

WEB TAX ORGANIZER INSTRUCTIONS

Any questions please contact 616-784-4445 or cpas@miercpa.com

1. You will receive a email from us called **2014 Tax Organizer**.
2. The email will look similar to below. You will first need to register your account to access your tax organizer by clicking on the link in the email.

**MIERENDORF & COMPANY, P.C.
4639 WEST RIVER DRIVE
COMSTOCK PARK, MI 49321
616-784-4445**

JOHN & JANE DOE
8888 MAIN ST
MAIN, MI 49321

Dear JOHN & JANE:

Your personal 2014 Tax Organizer is ready! The Tax Organizer is designed to help you conveniently gather the tax information needed to prepare your 2014 personal income tax return.

To access your tax organizer, you must first register your account here

https://secure.netlinksolution.com/nextgen/#/user/registration/uid/3175674/act_key/91b3b5ea-9887-456c-bc3a-s44370b54c43/?rc=1.

After you register your account, you can log in here <https://secure.netlinksolution.com/nextgen?firm=91413>.

To contact us regarding this message, please call us at 616-784-4445 or email us at cpas@miercpa.com.

Thank you for the opportunity to serve you.

Sincerely,

MIERENDORF & COMPANY, P.C.

This electronic mail message contains confidential and legally privileged information intended only for the use of the recipient. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution, copying or other use of this message is strictly prohibited and is hereby instructed to notify the sender immediately by return email and destroy this copy of this message.

3. After you click on the above link you will be brought to a screen that will prompt you to enter in the last four digits of the primary taxpayer's Social Security Number. It will then prompt you for a User ID and a password. This information has not already been created for you. You will need to create your own User ID and password. After you have entered in the information, click on **Register**.

Welcome

Please register your account.

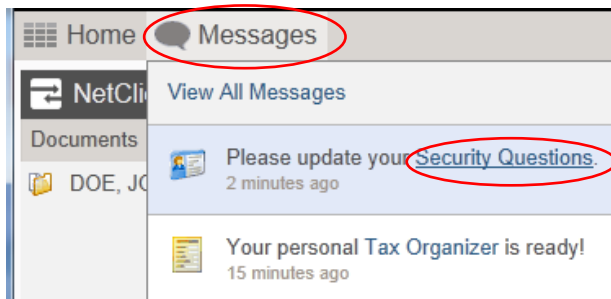
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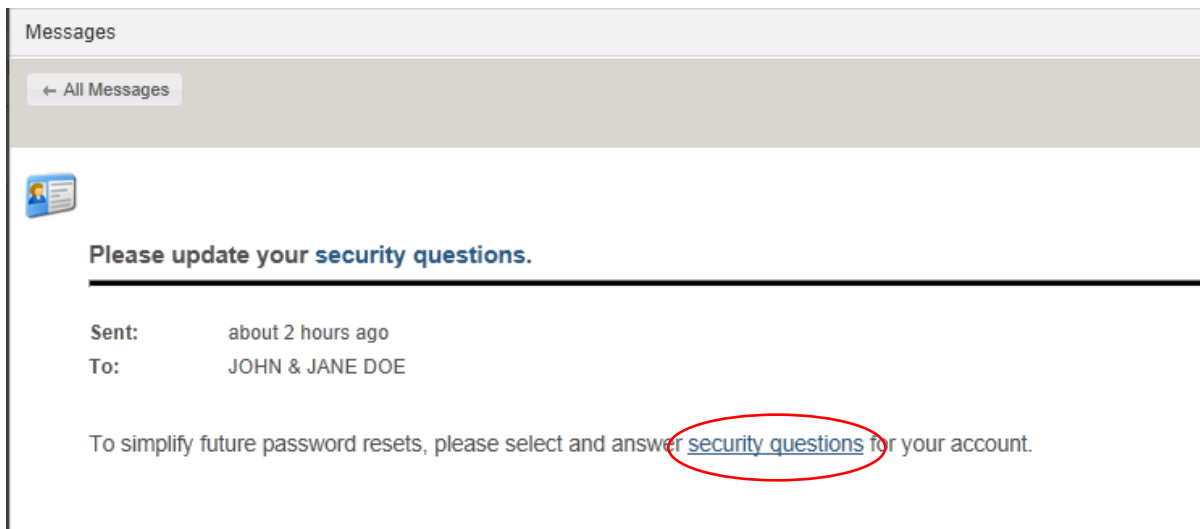
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Register

