

3

EASY STEPS FOR DIGITAL TAX SEASON SUCCESS!

Accounting+Plus

Ready to File? Use our Tax Portal
Make your tax season simpler and
smoother by following these steps!

accountingplusinc.com

Tax Season can be Easy as 1-2-3!



1

Setup Tax Portal & Gather Docs

- **Tax Portal Invite**-- Check your email for a tax portal invite-- it only takes seconds to setup a password
- **Gather your Documents**-- make a list & gather them on your device or computer
 - **Download copies when possible**-- ask for paperless/digital copies of forms-- like W2s, 1099s & investment statements to save scan time
 - **Scan paper copies with your device**-- download a Free Scan App & snap pictures of documents

2

Upload Docs in Tax Portal

- **Upload your Documents**-- Once you have gathered everything use our secure tax portal to upload them
 - **Go to Accountingplusinc.com/Client Center/Tax Portal**
Login or use Guest if you didn't get an invite
 - **Watch [portal basics video](#) for more info**
- **Keep originals/copies handy** in case of questions

3

Tax Preparation & Filing

- **Check your email**-- we will email you questions & results
- **Sign Docs**-- we will send E-Signature documents
- **Pay Bill**-- Click *Pay Bill* on our site or in the Tax Portal

Once the return is prepared, signed & paid for we will e-file the return & you will get an acceptance email from IRS!

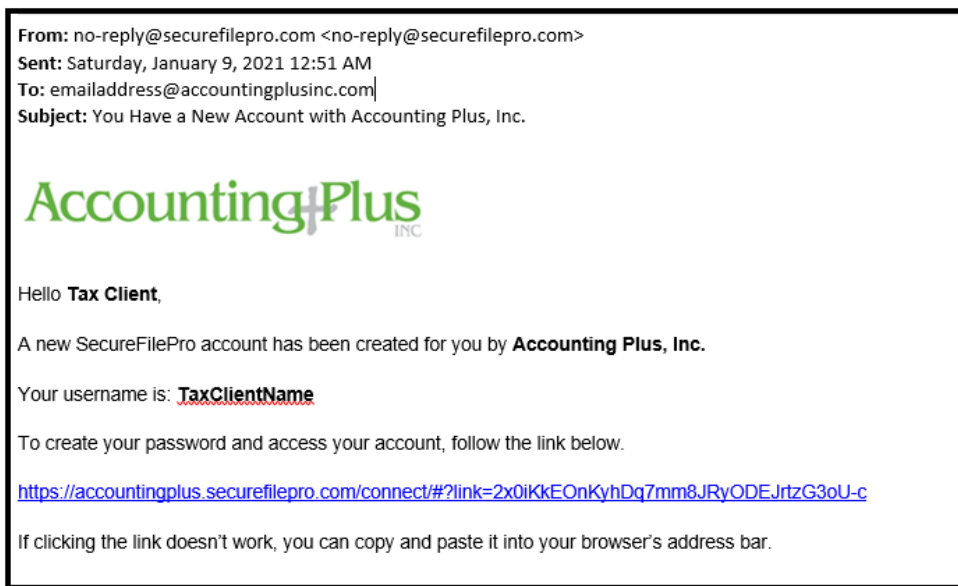
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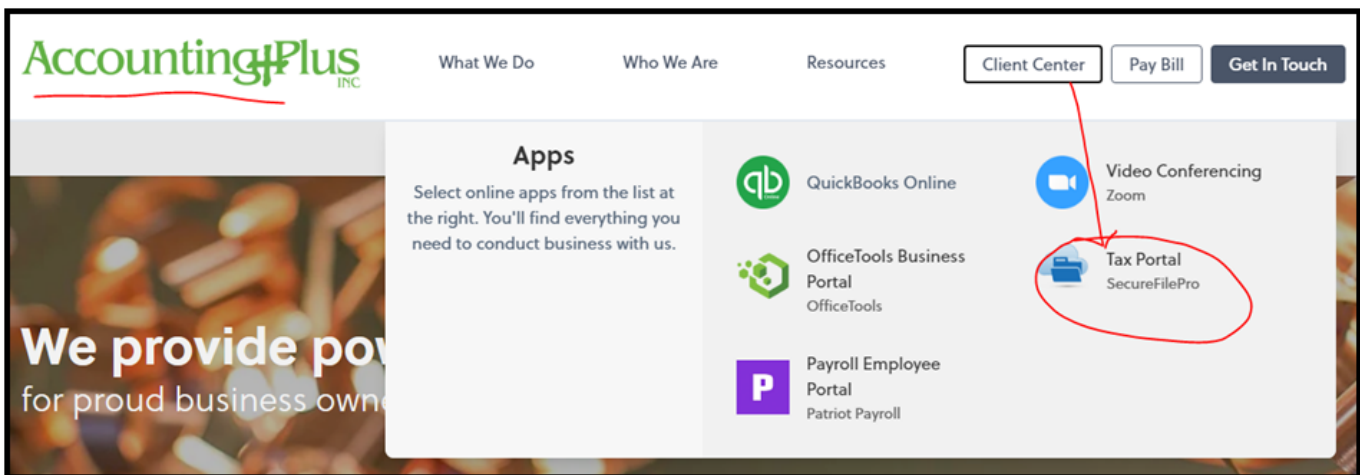


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Tax Season can be Easy as 1-2-3!

3

Tax Preparation & Filing

- **Check your email**-- we will email (or call) you questions, missing items & results
- **Sign Docs**-- When the return is complete, you will get an email that E-Signature documents are ready to sign
- **Pay Bill**-- Click *Pay Bill* on our site or in the Tax Portal to pay for tax preparation and complete the process

Once the return is prepared, signed & paid for we will e-file the return & you will get an acceptance email from IRS!

The Tax Portal will store your uploaded docs and copies of the completed tax return, for secure access 24/7 year-round!

If you would like prior year returns uploaded to the portal, simply ask your preparer.

