TaxAct® Professional

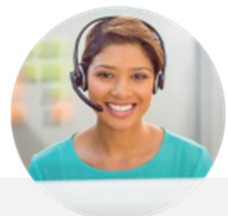
Setup Guide

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

Order, Payment & Sales Questions:

https://www.taxact.com/professional

prosales@taxact.com

(319) 536-3571

Support Hours:

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

All times are in Central time zone

* Check our support page for in-season hours

Sales hours:

Monday – Friday	8am - 5pm

Table of Contents

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.

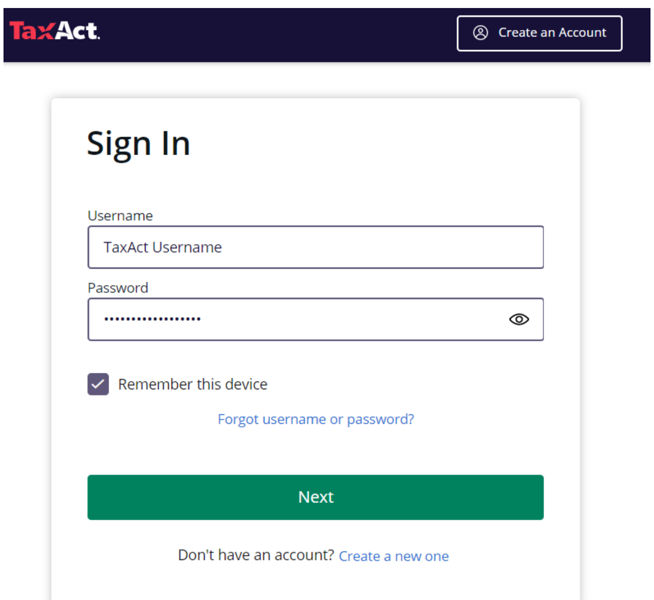
Be sure to verify the system requirements before installing the software.

Recommended Method:

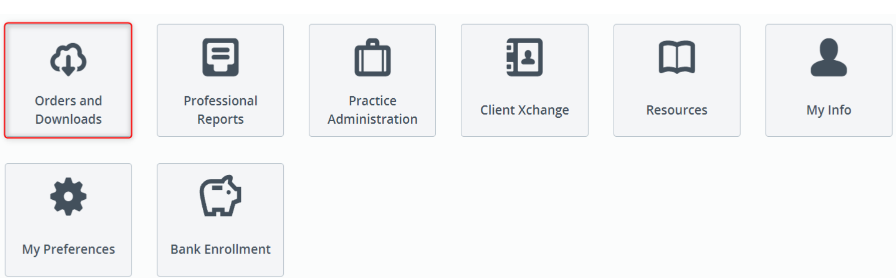
1. Download the TaxAct Professional Installer: TaxActProfessionalSetup.exe (3.08 MB)

Alternative Method: Download Installation File from Practice Manager

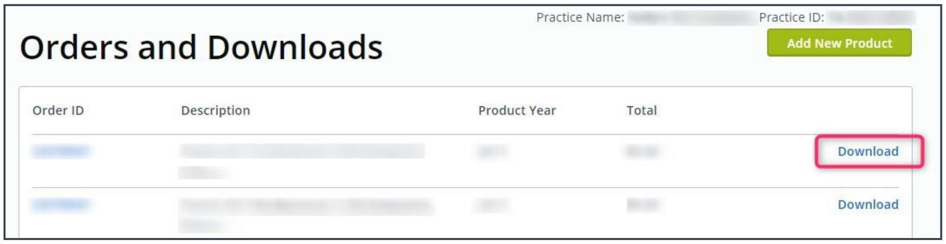
1. Go to *https://www.taxact.com/professional* and click the **Sign In** button in the upper right corner.
2. Sign in with your Username and Password.



3. Click the **Orders & Downloads** tile.



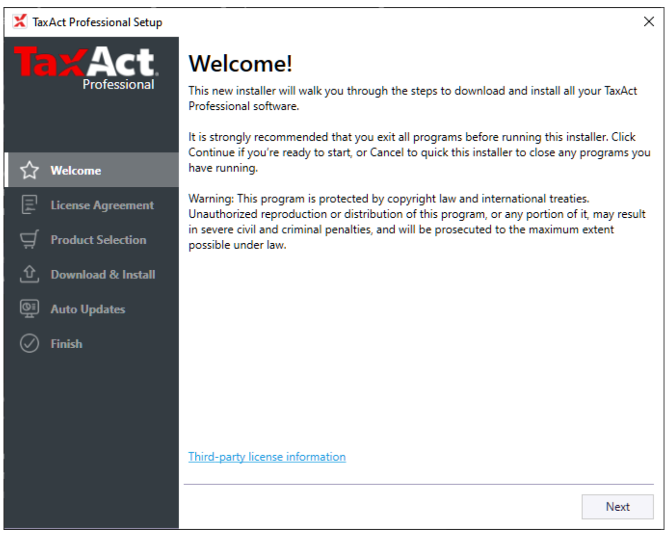
4. Click the **Download** link to the right of the product you wish to download.

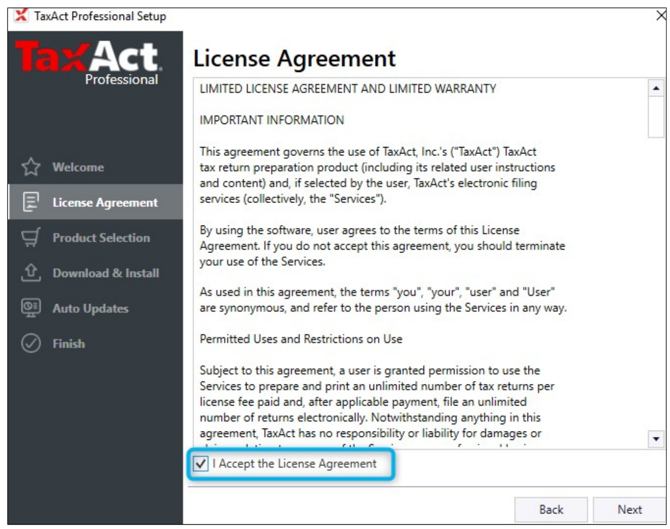


5. If the installation does not automatically run, locate and double click the **File** icon to manually install the software.

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

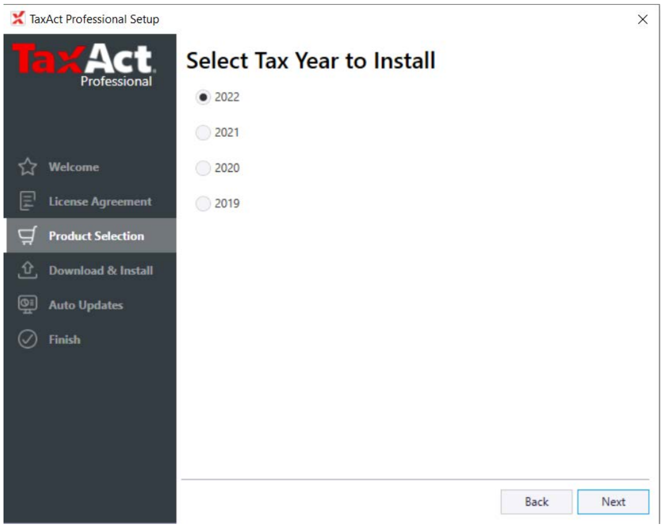
Install Your Software Using Simplified Installer (Recommended)

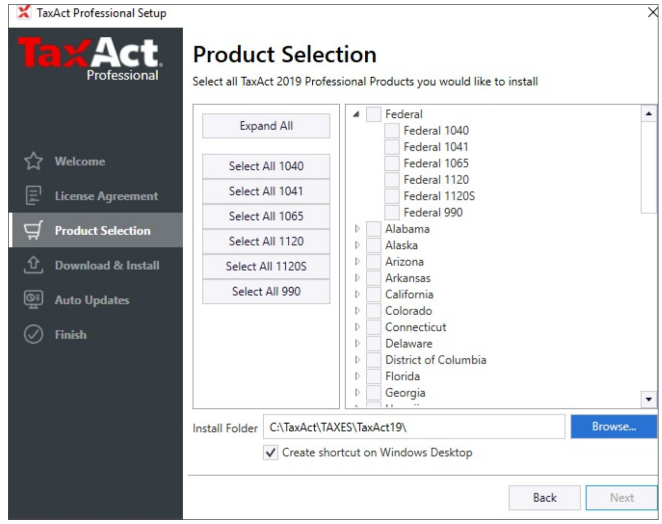




1 Open the downloaded program file. On the initial screen, click **Next** to begin the installation.

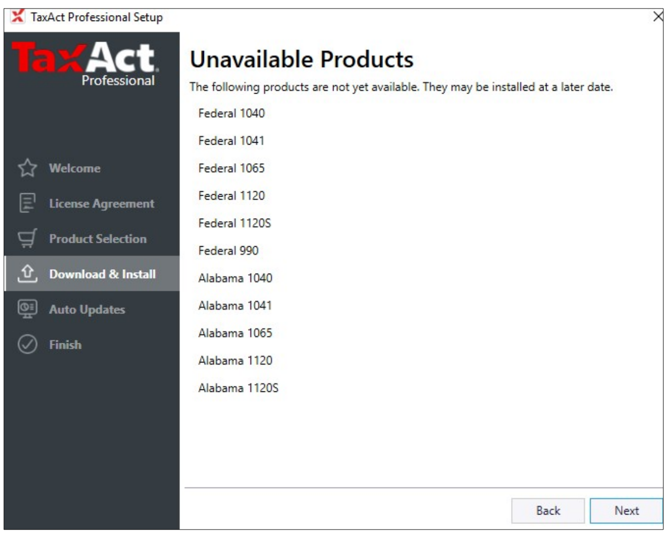
2 Select the checkbox next to "I Accept the License Agreement", then click **Next.**

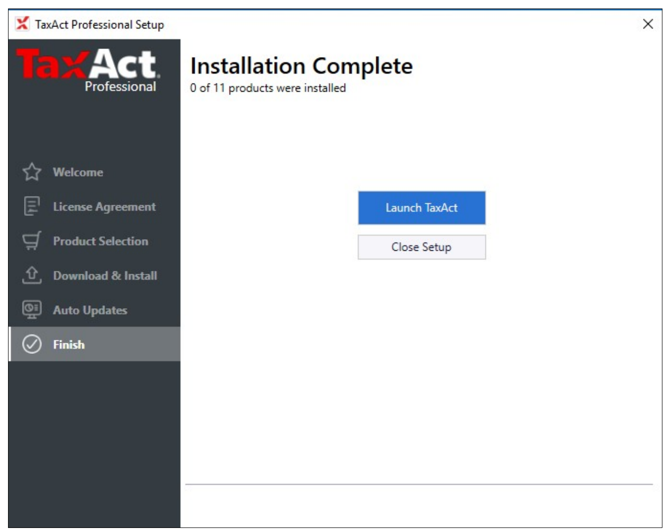




3 Select the year to install.

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





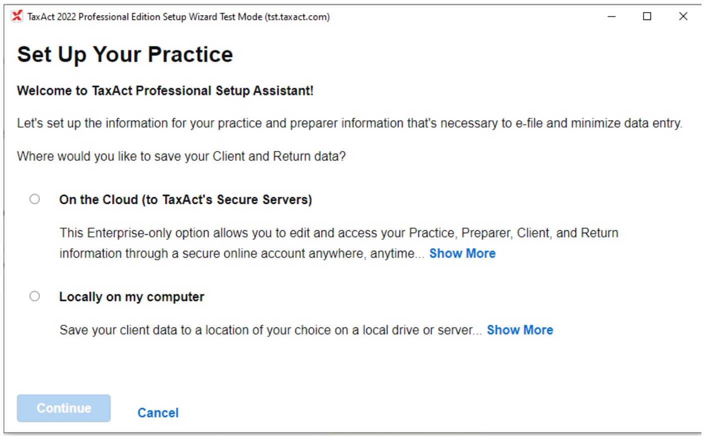
5 Selected products still in development will be listed. You will be notified when they become available.