4. After you have registered you will be automatically redirected to the NetClient CS web portal where you can access your tax organizer.
5. Before you enter in your tax information click on the **Messages** in the top left corner of the screen.
6. Click on the message that prompts you to update your security questions.

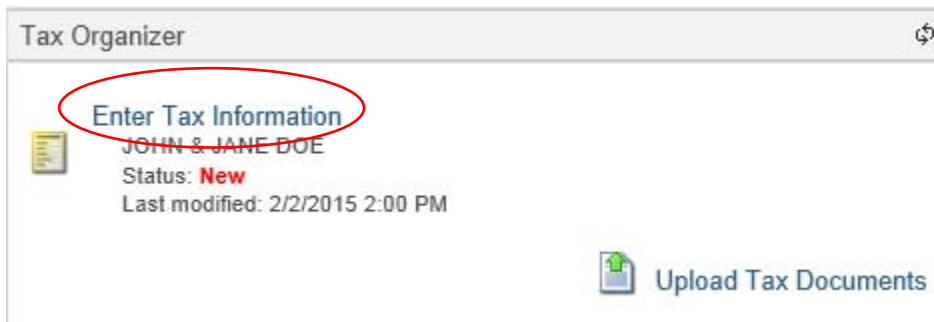


7. After you click on the message you should see a message similar to the one below. Click on the **security questions** link.

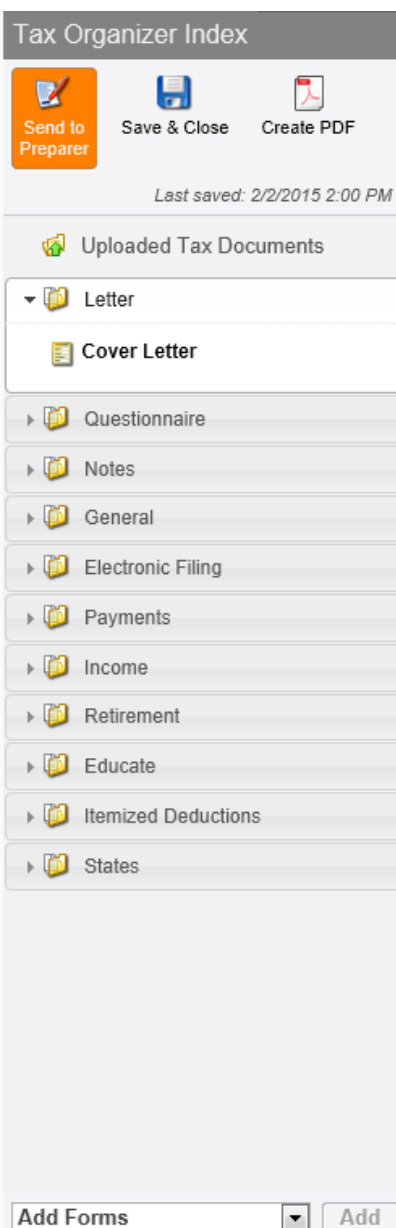


8. After you click on the security questions link you will be prompted to answer four security questions. When you are done entering in your security questions click on **OK**.

