

How to Login to TaxCaddy

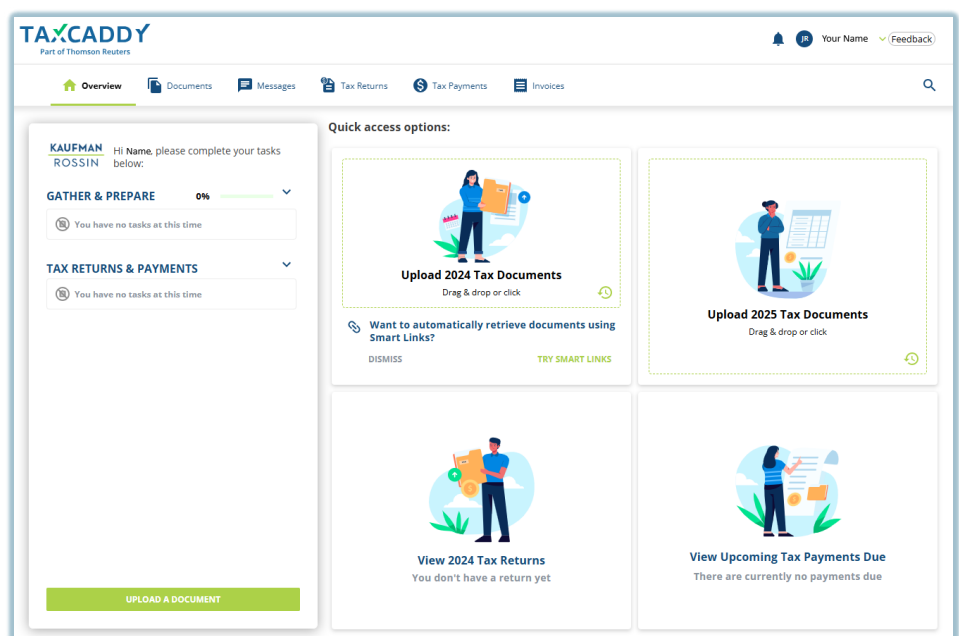
TaxCaddy Tutorial

Logging In

- 1. Go to the TaxCaddy website:** Open your web browser and go to www.taxcaddy.com.
- 2. Click on "Login":** You'll find a "Login" button at the top-right corner of the homepage. Click on it.
- 3. Enter your credentials:**
 - **Email Address:** Enter the email address associated with your TaxCaddy account.
 - **Password:** Enter your password. If you've forgotten it, you can click on "Forgot Password?" or "Send me a New Login Link" to reset it.
- 4. Click "Sign In":** After entering your credentials, click the "Sign In" button to access your account. Note that a two factor authentication may be sent to the phone number associated with the account. If you do not wish to receive that every time you log in, there is a box you can check to disable that additional verification.

How to Use TaxCaddy

Once logged in, you'll be on the "Overview" dashboard. Here's a guide on how to navigate the tool:



1. Upload Your Documents

- **You can either upload your documents directly on the dashboard or click on the “Documents” tab:** In either place, you can drag and drop or click to upload.
- **Upload options:** You can upload files directly from your computer or use your phone to take pictures of paper documents. TaxCaddy supports various file types like PDFs, Word, and Excel.
- **Organize your documents:** When you start uploading, you can categorize your documents (like W-2s, 1099s, etc.) by selecting the appropriate document type from the dropdown or add without categorization by clicking “Decide Later.”

Upload Documents

Select a category and/or tax year you would like the document to be uploaded to.

TAX YEAR
2024

Category

SEARCH A CATEGORY

Show Popular Show All

- W-2 (Wages)
- 1099s (Banks and Brokerages)
- Medical Expenses
- 1098s (Home Mortgage Interest)

Files to Upload (1)

DELETE.pdf

Drag and drop or click to upload documents

CANCEL DECIDE LATER

2. View Your To-Do List

- On the “Overview” dashboard, you’ll see any requested tasks from your tax professional. These tasks might include requested documents, completing a questionnaire or others.

