

Best Practices, Tips and Tricks for using TaxCaddy 2019

Hertzbach will be utilizing TaxCaddy (taxcaddy.com) to help you upload all tax related documents, answer important questionnaires, and sign your engagement letter. The TaxCaddy will not replace your NetClient CS portal where you access your tax return but will help us organize the documents, we need to complete your tax return.

In today's ever-increasing online world, everyone is responsible for maintaining the security of their electronic accounts. In accordance with the Tax Caddy user terms of service, you are responsible for maintaining the confidentiality of your password. If you become aware of any unauthorized use of your account, you agree to notify Tax Caddy immediately at the email address - security@sureprep.com and Hertzbach at taxcaddy@hertzbach.com. We recommend that you change your password regularly and turn on Two Factor Authentication, which can be found in the Settings options located in your user profile.

Please use Chrome, Safari, Firefox, and/or Microsoft Edge. Internet Explorer is not supported.

CONNECT – Please be sure to click the Accept Connection button on the Overview screen to establish the connection with us.



PROVIDE YOUR TAX INFORMATION – Please review the list of document request and upload the listed tax documents as you receive them and answer the questions to ensure we have the information we need to prepare your return.

- Keep file names short (less than 60 characters in length)
- When adding tax documents, particularly using the drag and drop box, please confirm that you are adding them to the current tax year, 2019.
- Scan or save your tax documents as PDF files. **Please don't** upload pictures (JPEGs) of your documents. If you wish to take pictures, use the TaxCaddy app for iPhone or Android rather than uploading a picture via the web browser.
- Organizer – If you would like a copy of your 2019 organizer with prior year amounts as an additional reference, please email us at taxcaddy@hertzbach.com to let us know and we will provide one to you.

SET UP "SMART LINKS" – Take advantage of TaxCaddy's ability to automatically download tax documents from your banks and other financial institutions by setting up Smart Links. As documents such as your 1099 are posted they will be automatically retrieved and placed in your TaxCaddy account.

- If you have utilized the Smart Links option to auto retrieve documents, please remember it is your responsibility to ensure the expected documents were retrieved.
- Remember to check your Smart Links to make sure they are relevant and updated with new passwords, if your password changed for a specific account it will not retrieve documents

FILL IN FORMS – Please complete the Schedule A and Estimated Taxes (if you itemized or paid any estimates in the prior year). Also, we have included Schedule C (Business) or E (Rental). Please complete if you have any of these items.

- At the top right corner of the form, there is a save button. Please utilize the save button once you have completed the fill in form. 
- Hit the green Mark Reviewed button to let us know you are finished preparing the document. 
- Remember to only select the reviewed/sign option once you are finished providing information. This will move your document to the uploaded documents tab and will disable the fillable fields from being edited
 - a. If you need to add additional information, please upload a word document or follow up with an email to your Hertzbach partner.
- **Schedule C, E, & F all have an auto save feature included with the form, so there is no need to hit the save button for those forms only**

TELL HERTZBACH YOU ARE DONE - When all documents are uploaded, and the questionnaire is complete, utilize the "Done Uploading" button to notify us that you are ready for us to begin preparation.



- Please only hit this button when you are completely finished uploading all your tax documents for 2019. If you happen to have a few extra documents come in after hitting "Done Uploading" you can still upload more documents to your account

SUPPORT – If you have technical questions about your TaxCaddy account or you're experiencing trouble accessing your account (e.g., if you forgot your password).

- Email Hertzbach's TaxCaddy address – taxcaddy@hertzbach.com
- If you have any questions or the online support does not resolve your issue, please email address above or contact your Hertzbach partner.