



TAXCOMM



Tax Client Quick Start Guide

TaxComm is a communications platform that your Tax Professional(i.e. CPA, EA, Etc) may utilize to help facilitate the tax preparation of your tax return remotely. With TaxComm you will be able to upload the needed tax information documents like Forms W-2(s), 1099(s) and other supporting tax information. You will also be able to sign your tax returns, meet with your tax professional via video conference, message your tax professional, and download your completed tax return.

Your tax professional is the account provider so the service is completely free to you. If you have questions about how to use certain aspects of TaxComm please contact your tax professional.

All though TaxComm is an internet web page, and everything talked about here can be accomplished on your mobile device, we recommend using a PC for initial registration and setup as you will be able to see more information and general ease of use. TaxComm does provide a mobile application that can be downloaded for iPhone and Android platforms that will be talked about later in this quick start guide but initial registration needs to be completed from our internet web page.

Your tax professional will send you an invitation email with a link. Registering with this link is what links you to the correct tax professional. **Please do NOT go to TaxComm.net and register** through the new client link. This is for tax professionals to register. If you have accidentally registered without using the emailed link, please contact your tax professional and they can start a support ticket to have you linked to them.

Registration

Your tax professional will send you an email with an invitation link. If your tax professional has notified you that this email was sent but you don't see it please check your spam, junk, promotional folders in your email software. Your tax pro can modify the text and send it directly from their email but it will probably look something like this:



Cindy,

I have authorized an account for you with Taxcomm.NET so that we can securely communicate regarding anything related to your taxes. If you can take a minute to complete your account setup then it will give you access to some great web and mobile tools to help you organize and secure your tax information throughout the year.

1. Easily capture and store images of important tax documents
2. Securely meet with me in private virtual meetings
3. When necessary sign documents

To setup your account, just [click here](#)

You can also view our [Client Registration Video](#)

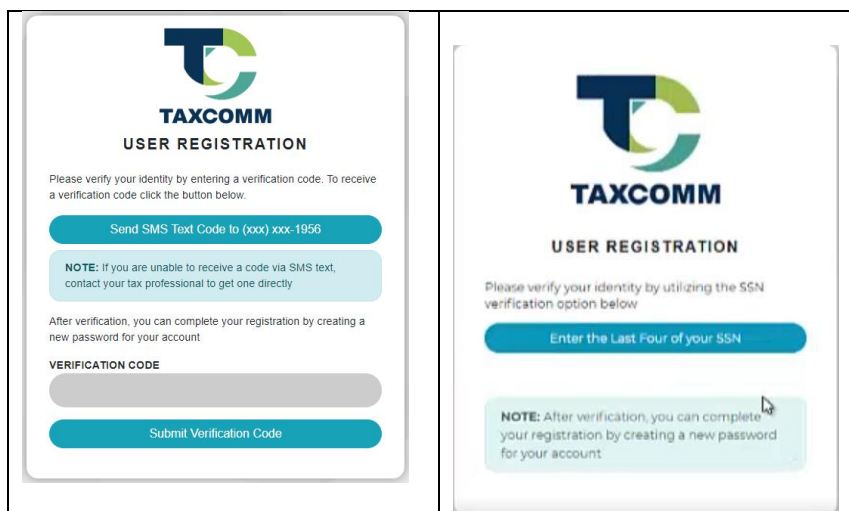
Looking forward to working with you for all of your tax preparation needs.

Regards, Eric Holland

Embedded in the email is a video tutorial that can be watched if you don't understand the registration process.

Click the website link on your computer (not mobile). The client verification page will open.

The software requires two factor authentication to verify that the person receiving the email is the correct person. This is done by either text verification code or your tax professional can give you the code over a phone call, or the last four digits of your SSN. Your tax professional designates which authentication method they want you to use. Depending on your cell phone carrier your tax pro may want to use the SSN method because your carrier is blocking the text verification code. The tutorial video included in the invitation email shows the text method but if your tax pro set it to use the SSN method it will work in a similar fashion.



