TaxAct® Professional

Setup Guide

Tax Year 2025 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

Order, Payment, & Sales Questions:

www.taxact.com/professional

prosales@taxact.com

(319) 536-3571

Support Hours:

Monday – Friday
8:00 a.m. – 5:00 p.m.

Saturday & Sunday
Closed

All times are in Central time zone

Check our support page for in-season hours

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

Table of Contents

Download and Install

Recommended Method ... 5
Alternative Method: Download Installation File from Practice Manager ... 5
Install Your Software Using Simplified Installer (Recommended) ... 6
Share Files on a Network (Enterprise Editions Only) ... 8
Install State Editions ... 9
Adding or Removing States from a Return ... 9
Installation FAQs ... 10

Import Master Information ... 11

Set Up the Software

Practice ... 12
Preparers ... 13
Set Master Forms Defaults ... 20
Copy Master Information to Client Returns ... 22

Data Conversion

Convert Client Data ... 23

Integrated eSignatures

Request new eSignatures ... 28
Add new eSignatures ... 32
eSignature Dashboard ... 33
Custom eSignature Requests ... 36

Import Last Year's Client Returns

Import TaxAct Returns ... 41

Add/Edit Client Returns

Navigating Client Manager ... 42
Add a Client (and associated return) ... 43
Edit Existing Client Return ... 43
E-file Client Return(s) ... 43
Other Return Actions ... 46

Protect, Backup, and Restore

Password-Protect Client Returns ... 48
Set Individual Usernames, Passwords & Permissions ... 49
Back Up Client Returns to Your Local Computer ... 49
Enterprise Editions: ... 49
Back Up Client Returns on TaxAct's Secure Servers ... 49
Restore Client Returns from Backup Files Saved Locally ... 50
Restore Client Returns from Backup Files Saved on TaxAct Servers (Enterprise Editions Only) ... 50

Print Returns, Labels, Reports, & Invoices

The Print Center ... 51
Print a Client Return ... 52
Print Consent Forms ... 52
Print Client Organizers ... 53
Print Labels ... 54
Print Reports From Preparer Menu ... 55
Print Invoices and Billing Statements from Client Reports Tab ... 56

Integrated Payments

TaxAct Practice Manager ... 57
Applying for Integrated Payments ... 57
Collecting Payments ... 59
Payments Tab ... 60

Additional Resources

Additional Resources ... 62
Professional Reports ... 63
Client Xchange ... 63
Bank Products ... 63

Have a suggestion to improve TaxAct Professional?

We want to hear from you!

To submit an idea to our product development team:

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

To provide general feedback:

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

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

Download & Install

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

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

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

Recommended Method:

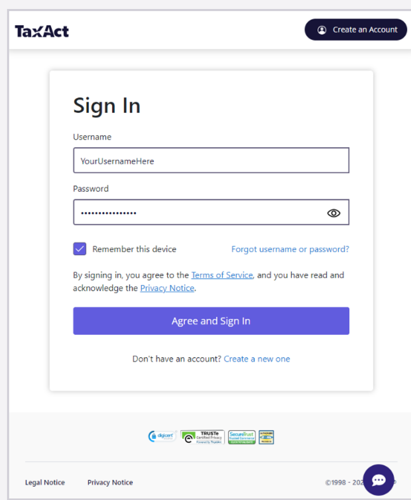
Download the TaxAct Professional Installer: TaxActProfessionalSetup.exe (3.08 MB)

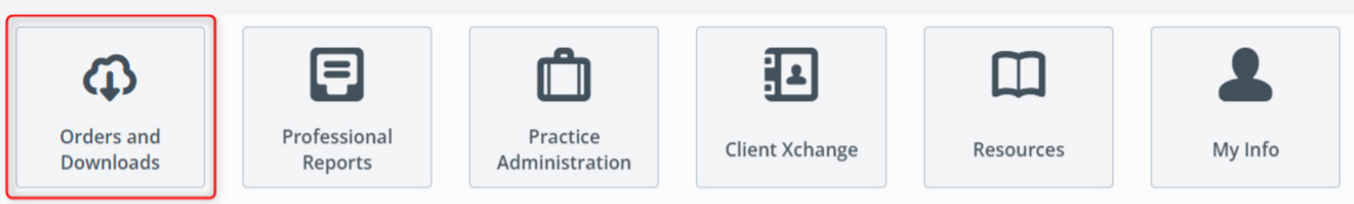
Alternative Method: Download Installation File from Practice Manager

1. Go to www.taxact.com/professional and click the **Sign In** button in the upper right corner.

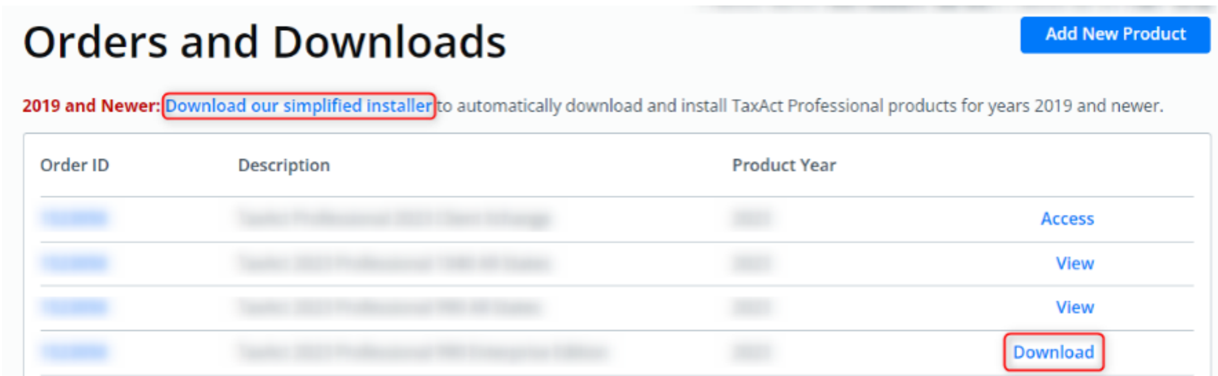
2. Sign in with your Username and Password.

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





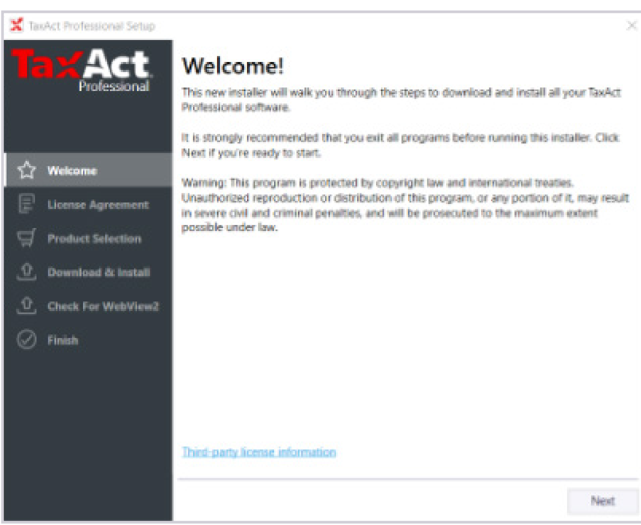
4 Click the **Download** link to the right of the product you wish to download, or to download multiple products at once click the **Download our simplified installer** link at the top.

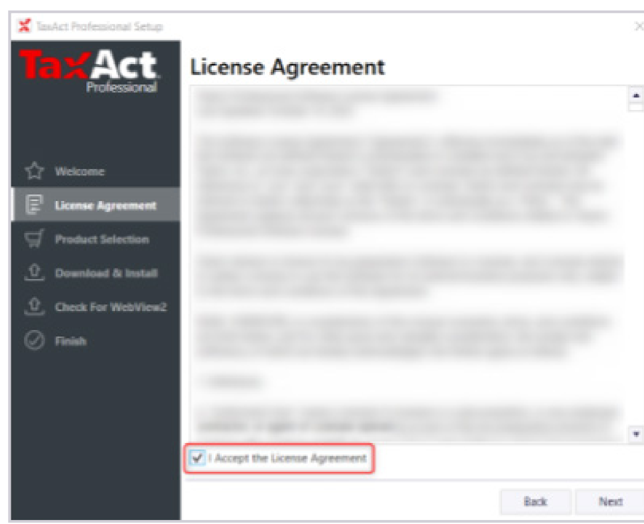


5 If the installation does not automatically run, locate and double click the **File** icon to manually install the software.

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

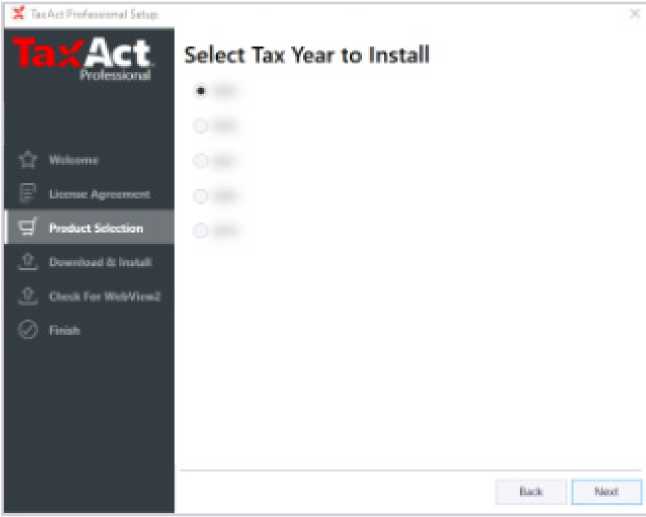
Install Your Software Using Simplified Installer (Recommended)

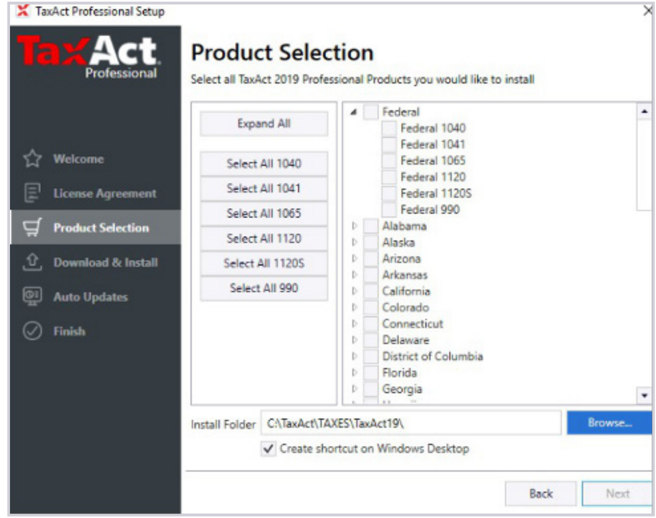




1 Open the downloaded program file. On the initial screen, click **Next** to begin the installation.

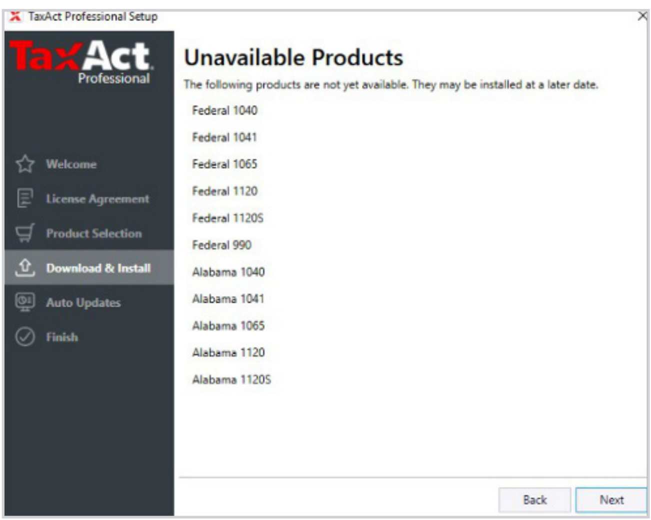
2 Select the checkbox next to "I Accept the License Agreement", then click **Next**.

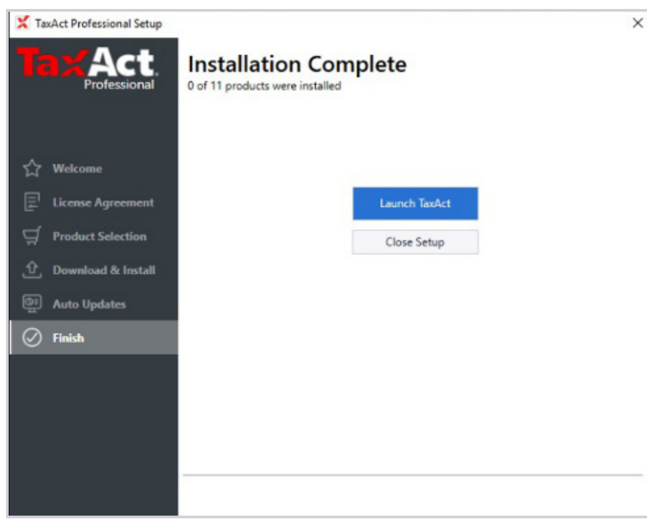




3 Select the year to install.

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





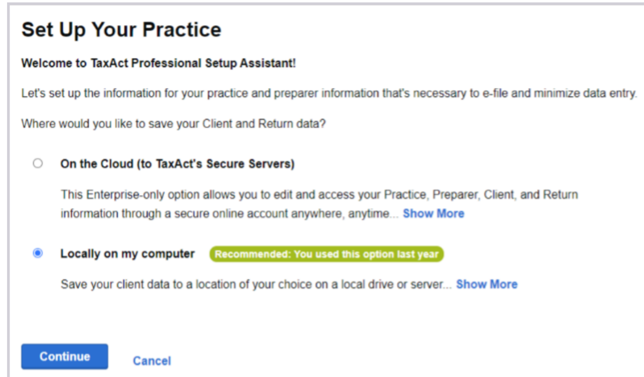
5 Selected products still in development will be listed. You will be notified when they become available.

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

Share Files on a Network (Enterprise Editions Only)

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

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



Online Network Option

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

Local Network Option

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

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

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

Windows Support	support.microsoft.com/en-us/products/windows
TaxAct Support – Network Installations	taxact.com/support/22832/
TaxAct Professional Support	taxactprofessional.com/support

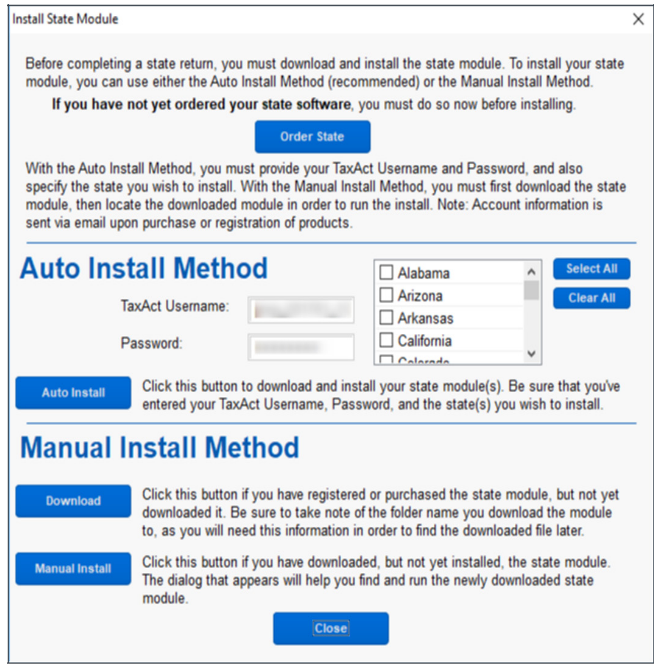
Install State Editions

1 Open a return, then click **Return > State > InstallState.**

2 Select each state you wish to install or **Select All.**

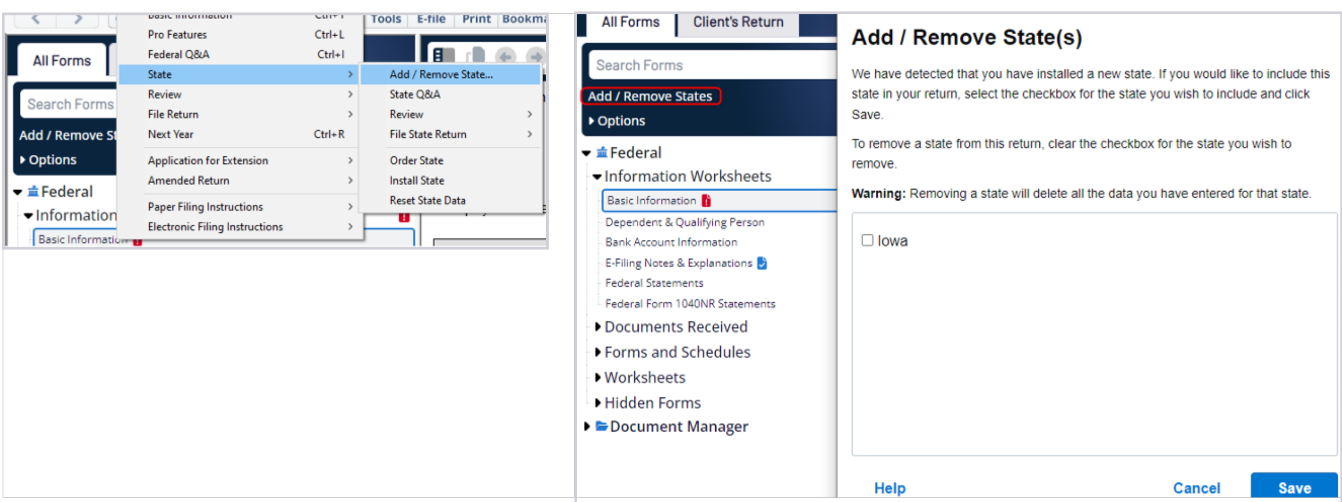
3 Click **Auto Install** to add the state modules with recommended settings.

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



Adding or Removing States from a Return

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



Installation FAQs

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

Try any of the following:

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

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

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

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

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

What are TaxAct’s system requirements?

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

Recommended	Minimum
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	8 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	1920x1080 or higher
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 TaxAct Support.
Microsoft no longer provide security updates or support for PCs running Windows 8.1. For the best experience and security of your data, you will need to update your system to Windows 10 or 11.

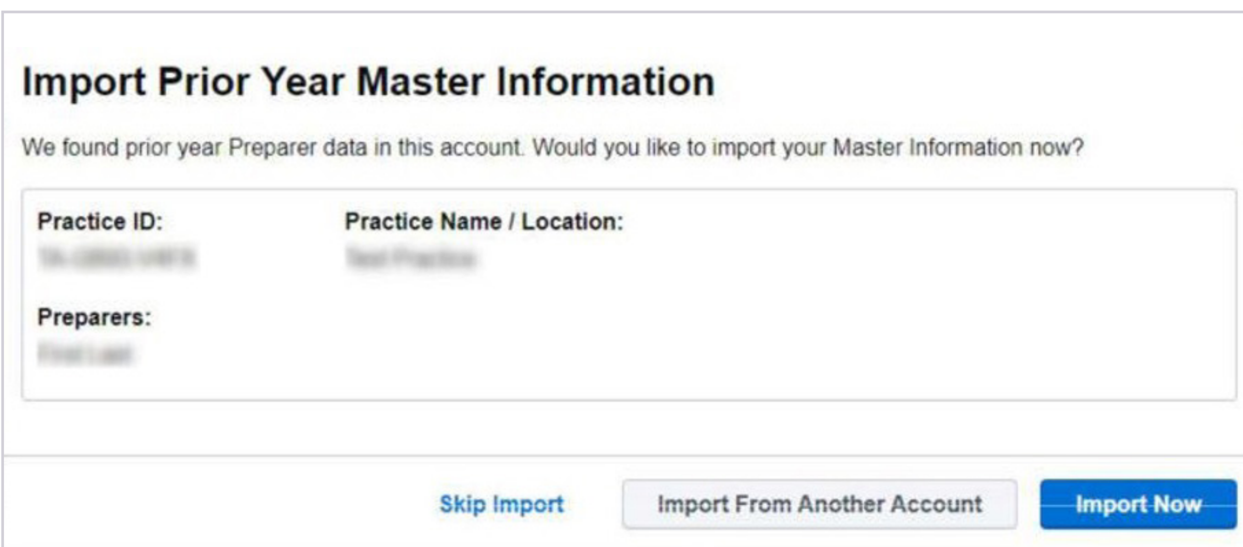
While TaxAct Professional may run on systems not meeting these standards, system performance will be sub-optimal.

Import Master Information

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

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

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

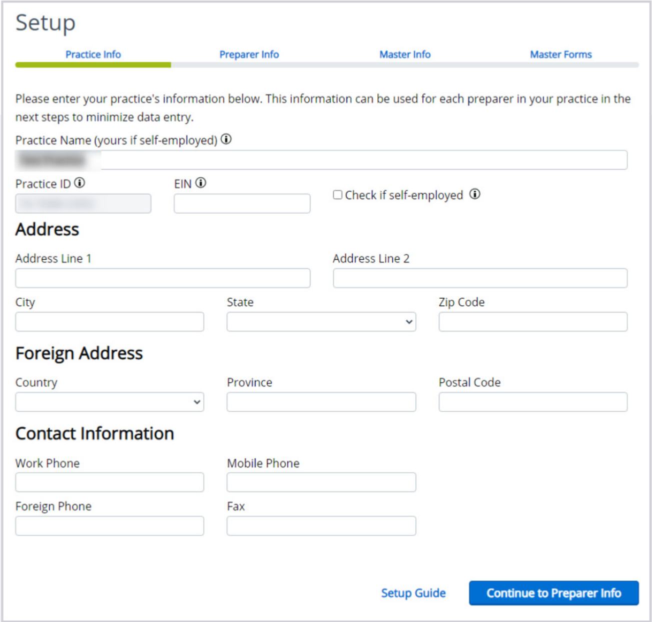


Set Up the Software

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

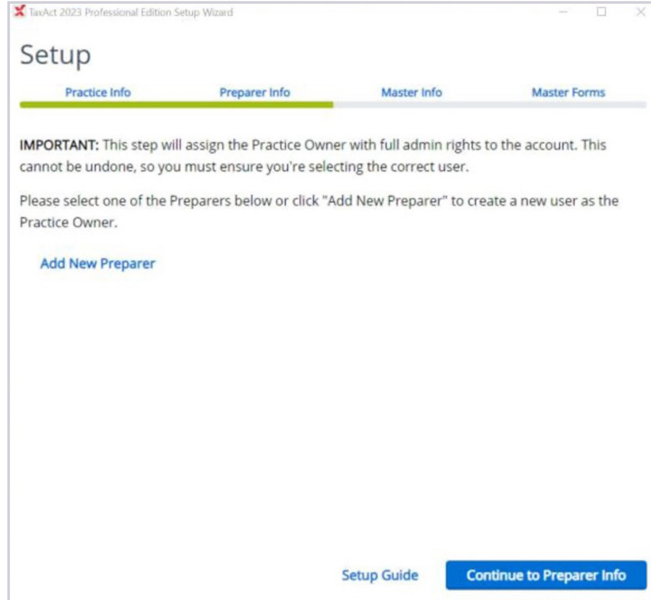
You can edit and access your Practice, Preparer, Client, and Return information through a secure online account anywhere, anytime. You'll need to sign in to Practice Manager each time you open the TaxAct software, so please ensure you have a stable Internet connection before proceeding.

