

AARP FOUNDATION TAX-AIDE

Taxpayer Instructions

**TaxSlayer Customer Portal
And
Google Meet Video Conferencing**

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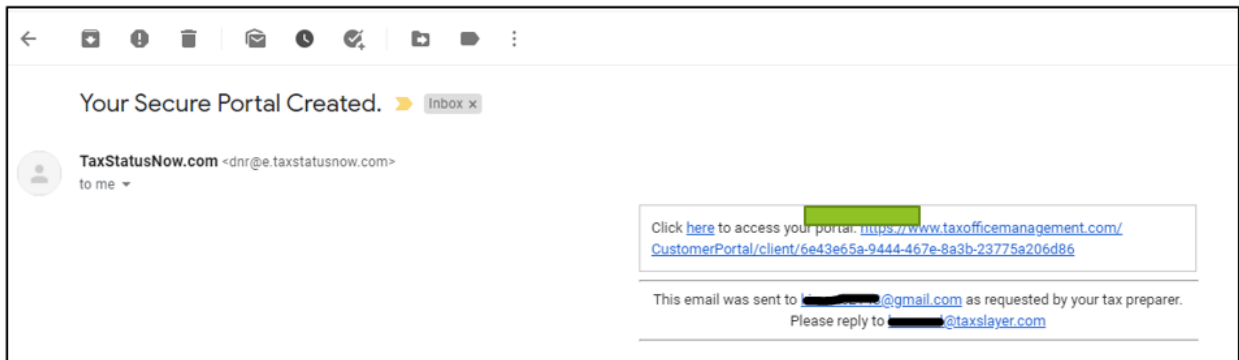
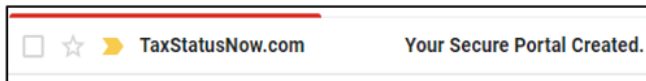
Click on Instruction names to activate hyperlinks. Click "Return to Table of Contents" to get back to this page.

AARP Foundation Tax-Aide 09 - Creating Your TaxSlayer Customer Portal Account

Following are instructions how to create your TaxSlayer Customer Portal account once you receive the link needed to do so. You cannot set this account up until you receive the Customer Portal link that one of our Counselors will send to you.

- There are two ways to receive the Customer Portal link
 - Email
 - Text message

- If you request the link be sent via email, the email message will appear as follows. The sender's name will be **TaxStatusNow.com**. Note that the message may be routed to your SPAM folder by your email provider, be sure to check there if you know the link has been sent but it does not appear in your inbox



- If you request the link be sent via text message, the message will appear as follows:



- Click the link provided in the email message or the text message you receive; you will be prompted to “Register Your Account”

Register Your Account

User Name
Kimmie1201

Password
.....

- One lowercase character
- One uppercase character
- One special (@\$!*%?&)
- One number
- 8 characters minimum
- 25 characters maximum

Email
[Redacted]@[Redacted].com

Phone Number
([Redacted]) [Redacted]

Last Name
Manuel

Last Four Of your SSN
1234


[Submit](#)

- Complete each field as follows, all fields must be filled in to complete this process
 - **Username:** Your username must be unique. If you enter a user name that is in use, you will see an error message and you must enter a different user name
 - **Password:** The password you create must meet the following criteria:
 - Contain at least 8, but no more than 25 characters
 - Contain at least one of each of the following elements: lowercase letter, uppercase letter, special character (@\$!*%?&), and a number
 - **Email:** The email address you enter here must match **exactly** the email address our Counselor used to send you the Customer Portal link
 - **Phone:** The phone number you enter must match **exactly** the phone number your provided the Counselor to enter in the **Basic Information** area of your return
 - **Last Name:** Enter the last name of the primary taxpayer (the one listed first on the return). The last name you enter must match **exactly** the name the Counselor entered in the **Basic Information** area of your return. This will be the name shown on your Social Security card
 - **Last Four of your SSN:** Enter the last four digits of the Social Security number of the primary taxpayer (the one listed first on the return). These numbers must match **exactly** the last four digits entered by the Counselor in the Basic Information area of your return
- When all of the above information has been entered, click on the **Submit** button at the bottom of the window


- After submitting your registration, you will be asked to verify your account. You can select whether to receive the verification security code via email or text message.

Verify Account

Please verify your account using one of the options below.



Send text verification



Send email verification

****.com

[Cancel Verification](#)

- When you receive the code, enter it in the space provided and click **Verify**

Verify Account

Please select an option below to send a security code to your account for verification.

Code sent - please check your account for your personalized Security Code.