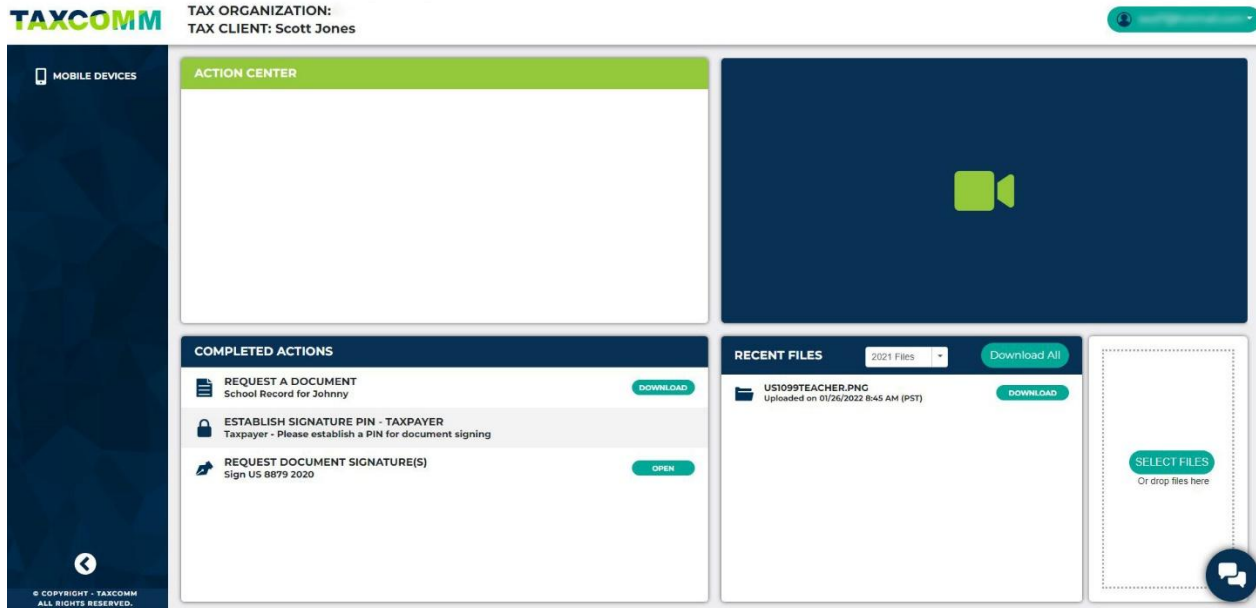
After the verification process the next page will open and ask you to input your own personal password. Instructions for password are listed above the input field.



The screenshot shows the TaxComm user registration page. At the top is the TaxComm logo. Below it, the text reads "USER REGISTRATION". There is an "E-MAIL" field with the value "scwam7-client01@gmail.com". A message states: "Your verification was successful. Please create a password to complete the creation of your new account." Below this are two "PASSWORD" fields, one for the password and one for the "CONFIRM PASSWORD". A "REGISTER" button is at the bottom.

Once registration is successful you will need to log in to the website for the first time using the same email and the password you just created. Review the Terms of Use and Privacy Statement, confirm you have read it, and click submit. This will then open your main TaxComm home page.

Your home page is where you will upload docs, meet with your tax pro, sign docs, etc. At this point you can also download our mobile app and sync it to your account and do all of the same things using our mobile app. How to sync and use the mobile app will be discussed later.



The screenshot shows the TaxComm user dashboard. At the top left is the TaxComm logo. To its right, it says "TAX ORGANIZATION: TAX CLIENT: Scott Jones". There is a user profile icon on the right. The dashboard is divided into several sections: "MOBILE DEVICES" on the left sidebar, "ACTION CENTER" at the top, "COMPLETED ACTIONS" with three items: "REQUEST A DOCUMENT" (School Record for Johnny), "ESTABLISH SIGNATURE PIN - TAXPAYER" (Taxpayer - Please establish a PIN for document signing), and "REQUEST DOCUMENT SIGNATURE(S)" (Sign US 8879 2020). "RECENT FILES" shows a file "U51099TEACHER.PNG" uploaded on 01/26/2022 8:45 AM (PST). There is a "SELECT FILES" button and a "Download All" button. A chat icon is in the bottom right corner.

To come back to this page simply go to Taxcomm.net and click the "User Login" button.

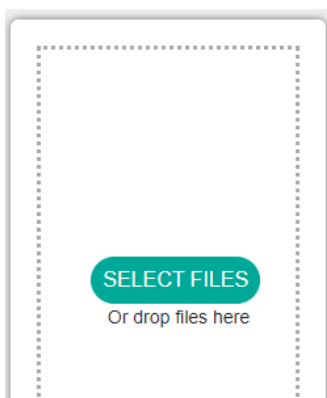




Working With Home Page

On this one page I can download and upload documentation and tax returns, I can securely chat with my tax pro, I can complete any actions that my tax pro has sent like requesting a specific document or sign Form 8879, and video conference. Let's expound on each of these items in a little more detail.