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 the Preparers Information menu section below). When finished entering your data, click **Continue to Preparer Information**.

Preparers

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

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



Preparers Information menu

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

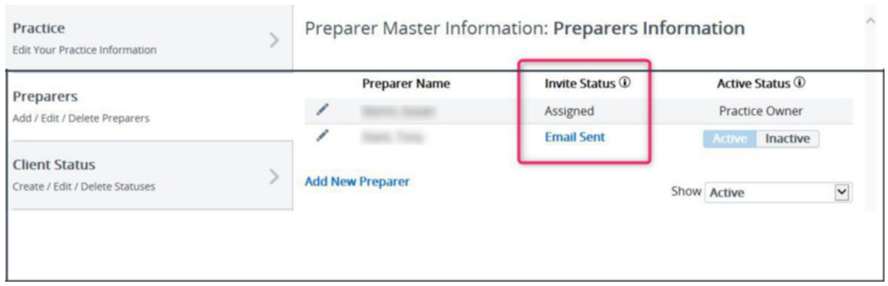
- ***Note:*** *The first preparer you add should be yourself or the default preparer.*
- Check the **Use My Practice Information** box (in the Address section) to link the preparer to the Practice address. Otherwise, enter the preparer's specific contact information.
- In the Basic Information section,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

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

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

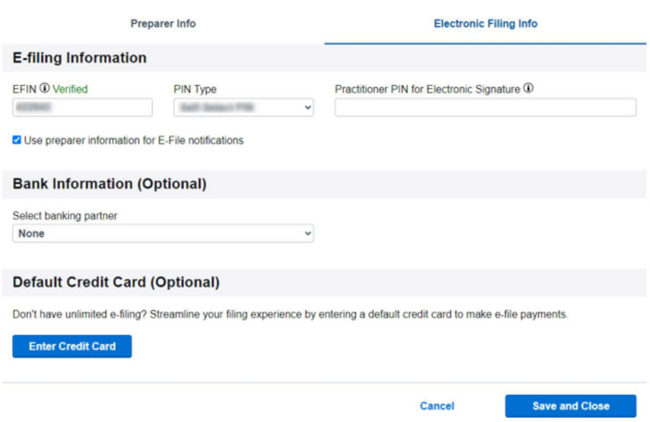
To locate your Practice ID, sign in to your TaxAct Account and look in the upper right corner.

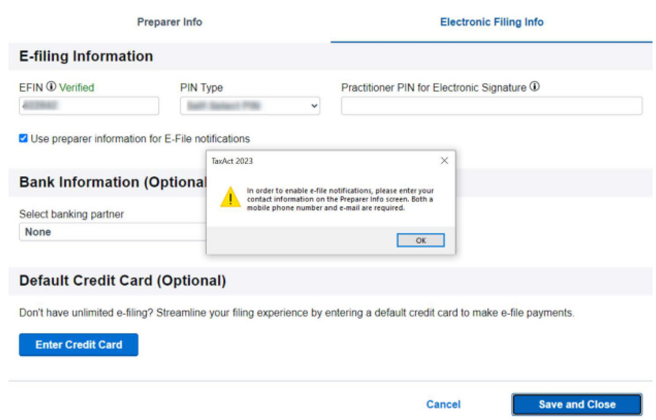
Use the **Invite Status** column to manage preparer invitations.



Electronic Filing Info Menu – E-Filing Info

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





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

IRS EFIN Requirements for Tax Professionals & Software Companies

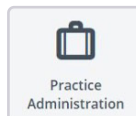
The IRS requires tax software companies to collect and verify EFIN Tracking Numbers from its professional customers. Your Tracking Number appears on the IRS e-Services Summary in your IRS e- Services account.

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

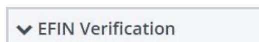
Generally, professionals who have been verified in a previous year will not need to be re-verified; however, TaxAct may request that you re-verify in order to e-file. You can check your EFIN verification status in your TaxAct Account. If your EFIN is rejected for any reason, we will notify you via email.

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

1. Sign in to your TaxAct Account.
2. Click the **Practice Administration** Tile.



3. Click **EFIN Verification** to expand.



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

Electronic Filing Info tab – Credit Card

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

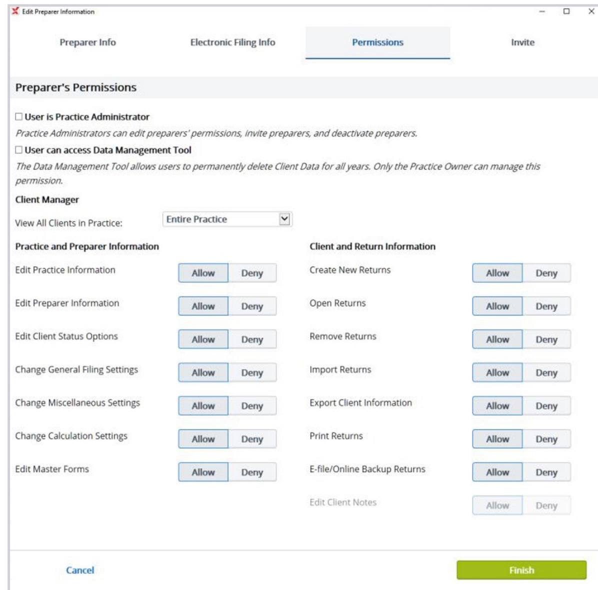
If your TaxAct order includes unlimited e-filing or you have prepaid for e-filing, you do not need to enter credit card information. Simply enter your EFIN, then click **OK**.

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

Permissions Menu

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

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



Anyone with the Practice Administrator permission will be able to:

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

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

Practice and Preparer Information

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

Client and Return Information

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

Invite Menu

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

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

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

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

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

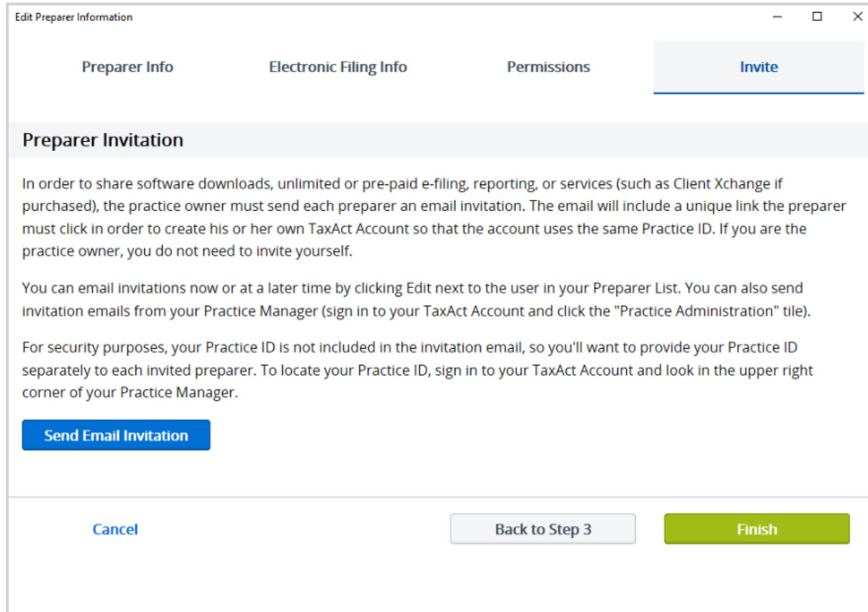
Your invited preparers will not have access to the following tiles in Practice Manager:

- Preparer Invitation

To invite preparers:

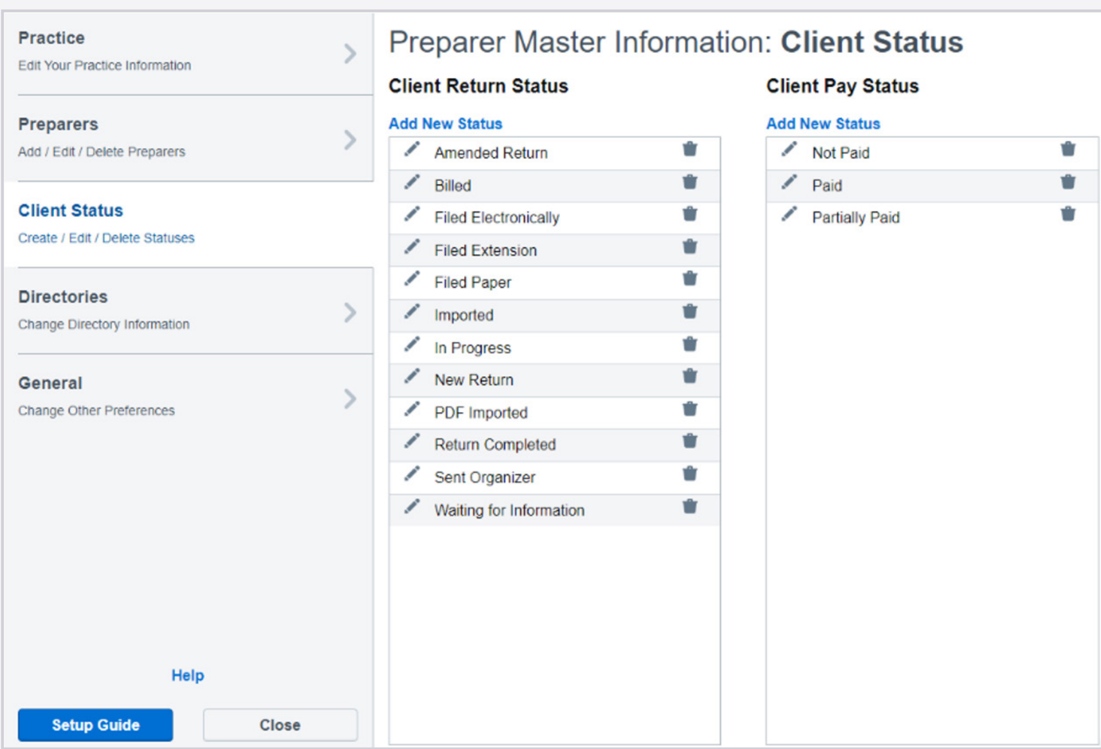
1. Click the **Practice Administration** tile
2. Click **Preparer Invitation**.
3. Complete and click the **Send Email Invitation** button.

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



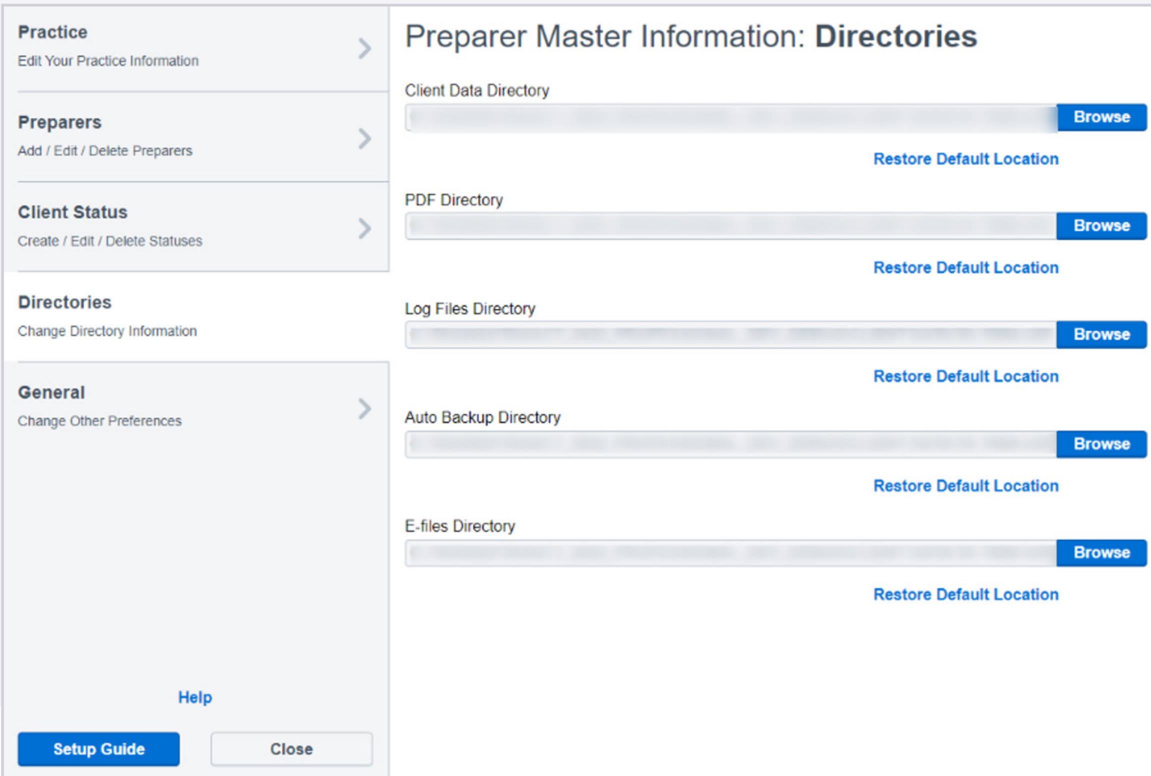
Client Status Menu

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



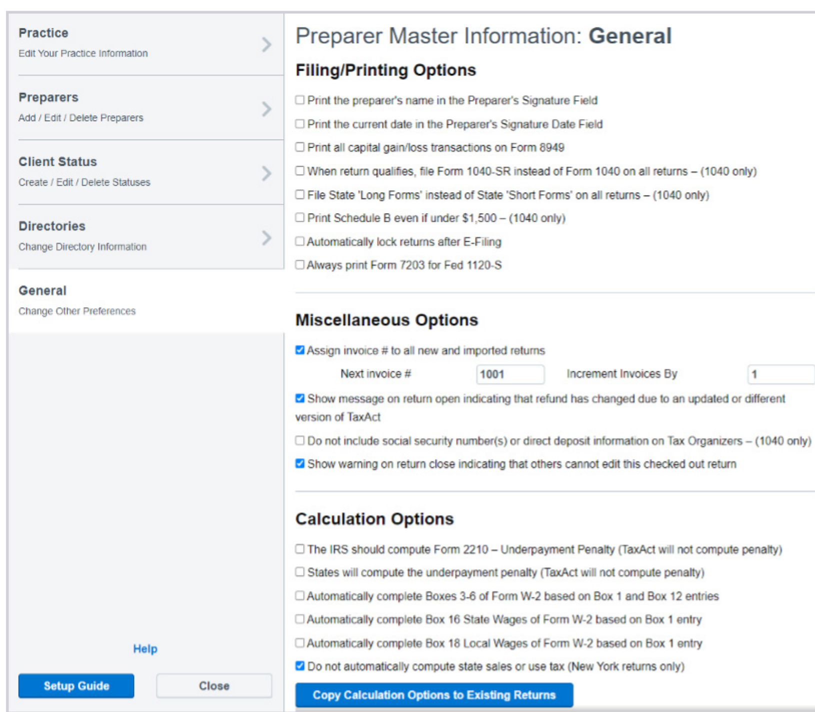
Directories Menu

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/printing, calculation, and miscellaneous preferences.



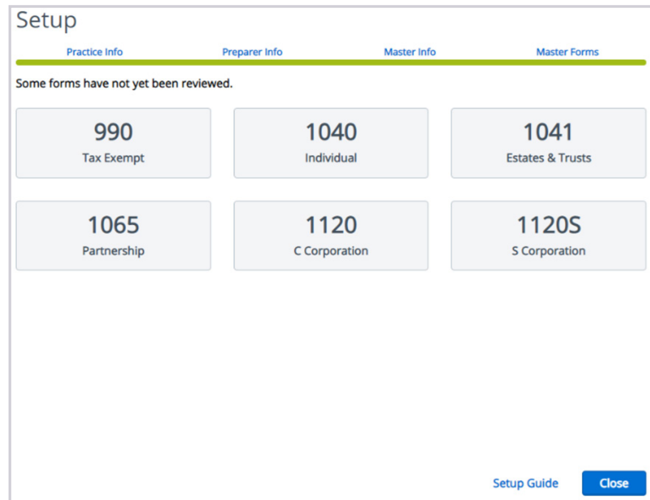
Set Master Forms Defaults

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:

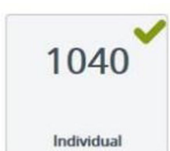
1. Click the appropriate program tile.

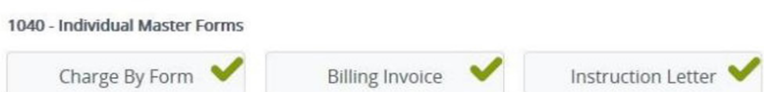
2. More options appear on the screen, which could include:
   - Charge By Form
   - Billing Invoice
   - Instruction Letter
   - Schedule K-1 Letter (applicable product versions only)



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.

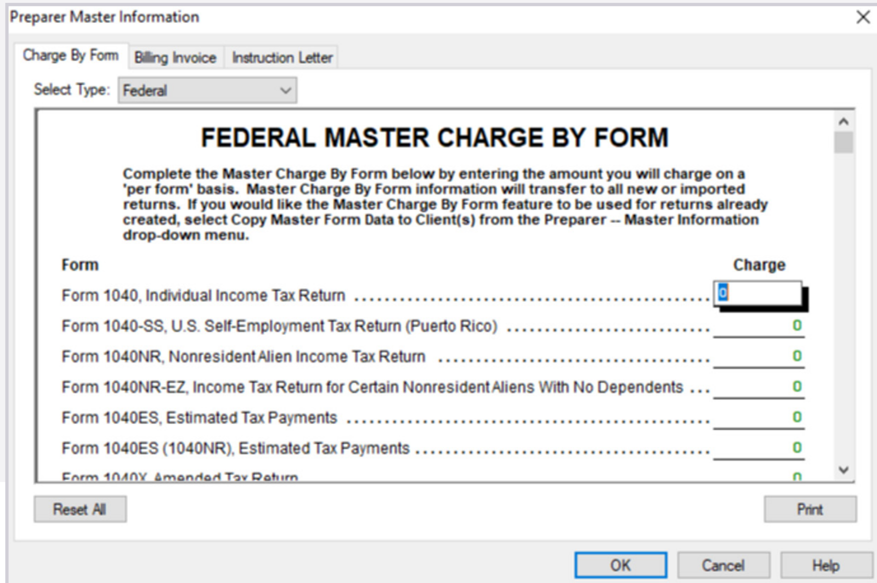
You can return to this section anytime, but keep in mind that setting Master Forms defaults from the beginning will save you time later.





Charge by Form

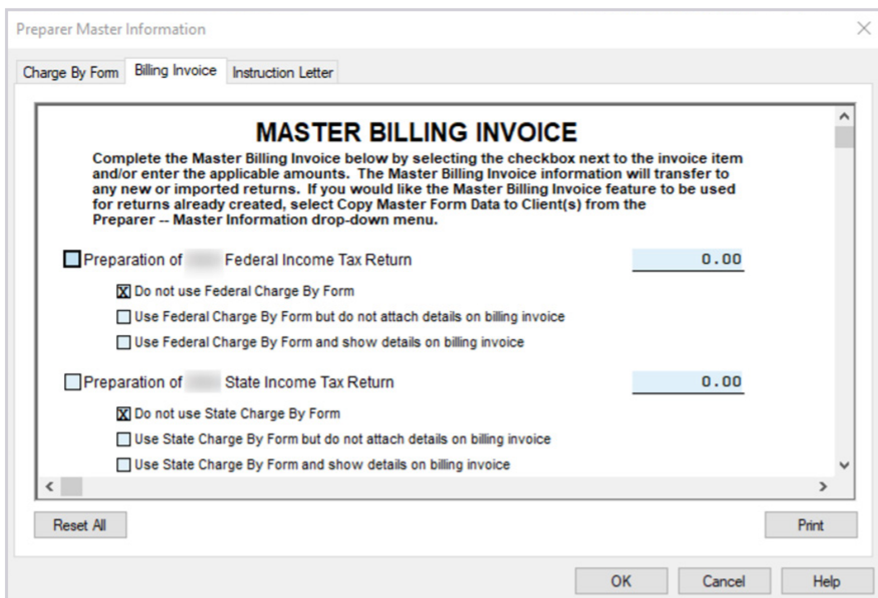
This feature allows you to set default billing rates by form. You can add forms and charges not listed on the blank lines at the bottom of the list. Use the Select Type dropdown menu to switch between federal and state forms.



