

How to Use TaxCaddy for Your Individual Tax Returns

Making Tax Season Easier With TaxCaddy

TaxCaddy is our secure document gathering and communication platform that allows you and your Mowery & Schoenfeld tax team to access the same information in one place and helps keep important documents organized throughout the year.

Through TaxCaddy, You Can:

- Submit documents by uploading them, scanning them, or taking a photo of them
- Complete questionnaires and information requests
- Track outstanding items
- Communicate with your tax team
- Access information from your computer, tablet, or mobile device
- Keep records of tax payments and access tax returns

Complete the entire tax process from the safety of your home via your computer, tablet, or phone.

Getting Started with TaxCaddy

- 01** Mowery & Schoenfeld will send you a TaxCaddy invitation email. In the email, click “Get Started.”
- 02** Enter your mobile number to receive your 6-digit verification code or authenticate your account using the last four digits of your SSN if applicable.
- 03** After verifying your account and accepting the Terms of Use, you will be logged in to the system.
- 04** Click “Set up account password” in the upper right-hand corner of the Overview screen and follow the prompts to create your account.
- 05** Grant access to your spouse, financial advisors, or other users, as needed.

How to Upload Your Documents

- On your TaxCaddy overview page, select the current tax year Document Requests task.
- On the Document Requests screen, you'll see a customized list of requested documents based on your prior year tax return.
- Click an item from the list to upload the document from your computer. Accepted file formats are: **.pdf**, **.docx**, **.xls**, and **.xlsx**. You can upload multiple files to the same category at once.
- If you have additional documents that aren't on the request list, open the Documents tab and toggle to the Uploaded Documents section. Drag and drop or upload your document in the box.
- For added convenience, you can use the TaxCaddy app to submit photos of paper documents from your phone.

For Business and Trust Returns

If you file multiple returns with us, including business and trust returns, these will be available to review and e-sign via SafeSend Returns, where you can also manage Schedule K-1 distributions. **Visit our SafeSend resources page for more information.**

Need help with TaxCaddy?

Contact your Mowery & Schoenfeld tax administrator, Stephanie Jackson, at 847-281-3588 or sjackson@msllc.com.

TaxCaddy Tips

Changing Document Status:

If you do not have anything to upload for a specific document request, you can update the status instead. From your Document Request list, select the item and choose the appropriate option, such as "Doesn't Apply" if the item is not relevant to your return or "Already Provided" if you have previously sent the document to your tax team. Other status options include "Firm Preparing" and "Reply with Amount." When you are done uploading and/or updating statuses, click the "I'm Done Uploading" button. Then click "Notify My Tax Professional."

Tracking Your Estimates:

Use TaxCaddy to track estimated payments and their due dates and to print vouchers. SafeSend Returns will take you exactly where you need to go to make payments electronically, if necessary.

Client Resources

Visit our client onboarding resources page to learn more: bit.ly/ms-iegt-onboarding