Send Email: she****.com

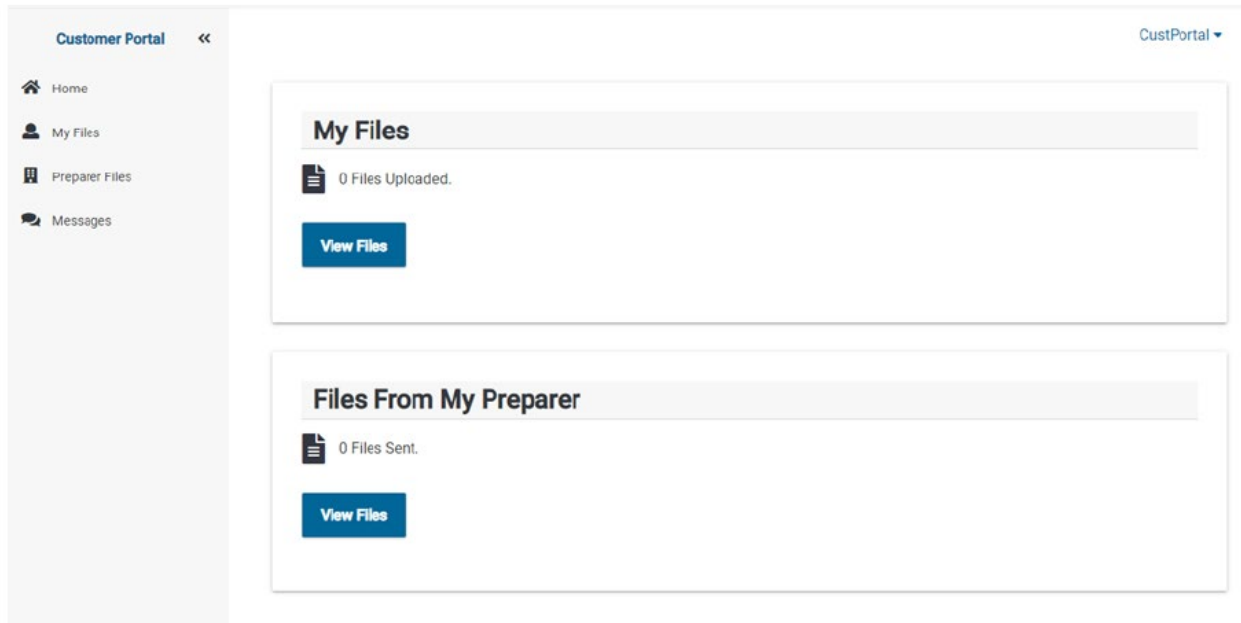
Send Text: 70****97

123456

Verify

[Cancel Verification](#)

- The next screen you see is the home page for your Customer Portal Account



- TaxSlayer Customer Portal account has been created. Depending on the instructions you receive from the Counselors working with you, you may use this account to:
 - Upload your scanned documents
 - Exchange messages with the Counselor preparing your return
 - Access, view, sign, and download copies of your tax return

Information on using the above features of the TaxSlayer Customer Portal is contained in other documents provided to you.

AARP Foundation Tax-Aide 10 - Uploading Scan Files to the Customer Portal

This document explains how to upload your scanned personal and tax documents to your Customer Portal account so they can be accessed by the Counselors who will prepare your tax return.


- Confirm that the files you will upload are within the Customer Portal’s file size limitations
 - A single scan file cannot exceed 5 megabytes
 - The total size of all files you upload cannot exceed 25 megabytes
- Log in your Customer Portal account – this can only be done **after** you have created your account using the link we provided you
 - Enter **taxslayer.com/myaccount** in your Web browser and press enter

Log in

Need a TaxSlayer account? [Create account.](#)

Username

Password

 Password is required

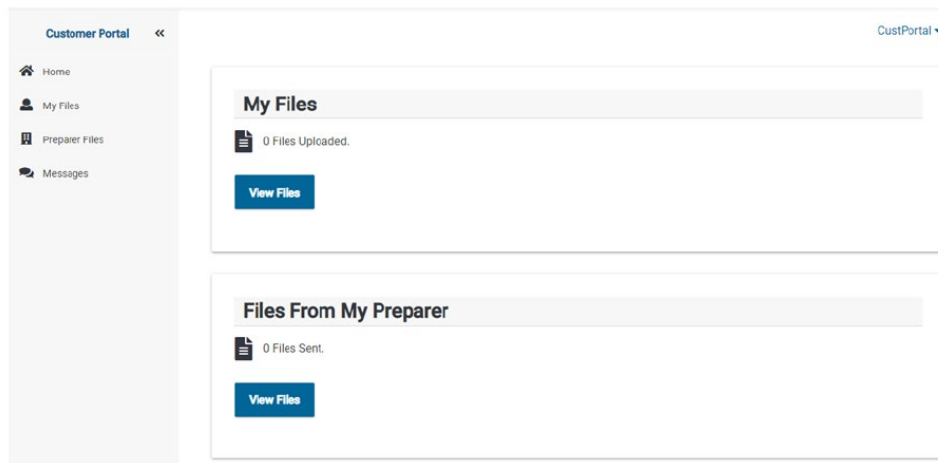
[Forgot Username](#) | [Forgot Password](#)

LOG IN

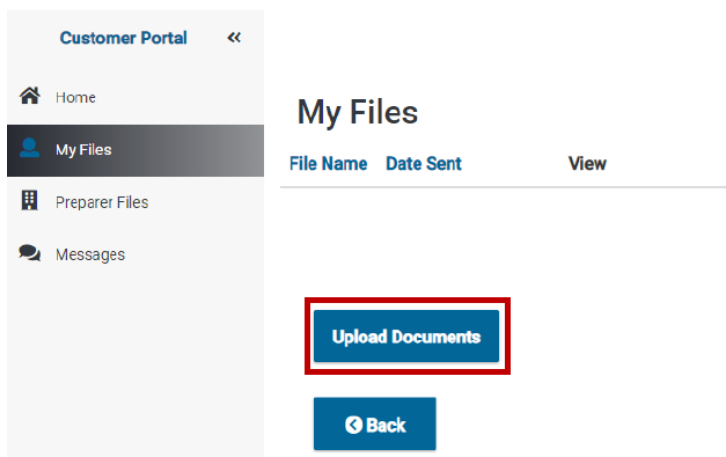
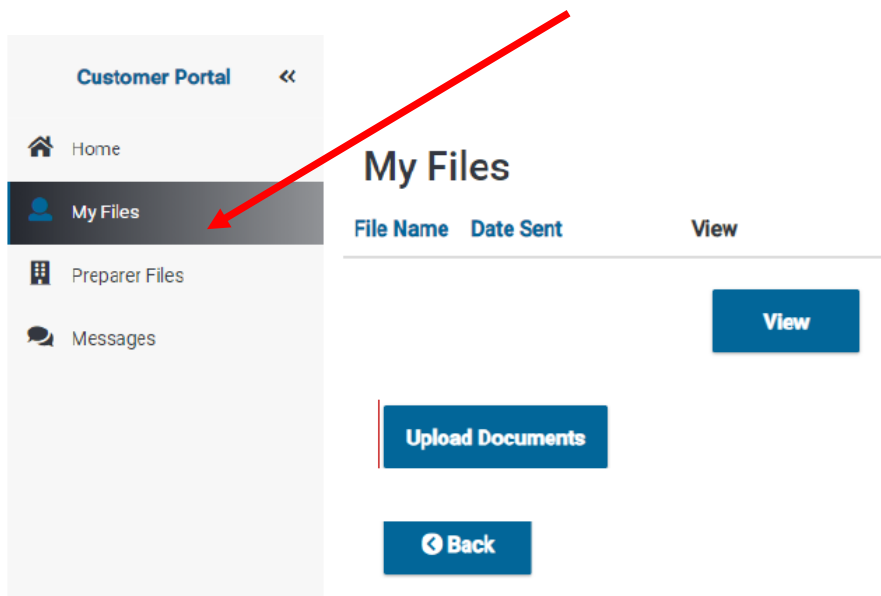
By clicking 'Log in', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and agree to receive marketing emails related to your account. You can [unsubscribe](#) at any time.

