TaxPassApp.com Job Aid



TAXPASSAPP.COM IS NOW ONLINE!

TaxPassApp.com is a dedicated mobile site for your clients to enter their personal information, upload tax documents, enter income information, and track their tax return.

Best of all, information entered on TaxPassApp.com transfers securely to your CrossLink software!

Follow the steps below to start using TaxPassApp.com this tax season.



TAXPASSAPP.COM WEBSITE (TaxPass mobile app is no longer required)

1. Generate your TaxPass ID (QR Code)

This process is quick, simple, and only needs to be performed once. Once a TaxPass ID is generated for your tax office, you're good to go.

If using CrossLink Desktop:

- 1. Log in to your account on CrossLinkTax.com
- 2. Go to Support > Mobile Site Management
- 3. Click + (under QR Code column) to generate your TaxPass ID (TaxPass IDs can be generated for each office with a unique Desktop User ID)
- 4. If desired, you can upload your office logo that will display on TaxPassApp.com

If using CrossLink Online:

- 1. Log in to <u>CrossLinkOnline.com</u> and navigate to your office Dashboard
- 2. Click Office Settings and then click TaxPass Application
- 3. Click Generate TaxPass ID
- 4. If desired, you can upload your office logo that will display on TaxPassApp.com, and enter an email address to receive a notification when a client submits information on TaxPassApp.com

2. Start using TaxPassApp.com

Once your office has a TaxPass ID, you're ready to start receiving data from TaxPassApp.com. Your clients will be required to type your TaxPass ID (or scan the QR code) when they register to use TaxPassApp.com.

You are welcome to share your TaxPass ID (or QR code image) with anyone that plans on using TaxPassApp.com.

What can your clients do on TaxPassApp.com?

- Start the tax return remotely
- Scan IDs to populate address information
- Take pictures of important documents
- Submit the data to your CrossLink software
- Capture signatures (once return is finished)
- Keep track on their tax return status and refund



Profile menu allows you to COPY the TaxPass URL for easy sharing.

2022 Tax Year Help	2022 Tax Year Help
Tax Return Progress	Dependent(s) Add + No dependent(s)
BEGIN	W-2(s) Add +
Tax Return	No manually entered W-2(s)
Check Status of Submitted Return or Create New Return	*If you took a picture of your W-2(s) it will appear in the documents area. Tax Office Information
Check Status New Return	Office EZ Income Tax
	Address PALANTINE, IL 60074
Client Data	Preparer Reyes, Rober
Bert Banderas Taxpayer Information	Phone (847)991-3939
Tax Return Documents Message Account	Tax Return Documents Message Account

3. Import TaxPassApp data to your CrossLink software

Once a client submits data using TaxPassApp.com, you can import the tax return data to your CrossLink software and finalize / e-file the tax return.

CrossLink Desktop:

• Click TaxPass Retrieval on the Work In Progress Summary

CrossLink 2023 1040 Returns		- ð ×			
040 Returns Business Returns Web Site Bing IRS.gov					
atabase <u>S</u> etup <u>U</u> tility <u>R</u> eports <u>C</u> ommands <u>H</u> elp					
Jdd New Iransmit Lookup Quick Payments Chat	Refund Calc Exit	CROSSLINE Professional Tax Solution			
User Id: 23806 (C)	Tax Year: 2022	Version: 2023.004			
	Work In Prog	ress Summary			
Tax Returns		Transmit Oueue			
Select a Return	3	Transmit to Central Site 7			
Status Summary List		Recover from Archive			
Management Dashboard					
Training Returns	1	Exceptions/Rejects			
TaxPass Retrieval		Fed Rejects			
************		State Refused and Rejects			
Printing Queue		Fed Refused			
Checks, Registers, and Activation		Fed/State Alerts			
Tax Returns		Verify Retrieved / Feeder Returns			
Proformas		Pending Remote Signatures			
Federal Acknowledgement Letters		Completed Remote Signatures			
State Acknowledgement Letters					
		Quick Reports			
Other Items		Text Message			
Software Updates		Reminder Report			
Secure E-Mail [1 New]	1	Checks Ready			
Bulletins		Economic Recovery Rebate			
Today's Appointments		Fees Paid			
Backup Returns	3				
TextLink Plus Inbound					
TaxPass Messages		© Creed ink Professional Tax Solutions 2022			
		© CrossLink Professional Tax Solutions 2022			

CrossLink Online:

• While viewing the office Tax Returns area, click ▼ (next to New Return +) and then click Import Mobile Returns

Exit To N	Exit To My Dashboard / Office OFFICE NAME										
YOUR LOGO HERE		Search					?	Help Profile Menu - Tax Year 2022 -			
á	Dashboard										
2	Preparers	Tax Returns						Clew Return + 👻			
	Tax Returns	All Returns		✓ Refresh				Import Mobile Returns			
m	Calendar	Customize									
	Secure Messages	RETURN ID	~	TAXPAYER NAME 🗸	SOCIAL SECURITY NUMBER \checkmark	DATE CREATED	✓ RETURN STATUS	~			
20	Checks 🗸	824186	*	SANDARS, BERNARD	ххх-хх-6666	12/22/2022	EF Return	Open			

Note:

Any pictures and attachments submitted from TaxPassApp.com will be stored in the tax return Document Archive.

2023 Edition

Need additional help? Contact us. 800.345.4337 Support@CrossLinkTax.com