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'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 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).

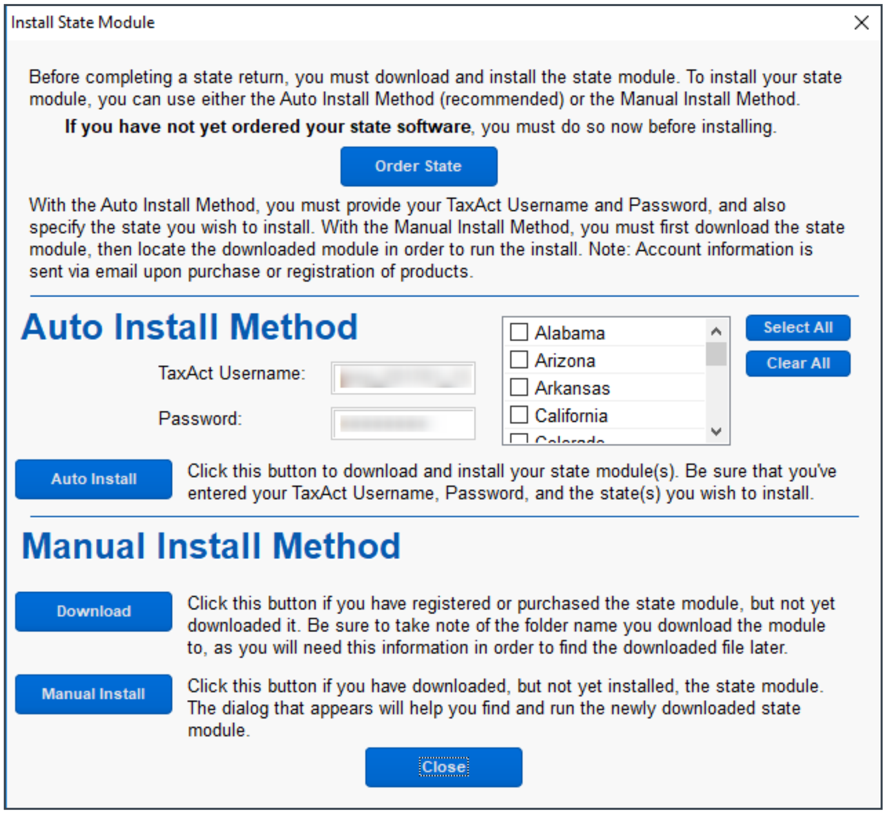
Have questions about how to set up a local network? Refer to the Microsoft and TaxAct Support resources below:

Windows Support	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

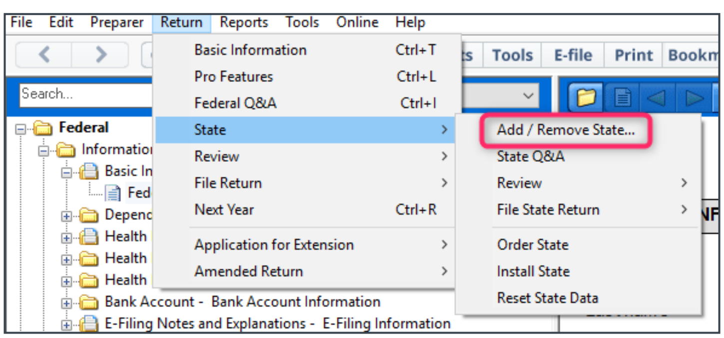
1. Open a return, then click **Return > State > Install State**.
2. Select each state you wish to install or **Select All**
3. Click **Auto Install** to add the state modules with recommended settings.

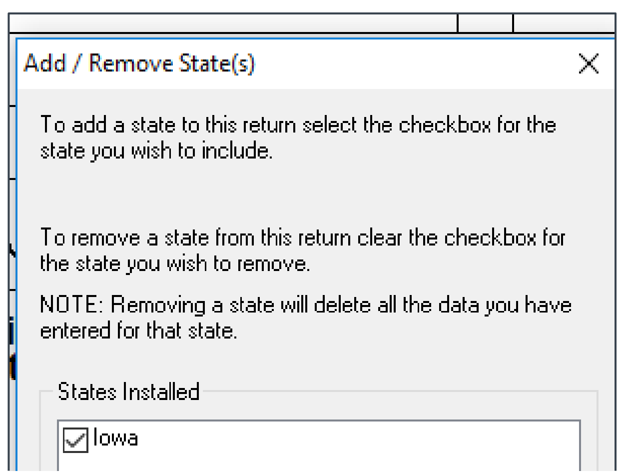
Or, click **Manual Install** to add states to an alternative location or to a network.



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.





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.

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

	Recommended	Minimum
Operating System	Windows 10 or 11	Windows 10
Computer Processor	Intel® Core™ i5 or equivalent AMD processors	Intel® Core™ i3 or equivalent AMD processors
Memory	8 GB of RAM	4 GB of RAM
Disk Space	2 GB per tax year	600 MB per tax year
Display Resolution (in pixels)	1920x1080 or higher	1024x768
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.

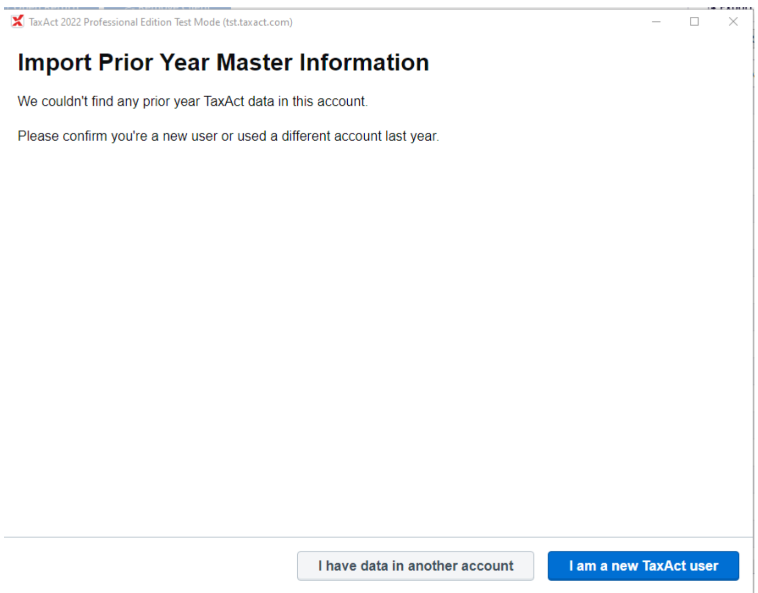
We recommend having your IT resource ensure all systems you're using are properly installed and mapped to the correct drives for all users for proper functionality prior to contacting TaxAct Support.

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.

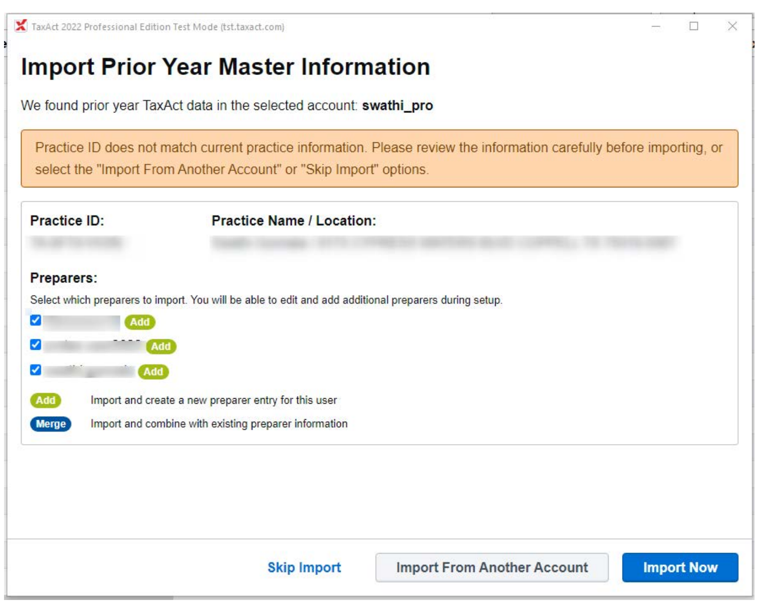
Import Master Information

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:



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



TaxAct Professional

Set Up the Software

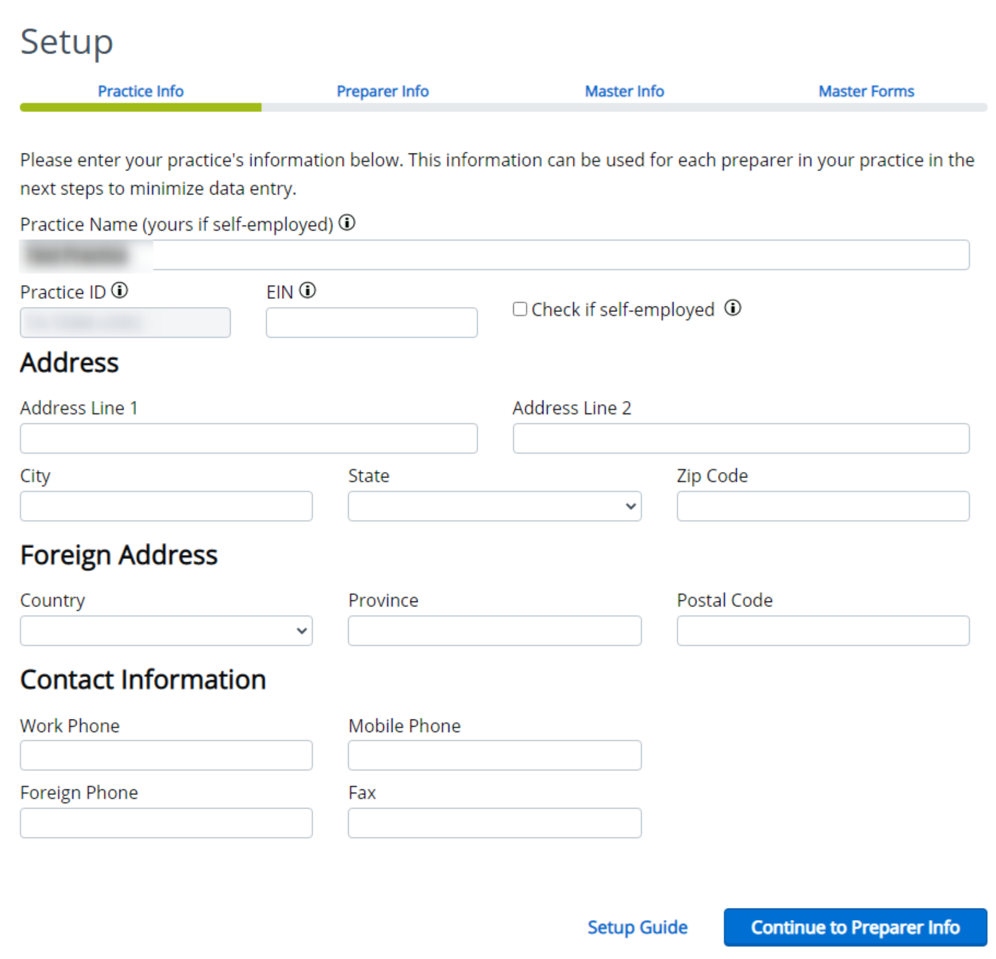
The first time you launch the software, the TaxAct Setup Wizard will walk you through steps to set up Master Information, including Practice, Preparers, Client Status, Directories, and General categories. For best results, complete every tab in the setup window before clicking the **OK** button.
To access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

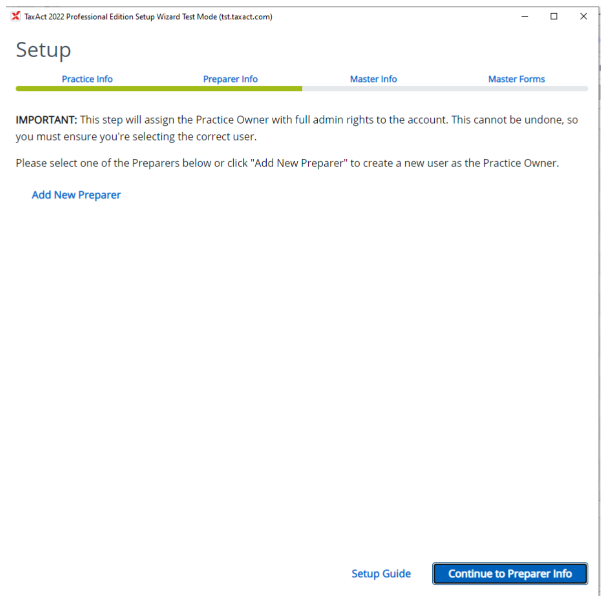


Enter your practice information as you want it to appear on tax returns, labels, letters, and other correspondence. The information you enter can also be linked to each preparer (see Preparer Info menu, later). When finished entering your data, click Continue to **Preparer Information**.