9. Once you are done with your security questions you are now ready to begin inputting your 2014 tax information. To start click on **Enter Tax Information**




10. On the left side of the screen you will see the Tax Organizer Index with pages of the organizer under each tab.






- Each tab is easy to follow and easy to input current year information.
- If there are tabs that do not pertain to you, skip that tab and move on to the next
- You will also see the prior year information under each tab. This should help you to know what tabs to complete and which ones you do not have to fill out.
- If you need to add additional information that is not listed on the tabs, you can browse more forms under the Add Forms at the bottom of the screen.
- If you are unsure about a tab or have any questions, you can put them under the notes tab or email or call our office at 616-784-4445 or cpas@miercpa.com

11. Below you will see an example of entering in W-2 information under the income tab.

a Employee's social security number 999-12-1111		Safe, accurate, FAST! Use 		Visit the IRS website at www.irs.gov/efile			
b Employer identification number (EIN) 88-8888888		1 Wages, tips, other compensation 51,000.00	2 Federal income tax withheld 5,100.00				
c Employer's name, address, and ZIP code MAIN STREET SCHOOL 777 MAIN STREET MAIN MI 49321		3 Social security wages 52,100.00	4 Social security tax withheld 2,188.20				
		5 Medicare wages and tips 52,100.00	6 Medicare tax withheld 755.45				
		7 Social security tips	8 Allocated tips				
d Control number		9	10 Dependent care benefits				
e Employee's first name and initial Last name Suff. JANE DOE 8888 MAIN ST MAIN, MI 49321		11 Nonqualified plans		12a See instructions for box 12 D 1,100.00			
		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>	12b				
		14 Other		12c			
				12d			
f Employee's address and ZIP code							
15 State MI	Employer's state ID number 88-8888888	16 State wages, tips, etc. 51,000.00	17 State income tax 2,800.00	18 Local wages, tips, etc. 51,000.00	19 Local income tax 600.00		
				20 Locality name GRA			

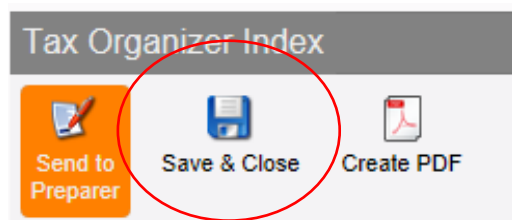
Form **W-2** Wage and Tax Statement **2014** Department of the Treasury—Internal Revenue Service
 Copy B—To Be Filed With Employee's FEDERAL Tax Return.
 This information is being furnished to the Internal Revenue Service.