○ Enter the username and password that you established when creating your account

- When you login the Customer Portal, you will be taken to the **Home Page**

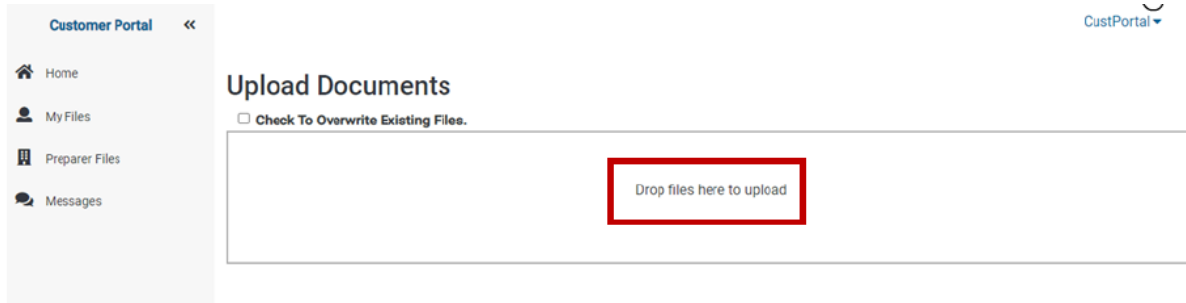


- Select **My Files** from the menu on the left of the screen

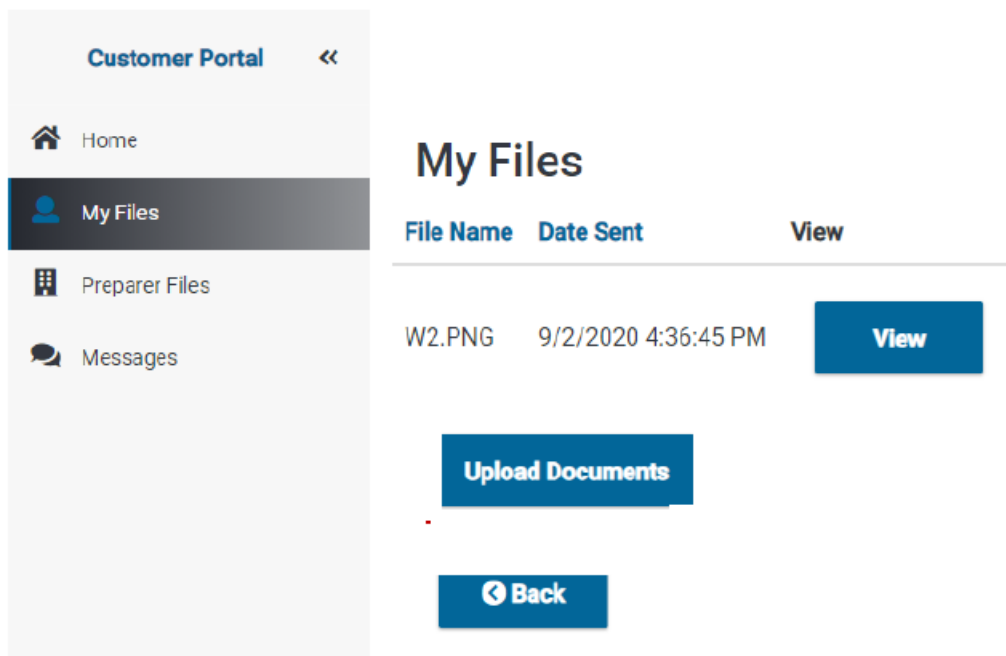


- To upload scanned document, click the **Upload Documents** button

- The **Upload Documents Window** will display on the screen



- Click **Drop files here to upload**. This will allow you to browse and select documents you want to upload. Navigate to the file you want to upload and either drag and drop it into the file area **OR** click on the file and select **Upload**
- The **Upload Documents Window** will display the uploaded file. You can view the file you uploaded by selecting the **View** button