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.



Preparers Information menu

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

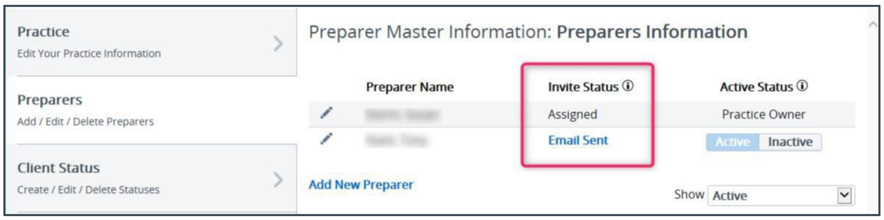
- **Note**: The first preparer you add should be yourself or the default preparer.
- Check the **Use My Practice Information** box (in the Address section) to link the preparer to the Practice address. Otherwise, enter the preparer's specific contact information.
- In the Basic Information section, selecting 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.

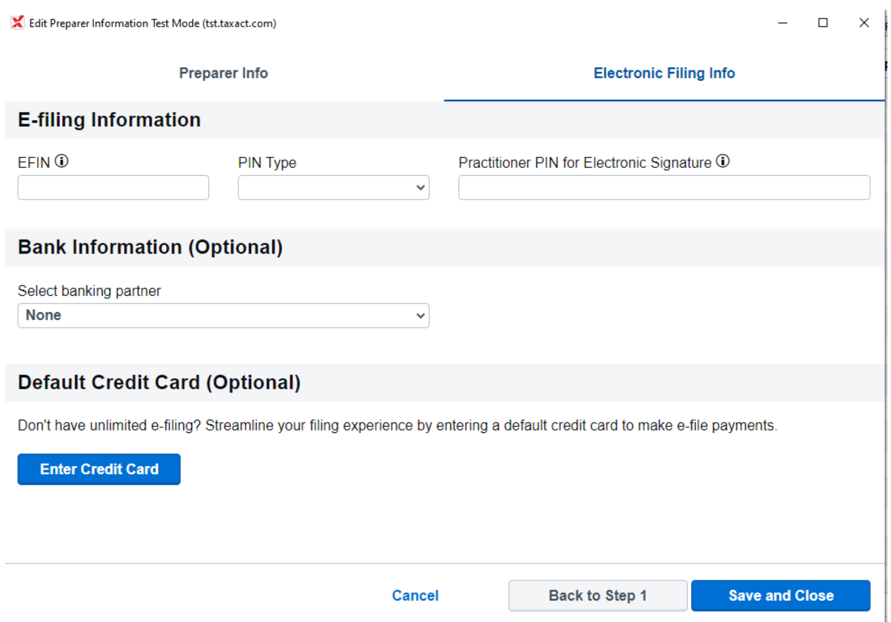
To locate your Practice ID, sign in to your TaxAct Account and look in the upper right corner.

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 from the IRS, file Form 8633, *Application to Participate in the IRS E-file Program*.



IRS EFIN Requirements for Tax Professionals & Software Companies

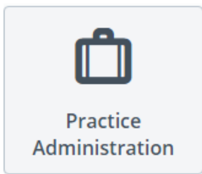
The IRS requires tax software companies to collect and verify EFIN Tracking Numbers from its professional customers. Your Tracking Number appears on the IRS e-Services Summary in your IRS e- Services account.

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.

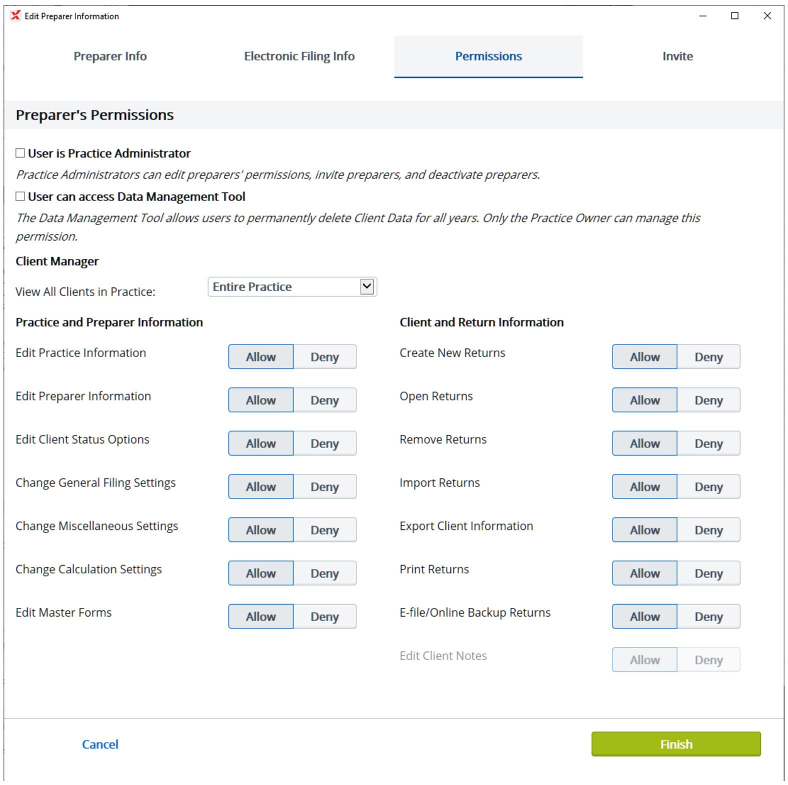
Permissions Menu

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



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 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

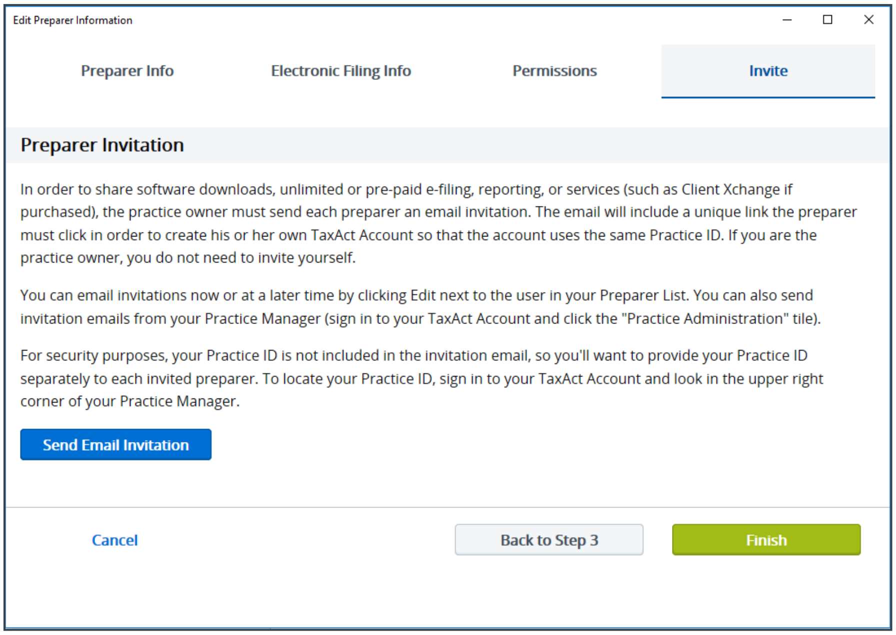
Your invited preparers will not have access to the following tiles in Practice Manager:

- Preparer Invitation

To invite preparers:

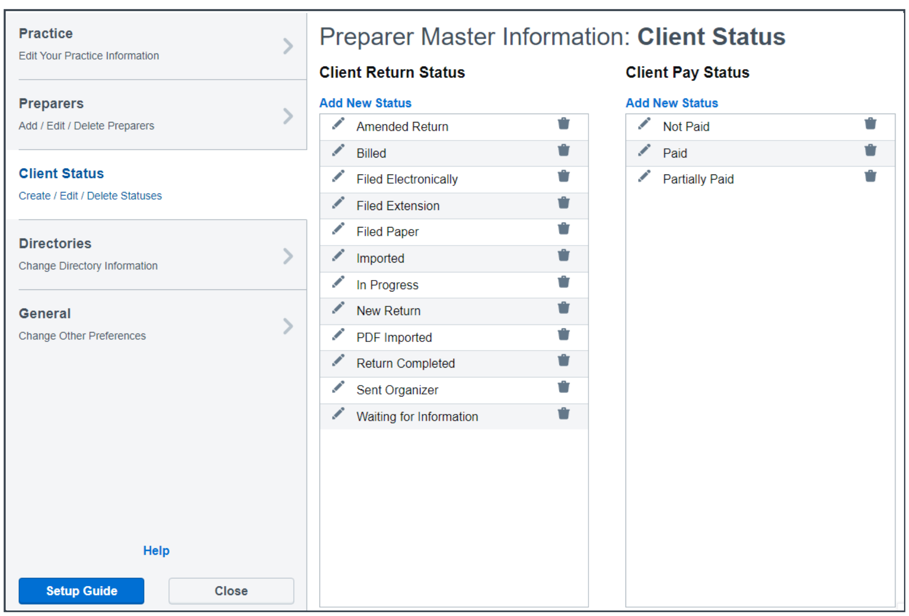
1. Click the **Practice Administration** tile.
2. Click **Preparer Invitation.**
3. Complete and click the **Send Email Invitation** button.

