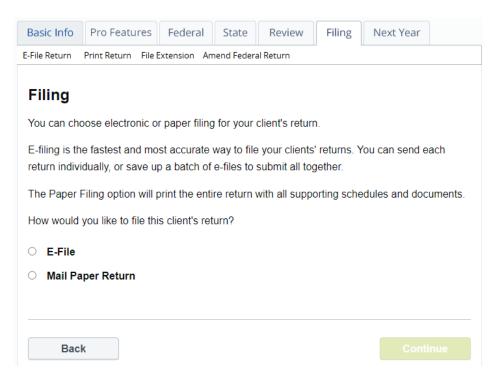


To access the E-file Center, you must be in a client's return. Click on the **E-file** button in the navigation menu.



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 2022 return: If you have not entered your Practice ID, EFIN or PTIN (or SSN) in <u>Preparer Info</u>, you will be prompted to confirm or enter the missing information. You will also need to have your <u>EFIN verified</u>, 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 <u>Protection Plus Audit Assistance</u>, 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:

- **Request E-Signature** Request an E-Signature. For more information see <u>Electronic Tax Signing</u>.
- **IRS PIN Method** In this required step, choose Self-Select PIN or Practitioner PIN via Form 8879, then enter related information.
- **IRS Refund Method** 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.
- 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.
- Miscellaneous Information (optional) Enter In Care Of information here.
- E-file Alerts Sign up for E-file alerts.

-File S	Summary S	teps				
	steps below to e-					
EW						
Requ	iest E-Signature				St	art
	PIN Method: Cho	ose			St	art
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A E-File	e Alerts				St	art
Bac	k					

- 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 check the return for potential errors, omissions and tax-saving opportunities. Make any necessary changes to the return.



- 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 submitthe 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 <u>for each return</u>. 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 <u>e-filing a single return</u>).
- 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 <u>e-filing a single return</u>.

- 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 <u>Print Returns, Labels, Reports, and Invoices</u>, 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.

File	Edit	Preparer	Return	Reports	Tools	Or
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	Exit					es

Password-Protect Client Returns

In Client Manager, double click to open return.

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

Reminder: Document all of your passwords in a safe location.

If you choose not to add a password 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 <u>TaxAct Professional</u>, <u>IRS</u> and <u>State Agencies Expand ID Theft Safeguards</u>.

Use the <u>Preparer's Permission menu</u> 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 downlist.)
- 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 savethe 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 2021 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 TaxActServers (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 2021 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, and Invoices

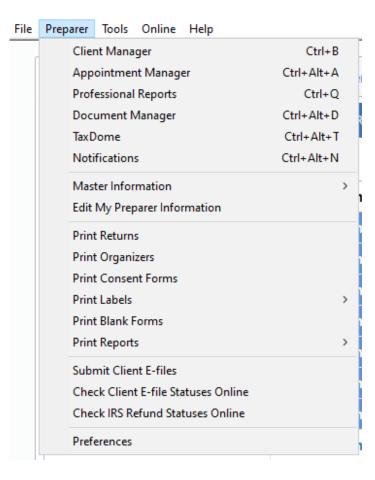
The Print Center

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 (see image above).
- 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 (Available early January 2022)

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.

Print Center Client Returns Client Organizers Consent Forms Labels Blank Forms Client Reports Select All Select All Select All Republic Bank River City Bank Protection Plus VPS Number of Copies Print Cancel	rint Center					- 0	×
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- 2. Click the **Consent Forms** tab.
- 3. Select the Client and Bank.
- 4. Enter the desired number of copies, then click **Print**.

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.
- 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.

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Print Labels

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

- Print Client Labels,
- Print Preparer Labels, and
- Print Other Labels.

Print Center						- 🗆 X
Print Cent	ter					Help
Client Returns	Client Organizers	Consent Forms	Labels	Blank Forms	Client Reports	
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 Show Fee 	deral Est. Tax Payme	nt Clients				
Print Married	f Filing Joint clients a	IS				
 Mr. and I 	Mrs.					
 Taxpayer 	^r Name					
 Both Clie 	nt Names					
 Print Prepa 	irer Labels					
Print	Cancel					

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.

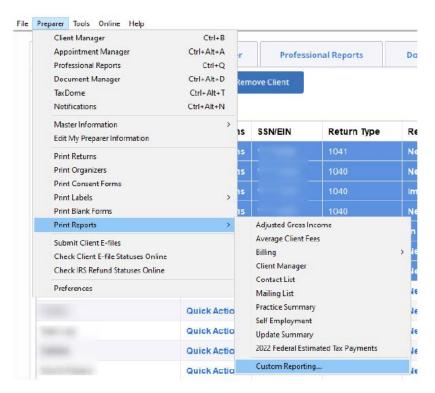


- 1. Set the print job based on your printer type and labelsize.
- 2. Click Set Font to access a list of available fonts and modify the text style and size.
- 3. Once you have set your preferences for the labels to print, click **Print**.

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 (All, Paid, or Unpaid)
- Client Manager
- Contact List
- Mailing List
- Practice Summary
- Self-Employment
- Update Summary
- 2023 Federal Estimated Tax Payments



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 PaidBilling Unpaid
- Billing All
- Client Manager
- Contact List
- Mailing List •
- Practice Summary •
- Self Employment
- Update Summary
- 2022 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	dd Client	4044	New Return
	Quick Ac O	pen Client Return		New Return
	QUICK AC	emove Client(s) leate a Copy		Imported
	Quick Ac	lit Client Informatio	on	New Return
	Quick Ac Ec	lit Client Notes		In Progress
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	C. internet	ssign Preparer		New Return
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	Quick Ac La	ock Return(s)		Labels Blank Forms
	Quick Ac	nlock Return(s)		Reports



Additional Resources

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 <u>Professional Reports Guide</u> to learn how to access the reports and navigate through the system.

Client Xchange

Client Xchange is a convenient and secure website portal that enables you and your clients to safely exchange tax information from any device with internet access. Easily upload and download all the tax information you and your clients need to share in seconds – from photos of Form W-2s and receipts, to CSV files of stock transactions and PDFs of client organizers and final tax returns.

If you are a single-preparer office, <u>sign in</u> to your account and click on the Client Xchange tile to purchase. Otherwise, talk to your practice owner today about purchasing Client Xchange. (In order for all preparers in a practice to have access to Client Xchange, it must be purchased by your practice owner.)

Refer to this guide to help set up your Client Xchange website, invite clients and manage files.

Bank Products

TaxAct Professional offers tax-related Bank Products such as Refund Transfers, Cash Advances, and Software Purchase Assistance. See <u>https://www.taxact.com/professional/bank-products</u> for more information.