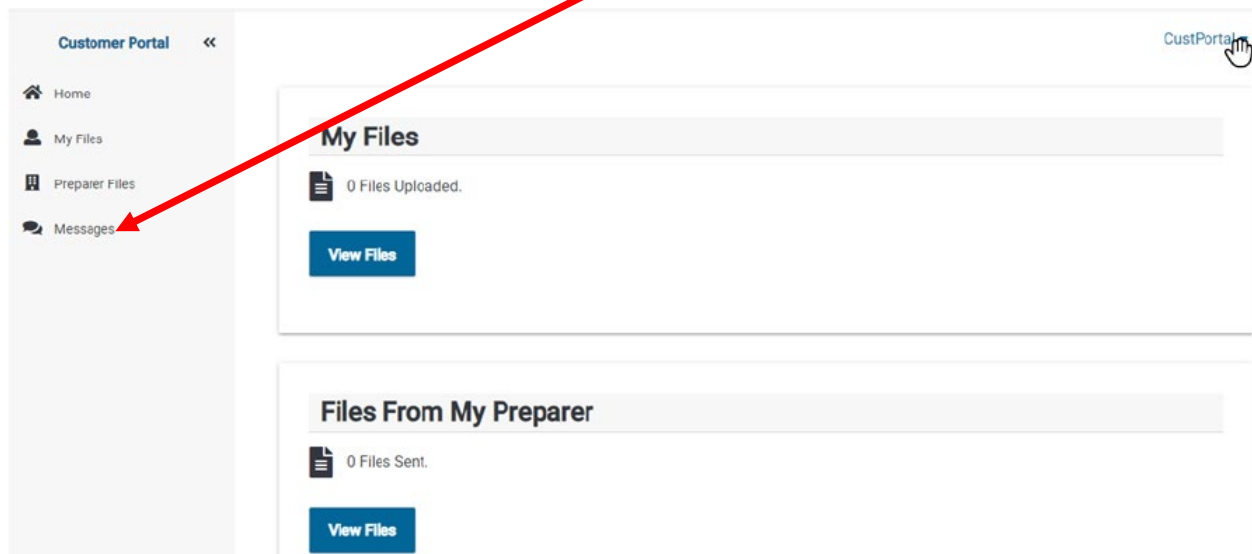


- Repeat the above procedure for each file you need to upload

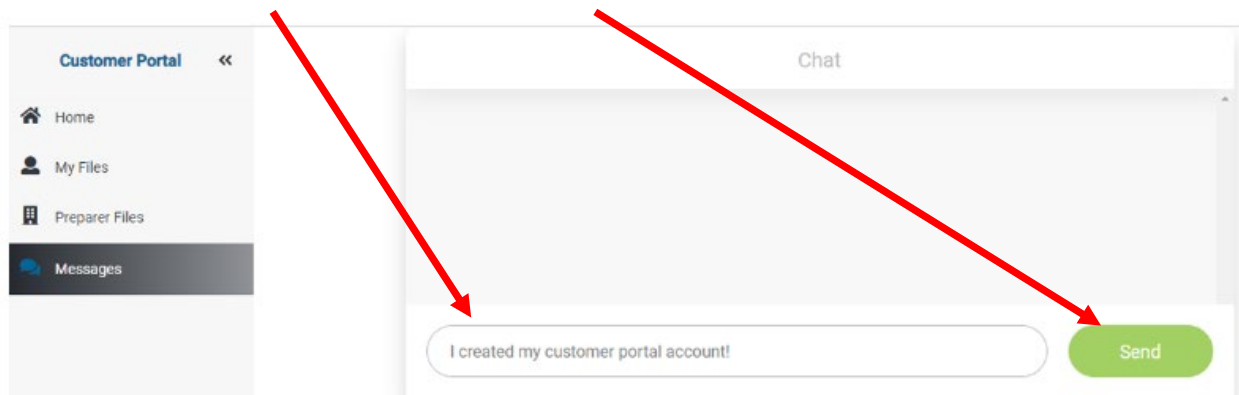
AARP Foundation Tax-Aide 11 - How to Message Your Counselor Via the Customer Portal

The Customer Portal is one way you and the Counselors working on your return can communicate. The messaging does not have to take place in real time. If you send a message to the Counselors, they will see a notification that there is a message waiting when they log into the tax software.

- Log in your Customer Portal account using the username and password you established
- The Portal home page will display; select **Messages**. If the word **Messages** is in blue letters, you have an unread message waiting.



- Enter your message and select **Send**



AARP FOUNDATION TAX-AIDE 12 - How to Join a Google Meet Video Conference

Google Meet is a conferencing tool that allows you to participate in a video meeting – if your computer has a camera, microphone, and speakers.

Tax-Aide Counselors may schedule a Google Meet video conference with you – to conduct the intake interview, review the completed return with you, ask you any questions that arise during the preparation, or the quality review of your tax return.

NOTE: If you are using an iOS or Android mobile device, you will not be able to participate in a Google Meet video conference unless you have a Google (Gmail) account.

Counselors also are able to call your telephone number from within the Google Meet application. **The caller ID that appears on your phone will be from a number you do not recognize. Please answer this call; we are unable to implement a more specific caller ID.**

JOIN A VIDEO MEET SESSION FROM A MEETING LINK

You can join a video meeting by clicking on the link sent to you in an email.

- Click the meeting link sent to you
- Follow the on-screen prompts to join the meeting
- An email invitation will look similar to the following:

You have been invited to the following event.

AL Leadership Discussion

When Mon Aug 16, 2021 10:30am – 11:30am Eastern Time - Toronto

Joining info Join with Google Meet
meet.google.com/rqt-xtkp-kyf

Meeting Code

Join by phone

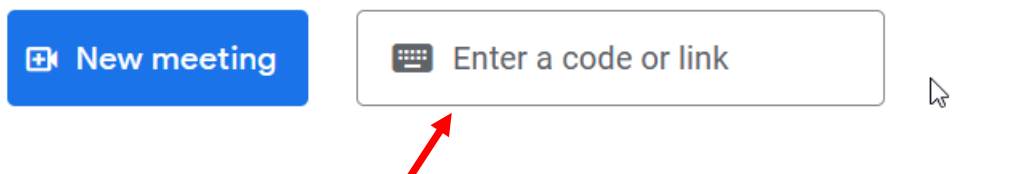
(US) [+1 631-621-7381](tel:+16316217381) (PIN: 642008555)

