

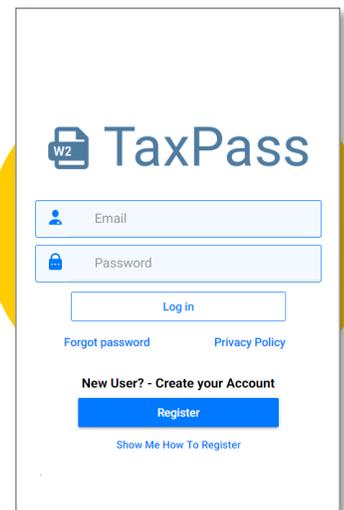
TAXPASSAPP.COM IS NOW ONLINE!

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.

NEW FOR 2023



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 CrossLinkOnline.com 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

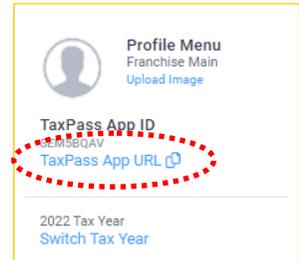
Once your office has a TaxPass ID, you're ready to start receiving data from TaxPassApp.com. Your clients will be required to type your TaxPass ID (or scan the QR code) when they register to use TaxPassApp.com.

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

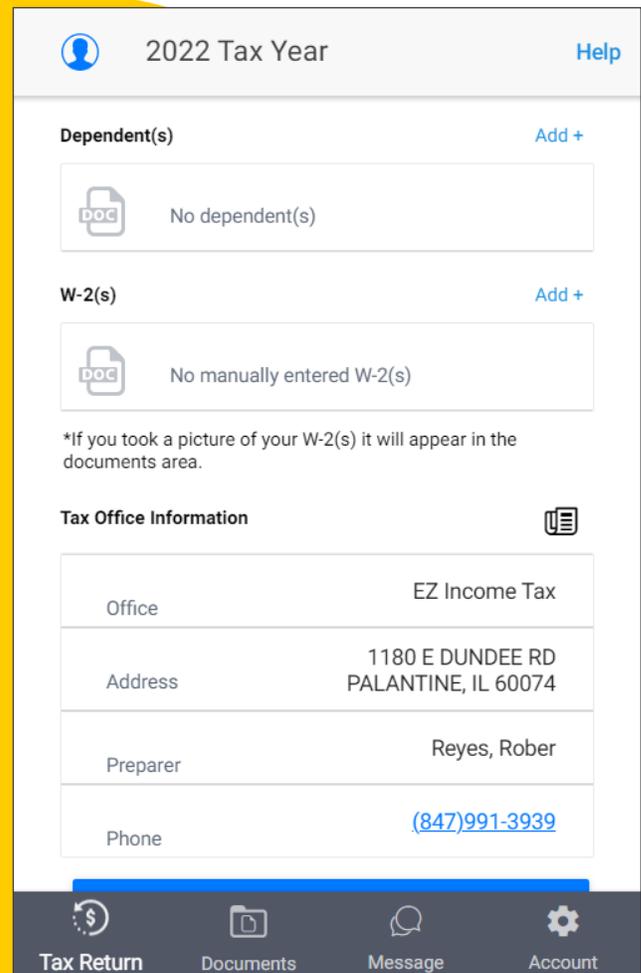
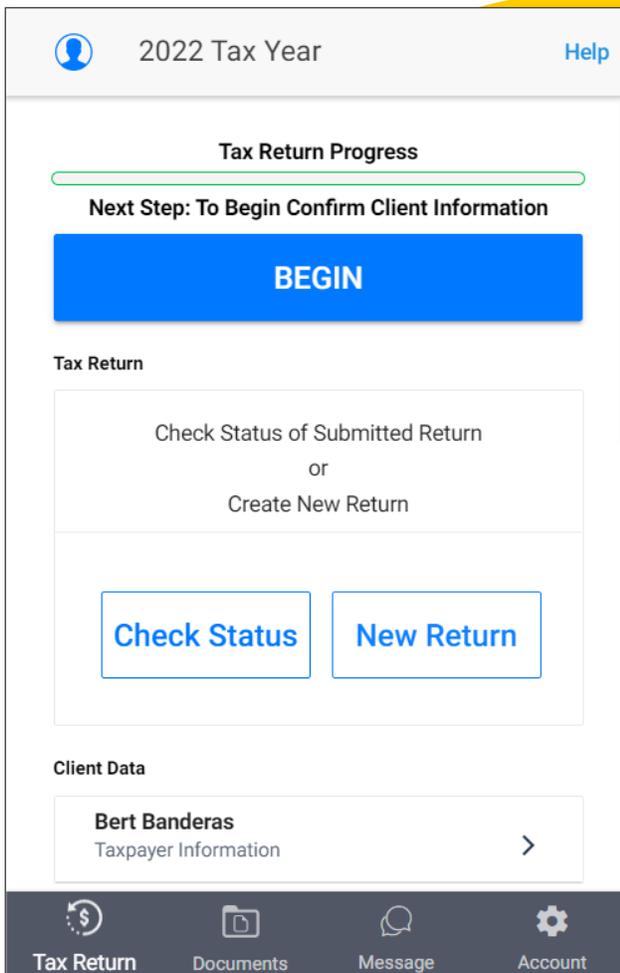
What can your clients do on TaxPassApp.com?