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

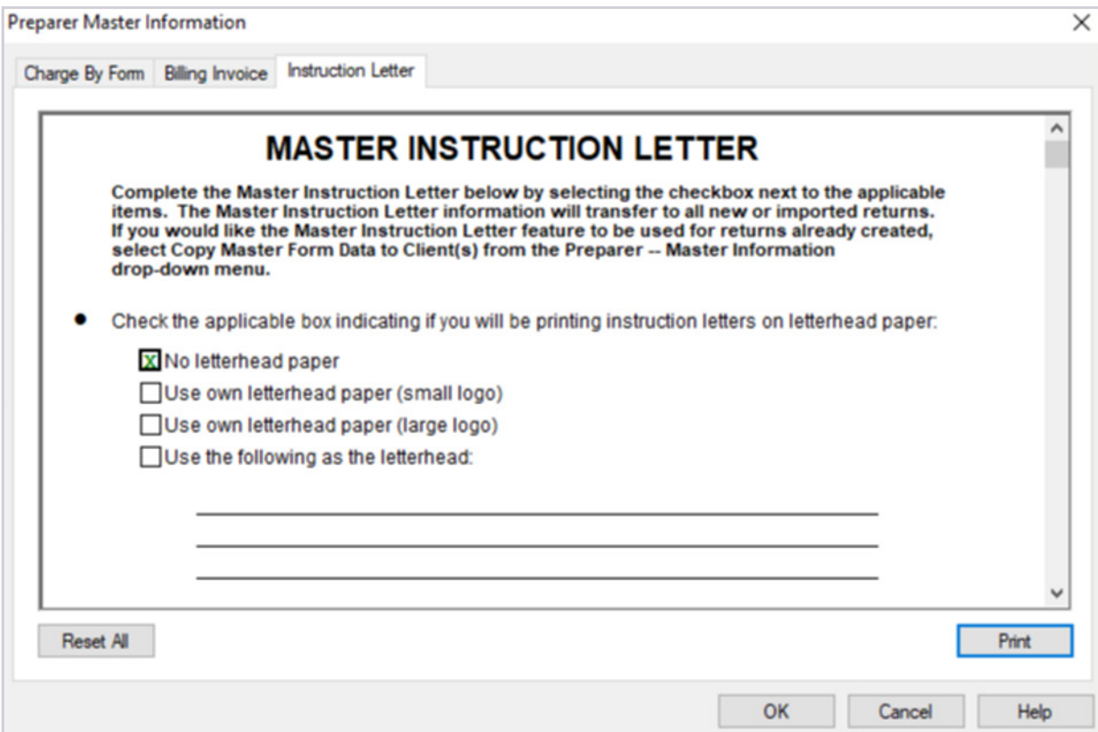


Master Instruction Letter

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.

Set Up the Software

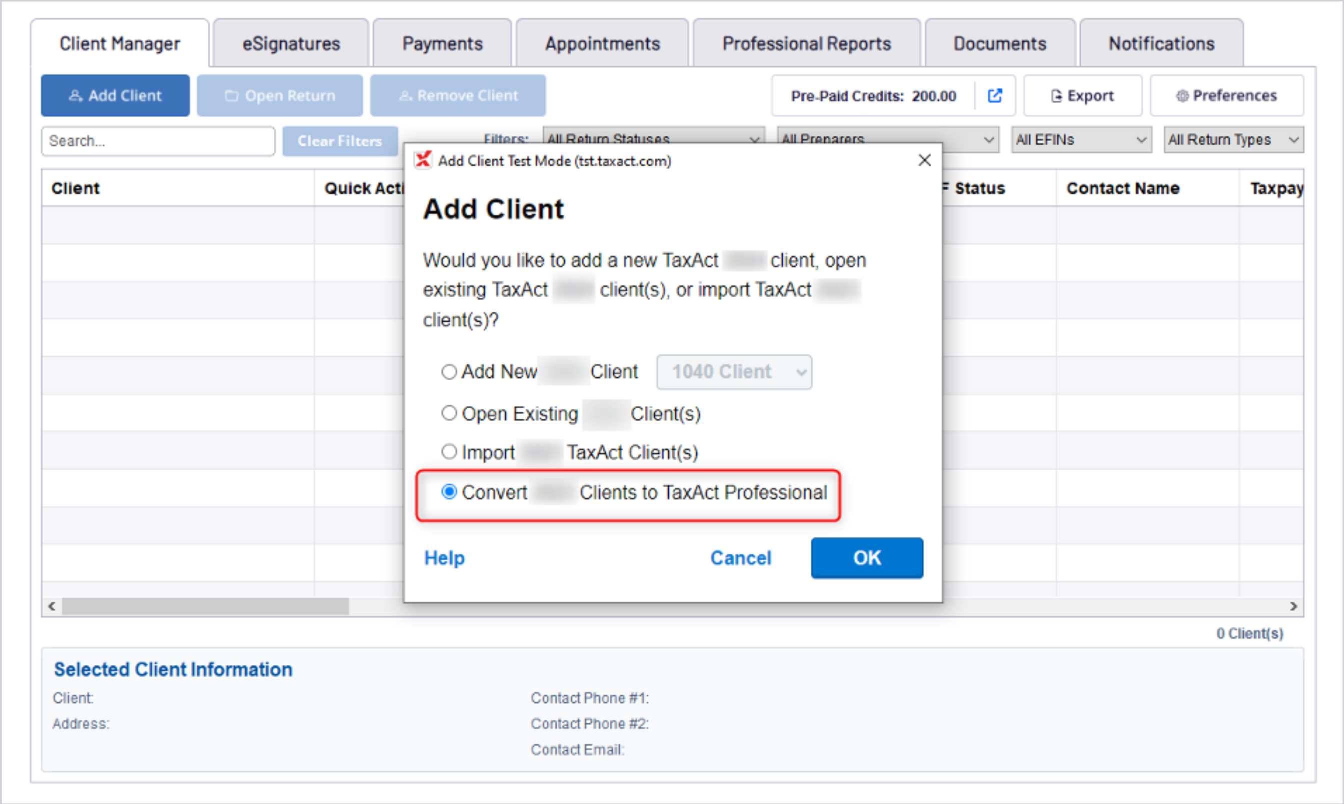
TaxAct now includes the ability to convert previous year 1040 ProSeries, TaxSlayer Pro™, and Taxwise® client data. Other software programs below can use PDF import:

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

Convert Client Data

To add a new client to convert:

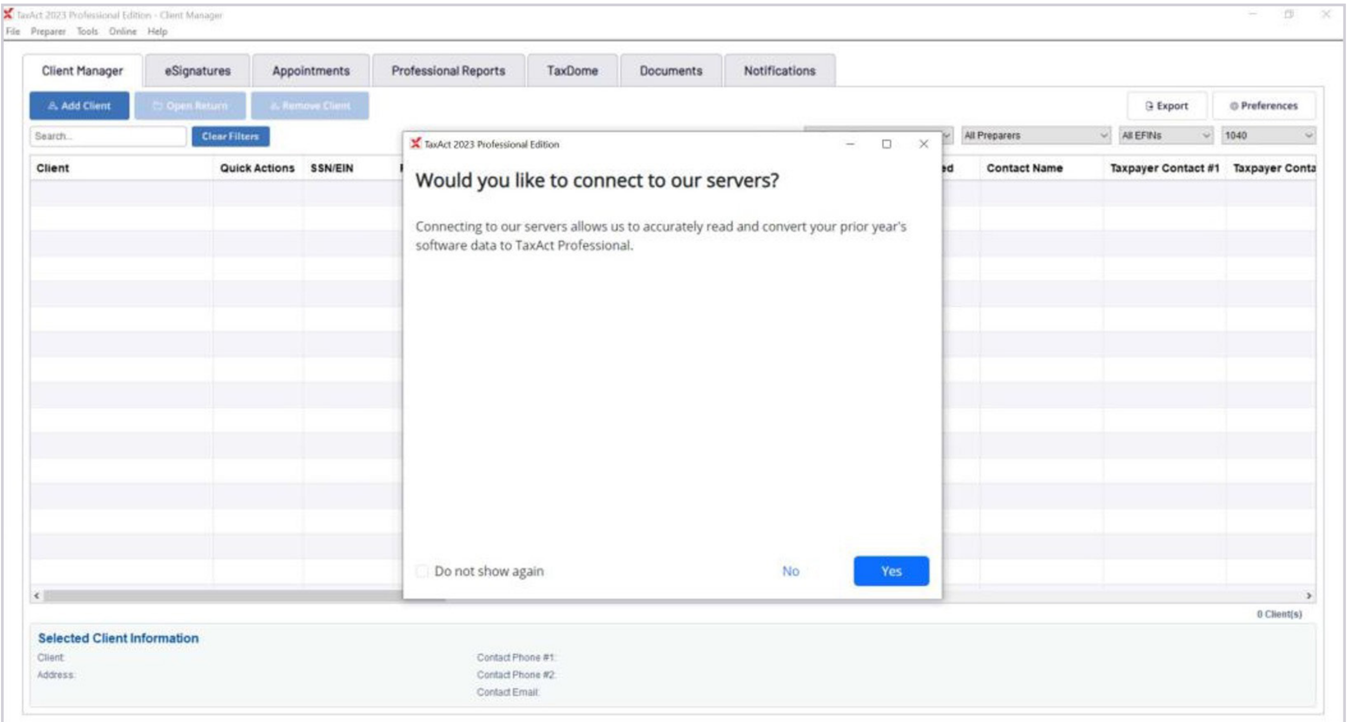
Click **Client Manager > Add Client > Convert Clients to TaxAct Professional**



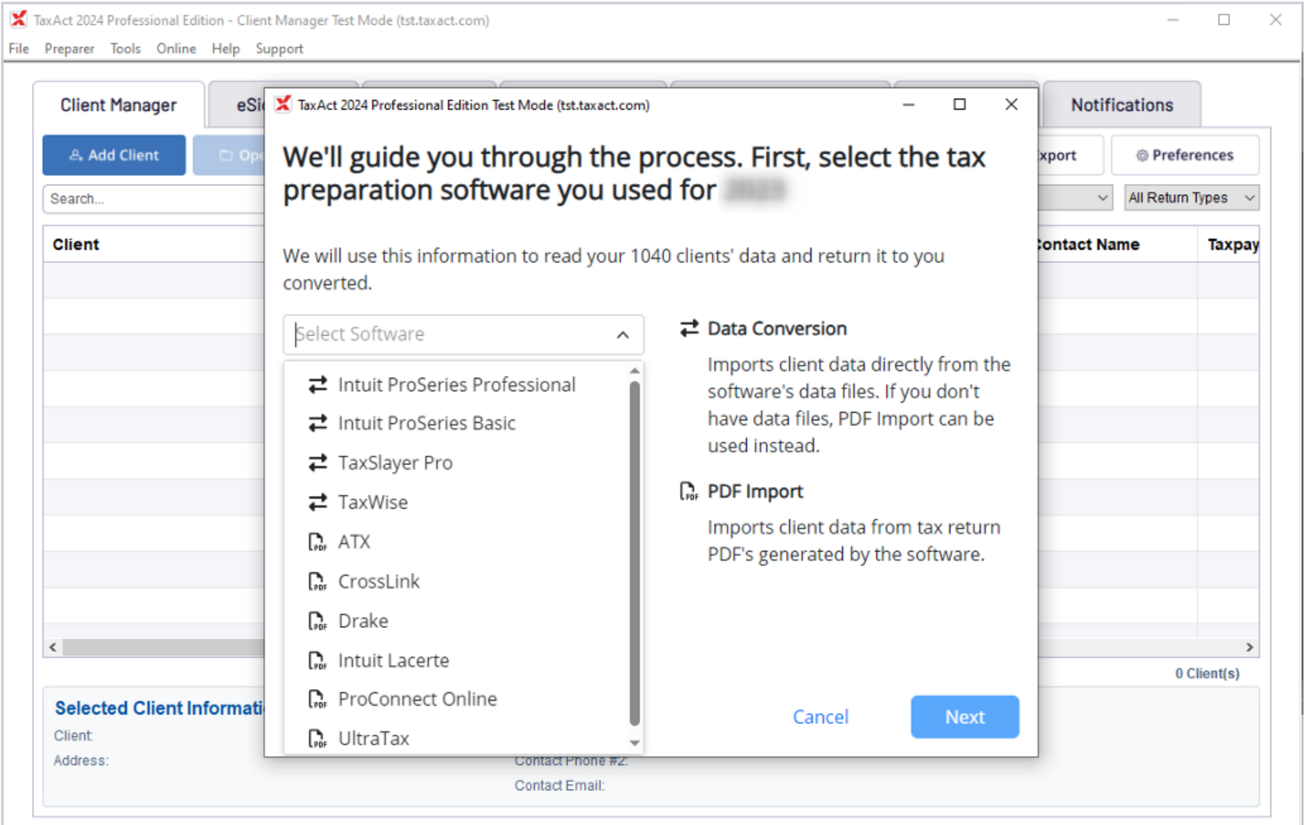
To import a client to convert:

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

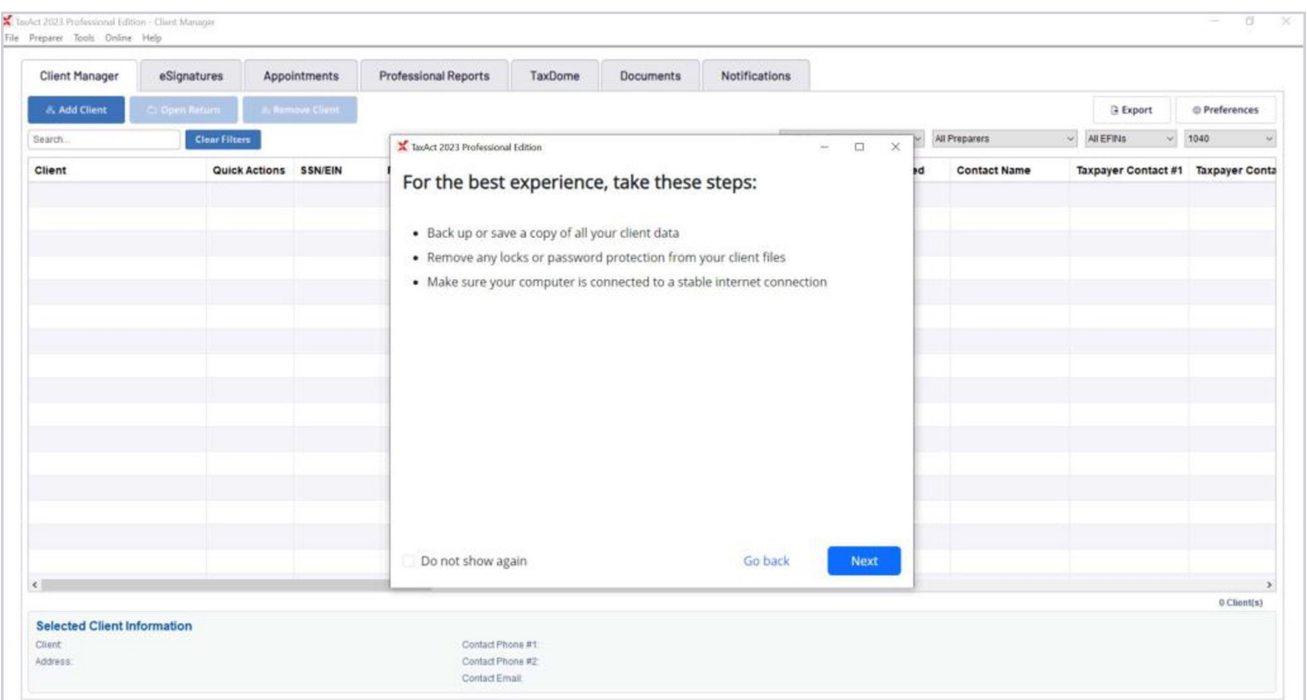
When asked: “Would you like to convert your 1040 clients’ data from your previous year’s software to TaxAct Professional?” chose **Yes**.



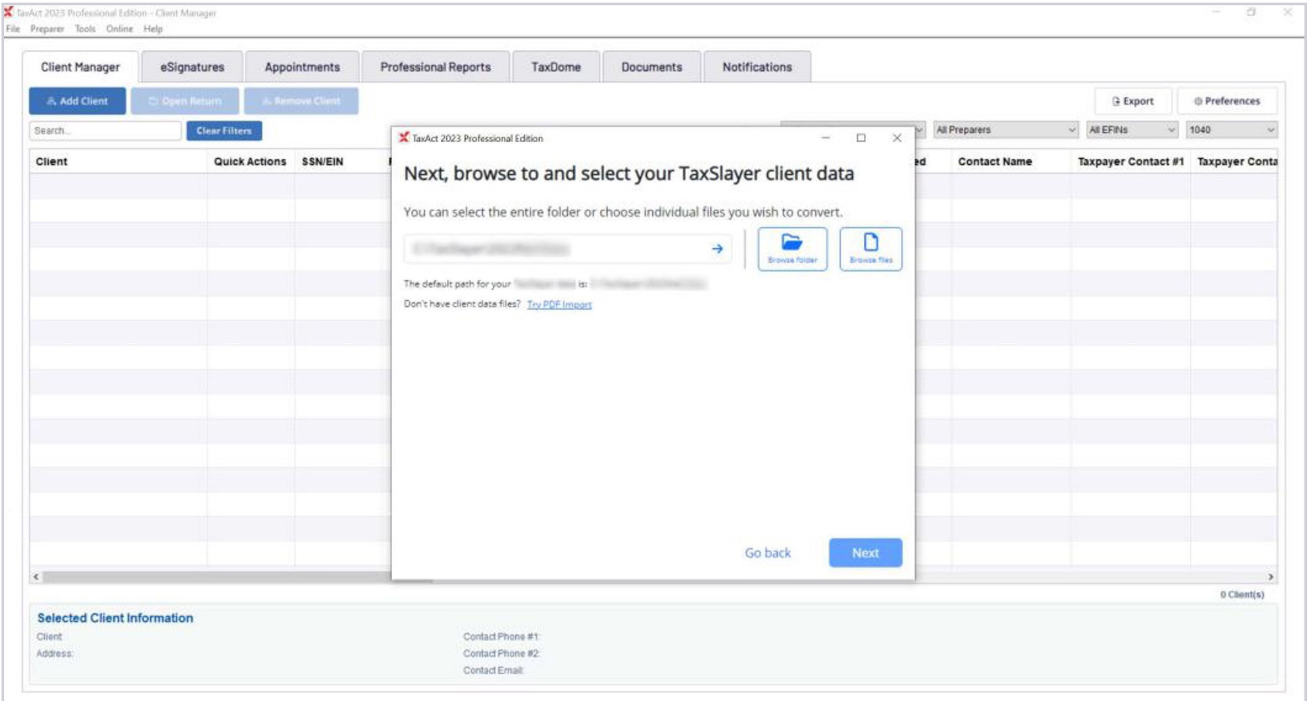
Next, select the ProSeries software you used the previous year and click **Next**.



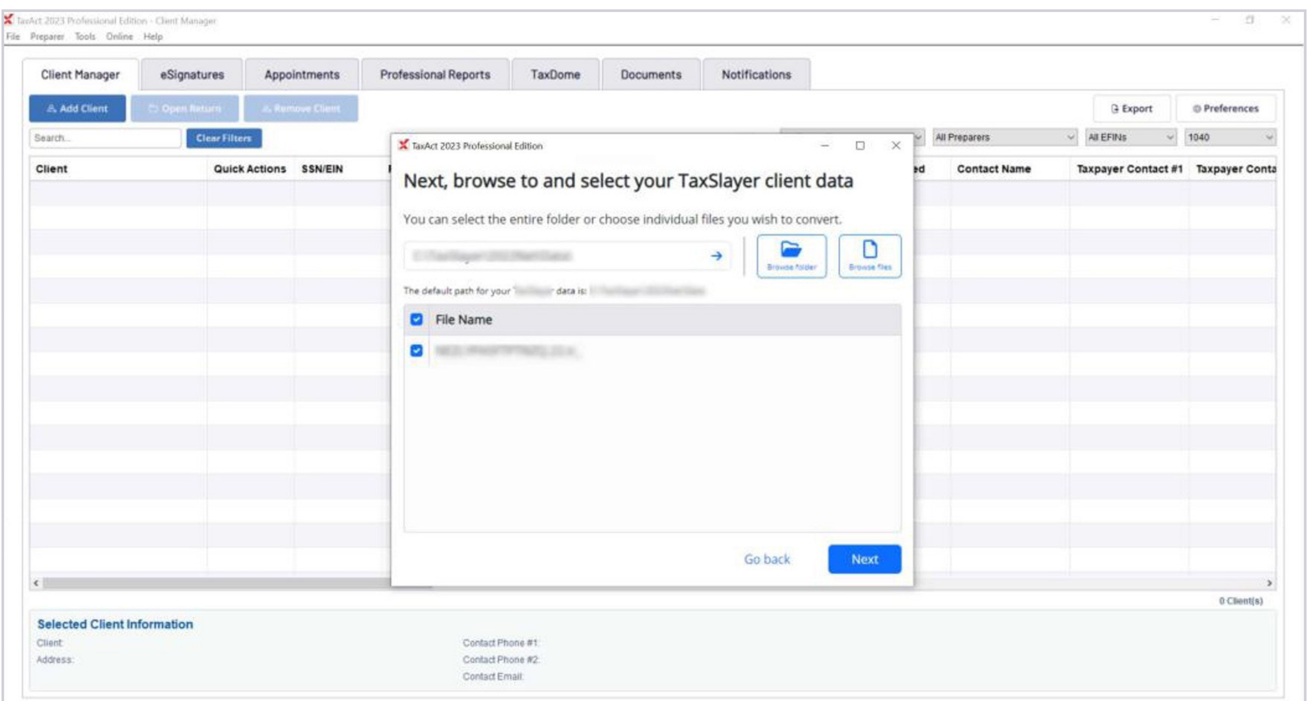
Be sure to save or back up all your client data, and to remove any locks or password protection from your client files before continuing.