Tax Organizer Index		Income > Salaries & Wages - DOE COMPANY, INC																																																																									
  		Local wages (Box 18) 100,000 Local tax withheld (Box 19) 150.00 Name of locality (Box 20) Gr Rapids																																																																									
Last saved: 2/2/2015 2:00 PM Uploaded Tax Documents Letter Questionnaire Notes General Electronic Filing Payments Income Salaries & Wages - DOE COMPANY, INC Interest Income Dividend Income Stocks and Securities (1099-B and 1099-S) Other Income Miscellaneous Income Retirement Educate Itemized Deductions States		<h3>Wages and Salaries #2</h3> <p>Please provide all copies of Form W-2.</p> <table border="1"> <thead> <tr> <th></th> <th>2014 Information</th> <th>Prior Year Information</th> </tr> </thead> <tbody> <tr> <td>Taxpayer/Spouse (T, S)</td> <td>S²</td> <td></td> </tr> <tr> <td>Employer name</td> <td>MAIN STREET SCHOOL</td> <td></td> </tr> <tr> <td>Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Farming / Fishing, 4 = National Guard)</td> <td>2</td> <td></td> </tr> <tr> <td>Mark if this your current employer</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>Federal wages and salaries (Box 1)</td> <td>51,000</td> <td></td> </tr> <tr> <td>Federal tax withheld (Box 2)</td> <td>5,100</td> <td></td> </tr> <tr> <td>Social security wages (If different than federal wages)</td> <td>52,100</td> <td></td> </tr> <tr> <td>Social security tax withheld (Box 4)</td> <td>2,188</td> <td></td> </tr> <tr> <td>Medicare wages (If different than federal wages)</td> <td>52,100</td> <td></td> </tr> <tr> <td>Medicare tax withheld (Box 6)</td> <td>755</td> <td></td> </tr> <tr> <td>SS tips (Box 7)</td> <td></td> <td></td> </tr> <tr> <td>Allocated tips (Box 8)</td> <td></td> <td></td> </tr> <tr> <td>Dependent care benefits (Box 10)</td> <td></td> <td></td> </tr> <tr> <td>Box 13 -</td> <td></td> <td></td> </tr> <tr> <td> Statutory employee</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td> Retirement plan</td> <td>X</td> <td></td> </tr> <tr> <td> Third-party sick pay</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>State postal code (Box 15)</td> <td>MI²</td> <td></td> </tr> <tr> <td>State wages (If different than federal wages)</td> <td>51,000</td> <td></td> </tr> <tr> <td>State tax withheld (Box 17)</td> <td>2,800</td> <td></td> </tr> <tr> <td>Local wages (Box 18)</td> <td>51,000</td> <td></td> </tr> <tr> <td>Local tax withheld (Box 19)</td> <td>600.00</td> <td></td> </tr> <tr> <td>Name of locality (Box 20)</td> <td>GRA</td> <td></td> </tr> </tbody> </table>			2014 Information	Prior Year Information	Taxpayer/Spouse (T, S)	S ²		Employer name	MAIN STREET SCHOOL		Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Farming / Fishing, 4 = National Guard)	2		Mark if this your current employer	<input type="checkbox"/>		Federal wages and salaries (Box 1)	51,000		Federal tax withheld (Box 2)	5,100		Social security wages (If different than federal wages)	52,100		Social security tax withheld (Box 4)	2,188		Medicare wages (If different than federal wages)	52,100		Medicare tax withheld (Box 6)	755		SS tips (Box 7)			Allocated tips (Box 8)			Dependent care benefits (Box 10)			Box 13 -			Statutory employee	<input type="checkbox"/>		Retirement plan	X		Third-party sick pay	<input type="checkbox"/>		State postal code (Box 15)	MI ²		State wages (If different than federal wages)	51,000		State tax withheld (Box 17)	2,800		Local wages (Box 18)	51,000		Local tax withheld (Box 19)	600.00		Name of locality (Box 20)	GRA	
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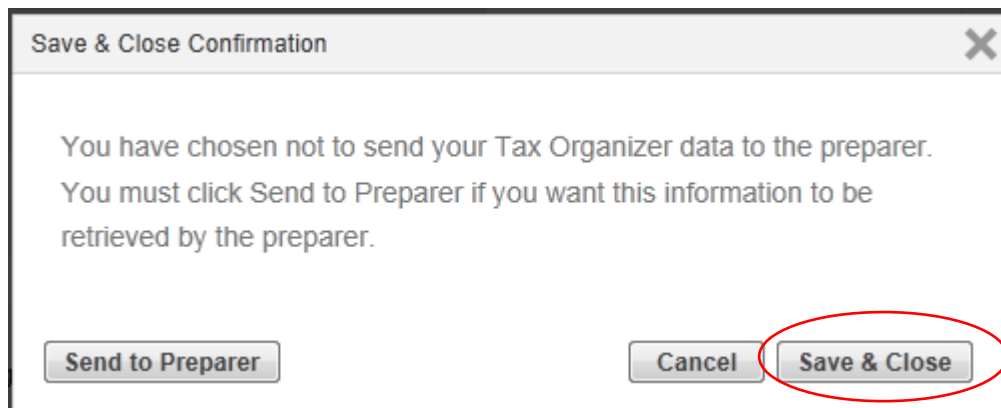
12. If there is information that you do not have this year, delete the information. See below for an example.