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



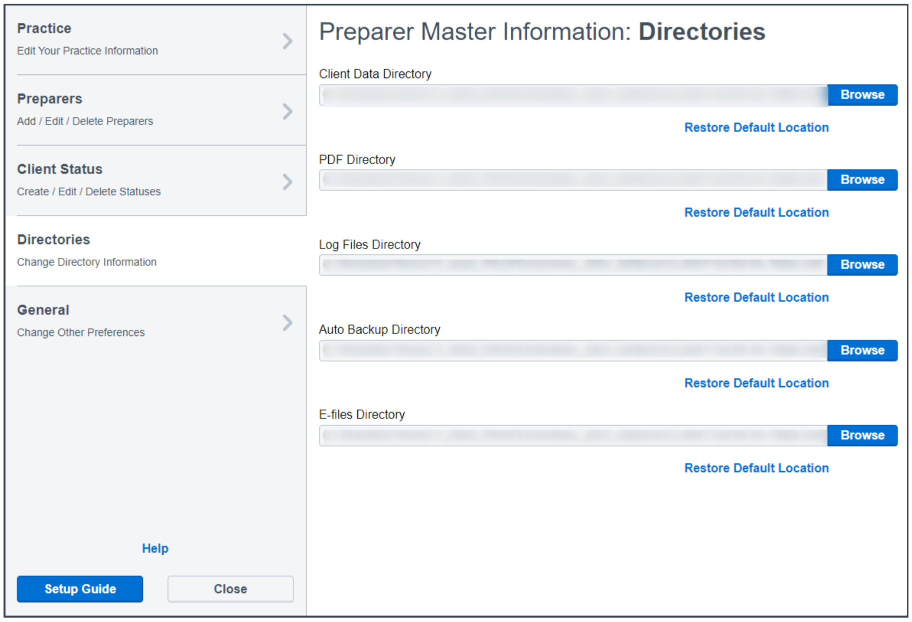
Client Status Menu

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



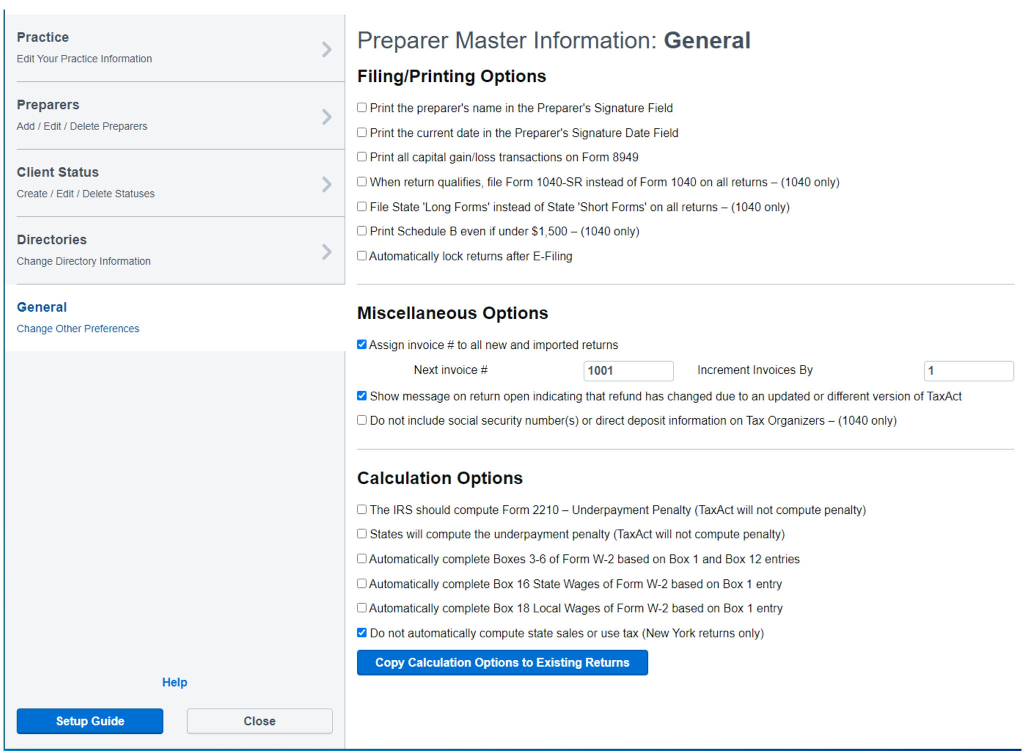
Directories Menu

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



General Menu

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



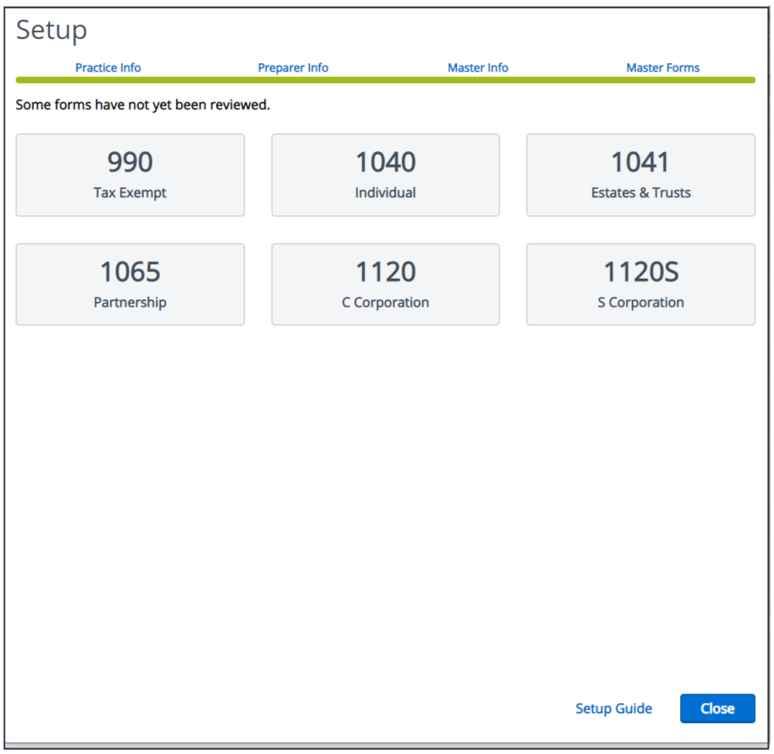
Set Master Forms Defaults

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:

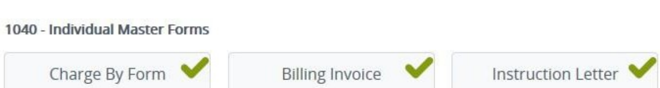
1. Click the appropriate program tile.
2. More options appear on the screen, which could include:

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



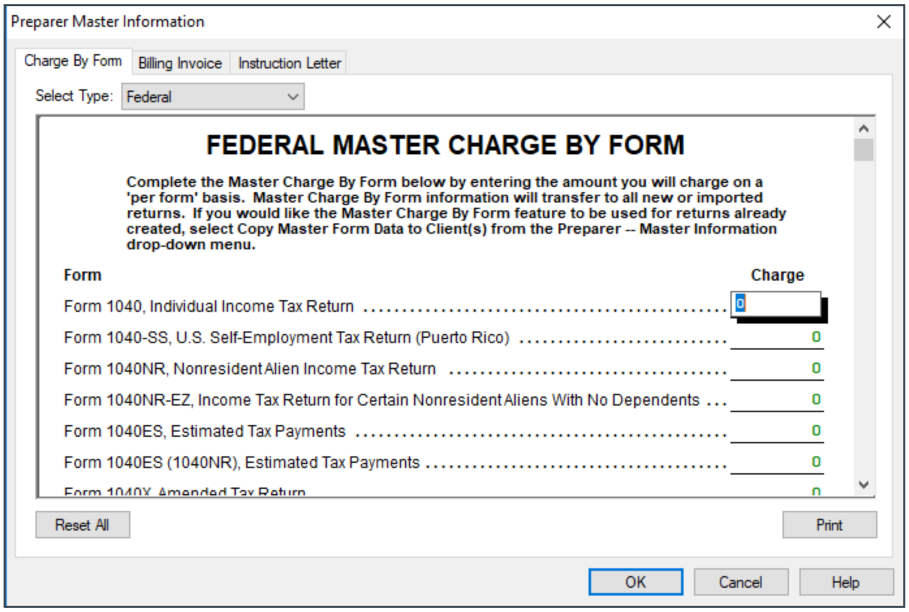
Once you complete the setup for each form, a green checkmark will appear on the tile so you can easily see which you have not yet completed.

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

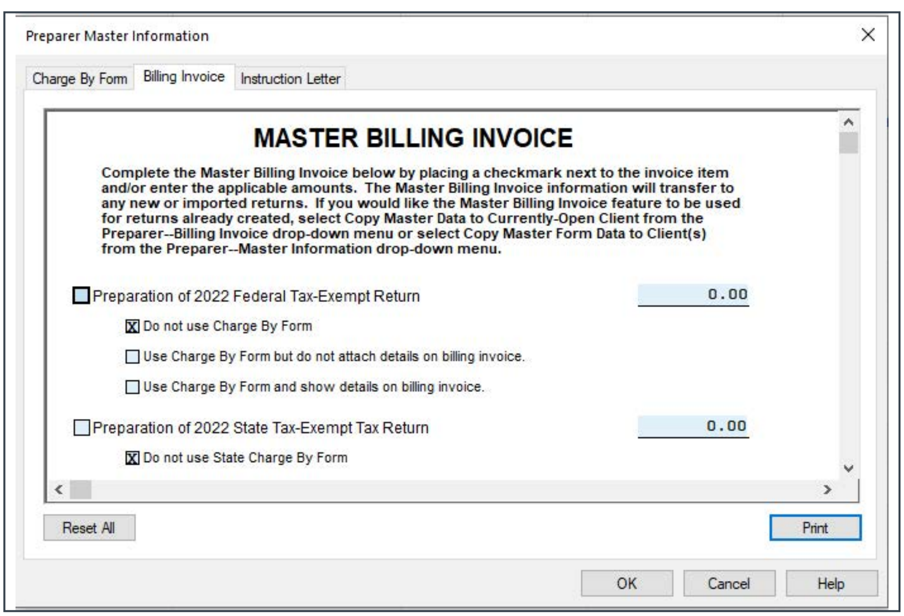
This feature allows you to set default billing rates by form. You can add forms and charges not listed on the blank lines at the bottom of the list. Use the Select Type dropdown menu to switch between federal and state forms.



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**

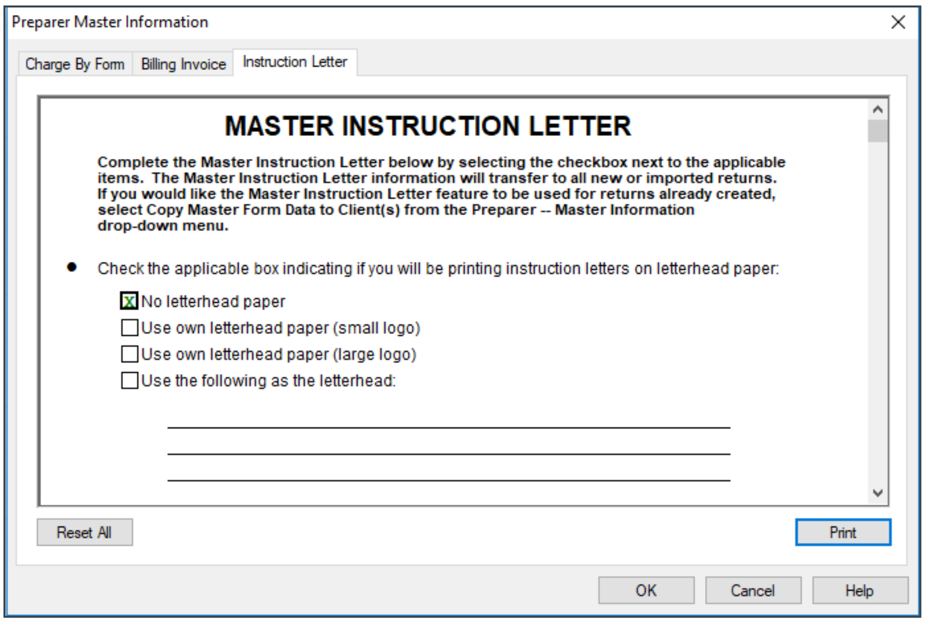


__Master Instruction Letter__

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**.