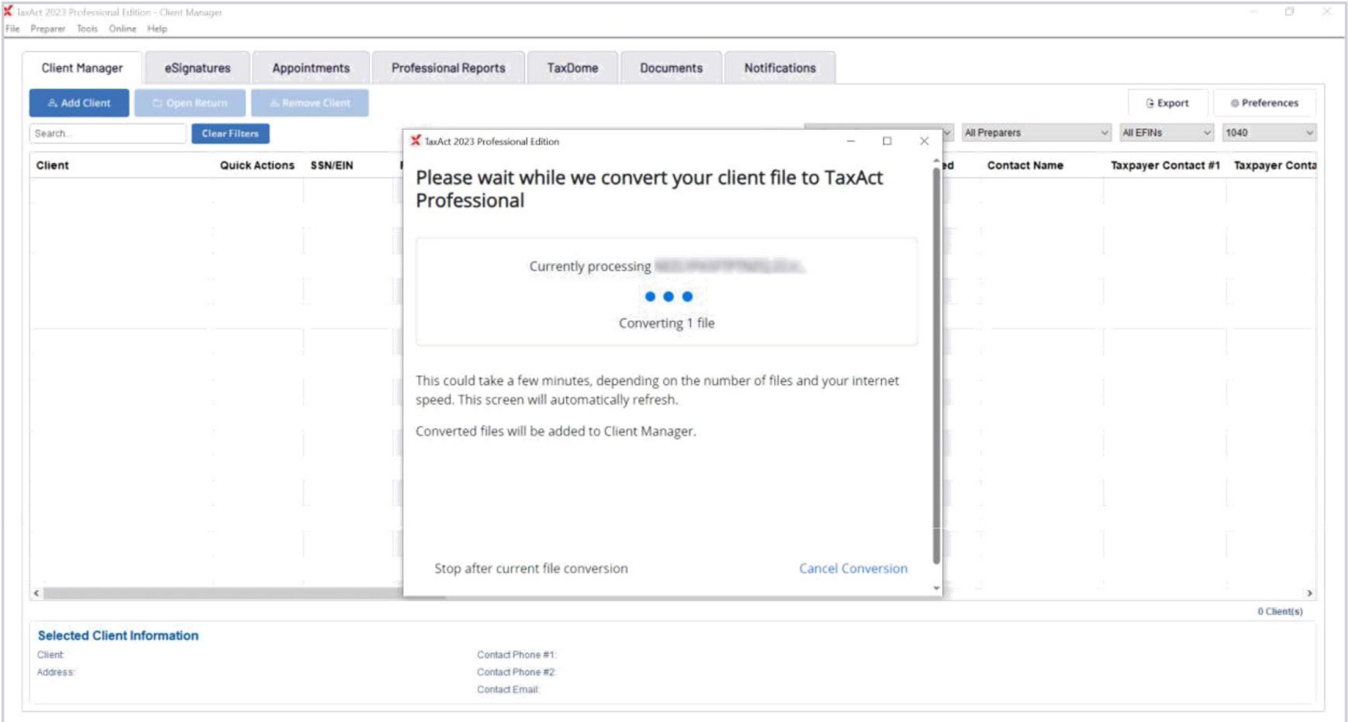
Browse to the client data you wish to convert.



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



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



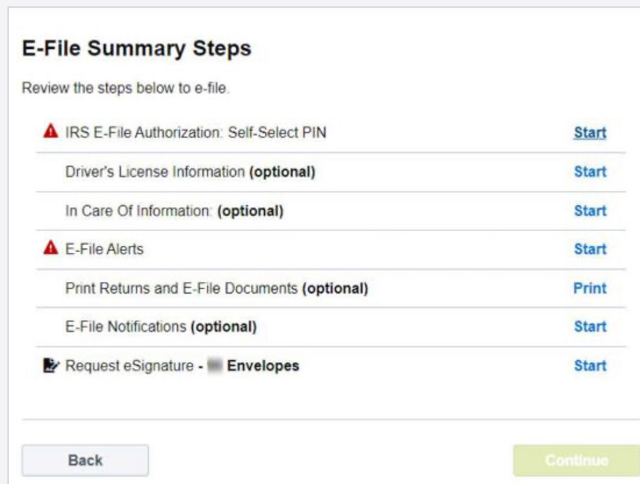
After the client data has been converted, the files will be added to Client Manager. Please see Data Conversion Frequently Asked Questions for any further questions.

Integrated eSignatures

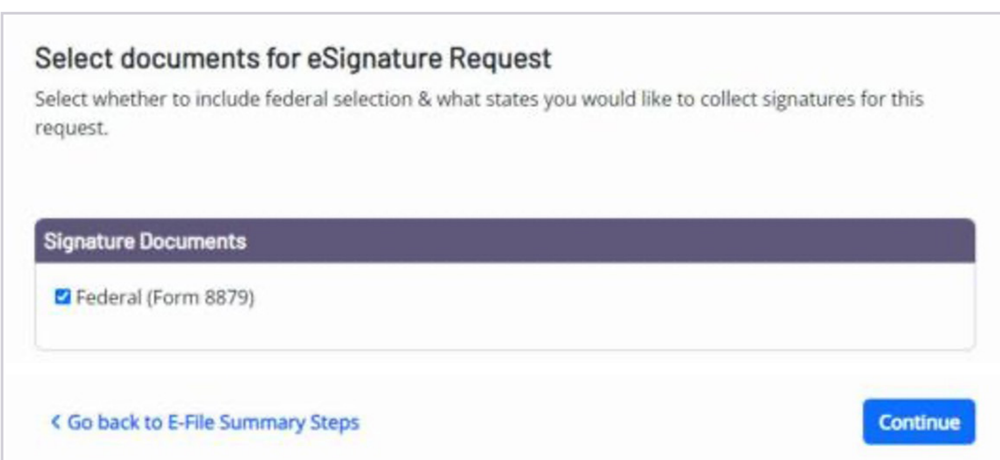
TaxAct now offers Integrated eSignatures, backed by DocuSign®, making it easier for you and your clients to get the signatures you need to e-file. Integrated eSignatures are only available for 1040 returns, state supported signature forms, and on applications for bank products. Files must be a PDF or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

Request new eSignatures

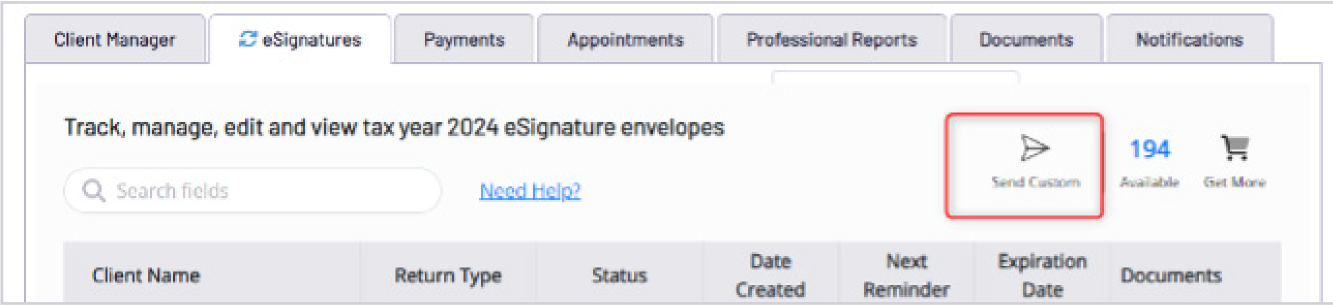
To request a new eSignature you can do so in the filing steps or the eSignature tab: Find **Request eSignatures** on the E-File Summary Steps, and click **Start**.



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

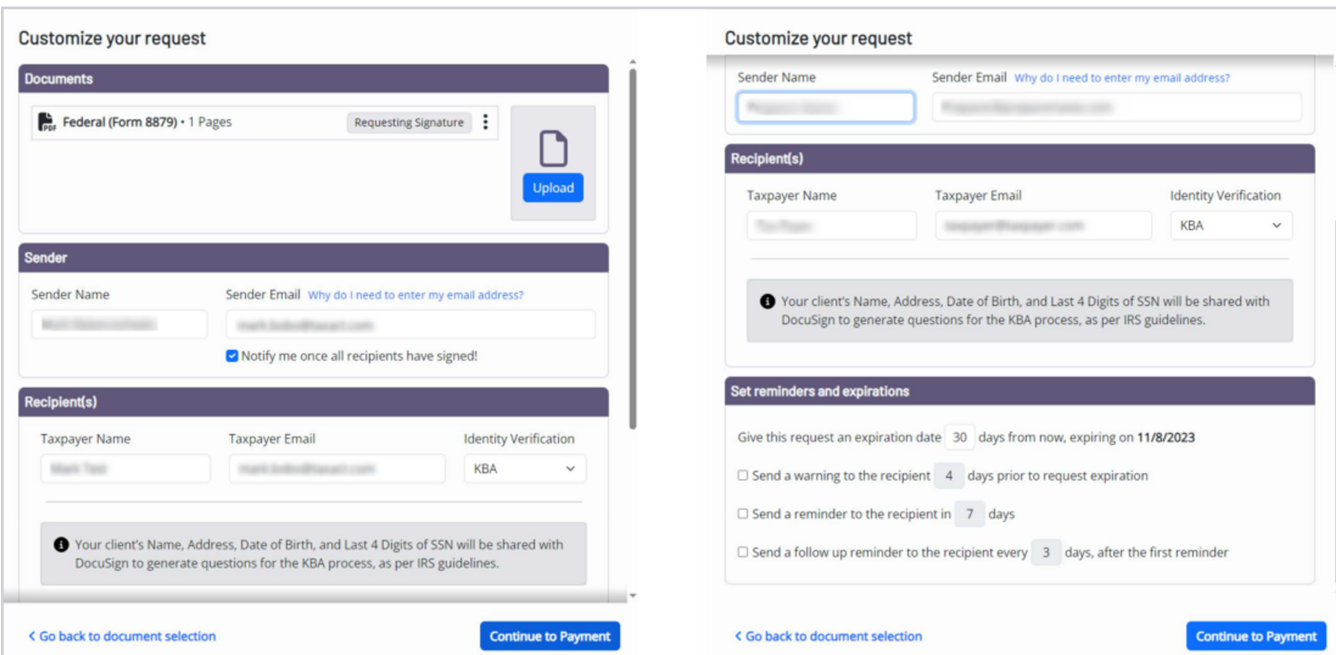


If you do a custom eSignature request, simply click the **Send Custom** button on the **eSignature** tab.

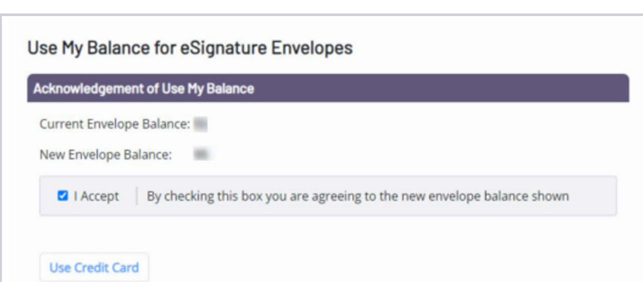


To customize your request, add Sender and Recipient details, and set reminders and expirations. After you have customized your request, click **Continue to Payment**.

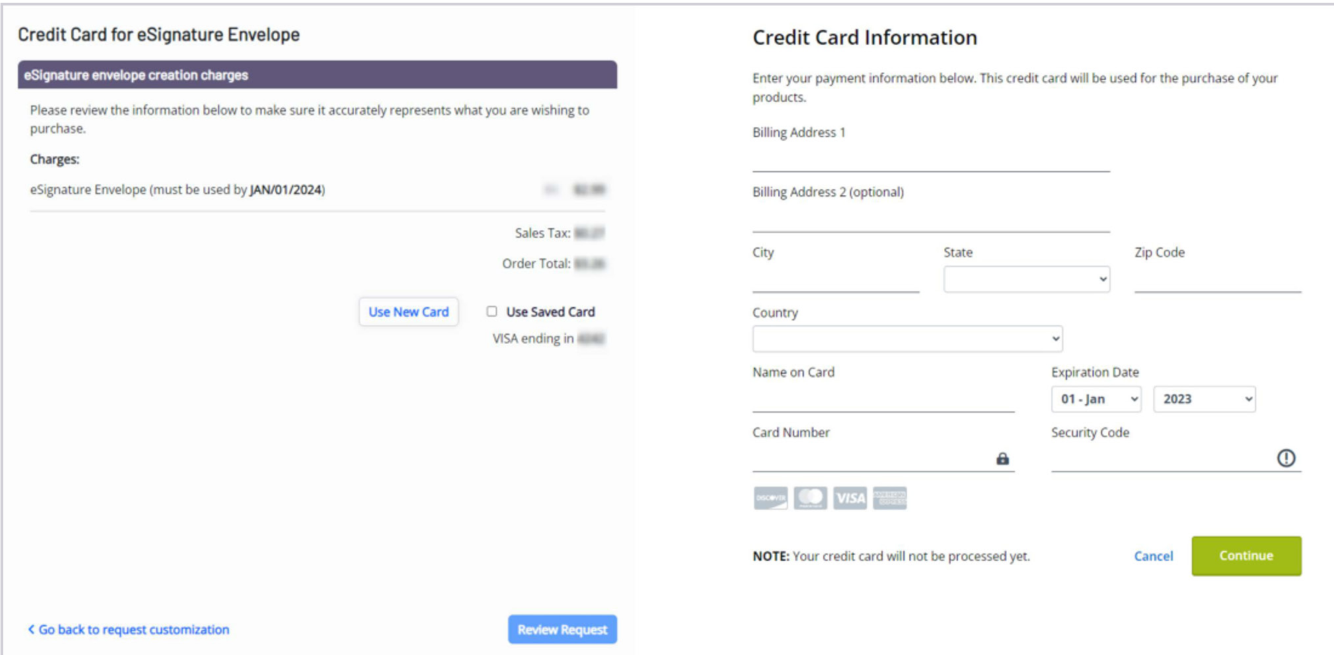
Note: *If you are sending a custom request, you are required to add a new eSignature.*



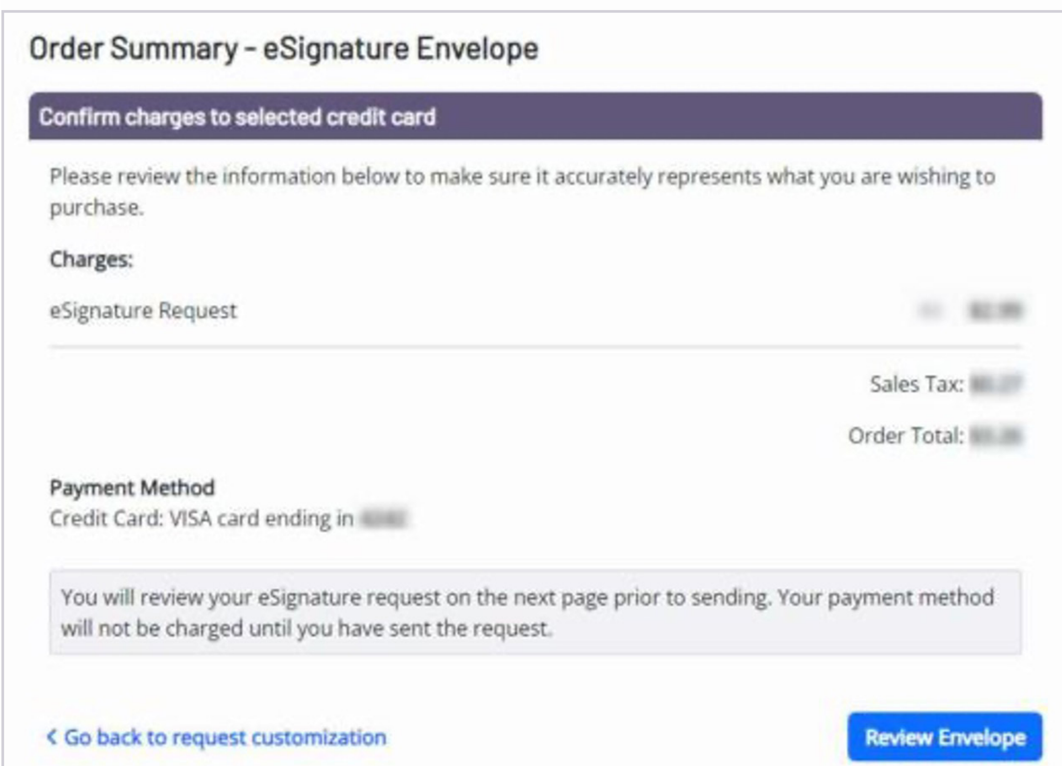
If you have a current balance, check **I Accept** to use your available balance.



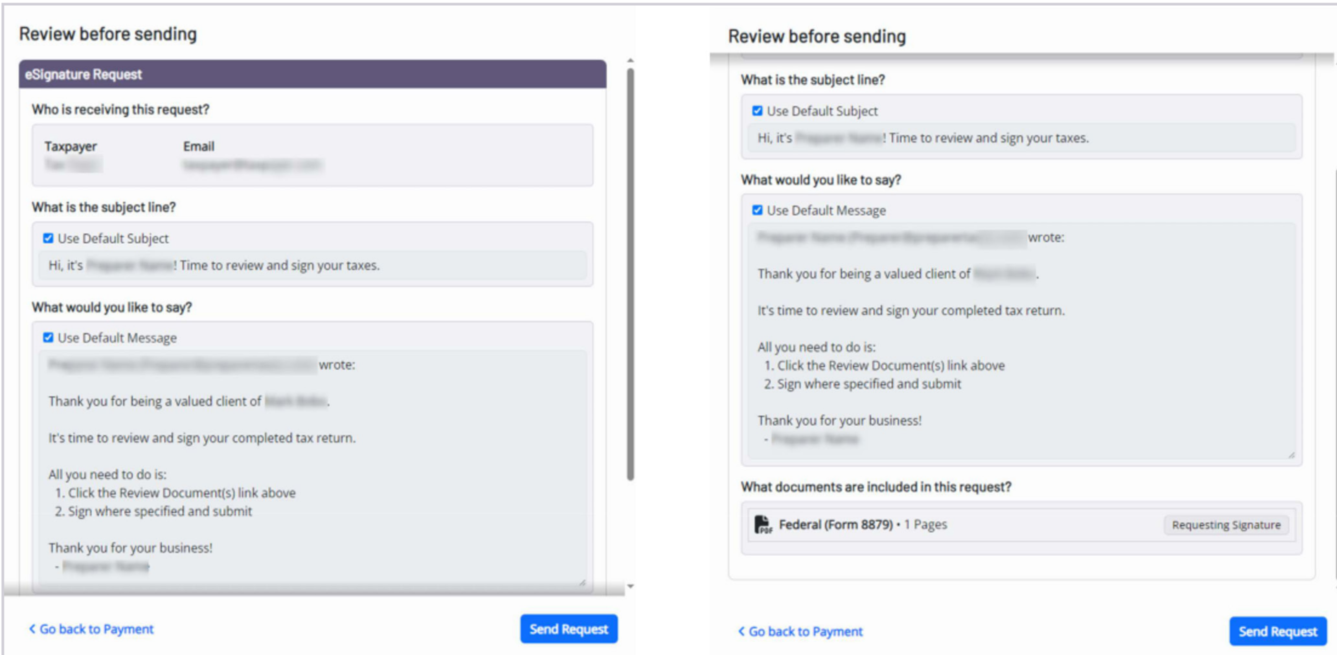
If there is no available balance, click **Use Credit Card**. Choose **Use Saved Credit Card** to use an existing credit card, or **New Card** to enter a new or different card. After your payment information has been entered, click **Continue**.



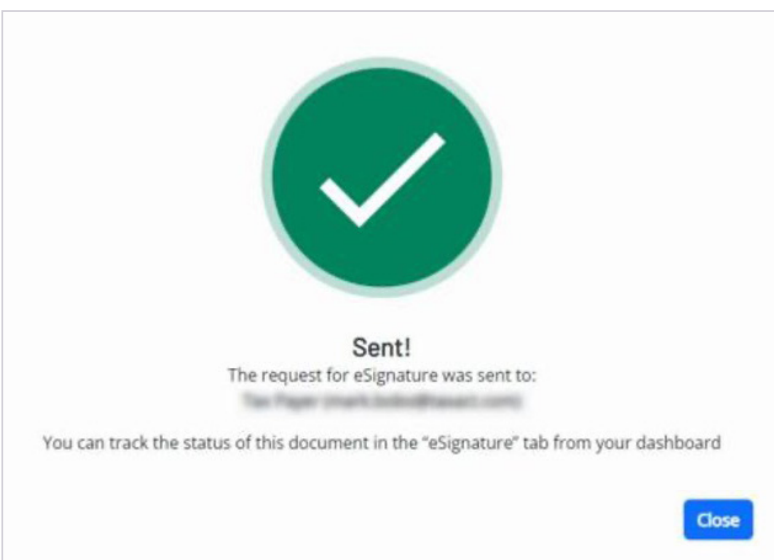
Confirm your charges and payment method, and click **Review Envelope**.



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



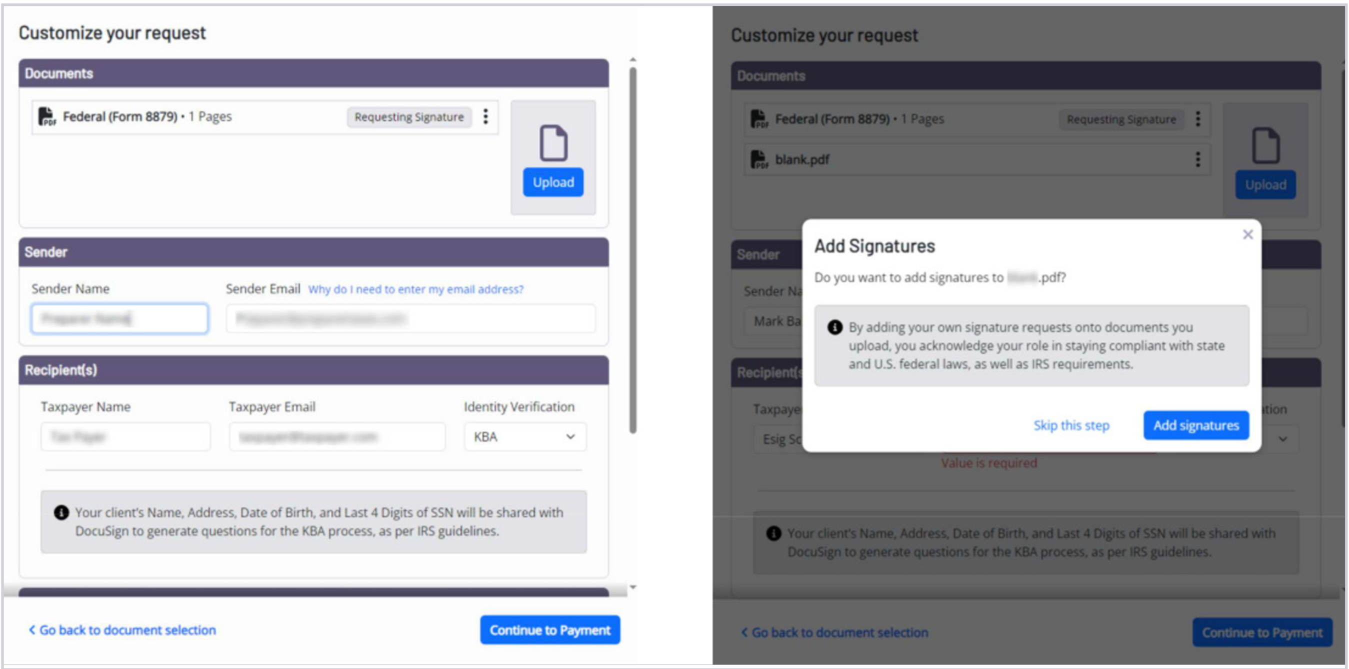
After you have reviewed your message and included documents, click **Continue** to send your request.