Charitable Contributions	
	2014 Information
Contributions made by cash or check (including out-of-pocket expenses)	
CHURCH	3,120
CHILDREN'S FOUNDATION	

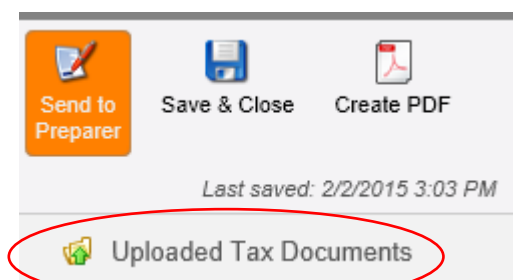
13. When you are done entering your tax information click on **Save & Close**



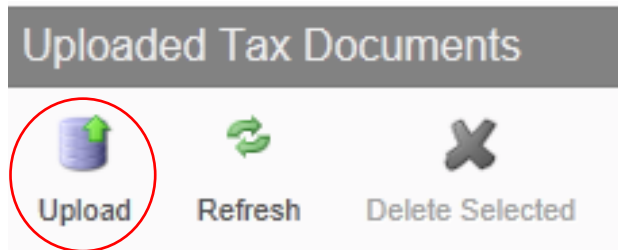
14. The following dialog box will appear, click on **Save & Close**



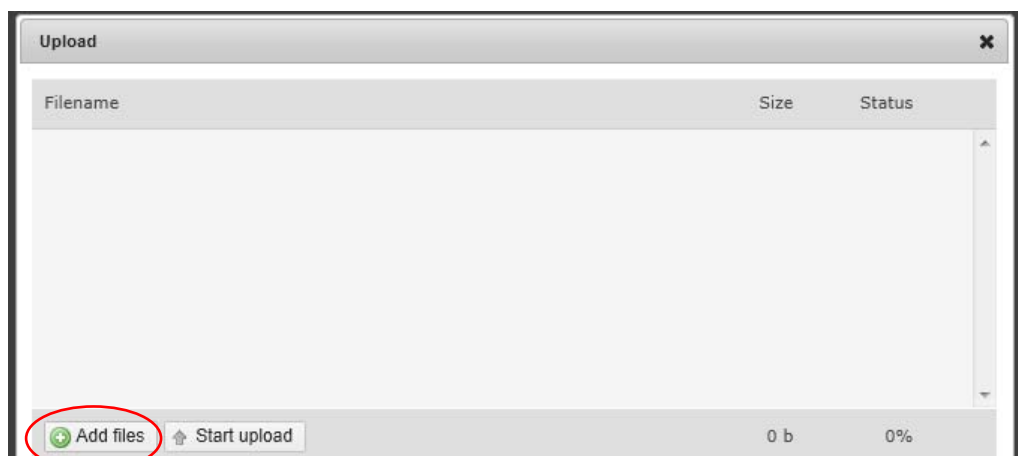
15. Now it is time to upload your source documents. First click on **Upload Tax Documents**