JOIN A VIDEO MEET SESSION FROM THE GOOGLE MEET WEBSITE

- Open a web browser, enter <https://meet.google.com>
- Click “Enter a code or link”

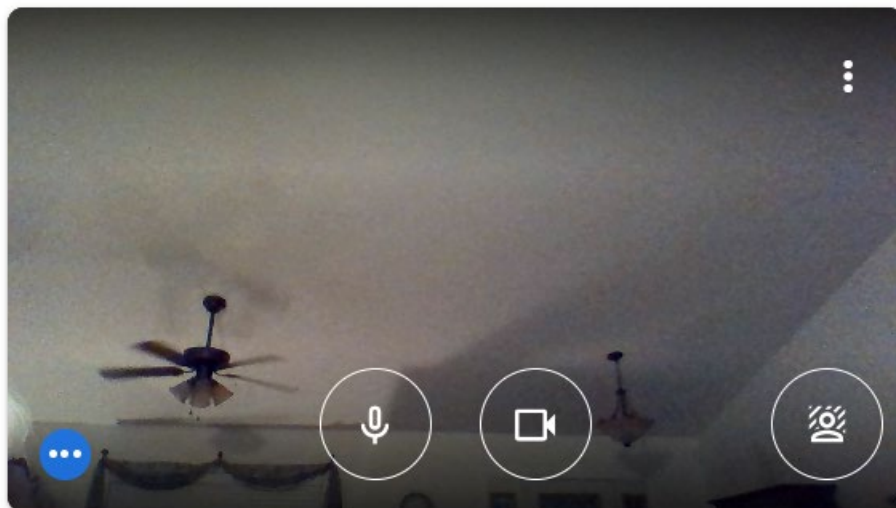
Premium video meetings. Now free for everyone.

We re-engineered the service we built for secure business meetings, Google Meet, to make it free and available for all.



[Learn more](#) about Google Meet

- Enter the meeting code you received
 - The meeting code is a string of letters at the end of the meeting link – you do not have to enter the hyphens
- You may receive an email with only the meeting code, just enter the meeting code as described here and you will be able to join the video session
- Click CONTINUE



Ready to join?

Ask to join

 Present

- Click “Ask to Join”

JOIN A GOOGLE MEET PHONE-ONLY CONFERENCE

You can also use Google Meet to participate in a phone-only conference.

- The Counselor scheduling the meeting will either send you a meeting invitation or an email containing the phone number and PIN needed to join the phone conference
- Dial the number provided and enter the PIN when prompted to do so.

You can also receive a phone call from a Counselor who has logged onto a Google Meet session. The person in the meeting will enter your phone number to add you to the meeting. You will receive a telephone call and will be able to speak with the Counselor. The caller-ID number on your display will be **617-675-4444**. You will know what date and time our volunteer will call, please answer the call; we will only call you for matters related to preparation and filing of your tax return.

AARP Foundation Tax-Aide

13 - How to Share Your Screen During a Google Meet Video Conference

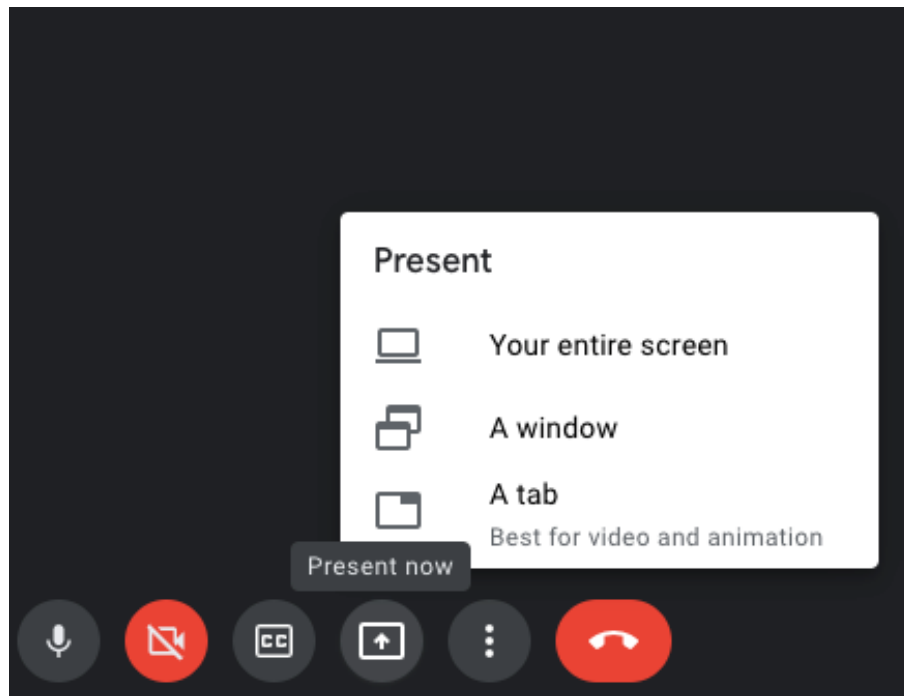
NOTE: If you are using an iOS or Android mobile device, you will not be able to participate in a Google Meet video conference **unless you have a Google (Gmail) account.**

There may be a reason that you want to share your screen with our Counselor during a Google Meet video conference. This document explains how to share your screen whether you are on a personal computer, an iOS device, or an Android device.