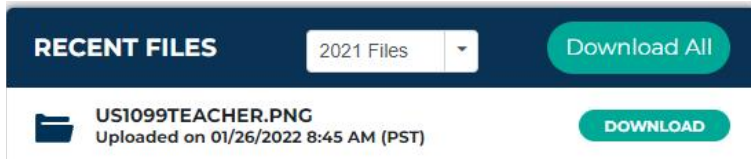
1. **Document Upload** – To upload a document simply drag the applicable file into the select files box. Or if you prefer you can click the "Select Files" button and browse to where the file is located.



File types are typically PDF's but image files are supported as well.

Note: Only you the TaxPro has the option to DELETE an uploaded file.

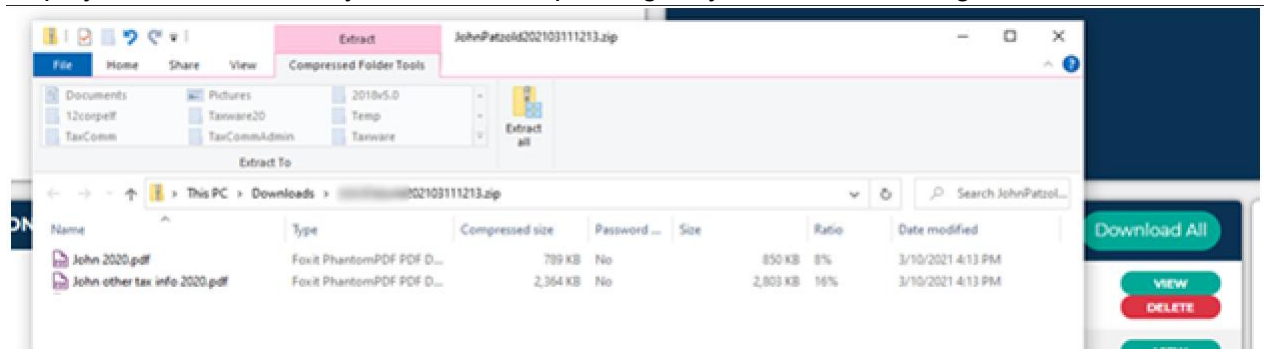
2. **Viewing/Downloading documents** – If the file is a PDF, click the “View” button on the file that you would like to view and it will open the file and view it from within TaxComm. All other files, the file will need to be downloaded and viewed per your internet web browsers preferences to open and preview/print/save locally.



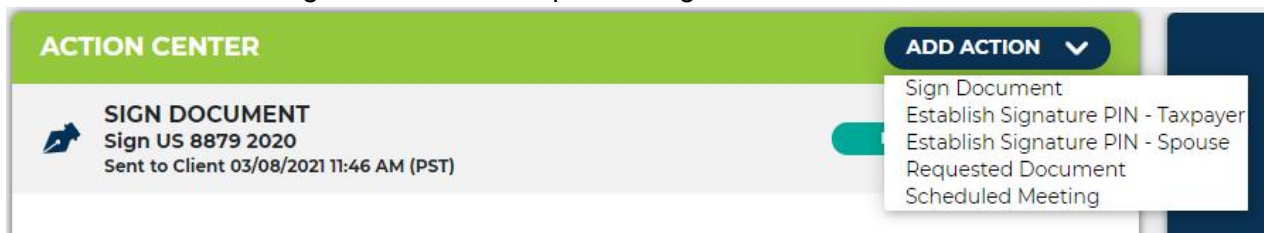
Most browsers default to download and display in the lower left corner of your browser application.



If you would like to download “All” the files, select the “Download All” button and TaxComm will Zip all of the files up into one file that will either open automatically or display in the lower left of your browser depending on your browser settings.



3. **Actions** – This is what we titled the events that the tax pro needs you to accomplish. Examples are to sign a document or form, request a school record or driver’s license that will be used for due diligence or state compliance regulations.




After an action is finished, your tax pro will be notified and the action will be moved to the “Completed Actions” panel.

COMPLETED ACTIONS		
	SIGN DOCUMENT Sign VA8453	OPEN DELETE
	SIGN DOCUMENT Sign Form 8879	OPEN DELETE
	SIGN DOCUMENT Sign Form 8867	OPEN DELETE

Establish a signature PIN – If your tax pro would like to use an electronic signature PIN as the signature option they will send you an action request to establish your PIN.



TAX ORGANIZATION: Tax Organization
TAX CLIENT: Scott Jones

 MOBILE DEVICES

Establish Signature PIN - Taxpayer

Enter a unique PIN code that will be used to sign documents sent to you by your tax professional. The PIN must be at least 5 digits.