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

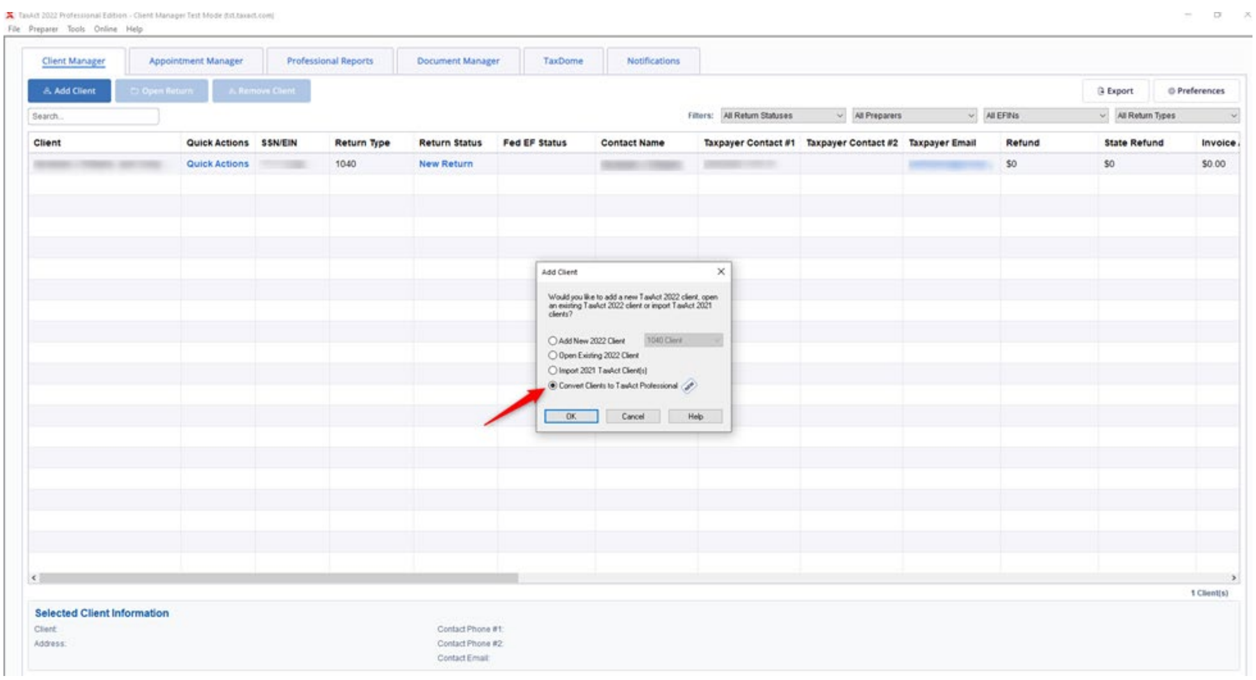
TaxAct now includes the ability to convert previous year 1040 ProSeries client data. Other software programs below can use PDF import:

- ATX™
- CrossLink®
- Drake®
- Intuit ProConnect Online®
- Intuit Lacerte®
- Intuit ProSeries Basic®
- TaxSlayer Pro™

Convert Client Data

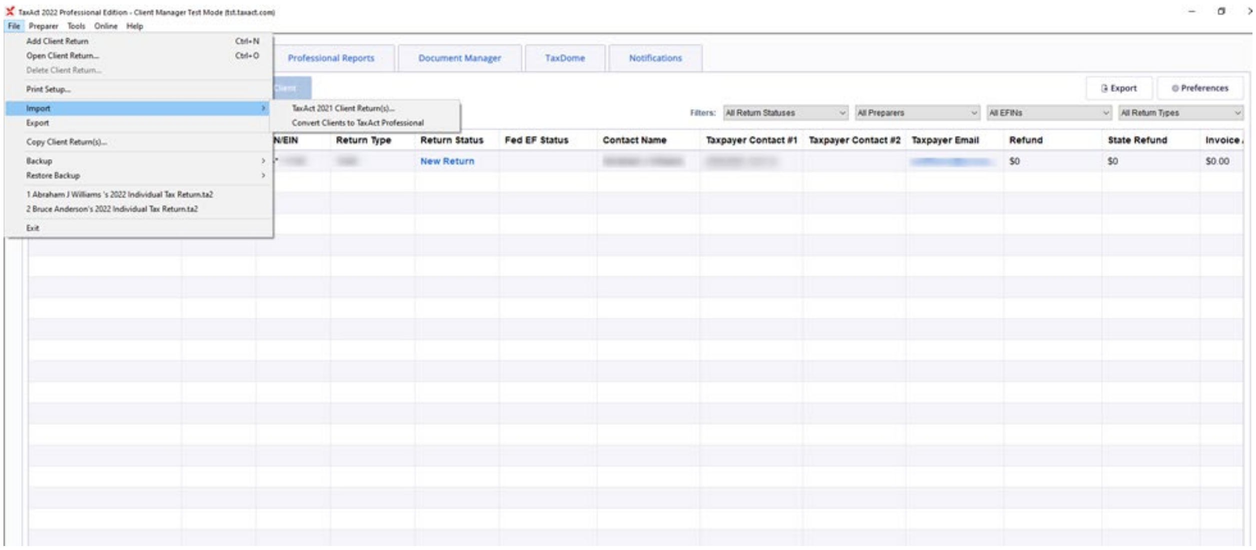
To add a new client to convert:

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

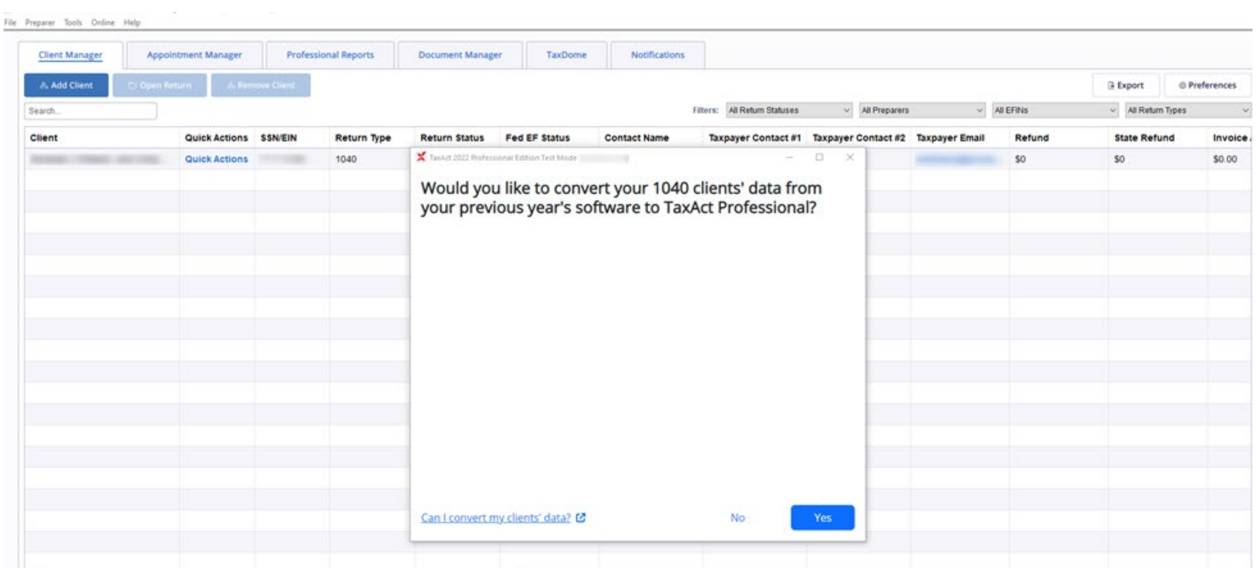


To import a client to convert:

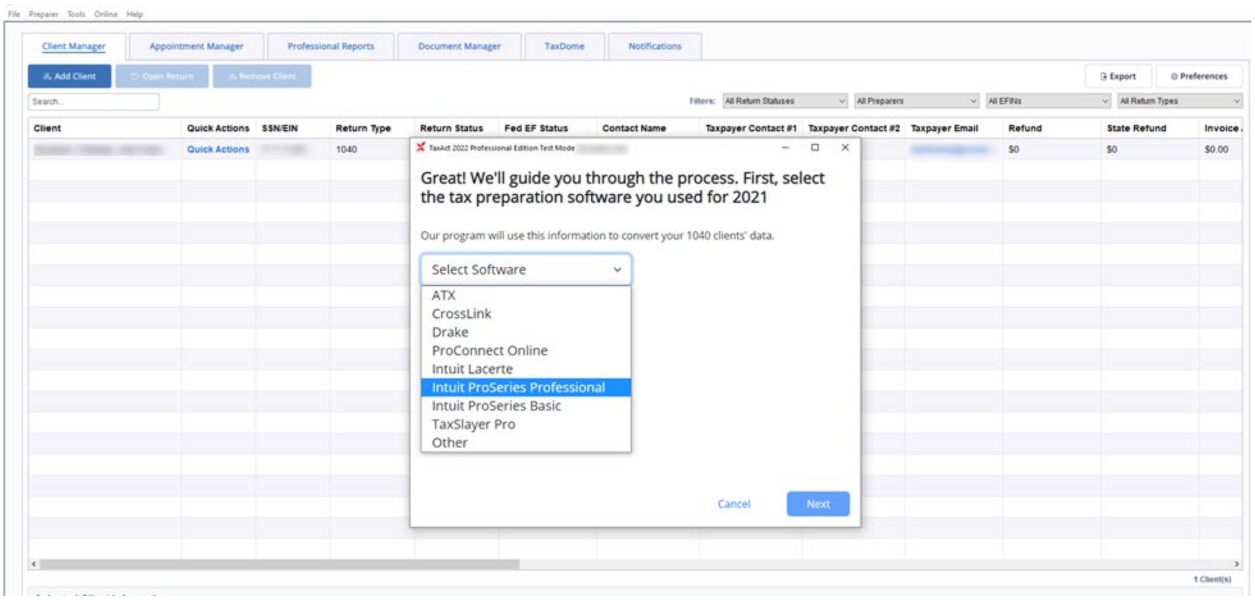
Click **File > Import > Convert Clients to TaxAct Professional**



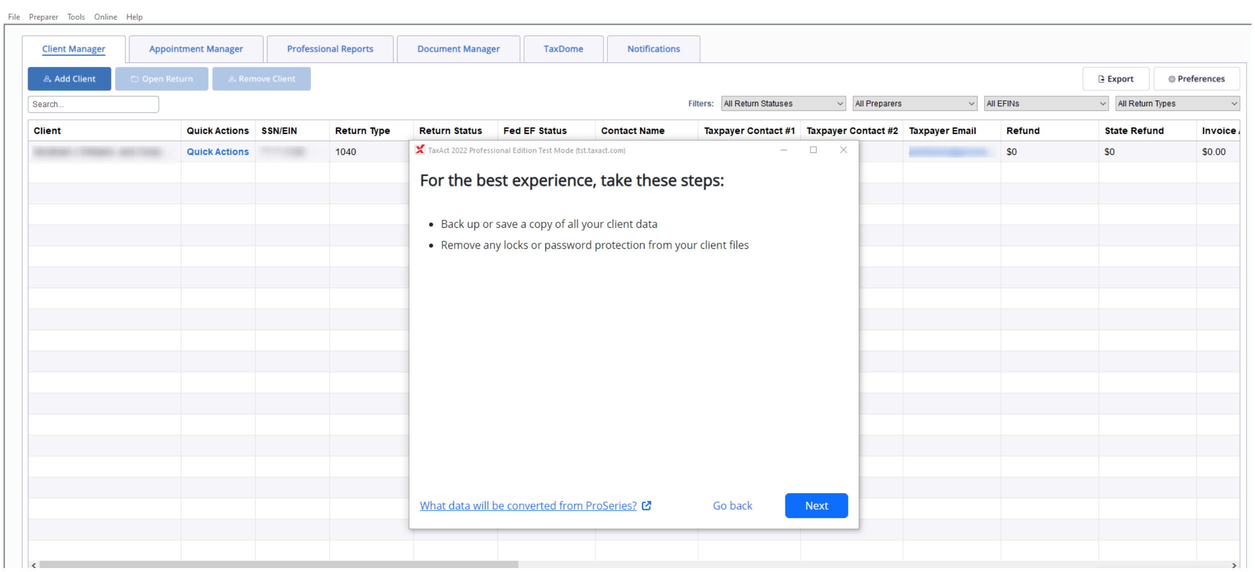
When asked: “Would you like to convert your 1040 clients’ data from your previous year’s software to TaxAct Professional?” chose **Yes**.