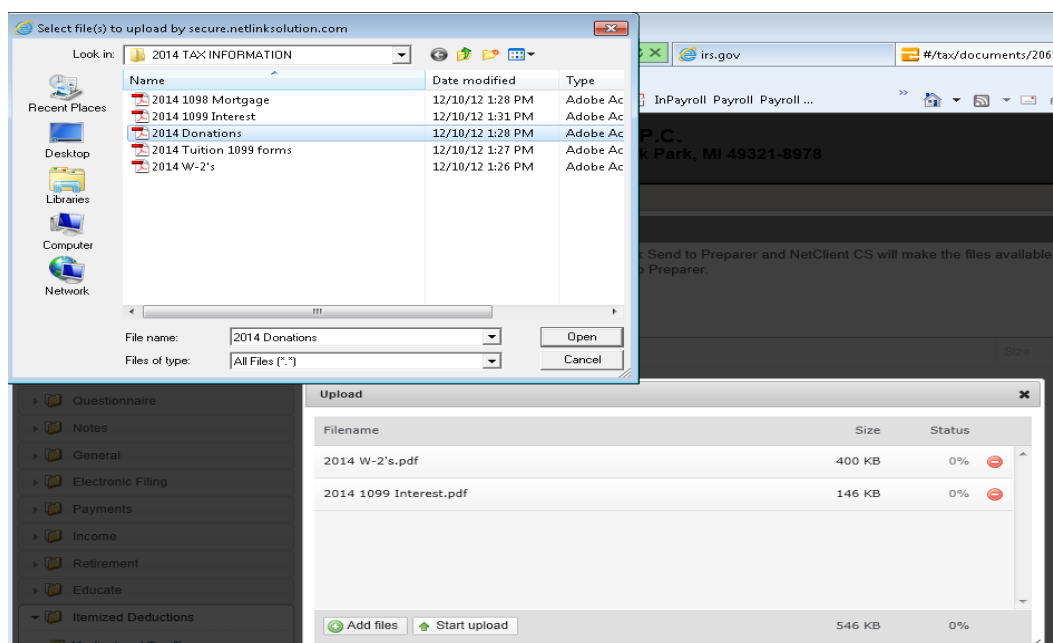
16. Scan in your tax documents and save them on your computer or external hard drive. Once the documents are saved, click on **Upload**



17. After you click on upload the below dialog box will appear. Click on **Add files**.



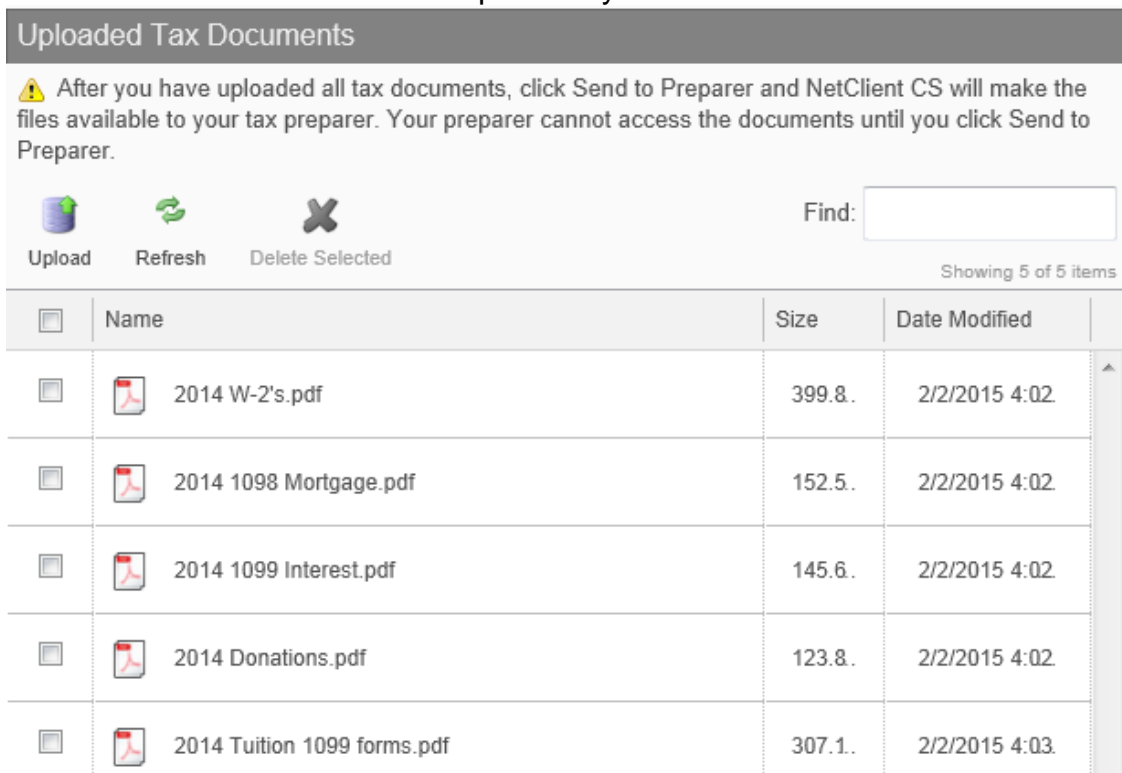
18. Double click on the file you want to add. To add additional files click on **Add files** again and repeat. See below for an example.