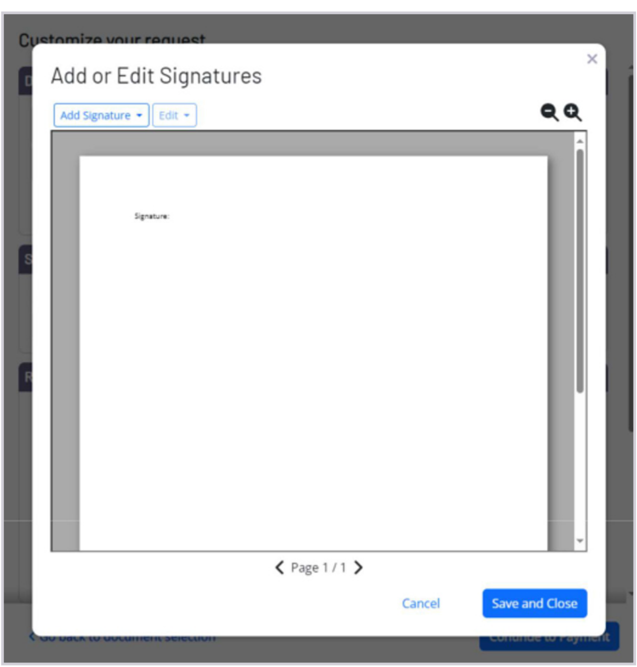
Add new eSignatures

To add a new eSignature:

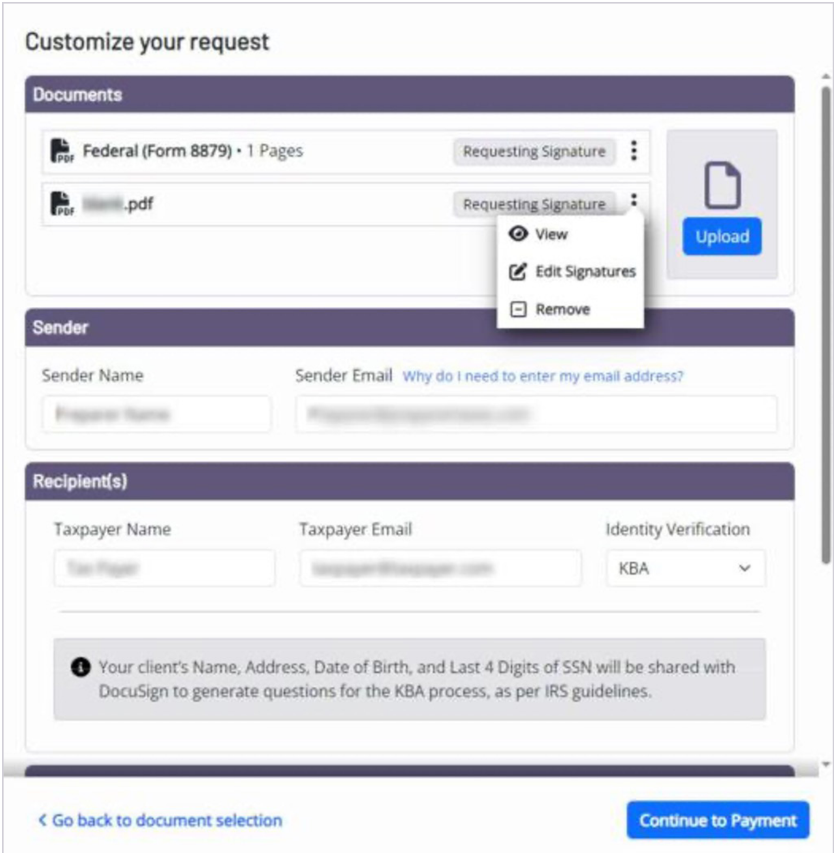
Click **Upload** to launch dialog window, and click **Add Signature**.



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

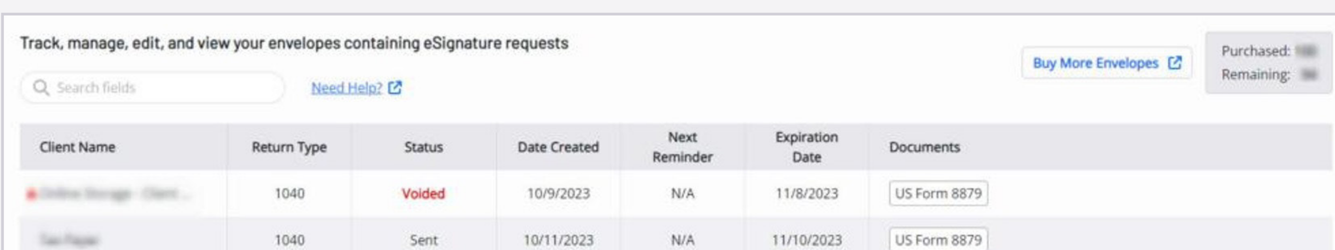


Click the dotted menu and then **Edit Signatures** to return to the menu.

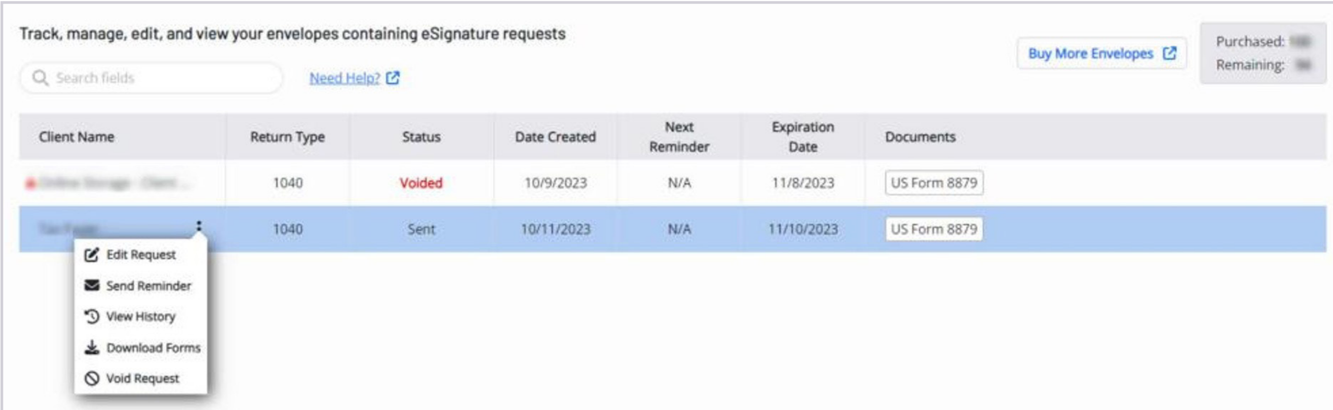


eSignature Dashboard

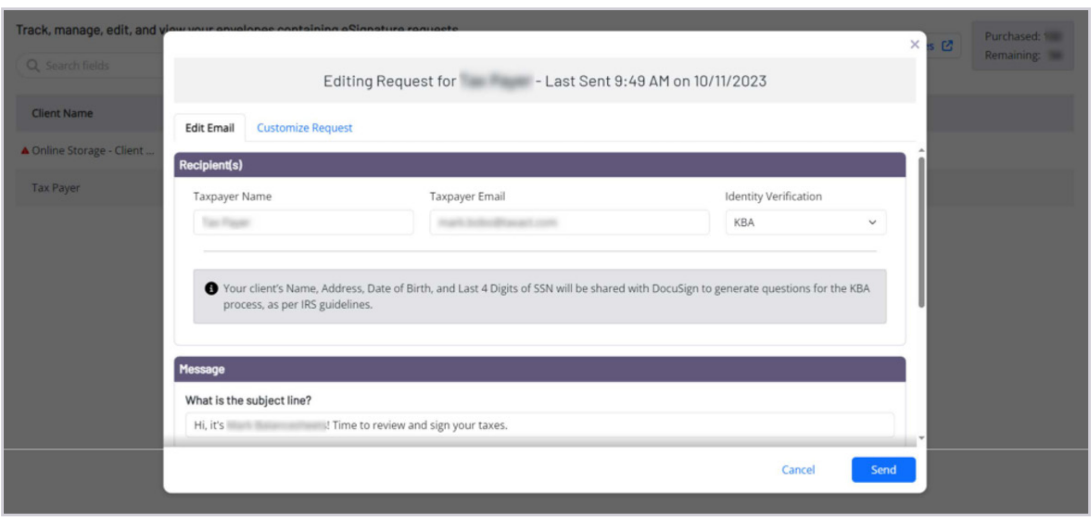
The eSignature Dashboard is where you will be able to view, track, manage, and edit your eSignature documents.

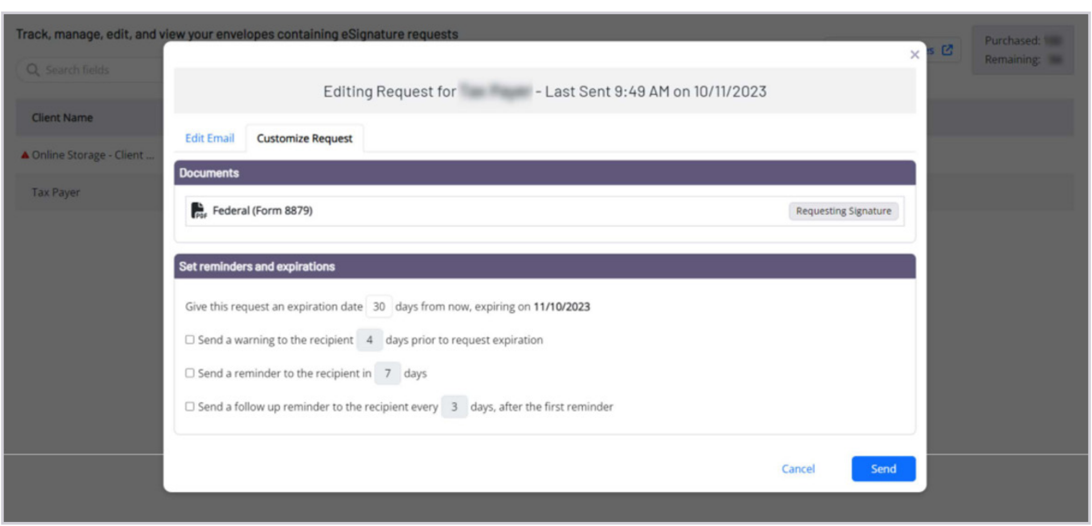


To view the Options menu for your documents, click the dotted menu next to the entry you wish to access.

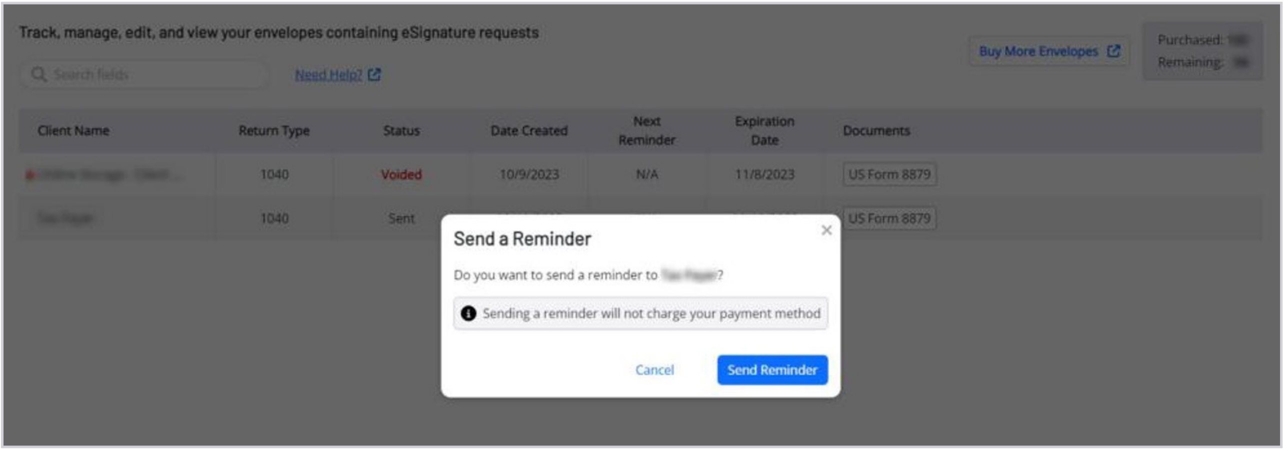


To customize your request, click **Edit Request** to bring up the Editing Request screen. Here, you will be able to edit your request email by clicking on the **Edit Email** tab, or set reminders and expirations under the **Customize Request** tab.

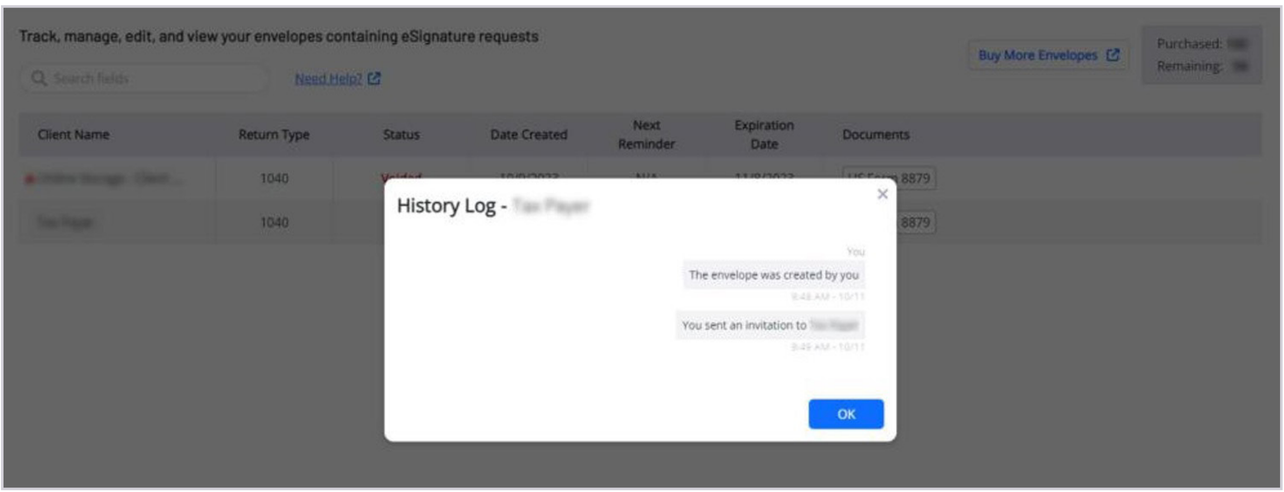




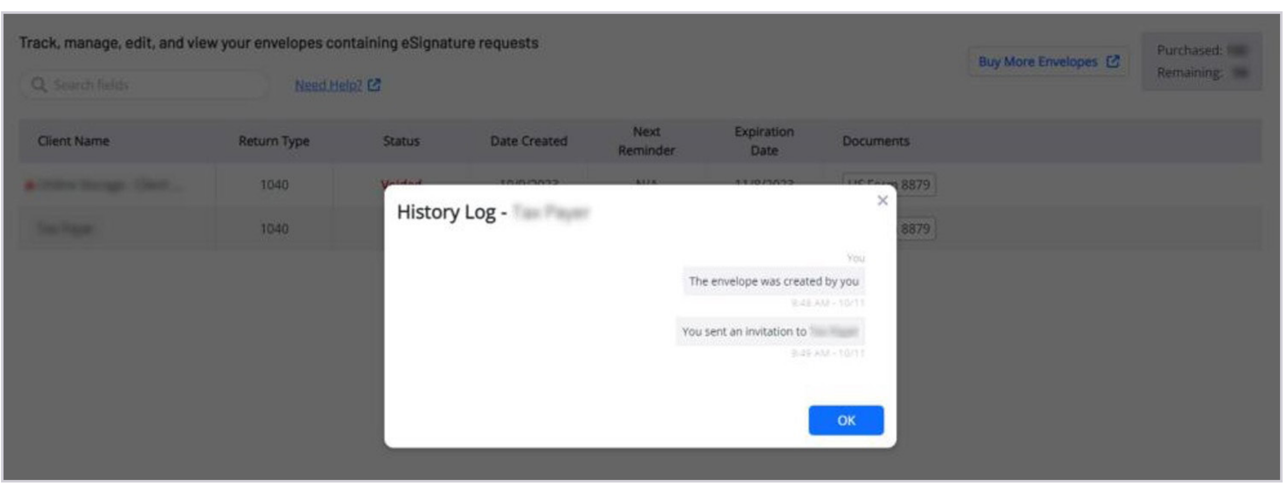
To send a reminder email to your recipient, click **Send Reminder**.



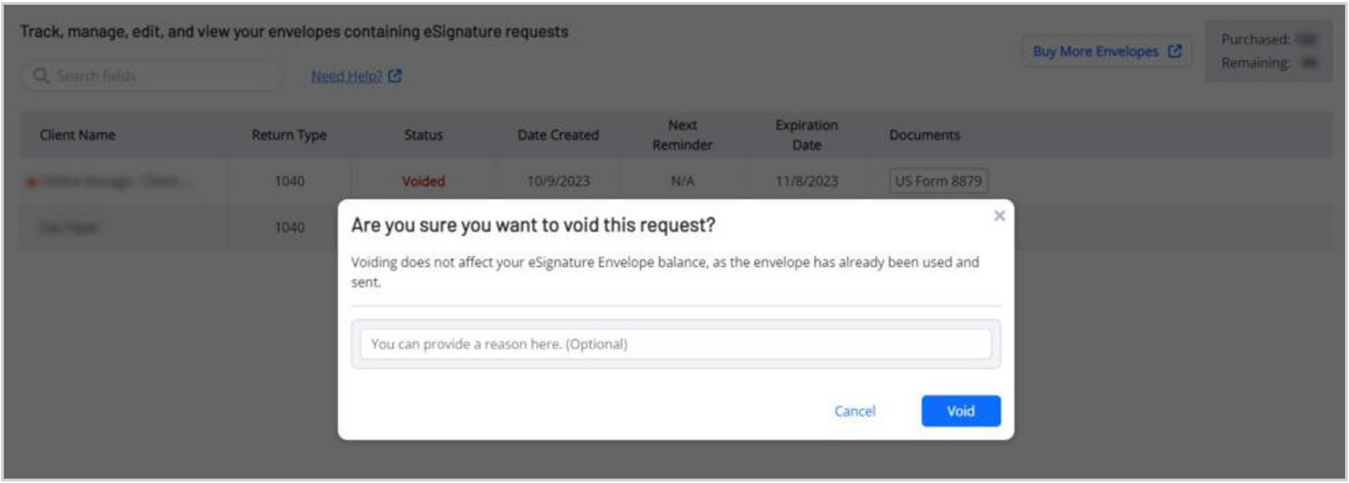
To view your entry's previous statuses in the History Log, click **View History**.



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

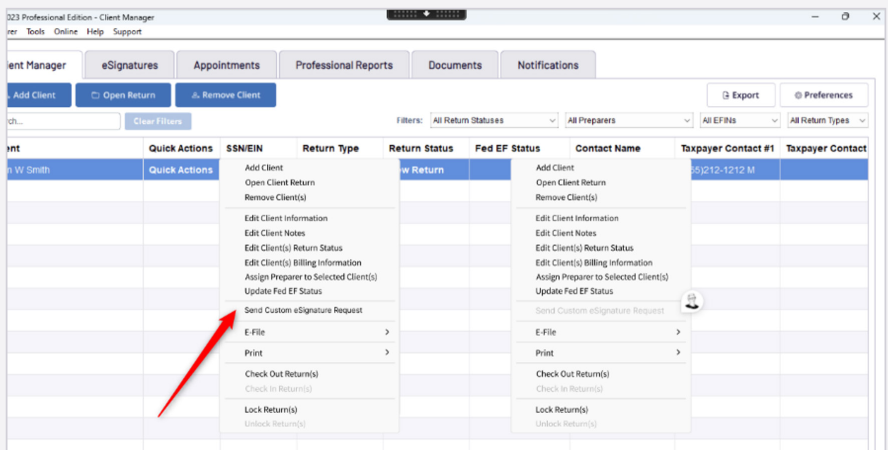


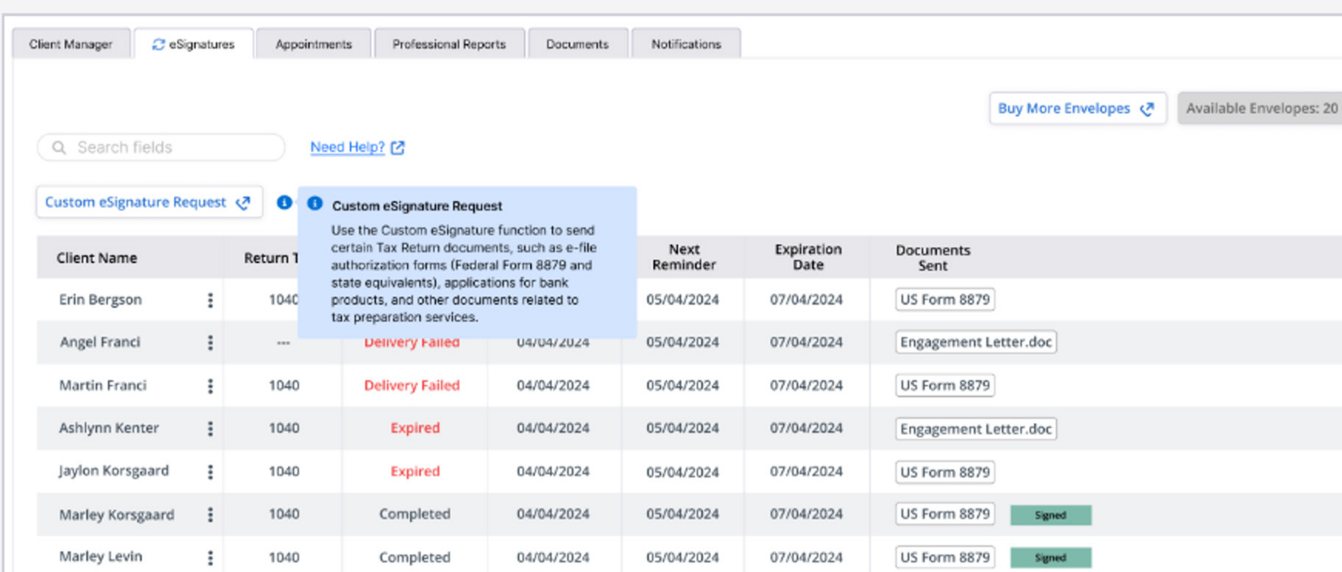
To void your entry, click **Void Request**. Enter a reason for voiding the request if you wish, and click **Void**.

