TaxDome for Tax Preparers: a Simple Checklist

TAXDOME

It's time to simplify your tax preparation processes with TaxDome.

Welcome to the TaxDome Tax Preparation cheat sheet! Here we have collected everything you should know to expand your knowledge base and speed up your tax preparation practice with TaxDome.

More on this in the **TaxDome for Tax Preparers** course in our Academy.

1. Set Up TaxDome for Tax Preparation

- [ ] **Create different tax preparation tags** to separate accounts of different types
- [ ] Create additional tax year subfolders **for your tax clients** and learn how to apply them in bulk
- [ ] Learn how to apply **custom data** for your clients and use it in templates
- [ ] **Create shared family accounts** from CSVs where the taxpayer and their spouse are listed in the same row by using our tips for import

2. Tax Preparation Processes in TaxDome: Best Practices

- [ ] **Automate and delegate all routine tasks** to speed up your workflow
- [ ] Automate adding your new clients and leads to your processes by **setting up your sign up form**
- [ ] **Handle filing extensions** using conditional stages in pipelines
- [ ] Ensure that you are always paid on time with the **"Lock to Invoice" feature**
- [ ] Request **the knowledge-based authentication** (KBA) to process 8879s and similar forms in TaxDome
- [ ] Discover the TaxDome desktop application to **upload ready tax returns to TaxDome**

3. Communicate with Your Tax Clients Effectively

- [ ] **Automate sending personalized emails** to your clients using shortcodes and pipelines
- [ ] Ensure that your clients are updated on time by **scheduling emails**
- [ ] **Integrate an external scheduler with TaxDome** and let your clients know
- [ ] Automate collecting documents from tax clients by **creating concise and straightforward organizers**
- [ ] **Automatically request confirmation from your tax clients** upon completion of uploading documents
- [ ] Prepare and review returns using the **embedded PDF tools**

More questions?

Here are the top three ways to find answers:

1. Visit the **TaxDome Help Center**, and use the search bar to find the desired topic.
2. Check out the resources on the **Get Help Page**.
3. Reach out to our **Customer Success** team by email.