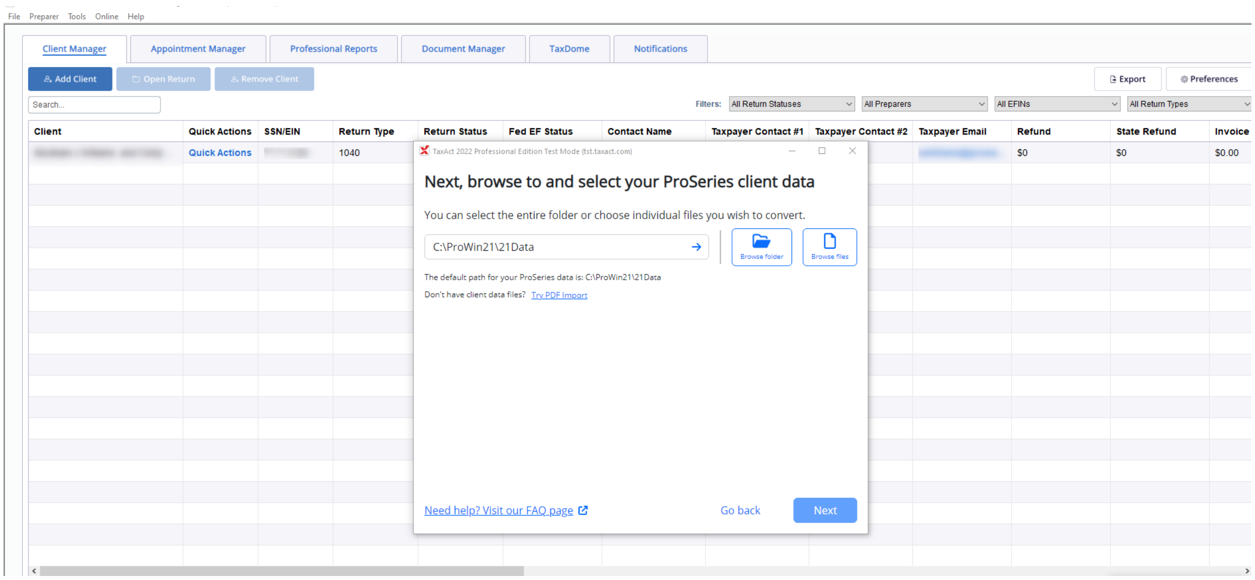
Next, select the ProSeries software you used the previous year and click **Next**.



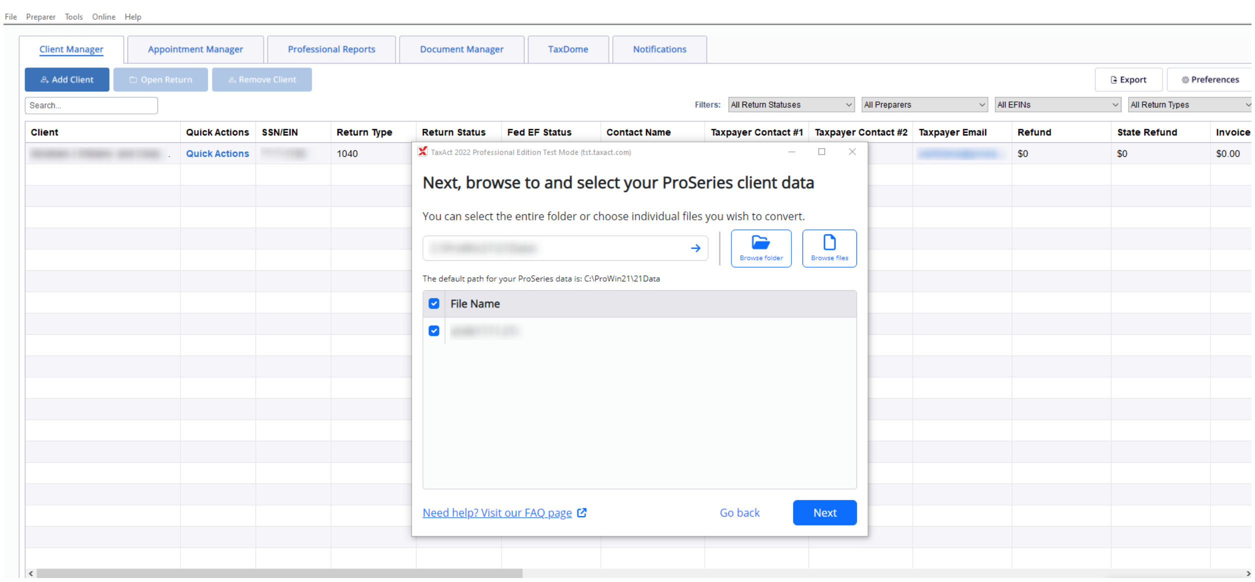
Be sure to save or back up all your client data, and to remove any locks or password protection from your client files before continuing.



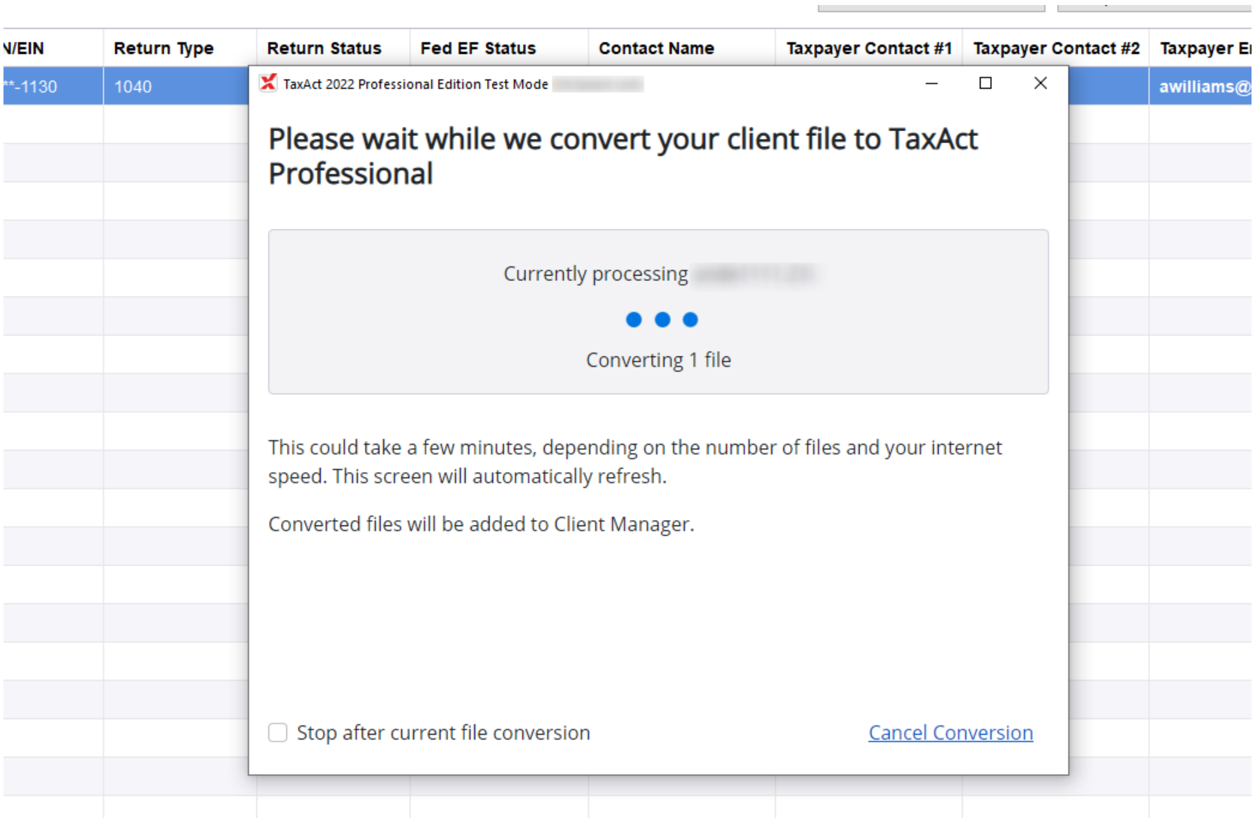
Browse to the client data you wish to convert (files ending with .21i or .21I extension)



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.

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.

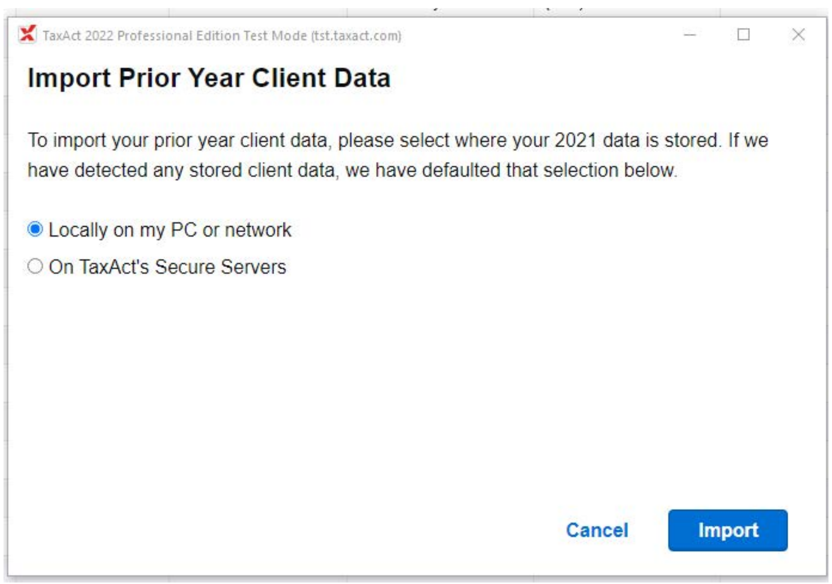
You can import:

- 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**.

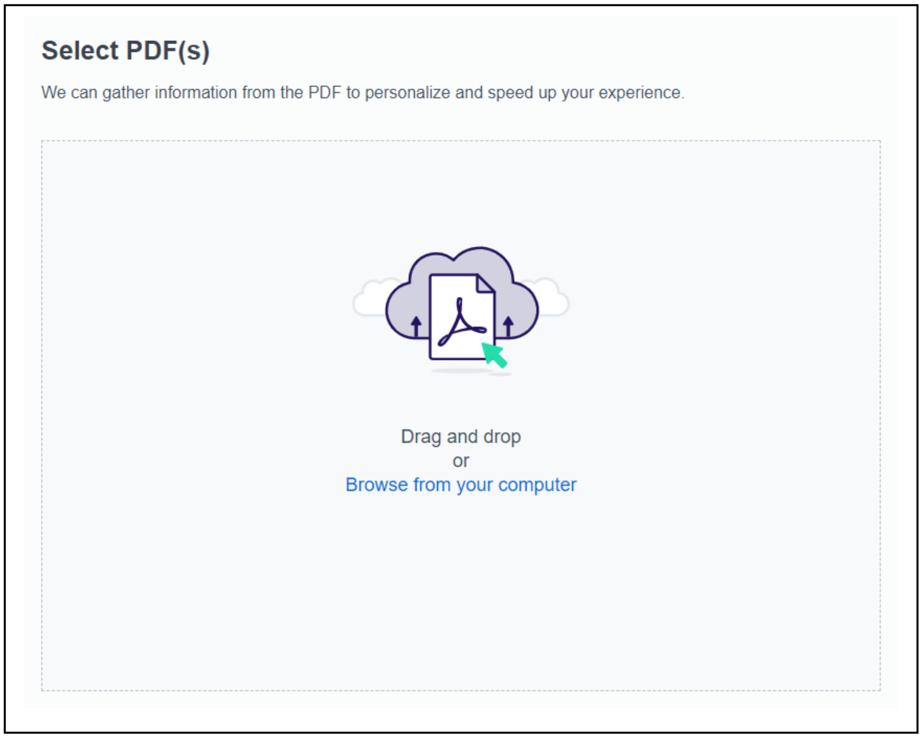
You will receive a message when the import process is complete. The return(s) will be added to the Client Manager with a status of "Imported."



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®
- UltraTax



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**.

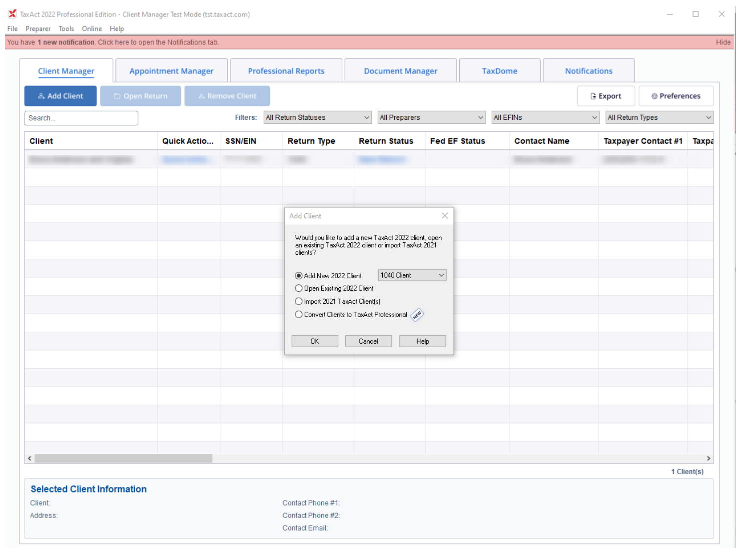
You will receive confirmation when the import process is complete. The return(s) will appear in Client Manager with a status of "Imported."