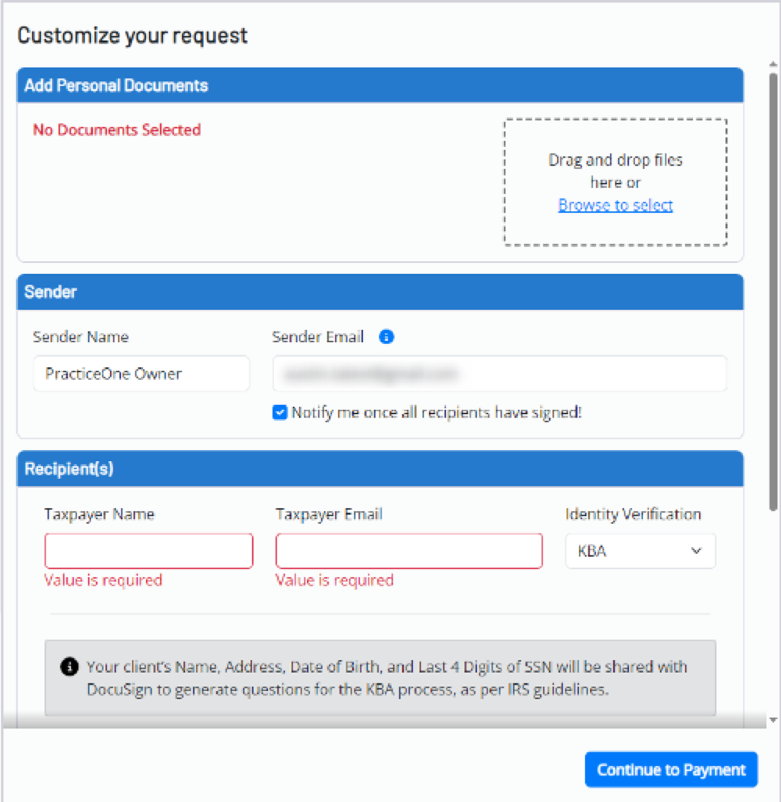


Custom eSignature Requests

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

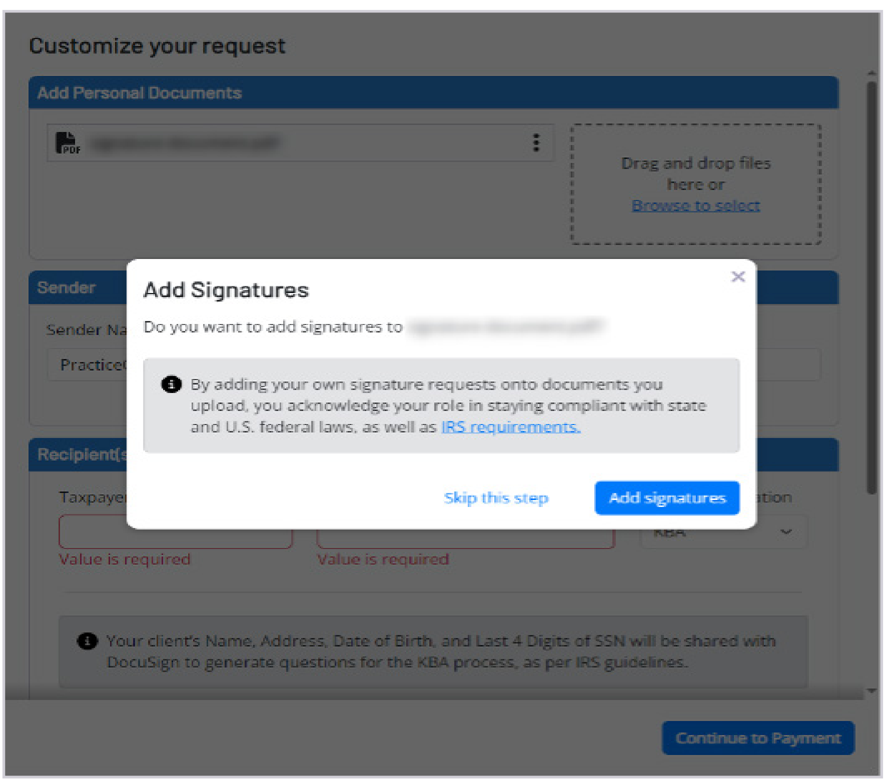




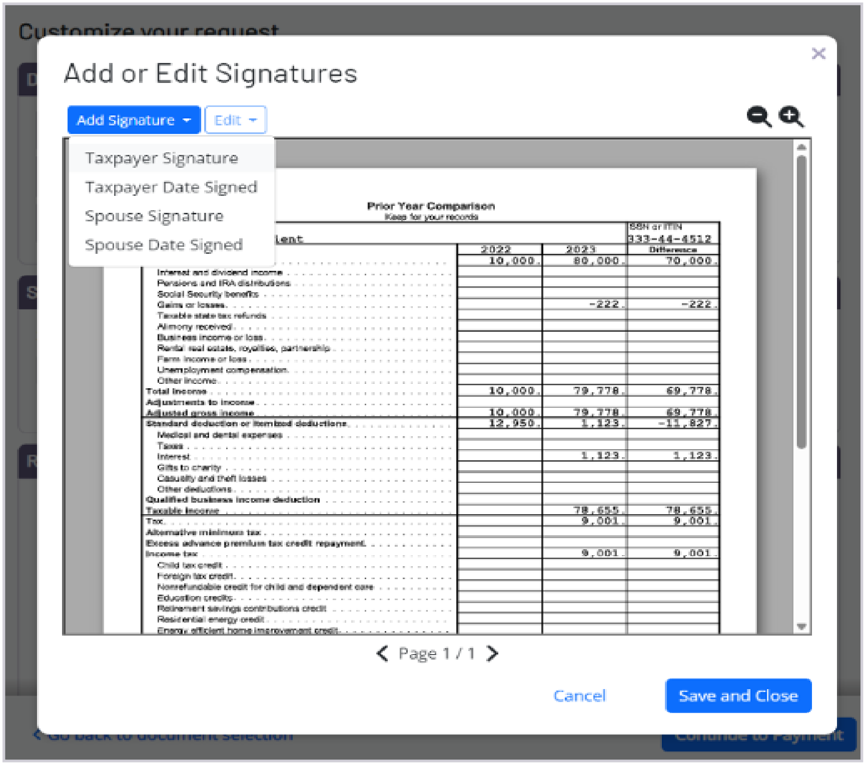


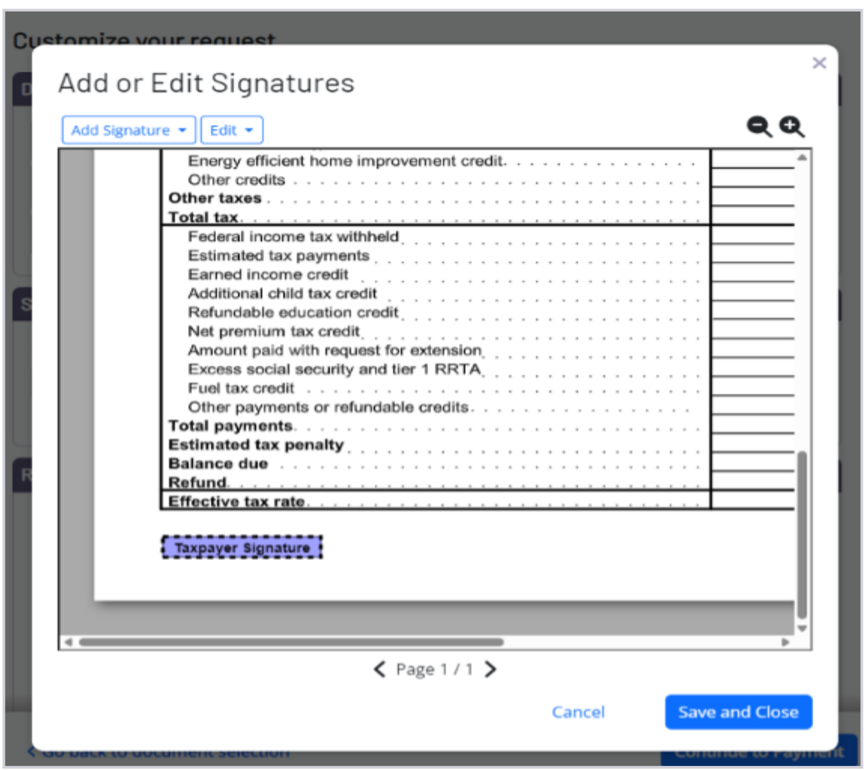
Next, select the documents you want for the eSignature Request by clicking **Browse to select**

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

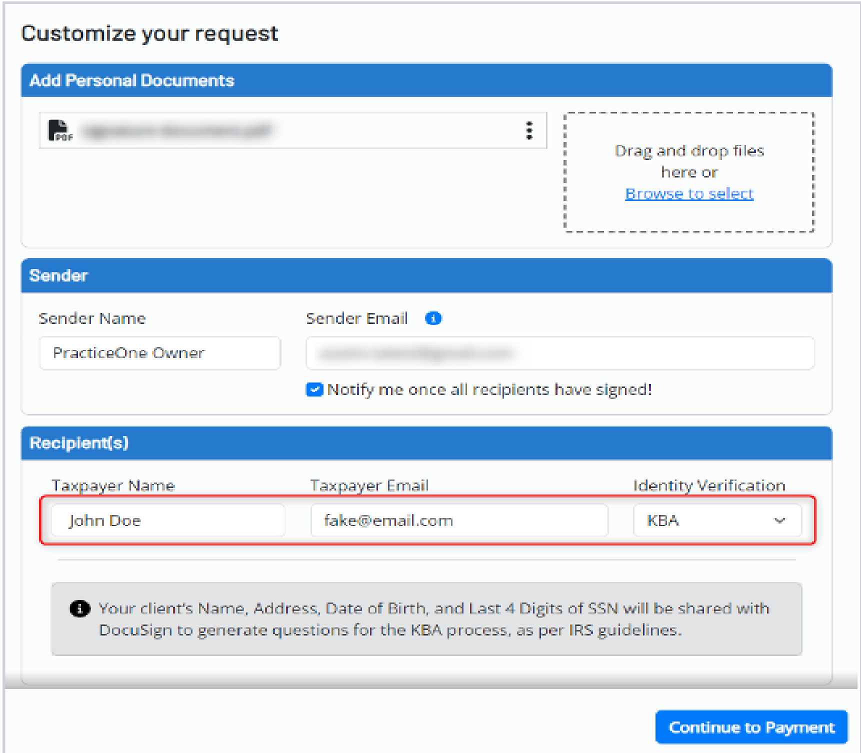


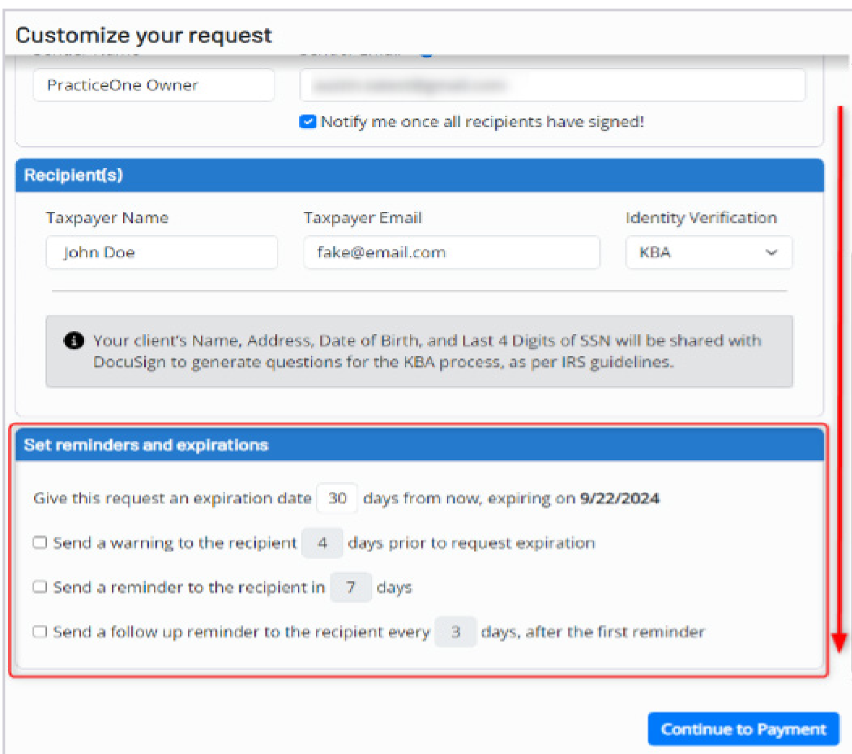
To add a taxpayer signature to the document,
click “**Add Signature**” and then “**Taxpayer Signature**”



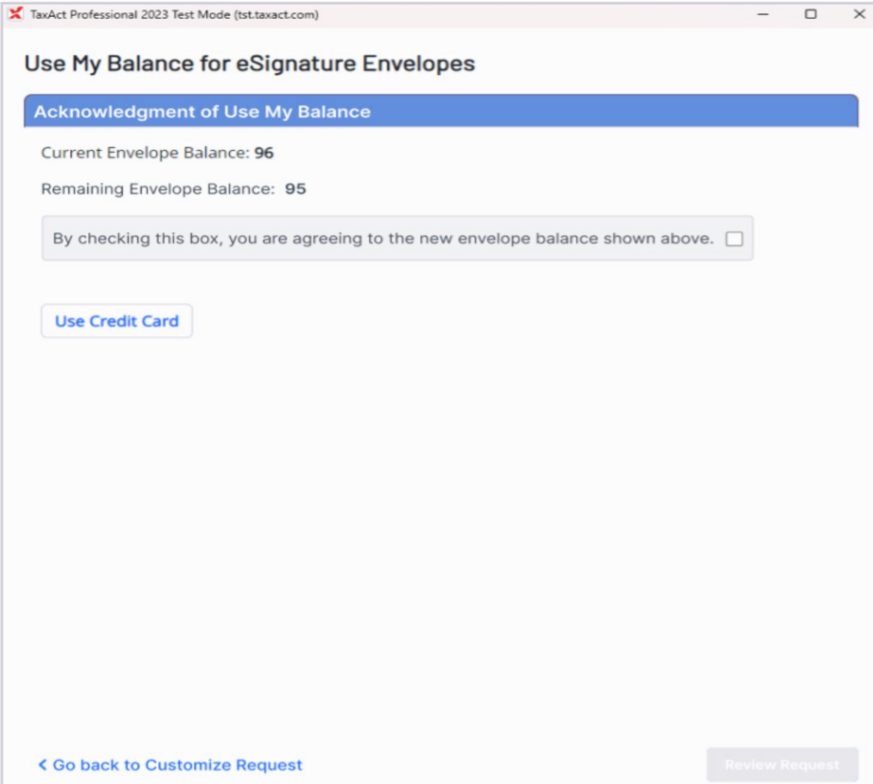


Fill out sender and recipient information and select an expiration date.





Confirm your envelope balance and proceed with payment.



For further information

Please see the following links:

- Integrated eSignatures
- eSignatures Frequently Asked Questions

Import Last Year's Client Returns

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

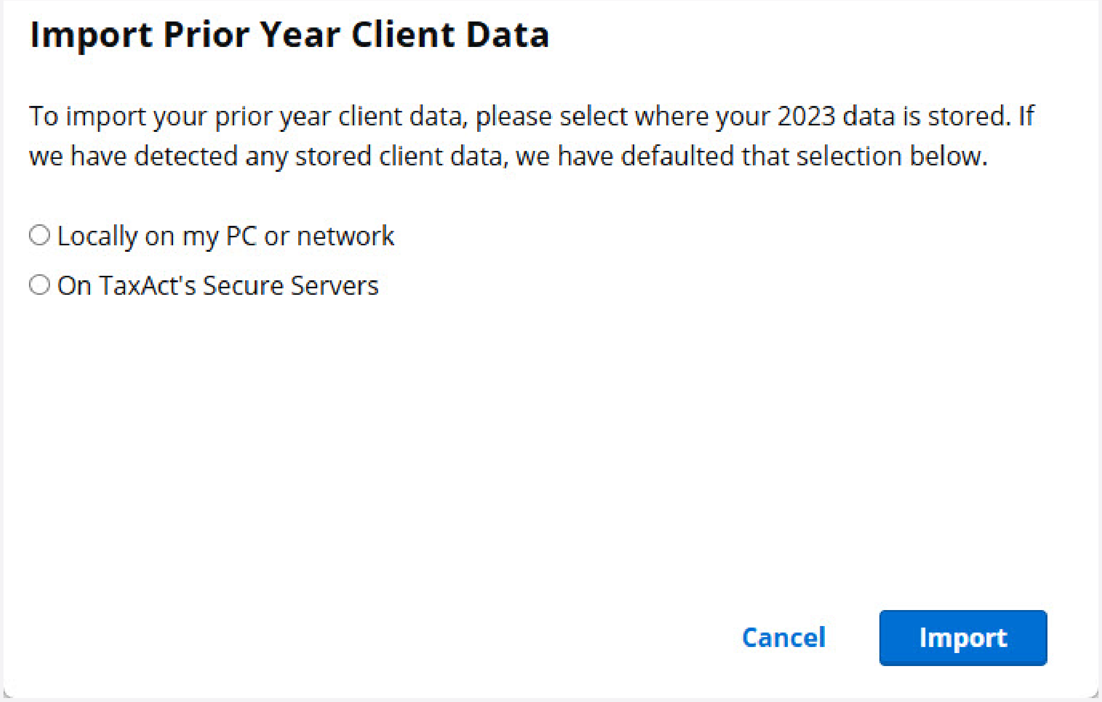
You can import:

- Prior year returns created with TaxAct
- PDFs from other supported tax preparation software.

Import TaxAct Returns

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

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

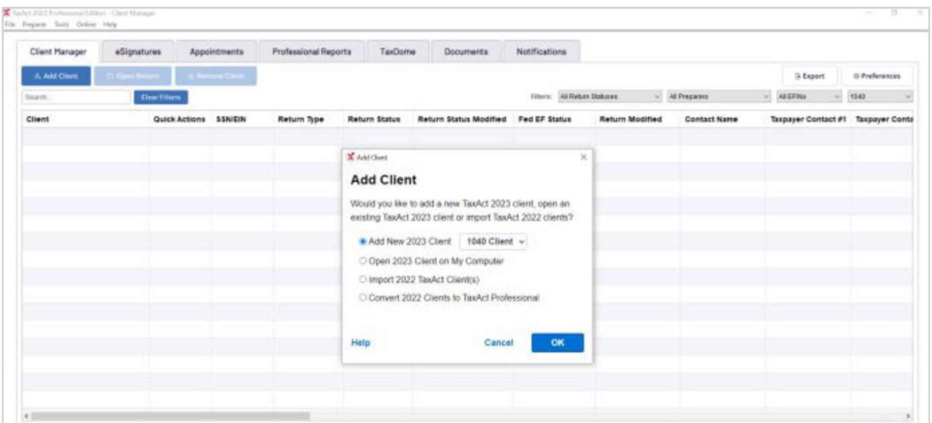


Add/Edit Client Returns

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

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

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



Import TaxAct Returns

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

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

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

Add a Client (and associated return)

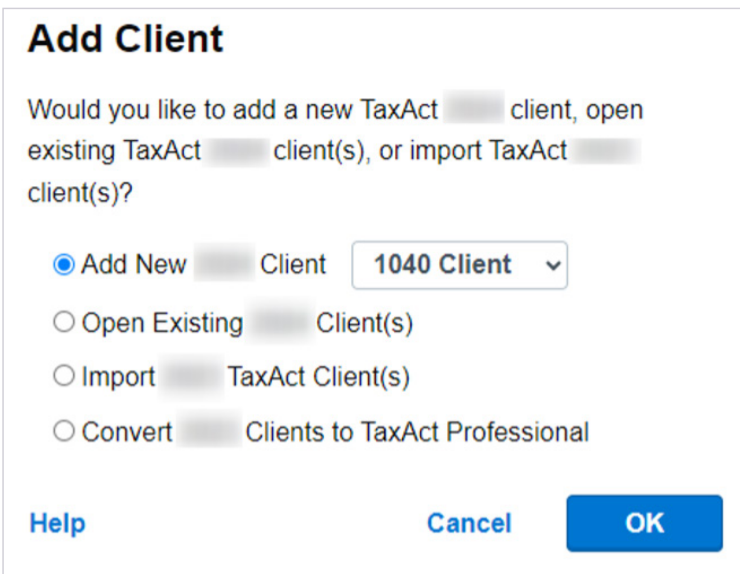
1. Click the Add a Client button. If you didn't complete the Master Forms section of the setup process, you may be prompted to do so. Fill out all Master Forms prior to adding clients.

2. Select Add New 2025 Client to complete the new client contact and basic information portion of the return, then click OK.

    a. Click Client and fill out the basic information for the client.

    b. Click Preparer to assign a preparer, set the Return Status and Payment Status, and make any related notes.

    c. Click OK to save the client record and create a new return. (Turn on auto-save if prompted).