- 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

USING CROSSLINK ONLINE?



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

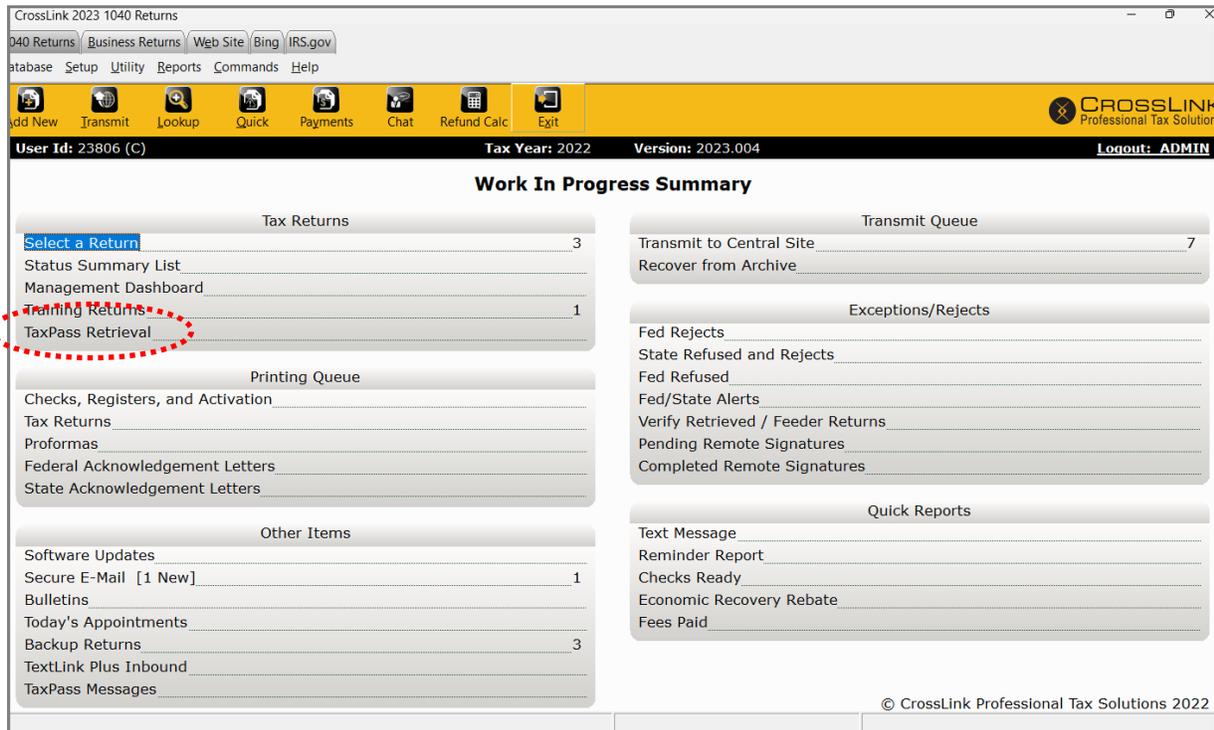


3. Import TaxPassApp data to your CrossLink software

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.

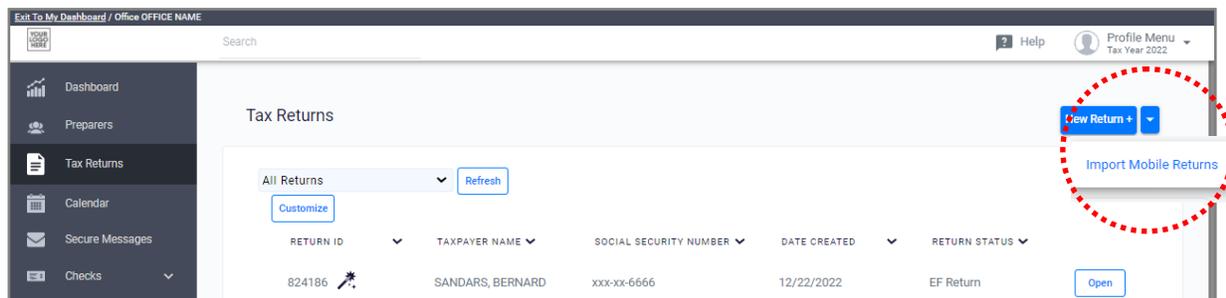
CrossLink Desktop:

- Click **TaxPass Retrieval** on the Work In Progress Summary



CrossLink Online:

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



Note:

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