Taxpayer PIN

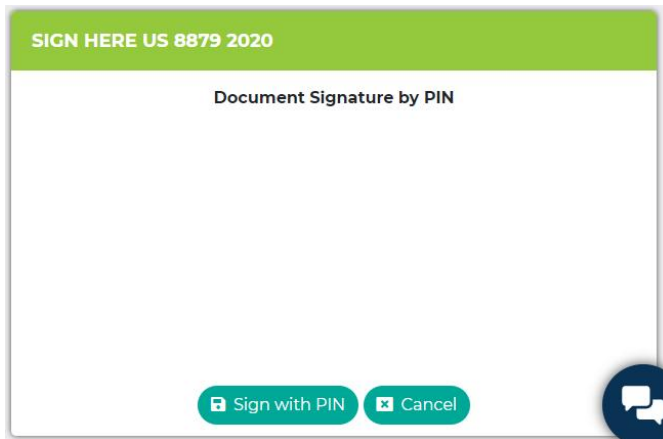
PIN Must be at least 5 digits

PIN Confirmation

[Save](#) [Cancel](#)

Establish your PIN(s), click SAVE and that action will be completed. Now that you have an established signature PIN, during a document signature action, your tax pro can change signature type from “Signature PAD” to “Signature PIN”. When you the tax client opens the signature action, you will now have the option to “Sign with PIN” verses signing with their finger or mouse.



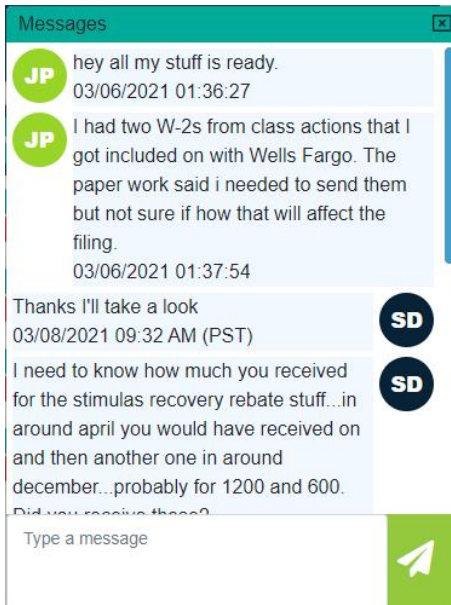


Regardless of which signature method is utilized, if your tax pro sets a spouse identity both signatures will be required to complete the action request.

4. **Securely Chat** – To access the messaging system click on the chat bubble in the lower right of the page.



The message window is fairly straight forward but the nice thing about these chats is that they are all done within the parameters of the secure system. These are not raw text discussions that could be viewed by any public cloud chat system.



5. **Video Meeting** - The last action on your home page is video meeting. Your tax pro will create a meeting action item. When you are ready to meet and the tax pro has started the



Tax Client Mobile Application

TaxComm provides a lite mobile application for tax clients to use for uploading documents and signing the requested signature documents. This is a great feature for tax clients to use especially if they don't have a scanner or don't have access to electronic copies or their tax documents like their W2's or brokerage statements.

Uploading documents from the mobile application makes it so they can take a picture of the applicable documentation and have that picture automatically get uploaded to their linked TaxComm Account.

To get started they will need to download the free mobile application from the applicable link below.

Android device Google Play Store:

<https://play.google.com/store/apps/details?id=net.taxcomm.taxcommmobile.android>

Apple Device:

<https://apps.apple.com/us/app/taxcomm-mobile/id1545085703>

We have a quick how-to video to help them with this on our FAQ page

<https://youtu.be/jMO0oLbeSYY>

After the application has been installed the tax client needs to login to their TaxComm account and pair the device to their account. Click MOBILE DEVICES in the upper left corner.



This will open the mobile devices page. Click the ADD DEVICE button.



Give your device a name, enter the cell phone number of that device, and click SEND REGISTRATION CODE

MOBILE DEVICE

[← Return to Device List](#)

This device is not paired. To begin the pairing process, enter a device name and mobile phone number.

Device Name: Mobile Device / Cell Number:

[Send Registration Code](#)

Check your mobile device for the code that was just sent, enter that code into the verification box, and click APPLY REGISTRATION CODE button.

Enter the Verification Code that you Received on your Mobile Device

[Apply Registration Code](#)

The program will then display a QR barcode

MOBILE DEVICE

[← Return to Device List](#)


This device is not paired. To begin the pairing process, enter a device name and mobile phone number.