Edit Existing Client Return

1. Click the client record in Client Manager.

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

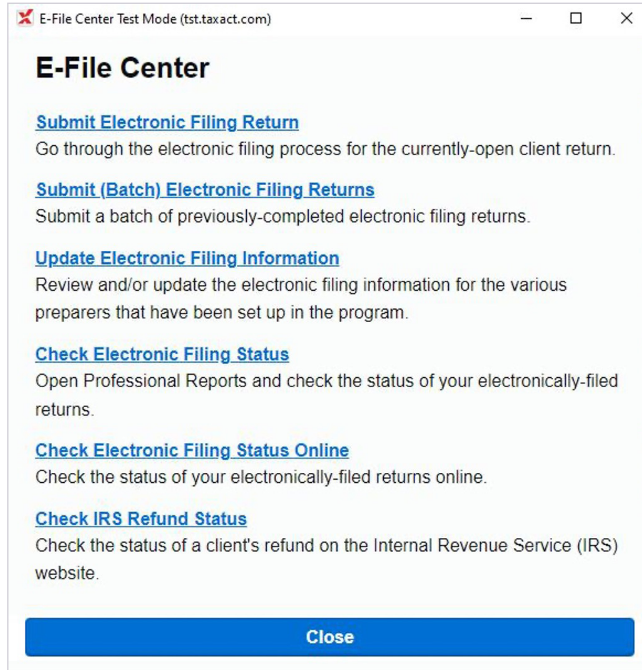
E-file Client Return(s)

E-file Center

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

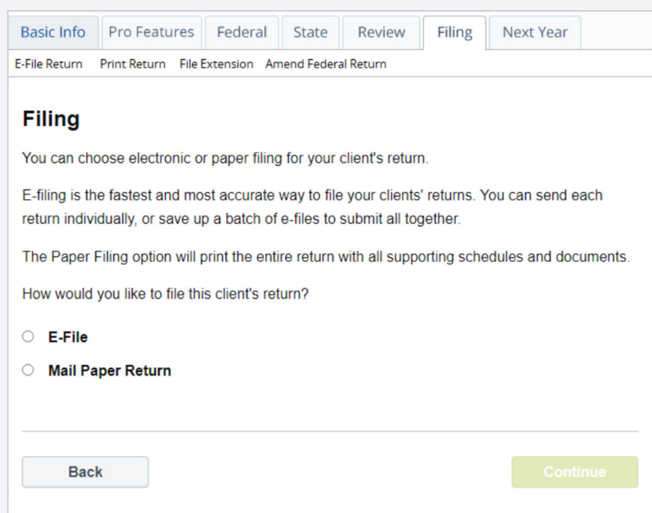
From here, you can also view e-filing information for other preparers in your practice and navigate to e-file and refund status reports.

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



E-file a single return

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

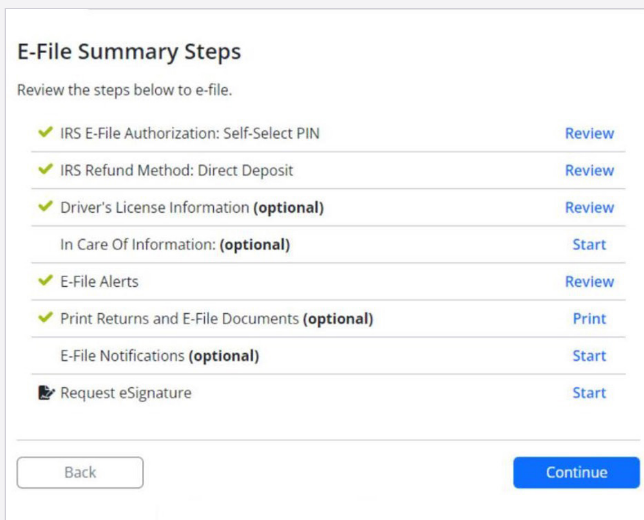


4. If you've enrolled in Protection Plus Audit Assistance, you will also indicate whether you want to purchase Protection Plus for your client and complete the subsequent entry screens.

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

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

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



6. After completing the E-Filing Summary, complete the screens to “sign” your client’s return. (Information required for signature depends on whether Self-Select PIN or Practitioner PIN was chosen.)

7. Then begin TaxAct Alerts, which checks the return for potential errors, omissions and tax-saving opportunities. Make any necessary changes to the return.

8. If your client’s return has any associated fees, the E-filing – Payment Method screen will appear. You must select whether to pay the client’s fees from your prepaid account (see instructions below) or by credit card. ***Note****: if you purchased a bundle that includes unlimited e-filing, you will not be prompted for payment.*

9. Continue through the next screens to submit the e-file.

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

E-file multiple returns as a batch

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

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

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

When you are ready to submit a batch of returns:

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

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

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

Other Return Actions

Remove a Client Return

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

Search for a Client

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

Print Information in Client Manager

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

View Preparer Preferences

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

Work on Files Offline (Local storage only)

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

Protect, Backup, and Restore

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

- Password protection
- Full backup and restore features

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

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

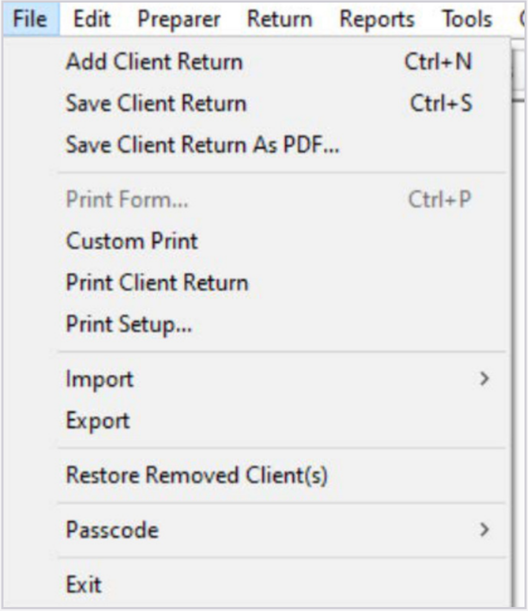
Password-Protect Client Returns

In Client Manager, double click to open return.

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

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

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



Set Individual Usernames, Passwords & Permissions

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

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

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

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

Back Up Client Returns to Your Local Computer

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

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

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

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

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

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

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

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

Restore Client Returns from Backup Files Saved Locally

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

A confirmation message will appear when files have been restored.

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

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

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

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

Print Returns, Labels, Reports, & Invoices

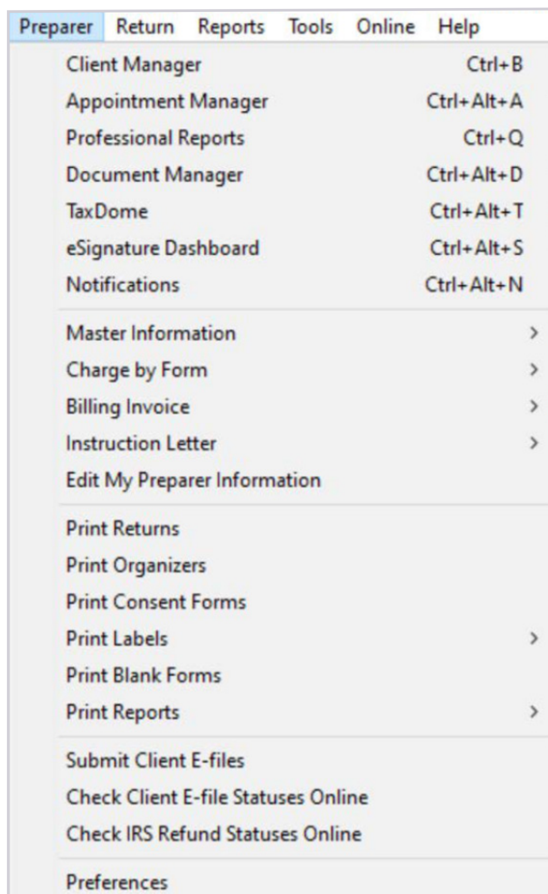
The Print Center

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

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

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

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



Print a Client Return

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

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

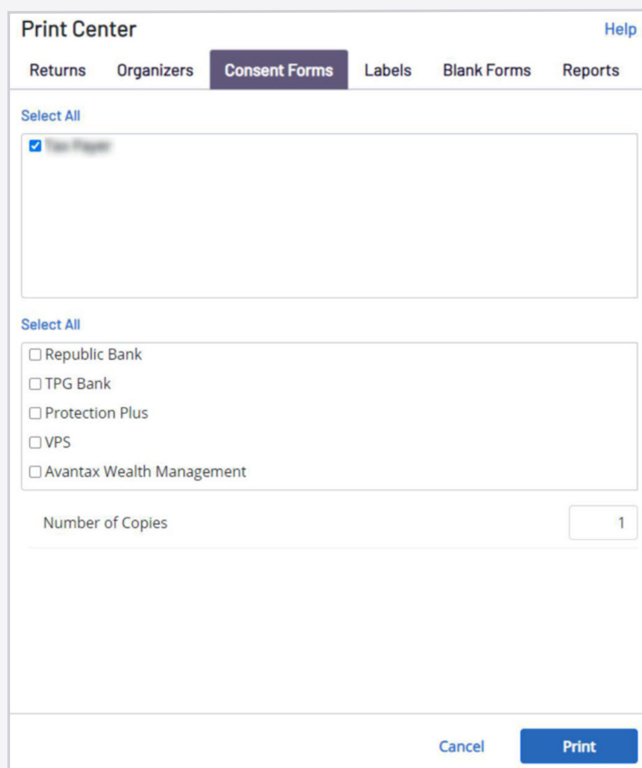
When printer preferences are set, continue with printing:

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

Print Consent Forms

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

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



Print Client Organizers

What is a Client Organizer?

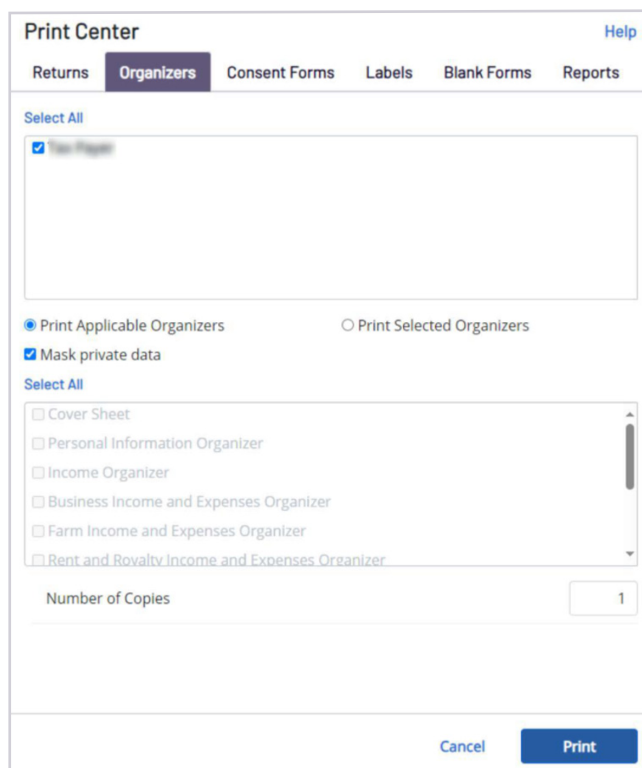
The Client Organizer is a portfolio of client return information designed to help you obtain tax information in advance. Imported returns will include prior year tax information to compare with the current tax year.

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:

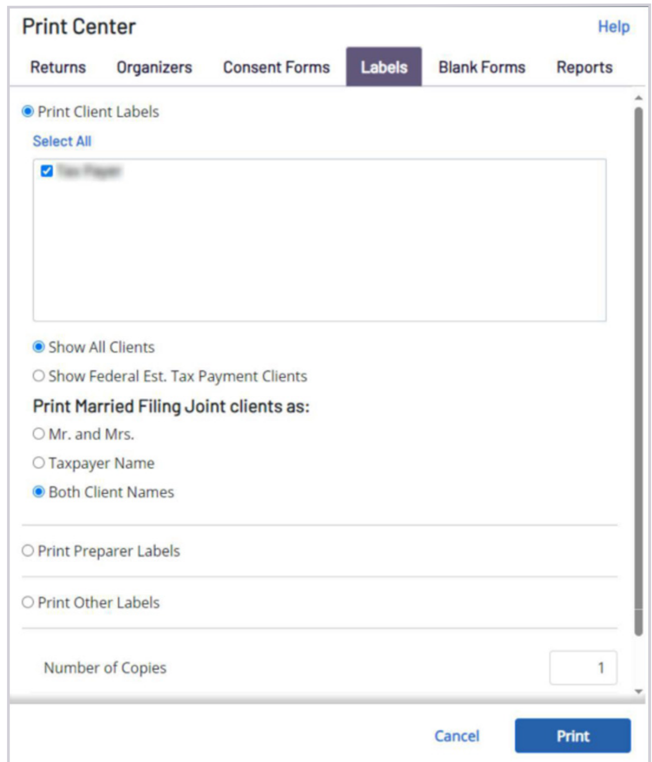
- **Print Client Labels**
- **Print Preparer Labels**
- **Print Other Labels.**

Client Labels

1. Select the client(s).

2. Select **Show All Clients** or **Show Federal Estimated Tax Payment Clients**.

3. Choose options for printing Married Filing Joint clients.



Preparer Labels

To print return address labels:

1. Choose the preparer.

2. Edit the address shown if needed.

Print Other Labels

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

Setting Label Properties

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

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

2. Click **Set Font** to access a list of available fonts and modify the text style and size.

3. Once you have set your preferences for the labels to print, click **Print**.

Print Reports From Preparer Menu

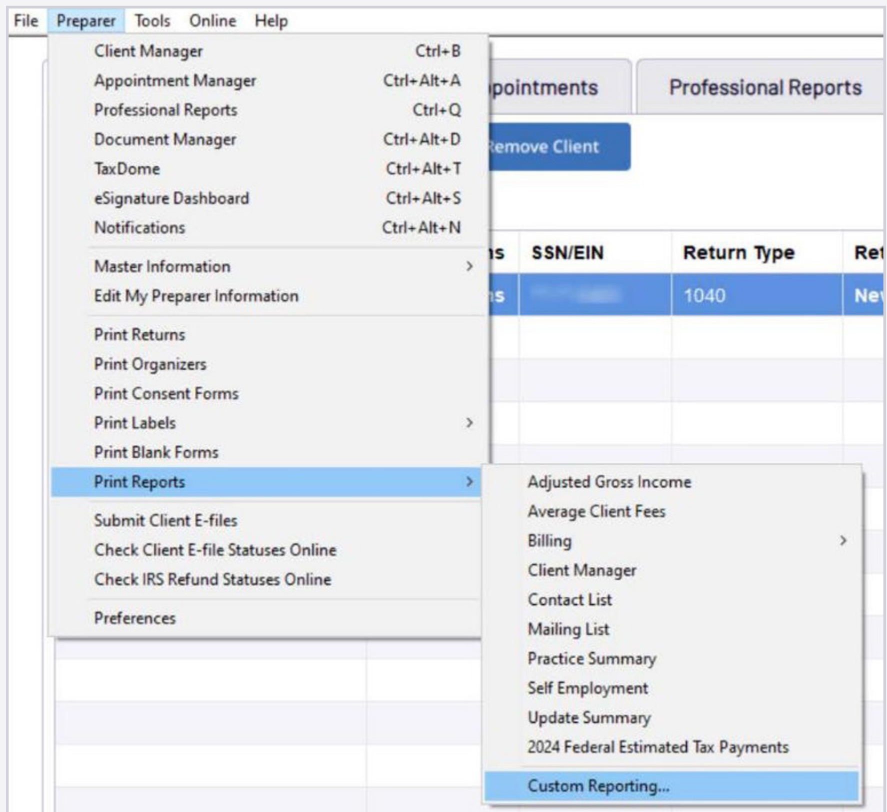
You can print any of the following reports in the Print Reports menu:

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

Custom Reporting

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

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

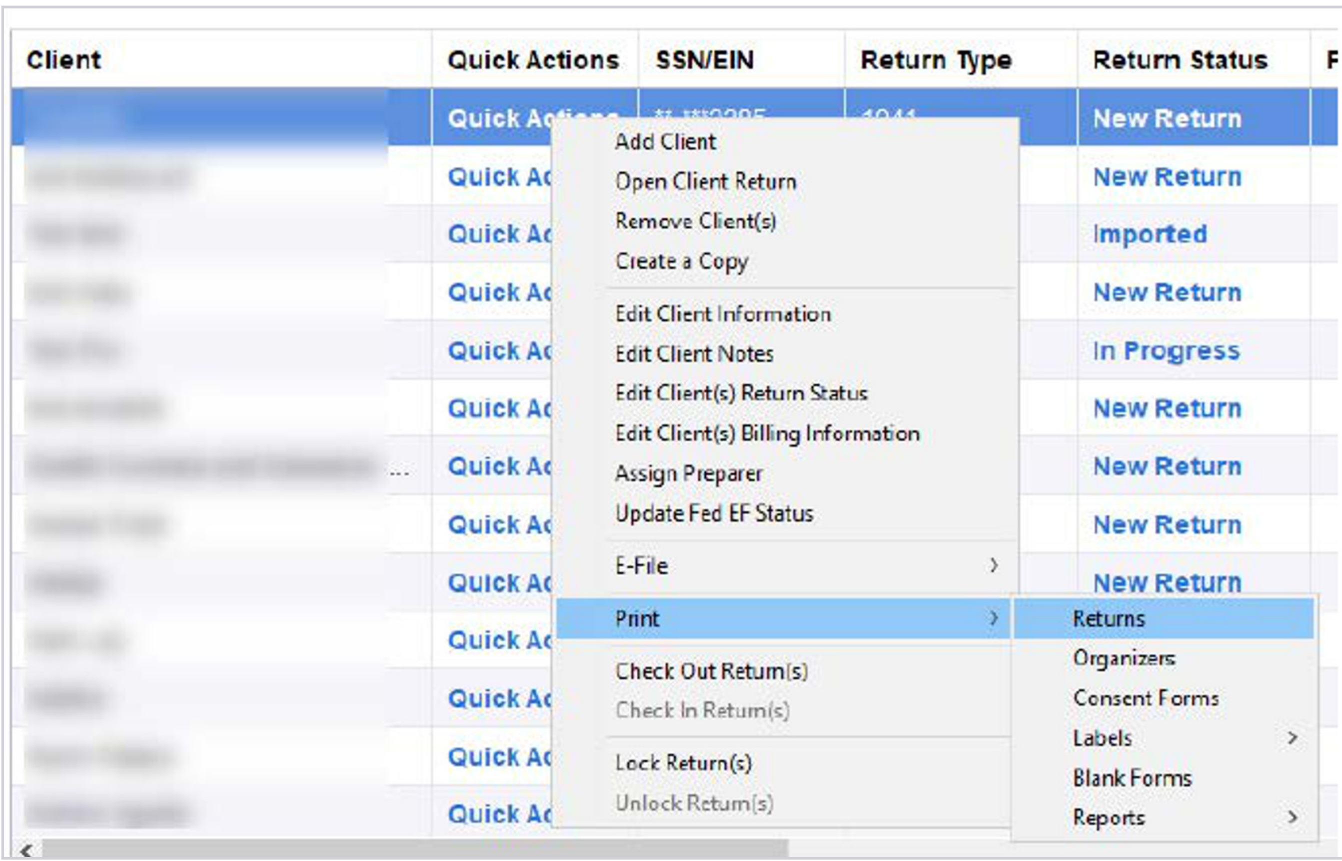


Print Invoices and Billing Statements from Client Reports Tab

Available reports include:

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

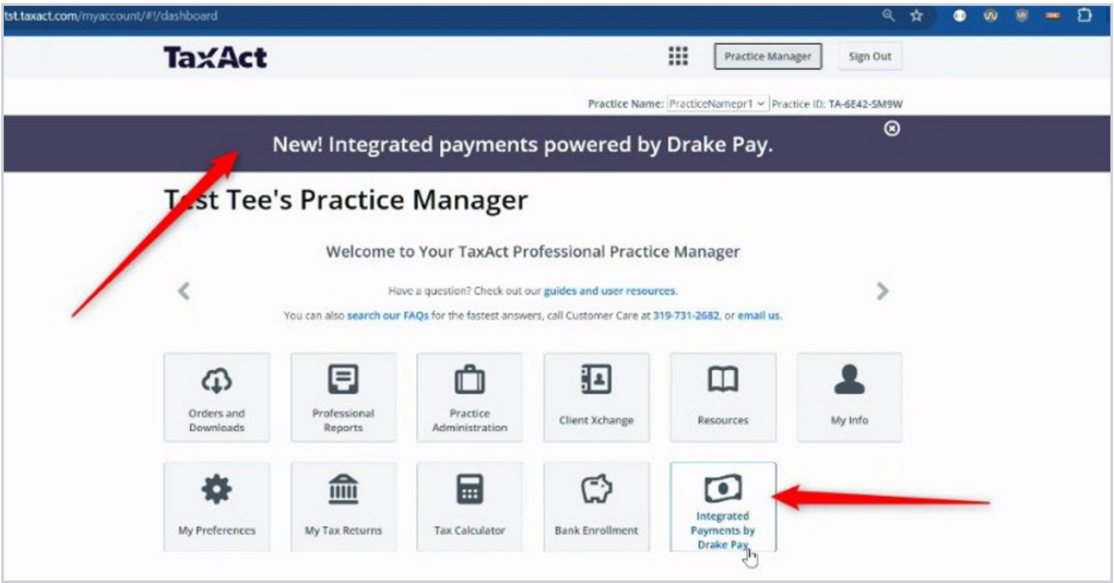
1. From within Client Manager, select a client. and right click.
2. Click Print and then select the desired report.