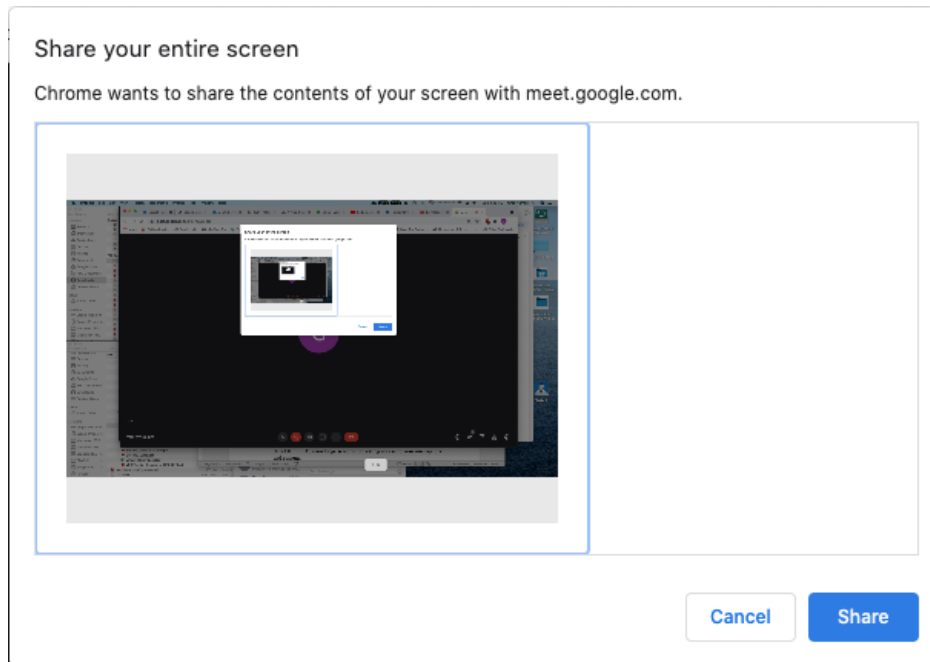
Sharing your screen on a personal computer

Note: This example was developed using Google Chrome. Other browsers may differ in the dialog boxes they present.

- Join the Google Meet video conference as explained in Taxpayer Instruction Sheet #05. Acknowledge dialog boxes requesting access to your microphone, camera, and screen.
- Click the **box with the arrow (Present now)** on the toolbar at the bottom center of the Google Meet screen.



- Select **Your entire screen** from the menu that pops up.



- Click on the picture of your screen when the *Share your entire screen* dialog box pops up.
- Then click **Share** in the lower right corner of the dialog box.
- The Counselor can now see what is on your screen.
- Move to the browser tab you wish to share.
- When you no longer need to share your screen, return to the Google Meet browser tab, and click **Stop presenting** in the upper right-hand corner the Google Meet screen.

Sharing your screen on an iOS device

- Join the Google Meet video conference as explained in Taxpayer Instruction Sheet #05. Acknowledge dialog boxes requesting access to your microphone and camera.
- Select the **three vertical dots** and select **Share screen**.
- Select **Start Broadcast**.
- Move to the app you want to share.
- The Counselor can now see what is on your screen.
- When you no longer need to share your screen, tap the red bar at the top of the screen, then select **Stop** in the *Screen Broadcasting* dialog box that pops up.
- The red bar at the top of the screen is replaced by a green bar.
- Touch the green bar to return to the Google Meet call.

Sharing your screen on an Android device

- Join the Google Meet video conference as explained in Taxpayer Instruction Sheet #05.
- Select the **three horizontal or vertical dots** and select **Present screen**.
- Confirm by touching **Start presenting**.

- Confirm a second time by touching **START NOW**.
- Move to the app you want to share.
- The Counselor can now see what is on your screen.
- When you no longer need to share your screen, return to the Google Meet app and touch **Stop presenting**.

AARP Foundation Tax-Aide 14 - Viewing and Downloading Your Return Via the Customer Portal

The Counselors working on your tax return will upload a copy of your return to your Customer Portal account. Using Google Meet video conferencing, a Counselor will review the return with you and answer any questions you have. Below are instructions how to access and view the return.

- To log in your Customer Portal account – this can only be done **after** you have created your account using the link we provided you
 - Enter **taxslayer.com/myaccount** in your Web browser and press enter

Log in

Need a TaxSlayer account? [Create account.](#)

Username

Password

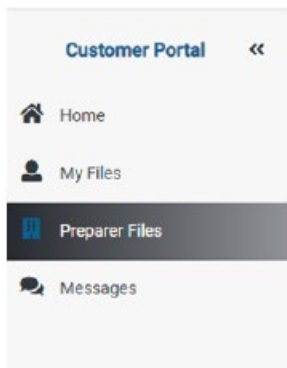
❗ Password is required

[Forgot Username](#) | [Forgot Password](#)

LOG IN

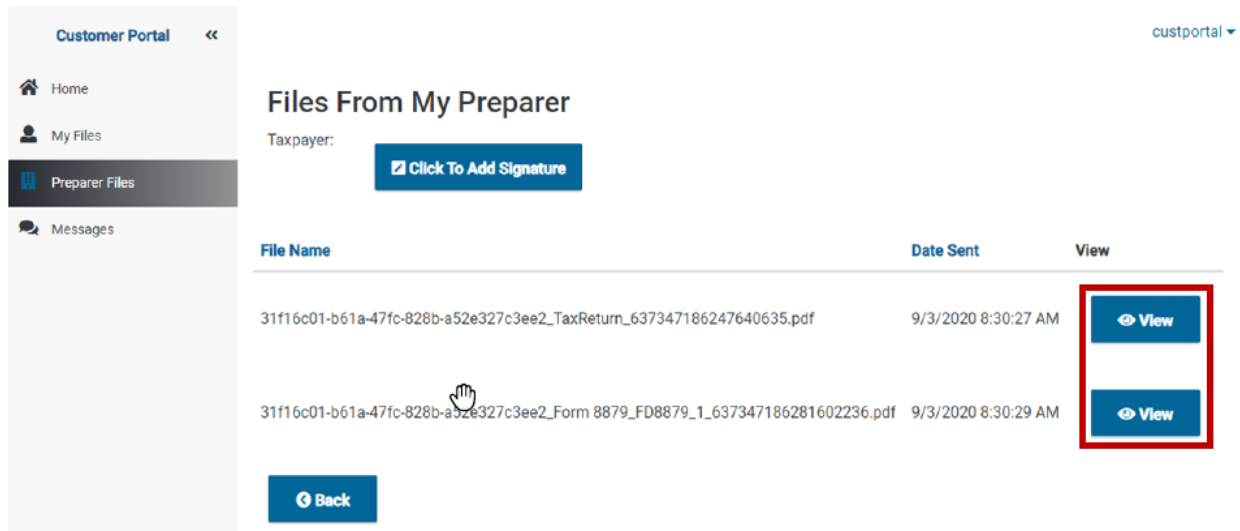
By clicking 'Log in', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and agree to receive marketing emails related to your account. You can [unsubscribe](#) at any time.