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.

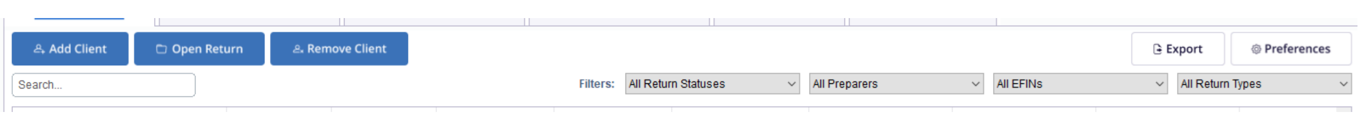


Navigating Client Manager

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

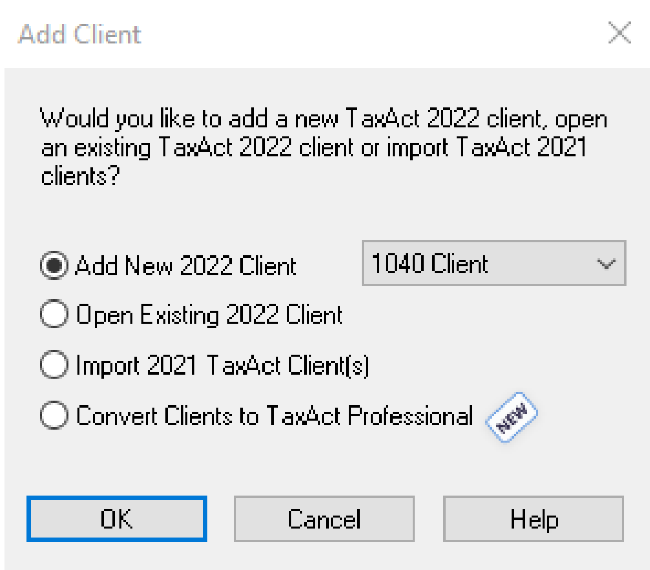
To open a return, double click the desired client record. To add or edit a client's information or return, click the client name in Client Manager. Once the record is selected, you can find additional menu items in two ways:

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



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).



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.

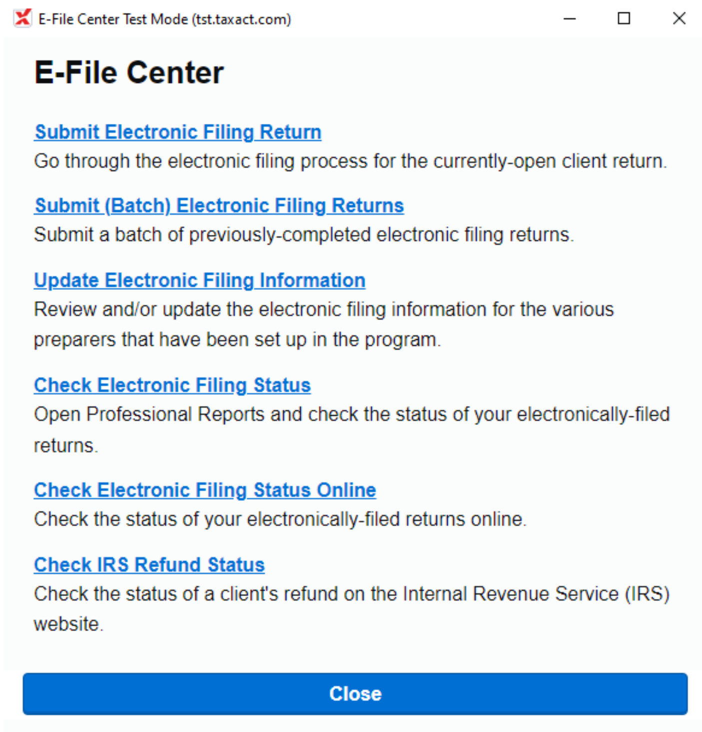
E-file Client Return(s) (Available in January, 2023)

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.

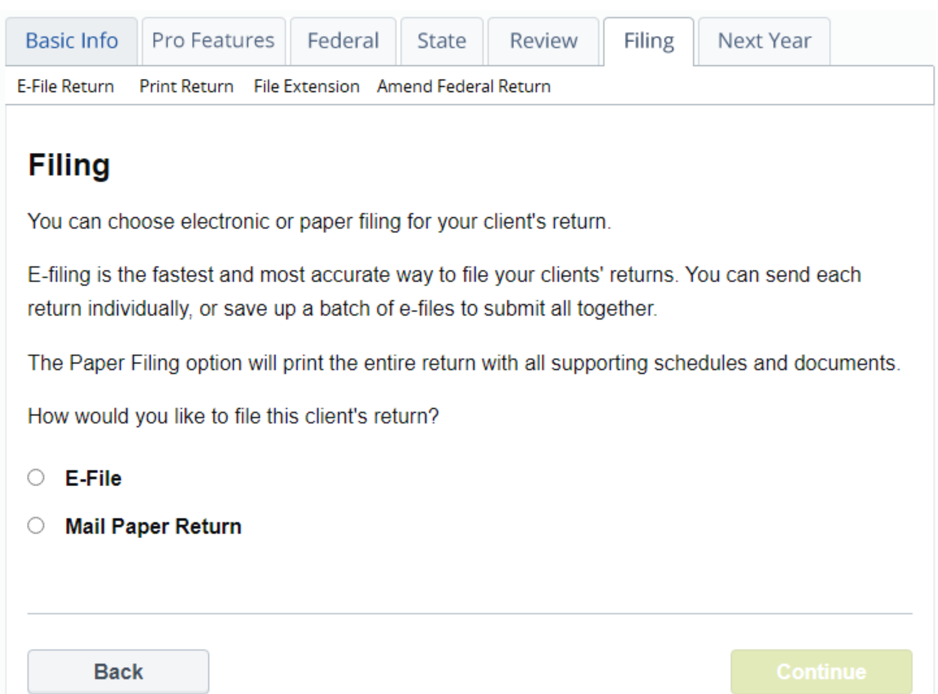
From here, you can also view e-filing information for other preparers in your practice and navigate to e-file and refund status reports.

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

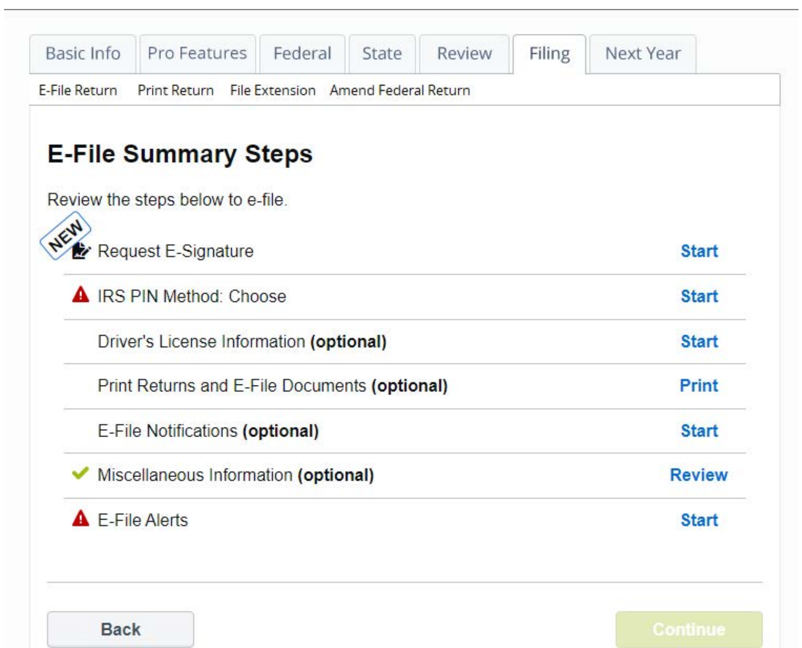
1. From the E-file Center, click the first link, **Submit Electronic Filing Return**. This will open to a screen in the Q&A.
2. Select **E-File** and click **Continue**.



3. **When e-filing your first 2022 return:** If you have not entered your Practice ID, EFIN or PTIN (or SSN) in 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:

- **Request E-Signature** – Request an E-Signature. For more information see Electronic Tax Signing.
- **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.



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 check 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.

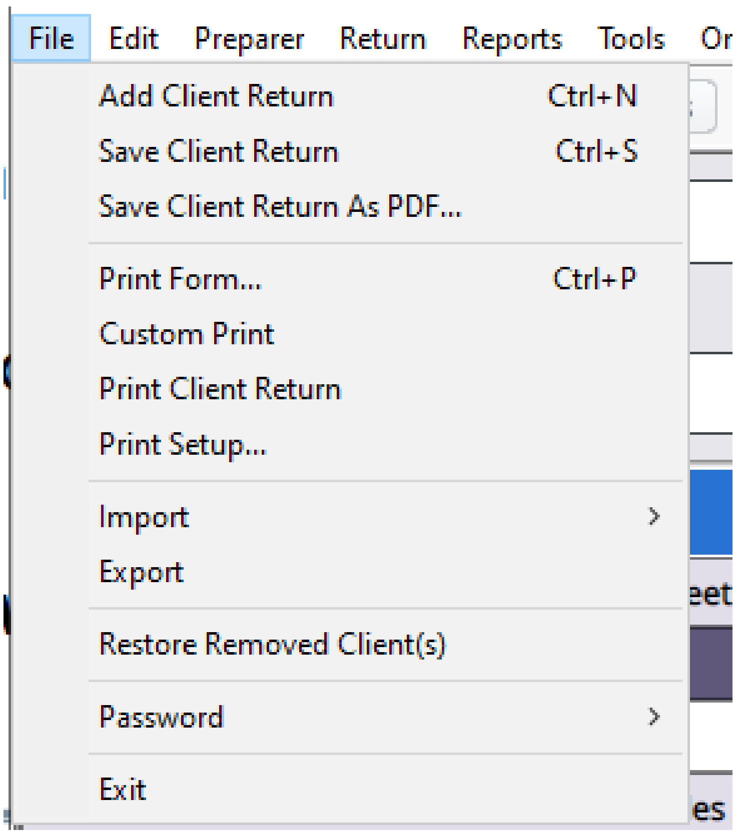
Protect, Backup, and Restore

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 > 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 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 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 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 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

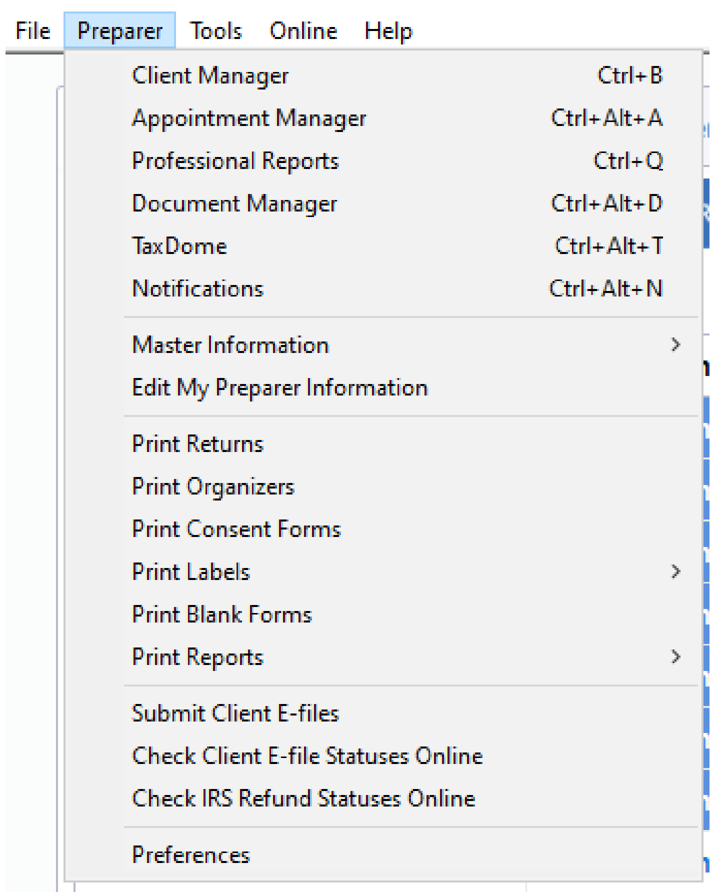
The Print Center

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**.