Integrated Payments

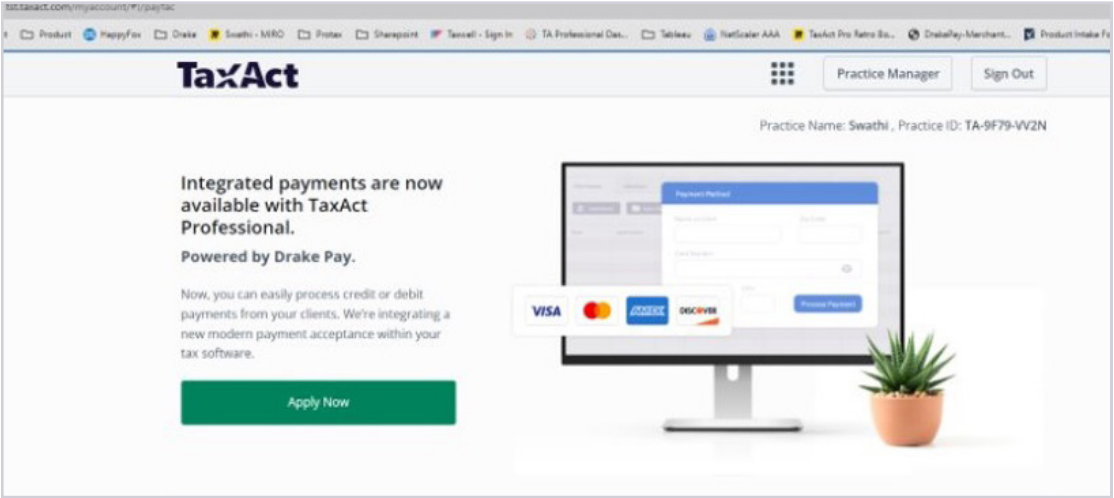
TaxAct Practice Manager

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

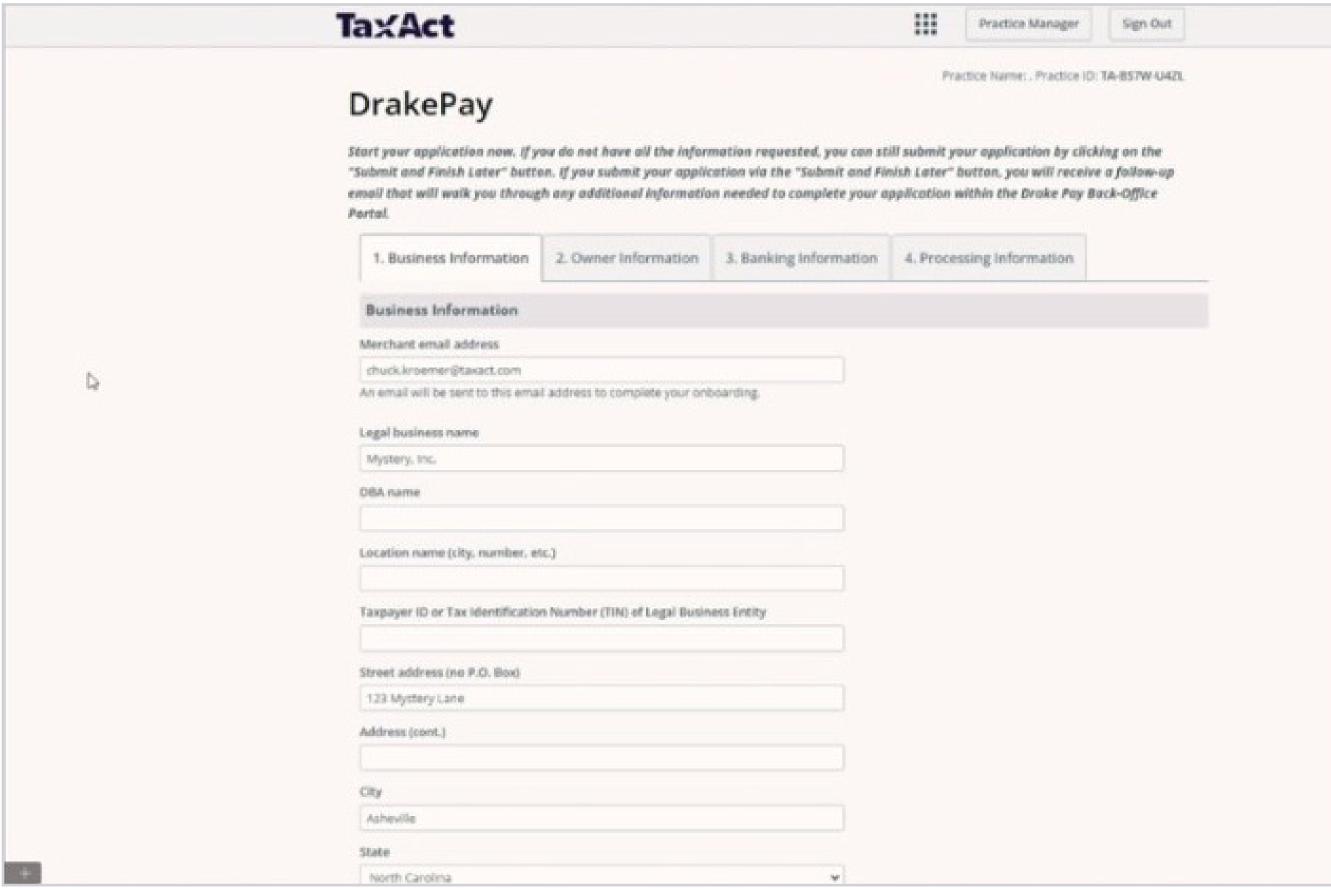


Applying for Integrated Payments

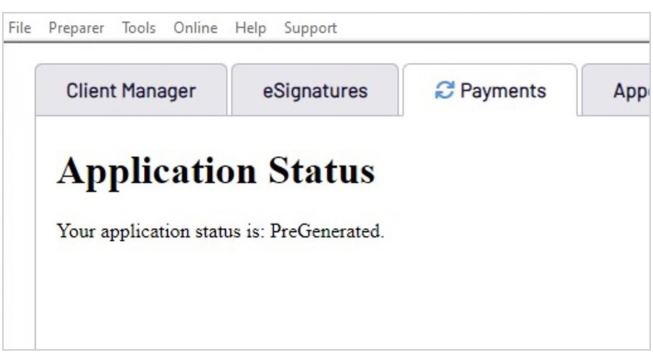
After clicking the button, select “Apply Now”



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

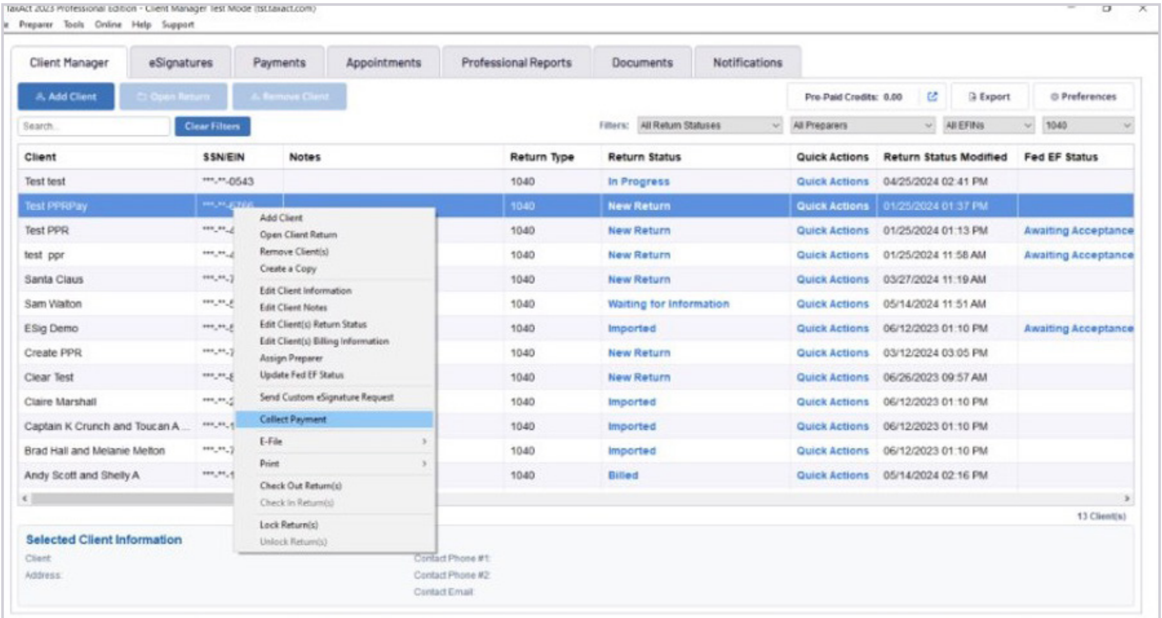


It may take 1-3 business days for your application to be processed once complete. You can check the status of your application in the Practice Manager dashboard, or by visiting the new “payments” tab in the TaxAct Professional Software.

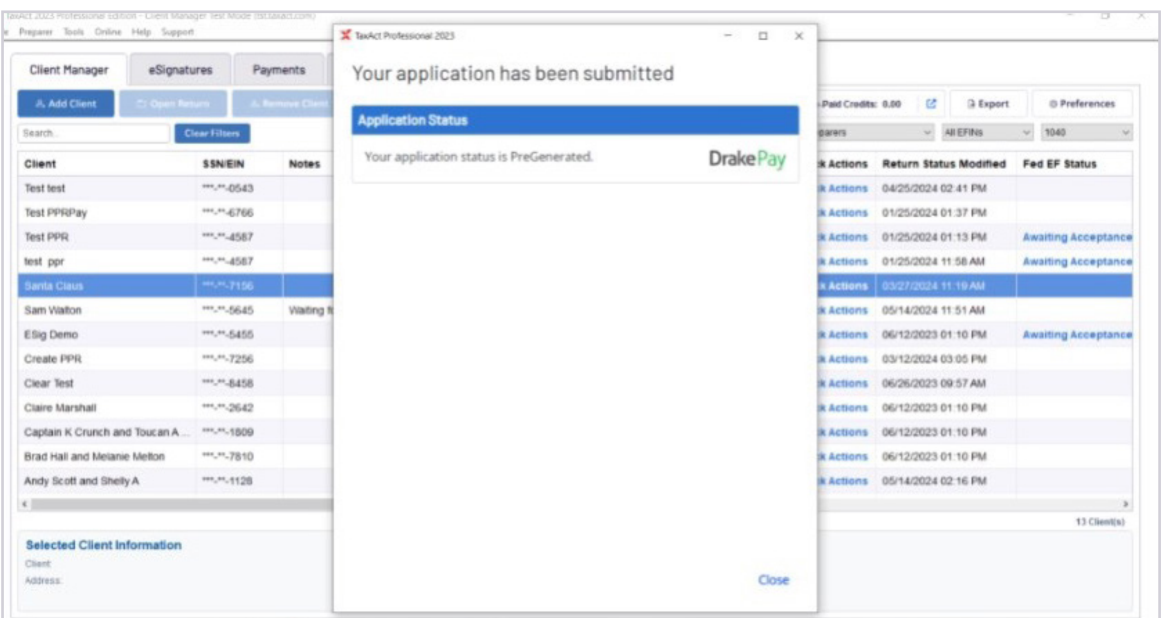


Collecting Payments

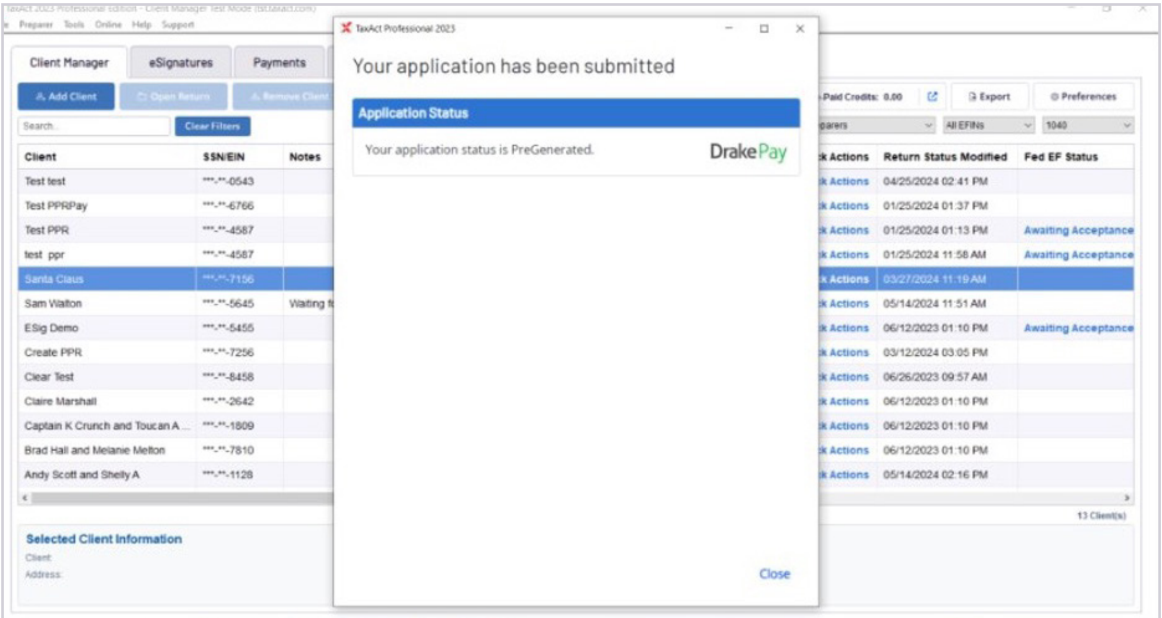
To collect a payment from a client with a balance due, go to the "client manager" tab and right click on a client. Then click the "Collect payment" option.



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

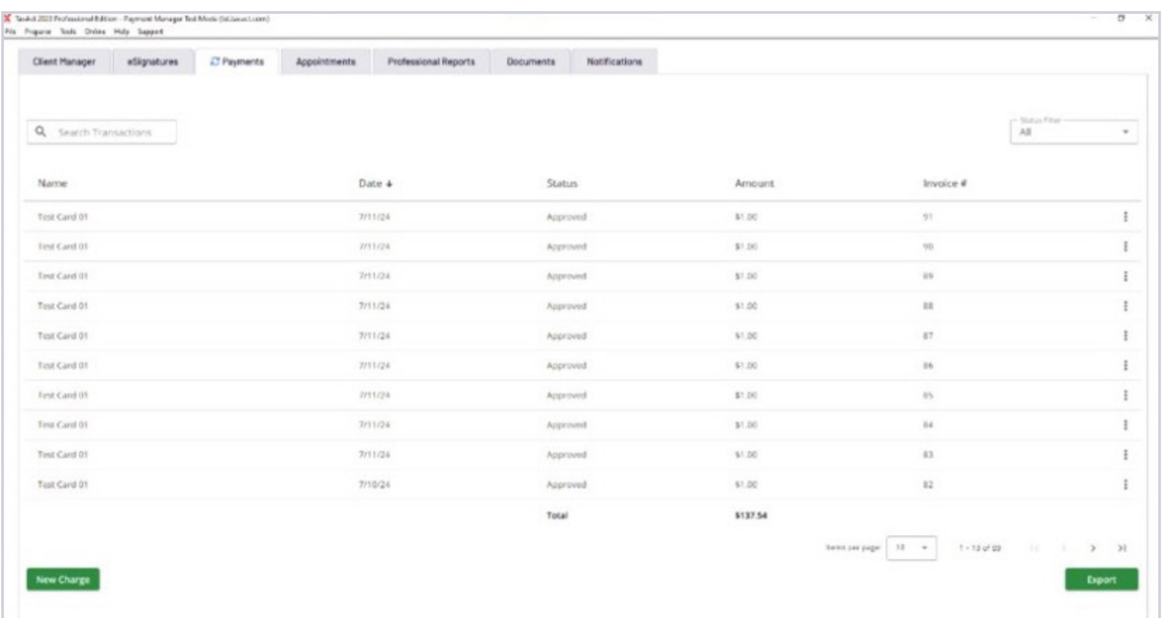


Assuming your application has been accepted and approved, simply fill out the client card information including the Amount to Pay, which is the amount that will be charged. Then, press “Process Payment”.

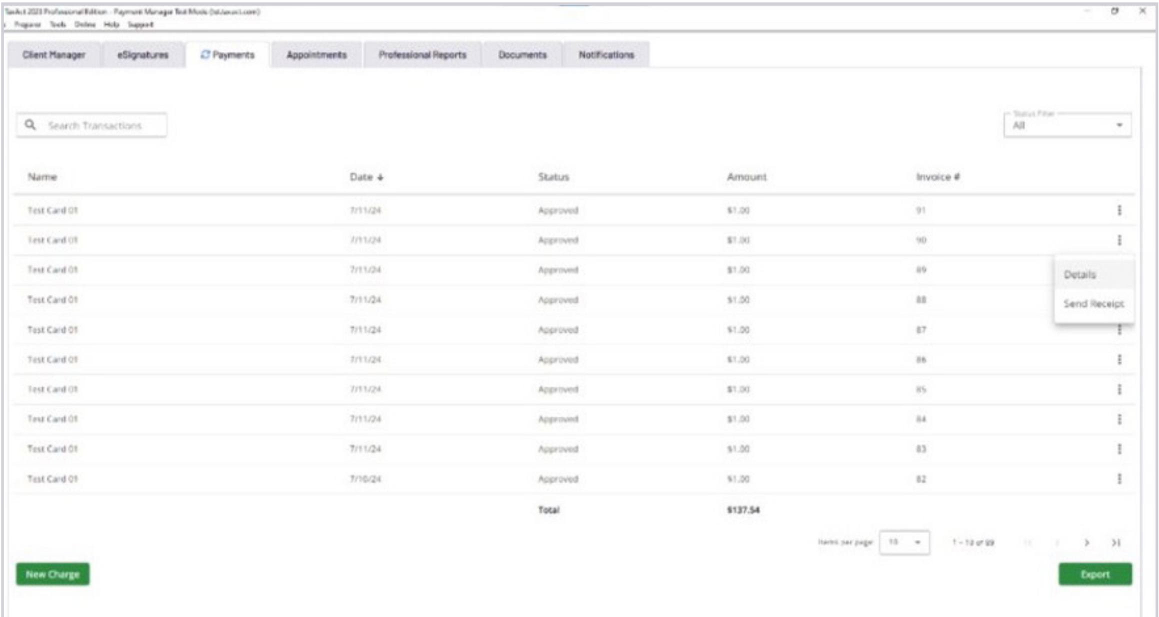


Payments Tab

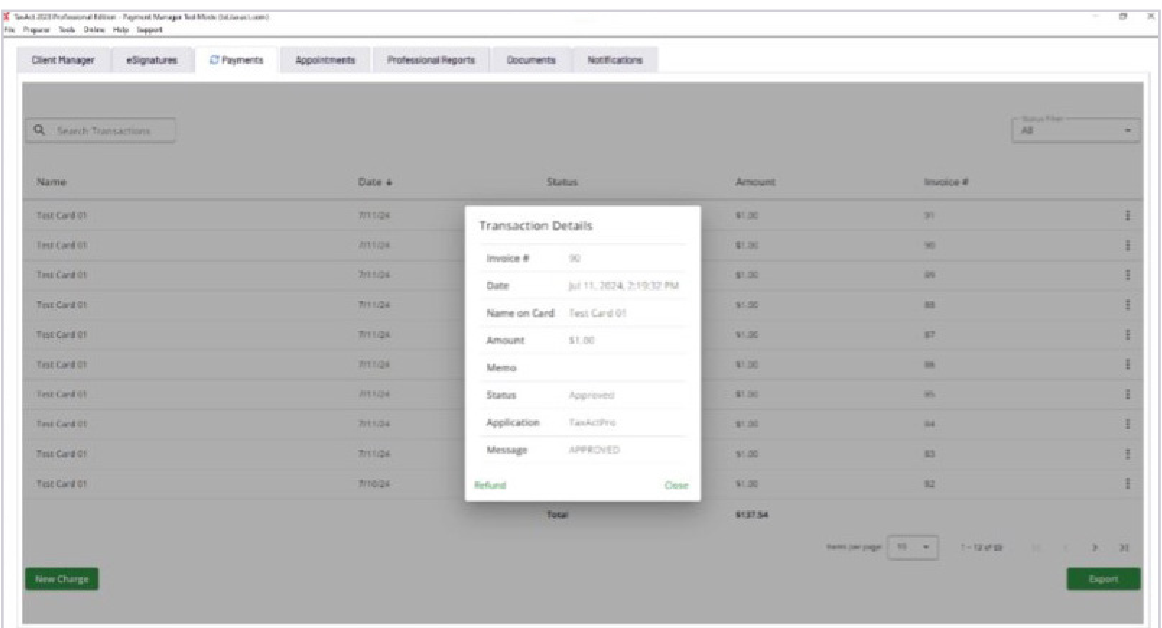
A successful payment will be displayed in the Payments Tab. Here, you can view all previous payment history.



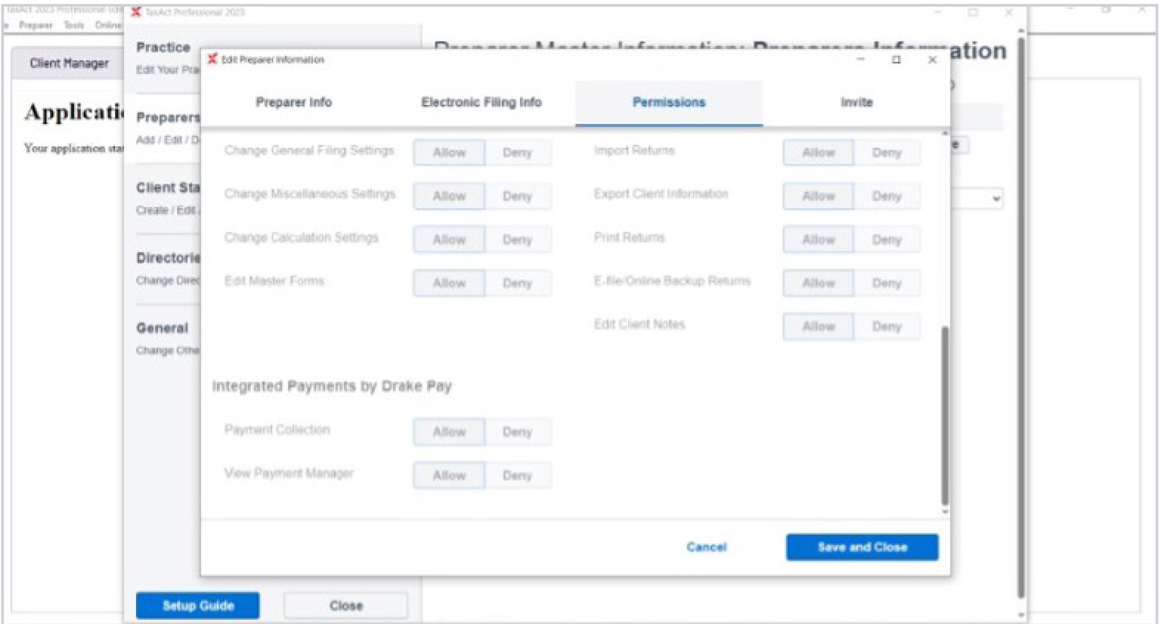
To refund a payment, click the 3 dots next to the desired payment and click “Details”.



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



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



Additional Resources

www.taxact.com/professional

professional@taxactservice.com

(319) 371-2682

Professional Reports

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

Refer to the Professional Reports Guide to learn how to access the reports and navigate through the system.

Client 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 taxact.com/professional/bank-products for more information.