

Please follow these steps to ensure your TaxCaddy account is properly setup. For technical support and troubleshooting assistance, click on Help Center at the top of taxcaddy.com, or email support@taxcaddy.com.

1. CONNECT – Log in to your TaxCaddy account, navigate to the Overview screen, and click the Accept Connection button to establish a connection with our firm. [Learn more about connecting.](#)
2. ADD AUTHORIZED USERS – To provide access to your spouse or others, click your name in the top right corner and then Settings. Click Additional User Account and enter their information. They will receive an invitation email to create a linked account with the same steps you have already completed. [Learn more about adding users.](#)

Please note that when it comes time to electronically sign your e-file authorization, if you are “married filing jointly,” then your spouse can sign documents using your TaxCaddy account or they can create their own. If your spouse opted to create their own account, then you must link their TaxCaddy account to yours in order for them to apply their electronic signature. [Learn more about e-signatures.](#)

3. DOWNLOAD & USE THE TAXCADDY MOBILE APP – The TaxCaddy mobile app can be downloaded from the iTunes App Store or Google Play. It provides a convenient way to access your information and communicate with us directly from your mobile phone. [Learn more about the TaxCaddy mobile app.](#)
4. PROVIDE YOUR TAX INFORMATION – In your TaxCaddy account you’ll find our firm’s Engagement Letter, Tax Questionnaire and a Document Request List. You can do the following in TaxCaddy:
 1. SIGN ENGAGEMENT LETTER
 - a. You can easily sign our engagement letter via Tax Caddy, so you don’t have to physically sign it and mail/email it back to us. [Learn more about signing documents.](#)
 2. COMPLETE THE QUESTIONNAIRE – Provide answers to the Questionnaire by navigating to the TaxCaddy Questionnaire. [Learn more about the questionnaire.](#)
 3. PROVIDE DOCUMENTS BY
 - a. Setting up “Smart Links” with your financial institutions to automatically retrieve tax documents. As documents become available, they will be automatically retrieved and placed in your TaxCaddy account. [Learn more about Smart Links](#)
 - b. Photoscanning the document with the TaxCaddy mobile app.
 - c. Uploading files.
 - d. Manually entering form information. [Learn more about documents](#)
 4. SEND & RECEIVE MESSAGES - Ask questions and provide answers in TaxCaddy’s Messages tab, found on the navigation bar, to ensure we have the information we need to prepare your return. [Learn more about messages.](#)
5. REQUEST SUPPORT – If you have technical questions about your TaxCaddy account or you’re experiencing trouble accessing your account (e.g., if you forgot your password), the TaxCaddy support team is just an email away. [Learn more about getting help.](#)

We’re excited about this powerful solution and we think you will be, too. Please don’t hesitate to reach out to our office if you have questions.