Device Name: Mobile Device / Cell Number:

Enter the Verification Code that you Received on your Mobile Device

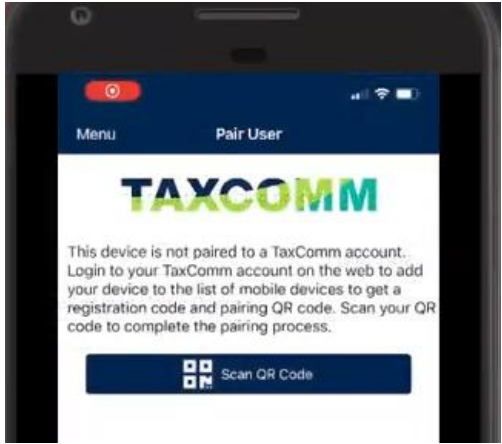
[Apply Registration Code](#)

Registration code successful. Open the TaxComm mobile app and scan the QR code Below to complete the pairing process

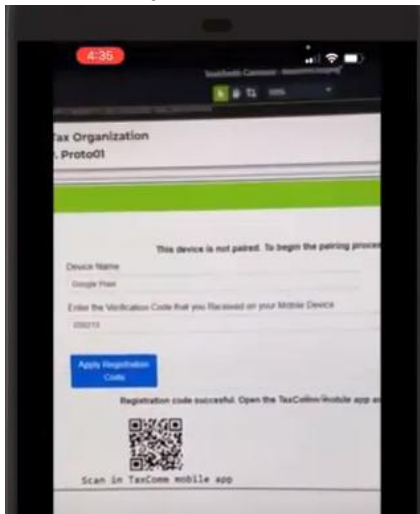


Scan in TaxComm mobile app

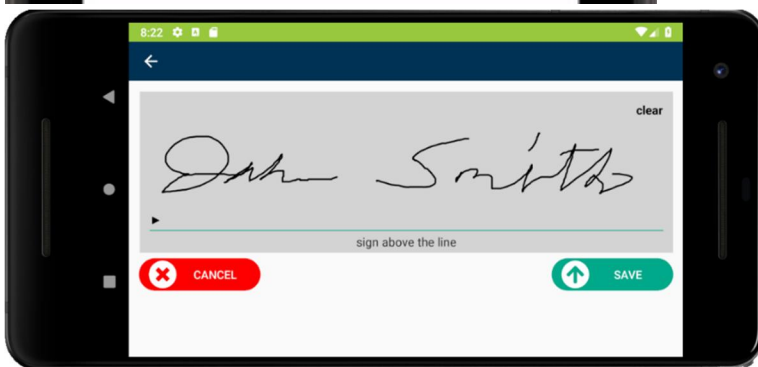
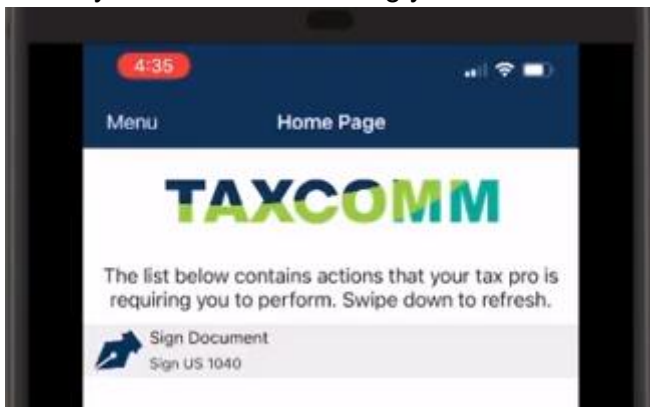
Open the TaxComm mobile application and select the button that says SCAN QR CODE

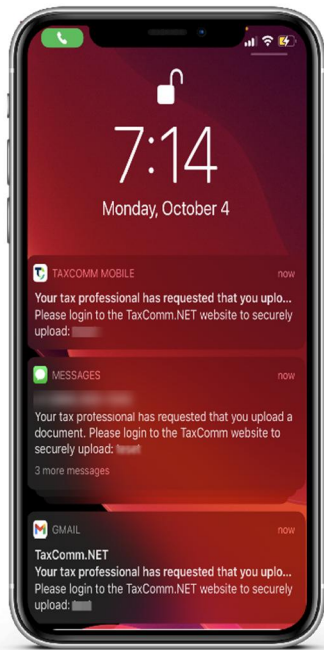


This will allow you to scan the QR code on the TaxComm web page using your phones camera. Make sure you allow TaxComm to use your camera and access your photos.



After you have scanned your QR code your phone is now paired to your TaxComm account where you can now start using your mobile device to upload and sign documents.





TaxComm Additional Resources

For additional recourses and how to videos please check out our FAQ page

<https://taxcomm.net/faq>