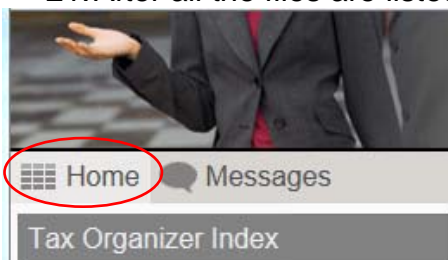
19. When all the files are added click on **Start upload**.



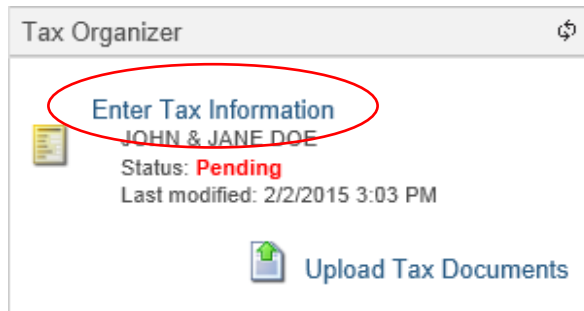
20. Once the files have been uploaded you should see files listed similar to below.



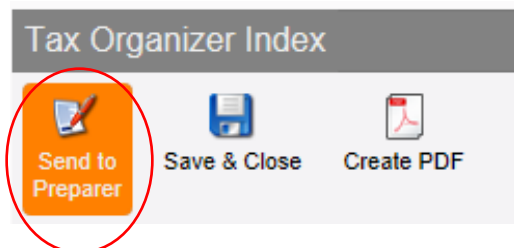
21. After all the files are listed click on **Home**.



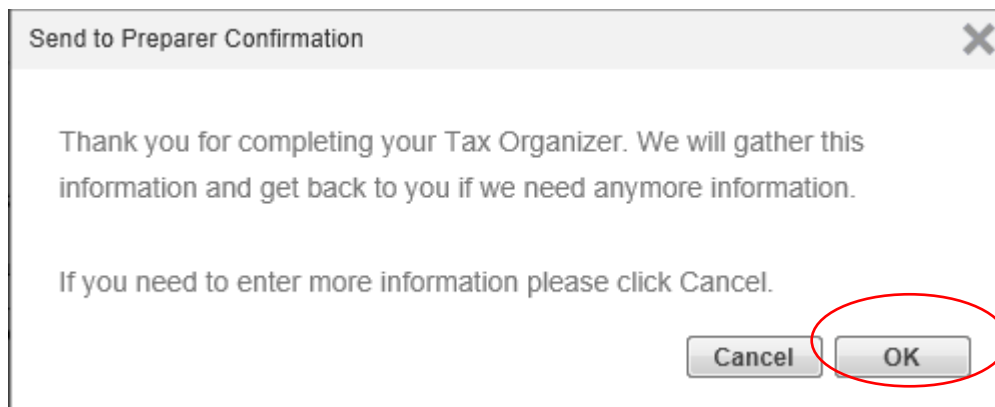
22. Back at the home screen click on **Enter Tax Information**



23. Now you are ready to send your completed tax organizer and source documents to our office. To do this simply click on **Send to Preparer**



24. After you click on Send to Preparer the following dialog box will appear. Click on **OK**



25. After the information has been sent we will receive a confirmation email that your web organizer has been completed and ready for us to retrieve.

If you have any questions regarding the web organizer please do not hesitate to contact our office at 616-784-4445 or cpas@miercpa.com.