Enter the username and password that you established when creating your account

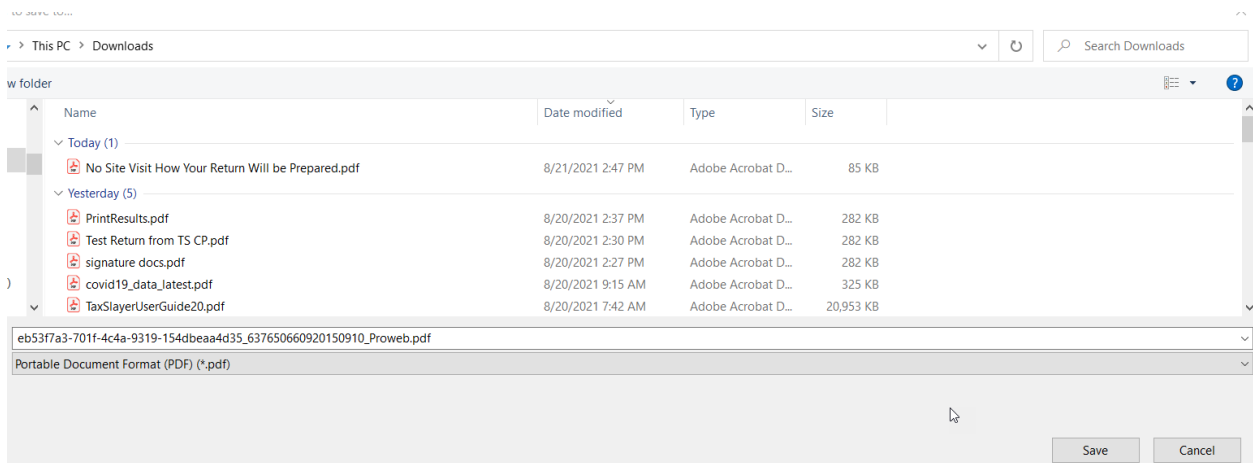


When you login the Customer Portal, you will be taken to the **Home Page**, select **Preparer Files**

- The **Files From My Preparer Window** will display files sent by the Counselors preparing your tax return



- Select the **View** button to the right of the file you want to view. The document will automatically download to your device. You will be prompted to **Save** the file on your device; you can accept whatever the default download location is (often this is “Downloads”) or browse to a different location on your device. You may want to rename the document to a more easily identifiable name. Once you have identified the area / folder in which you want the document saved and renamed it as you wish, click **SAVE**.



- Once the file is saved on your device, you can view or print it, as you wish.

AARP Foundation Tax-Aide 15 - Electronically Signing Documents Relating to Your Return

A Counselor will review the tax return with you via a Google Meet video conference. After answering any questions, the Counselor will ask you to electronically sign documents related to your return. Those documents include an IRS Form 8879 and may include State forms. You, and your spouse if you are married filing a joint return, must sign the documents to grant permission for us to e-file the return on your behalf. Without your signature, we cannot transmit your return to the IRS. Following are instructions to execute your electronic signature.

- Log in your Customer Portal account
 - Enter **taxslayer.com/myaccount** in your Web browser and press enter

Log in

Need a TaxSlayer account? [Create account.](#)

Username

Password

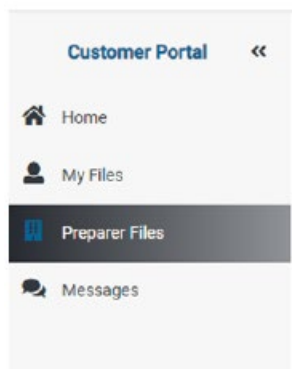
❗ Password is required

[Forgot Username](#) | [Forgot Password](#)

