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-bc3ae44370b54c43/?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.



- 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.

Messages	
← All Messages	
2	
Please up	date your security questions.
Sent:	about 2 hours ago
To:	JOHN & JANE DOE
To simplify f	future password resets, please select and answer security questions for your account.

 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.

Tax C)rganizer Index
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~	Last saved: 2/2/2015 2:00 PM
	Uploaded Tax Documents
	Letter
	Cover Letter
> 📁	Questionnaire
🔰	Notes
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Add F	orms 💽 Add

- 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 <u>cpas@miercpa.com</u>

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

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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					
Contributions made by cash or check (including out-of-pocket expenses)	2014 Information				
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**

Uploaded Tax Documents				
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Upload	Refresh	Delete Selected		

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

Upload			×
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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.

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2014 1099 Interest.pdf	146 KB	0%	0	
2014 Donations.pdf	124 KB	0%	٢	
2014 Tuition 1099 forms.pdf	307 KB	0%	0	
2014 1098 Mortgage.pdf	153 KB	0%	٢	-
Add files Add files	1 MB	0%		

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.

Uploa	ded Tax Documents			
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Upload	Refresh Delete Selected		Showing 5 of 5 it	ems
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	5 2014 W-2's.pdf	399.8.	2/2/2015 4:02.	*
	2014 1098 Mortgage.pdf	152.5.	2/2/2015 4:02.	
	2014 1099 Interest.pdf	145.6.	2/2/2015 4:02.	
	2014 Donations.pdf	123.8.	2/2/2015 4:02.	
	2014 Tuition 1099 forms.pdf	307.1	2/2/2015 4:03.	

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**

Send to Preparer Confirmation	×
Thank you for completing your Tax Organizer. We will gather this information and get back to you if we need anymore information.	
If you need to enter more information please click Cancel. Cancel 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.