KAUFMAN ROSSIN Hi Name, please complete your tasks below:

GATHER & PREPARE 0% ▬ ▾

You have no tasks at this time

TAX RETURNS & PAYMENTS ▾

You have no tasks at this time

UPLOAD A DOCUMENT

- **Upload missing documents:** For a clear view of requested items, click on the “Documents” tab. If there are any missing documents on your “Requested Items” list, upload them by clicking on the requested item or add them to the drag and drop area. Note that some requested items are fillable forms such as a Schedule E for Rents and Royalties. Click on the requested item to fill out the form and click “Submit” when done. If a document was already provided or does not apply this year, you can click the three dots next to the requested item to mark it as such.

View Requested Items and Manage Your Documents

Requested Items (1)

Uploaded Documents (2)

 Drag and drop or click to upload documents like W-2s, 1099s, 1098s, Schedule K-1s, etc.

Documents Requested (1)

Type	Document Name	Requested On	More Options
	Test Sch. E (Rents and Royalties)	03/08/2024 - 08:24 AM	 ...

 Upload a Tax Document Not Listed Here

3. Share Documents with Your Tax Professional/Message them

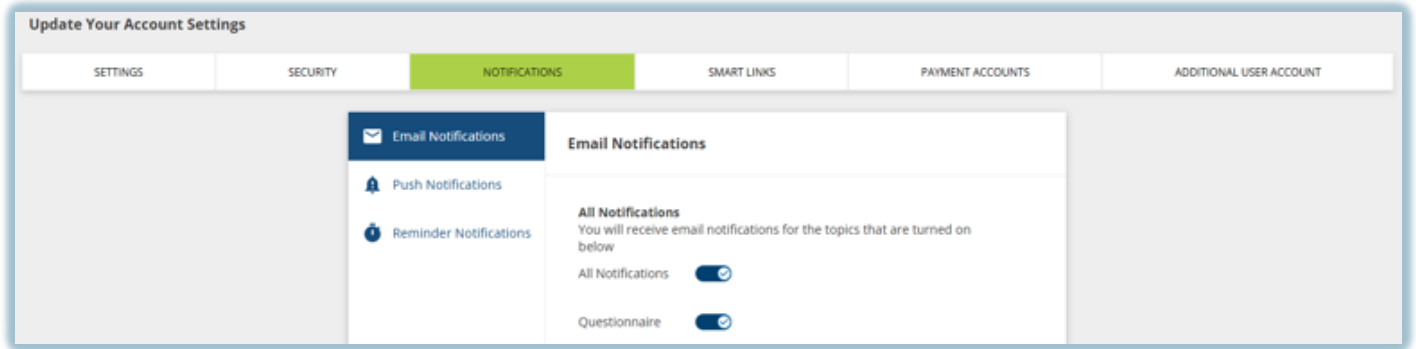
- Once your documents are uploaded, your tax professional can access them. If any further information or clarification is needed, they may ask for additional documents or provide feedback via the app. If you have a question or comment for your tax professional, you can click the “Messages” tab to communicate.

4. Use the Mobile App

- TaxCaddy also has a mobile app for easier document upload and management on the go. You can download the app from the **App Store** (for iOS) or **Google Play Store** (for Android).

5. Check Notifications/Add an additional user

- **Get alerts:** Ensure you enable notifications to be alerted whenever your tax professional requests additional information or uploads documents for review. Notifications can be accessed by clicking your name in the upper righthand corner of the dashboard and then clicking "Settings." Note that this is also where you can click to add an additional user, such as a spouse or trusted advisor.



Need Help?

- If you're having trouble logging in or using TaxCaddy, please reach out to your Kaufman Rossin tax professional for assistance. Alternatively, you can contact the TaxCaddy customer support directly by calling (833) 829-3375. Finally, if you click your name on the dashboard, you can access help center articles as well as a brief tutorial for additional features.