

TaxCaddy Specialized Resource

TaxCaddy FAQ

Starting your TaxCaddy account is just the beginning of a positive, efficient tax filing process. If you have any questions regarding TaxCaddy, we encourage you to contact your trusted advisor. In the meantime, we've put together some commonly asked questions to help you navigate your TaxCaddy experience.

Q: Do I need a specific internet browser to access TaxCaddy?

A: TaxCaddy works best on Google Chrome, but is also supported on Firefox, Edge, and Safari. TaxCaddy is not supported on Internet Explorer. When using taxcaddy.com on a tablet, we recommend viewing in landscape screen orientation for best results.

Q: How do I get the TaxCaddy mobile app, and do I need it?

A: The TaxCaddy app for iPhone and Android is a must-have companion. Using the app, you can photograph paper documents and upload them as you receive them or message your tax professional while on the go. The app, while not required, offers invaluable features for your tax filing process. Use the links below for help downloading the app.

[Download TaxCaddy for iPhone](#) · [Download TaxCaddy for Android](#)

Q: Can I allow my spouse access to my account?

A: You have the option to invite your spouse, or one other person, to be an additional user on your TaxCaddy account. Additional users can upload documents, view tax documents you upload and review certain tax documents uploaded by your tax professional. Adding an additional user as a spouse also lets them sign spouse-related documents. You can revoke an additional user's access at any time. [Click here](#) to learn how.



TaxCaddy User Tips

We want to work as a team to get your return prepared as efficiently as possible. Review the suggestions below to make the most out of your TaxCaddy tool.

- ▶ Use TaxCaddy's mobile app photo-scan feature to photograph your documents, instead of using your smartphone's camera application. TaxCaddy converts photos to PDF images that capture high-quality uploads to your account. Keep in mind, it's best to upload any PDF documents directly, especially brokerage 1099s, by dragging and dropping the PDF into your account.
- ▶ Drag and drop any documents you've received electronically directly to your TaxCaddy account, e.g., brokerage 1099s. This eliminates the need to print any of these documents and retains better image quality.
- ▶ Upload each document only once. If the same document applies to another requested item, simply mark that item as "Already Provided" to avoid uploading duplicate copies.
- ▶ Whenever possible, set up Smart Links for all of your government tax documents to ensure we receive your tax documents as soon as they're available from your institution.
- ▶ Invite your spouse to join your account prior to the delivery of your tax returns. This allows both of you to use the electronic signature option in TaxCaddy for signing your e-file authorization.
- ▶ You can select "Reply With Amount" for any document requested. This feature is especially helpful for charitable contributions and medical expenses. Keep in mind, you should retain for your records any written acknowledgment from the charity for contributions of \$250 or more. For purposes of preparing your tax return, we do not need such acknowledgment letters for our files; uploading a summary of all contributions is sufficient.

TaxCaddy Support

Many resources, such as visual tutorials and support staff, are provided at TaxCaddy's Help Center.

- ▶ View tutorials on how to get started
- ▶ Access the knowledge base with various visual tutorials

If you need additional help, you can:

- ▶ Submit a ticket from TaxCaddy or the Help Center
- ▶ Email support@taxcaddy.com

Support hours are from 9 a.m. to 7 p.m. CST, Monday through Friday, excluding holidays. Typical turnaround time for support tickets is 24 hours.

Note: TaxCaddy is unable to provide phone support.