LOG IN

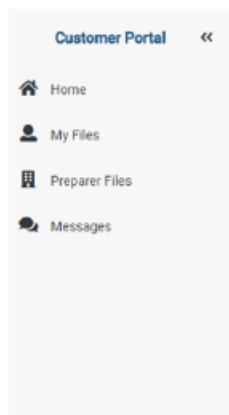
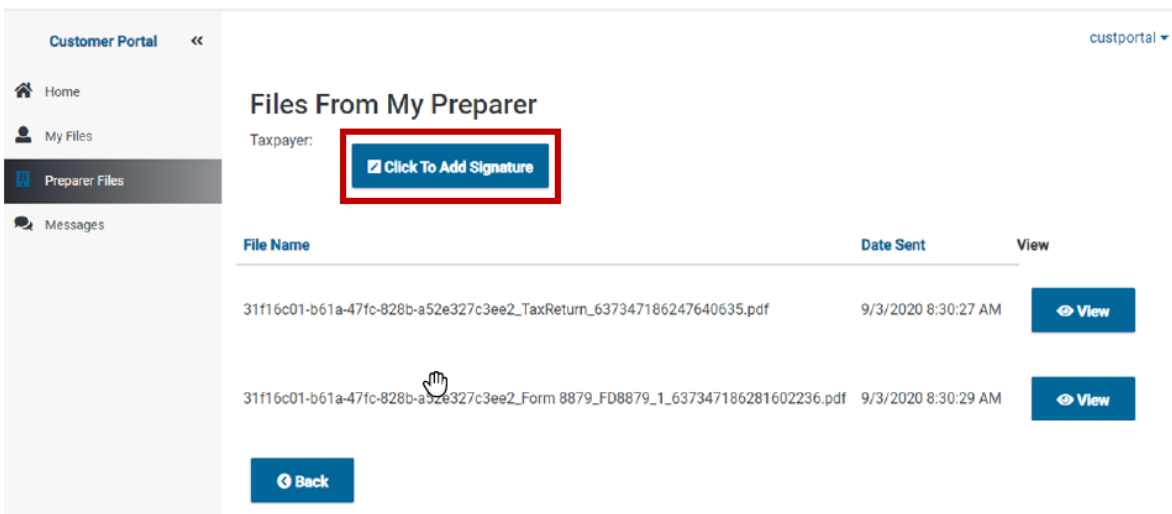
By clicking 'Log in', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and agree to receive marketing emails related to your account. You can [unsubscribe](#) at any time.

Enter the username and password that you established when creating your account



When you login the Customer Portal, you will be taken to the **Home Page**, select **Preparer Files**

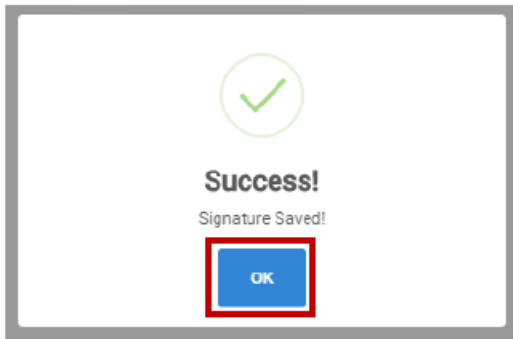
- The **Files From My Preparer Window** will display files sent by the Counselors preparing your tax return



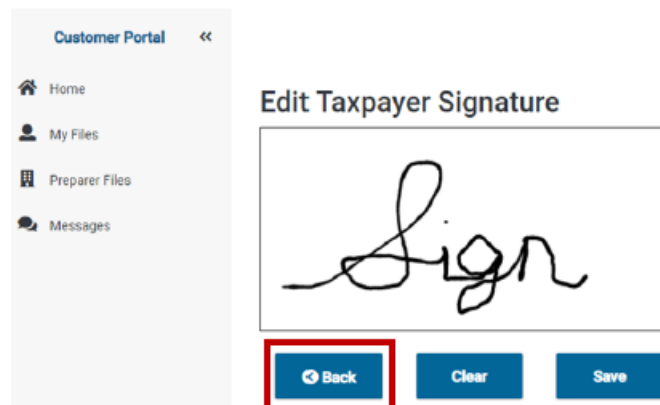
Click on the **Click to Add Signature** button. The **Edit Taxpayer Signature** window will be displayed

- Use your mouse to write your signature. If working on a device with a touch screen, use your finger to write your signature in the box.
- To save your signature, click on the **Save** button

- A message will display when your signature has successfully saved. Click **OK**

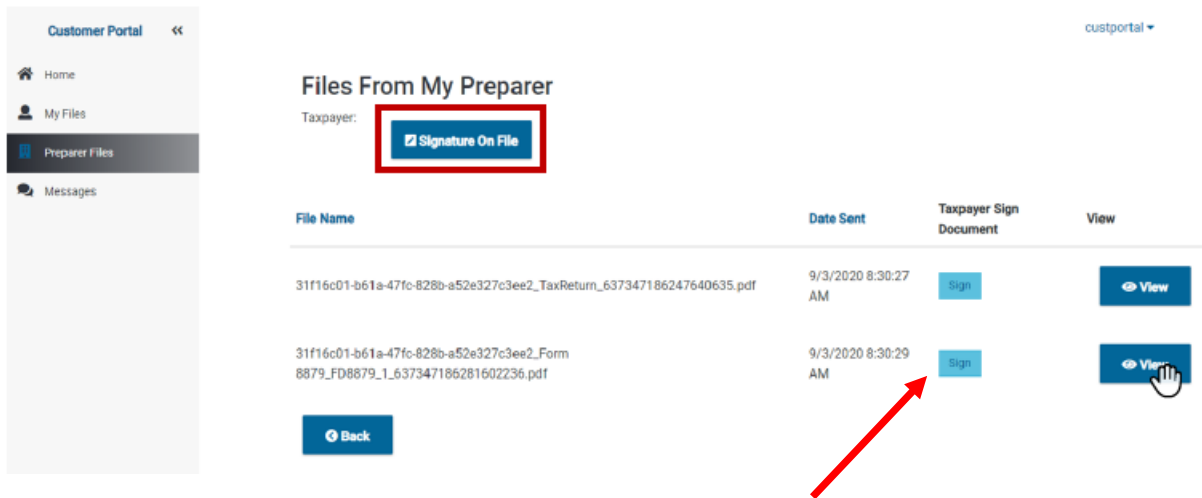


- You will be returned to the **Edit Taxpayer Signature** screen



- To “sign” the documents related to your tax return, click the **Back** button

- You will now see that your signature is **On File**



- After reviewing and approving the tax return, click the **Sign** button next to each document name

Date Sent	Taxpayer Sign Document	View
9/3/2020 8:30:27 AM	Signed!	View
9/3/2020 8:30:29 AM	Sign	View

- Once the signatures have been entered, they will be visible to our Counselors when viewing your return in the software program