TAX PREPARATION PROCEDURES

This guide will walk you through what you can expect when using JS Grigsby, CPA, PLLC ("JSG") for your current year tax preparation, and will allow for a more streamlined and seamless experience. If you have any questions throughout the process, please do not hesitate to let us know.

1. Client Portal Setup

Our office uses TaxDome to manage the tax preparation process. TaxDome allows us to be as paperless as possible. Each client will have a secure personal account through TaxDome, which will be used for all documentation and communication. TaxDome employs a number of industry standards to keep your data safe, which is why **it is critical to use only TaxDome for document transfer to safeguard your sensitive personal information**.

TaxDome should be used for all communication once you have been assigned a TaxDome account. **Emails and text messages containing sensitive will not be accepted (or acknowledged) and will be deleted immediately.**

Examples of sensitive information includes, but is not limited to:

- Social security numbers or tax ID numbers
- Account numbers – includes bank accounts, credit card accounts, and any other unique account identifier
- Identification Cards – includes driver's license, passport, school ID, government ID, work ID, or any other identification card
- Date of birth
- Addresses
- Passwords
- Medical information
- Financial information – includes income history, payment history, credit scores, receipts, bills, or any other financial related information
- Any requested documentation needed to complete your tax return

Ways to Access TaxDome

- Download the TaxDome app and use on your mobile phone
- Use the direct link from our website – it is a good idea to bookmark the site in your web browser

TaxDome Notifications

- You can receive notifications via email or push notification directly to your phone if you use the mobile app
- In order to receive push notifications on your phone, you may need to go into your settings to allow notification from the TaxDome app
- If you do not receive the TaxDome invitation email, please check your *spam* folder in your email
    - You will need to be sure to add TaxDome to your approved senders if you see that the invitation went to your spam folder

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2. Engagement Agreement & Tax Organizer

Once you have signed-up on TaxDome, you will receive an **engagement agreement (contract)** and **tax organizer(s)**.

To ensure clarity, the engagement letter will outline the nature and limitations of the tax preparation services to be provided.

- It is essential that you read the engagement letter in its entirety
- For couples filing *Married Filing Jointly*, ***both individuals must sign the engagement letter***

Each client will have at least one tax organizer assigned to their TaxDome account.

- Tax organizers must be completed through TaxDome
- If your tax situation constitutes multiple tax organizers, all tax organizers must be completed

Once your tax organizer is complete and all related documents are uploaded, the documentation will be reviewed.

- You will be notified of any illegible or incomplete documentation, and will be asked to re-upload to your portal

3. 50% Retainer

Upon e-signing the Engagement Agreement, you will receive an invoice uploaded to your TaxDome account – ***a retainer fee of 50% is due before tax preparation work will start***

- All major credit cards are accepted for payment
- The remaining 50% will be due upon completion of the tax return and will have a separate invoice

4. Tax Preparation Work

Communication during the tax preparation work will take place through TaxDome, or by phone/Google Meet when needed.

TaxDome allows for notifications via email, as well as push notifications on your phone if you have downloaded the mobile app.

- If you choose not to use the mobile app for push notifications, please be sure to check your email regularly for any TaxDome notifications that may require your response
- If new discoveries are made during the tax preparation work that were not brought to our attention in Step 2, there may be a price increase depending upon the extent of the new discoveries and we will discuss with you prior to beginning the additional work

5. Completion of Tax Preparation & Final Balance

You will be notified through TaxDome upon completion of your tax return and will be provided with a **draft copy** of your tax return.

The remaining balance must be paid in order to e-file your tax return.

- It is vital that you carefully review the draft documents to verify that the information is accurate
    - Any needed edits will be made, and resubmitted to you for review
- If you have any questions during the review, please do not hesitate to contact us through TaxDome
    - We are more than happy to schedule a virtual meeting to review, if needed
- Clients will have fourteen (14) days to pay the final invoice, unless the 14 days extend past April 10th – in that event, the final payment is due by April 10th

6. Final Documents & E-Filing

Upon payment of the final balance, your final documents will be released to you for electronic signature

- Electronic signature is **required** for e-filing
- Your tax return will **not** be submitted to the IRS for e-filing until the required electronic signatures have been provided
- It is expected that you will electronically sign your final documents within twenty-four (24) hours of receiving them to ensure there are no delays in submission to the IRS
    - If the twenty-four (24) hours extends past the filing deadline, JSG will discuss the signature requirements with you accordingly
- You will be provided with an e-file confirmation within ten (10) business days of notification from the IRS

Required Due Dates

If we have not received all of your required tax documents and information by the deadlines below, we cannot guarantee the ability to complete the tax return by the IRS filing deadline – an extension may be needed, which is **not included** in the quoted tax preparation price.

Business Entity Structure (with calendar year-end)	Documents Due to JS Grigsby, CPA, PLLC	IRS Filing Deadline
Partnerships & S-Corps	February 14th	March 15th
Individuals, Single-Member LLCs, & Corporations	March 14th	April 15th

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Useful Links

- **IRS Where's My Refund** – this link is pertinent because once your tax return has been e-filed and acknowledged by the IRS, we have no other status information regarding your tax return other than what shows on the IRS tracking website
    - **Online**
        - Get Refund Status (irs.gov)
    - **IRS2Go Mobile App**
        - IRS2GoApp | Internal Revenue Service
- **Ways to Pay if You Owe**
    - **Online**
        - Payments | Internal Revenue Service (irs.gov)
    - **IRS2Go Mobile App**
        - IRS2GoApp | Internal Revenue Service
    - Mail by using Form 1040-ES along with check or money order
        - ***Mailing a check or money order should be a last resort***
- **TaxDome** – https://jsgrigsbycpa.taxdome.com/

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