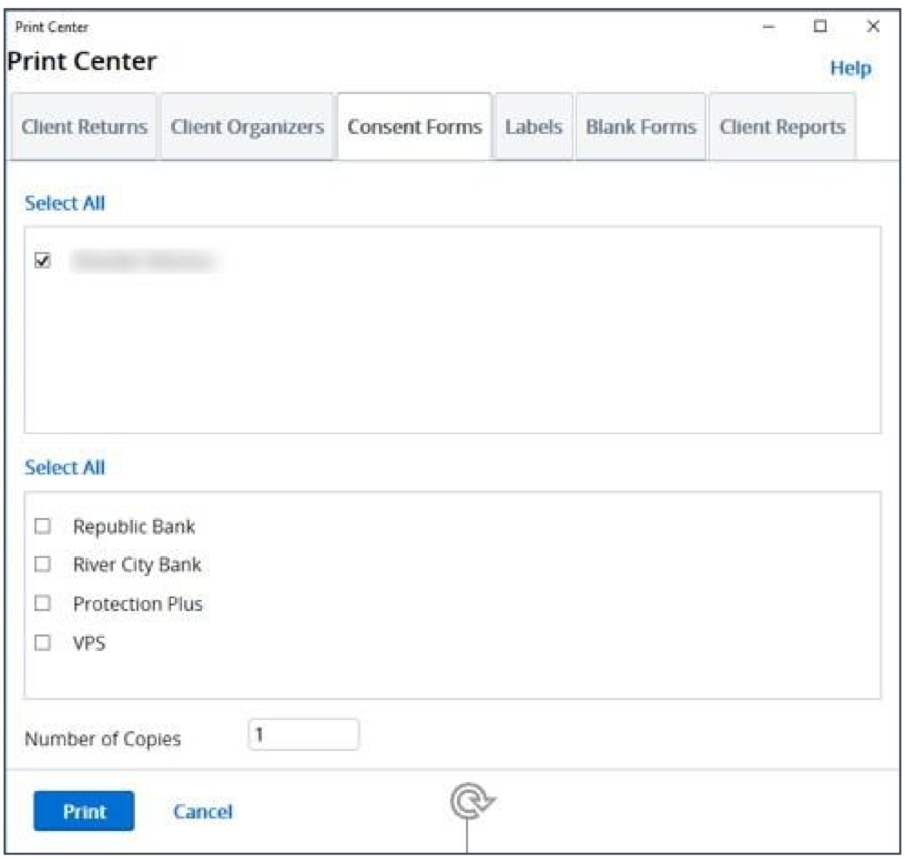
When printer preferences are set, continue with printing:

1. Click **Preparer**, **Print Returns**. This will open the Print Center window (see image above).
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 (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.



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?

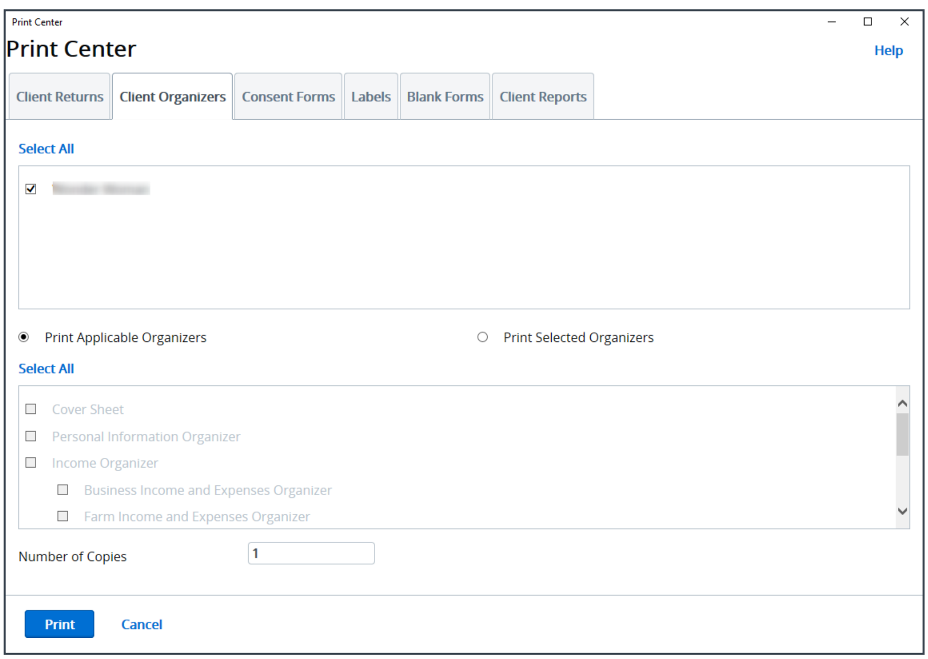
The Client Organizer is a portfolio of client return information designed to help you obtain tax information in advance. Imported returns will include prior year tax information to compare with the current tax year.

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.**

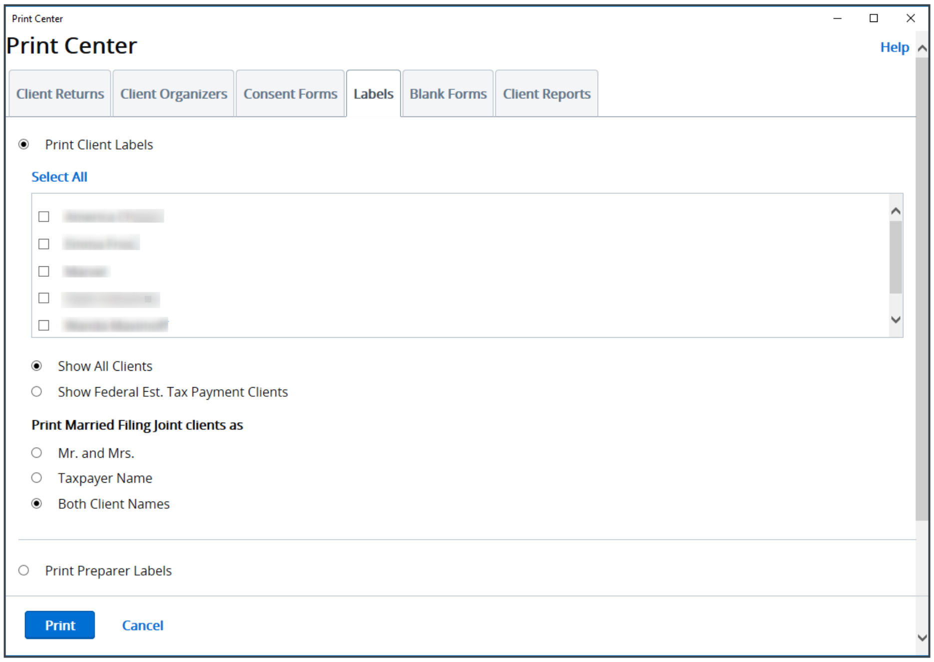
1. Select the clients for whom you want to create Organizers.
2. Select the **Print Applicable Organizers** radio button to print only the documents that directly apply to the client's return. To choose specific Organizer documents to print, select **Print Selected Organizers** instead.
3. Select the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



Print Labels

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

- **Print Client Labels**,
- **Print Preparer Labels**, and
- **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

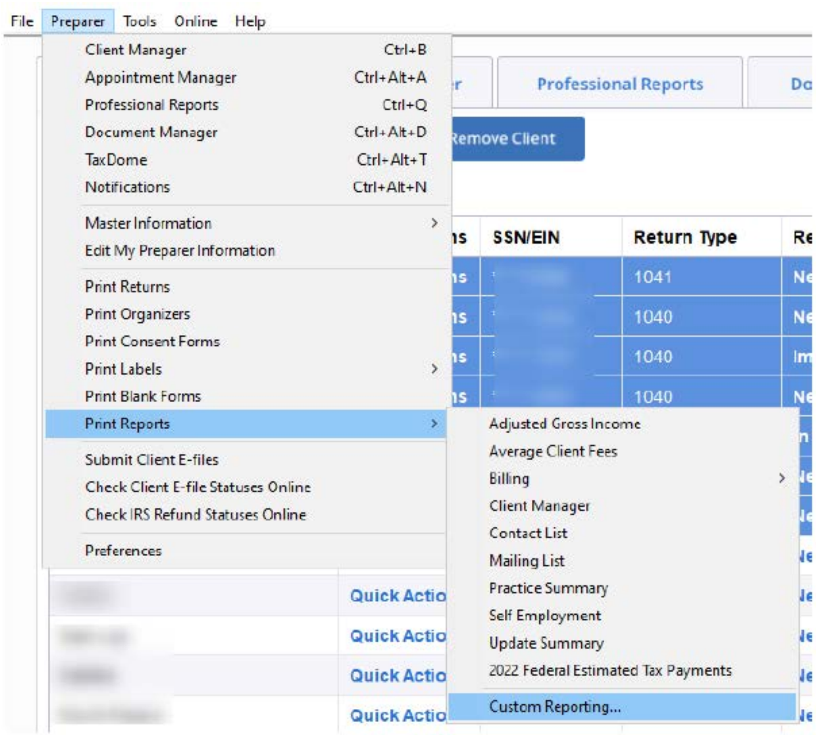
To format labels, click **Label Properties.**

1. Set the print job based on your printer type and 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.

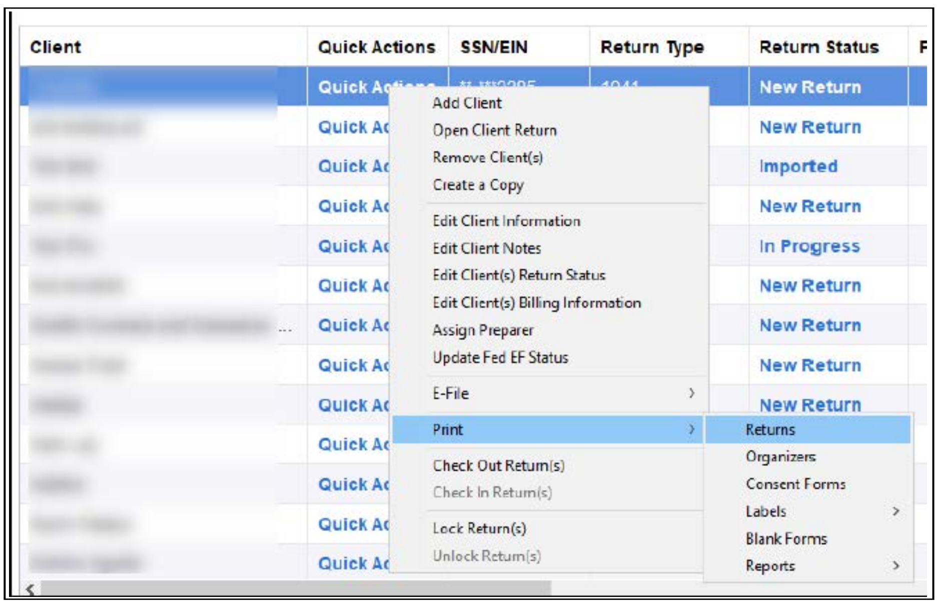
To change the display order, click the appropriate field name within the **Fields Included** box. Then click on **Move Up** or **Move Down** until the fields are in your preferred order.

Print Invoices and Billing Statements from Client Reports Tab

Available reports include:

- Adjusted Gross Income
- Average Client Fees
- Billing – Paid
- Billing – 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.



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 Professional Reports Guide 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, sign in 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 https://www.taxact.com/professional/bank-products for more information.