

TaxCaddy

Scanning and Uploading

SCANNING DOCUMENTS

Please keep the following tips in mind when scanning tax documents to us:

- Scan one tax document per file; NO bulk scans
- Save documents as PDF file types only
 - [Click Here](#) to access Adobe Acrobat's free conversion to PDF tool
- Name each document appropriately (i.e. W2 CompanyName, not Scan 1234)
- Black and White scans are preferred
- Scan in the correct orientation (i.e. Landscape or Portrait format)
- Keep all pages of a multi-page document together
- Do not upload password protected documents

Based on your feedback we created this handout to provide guidance on scanning and uploading documents to TaxCaddy. Ultimately this should expedite the processing of your return.

UPLOADING DOCUMENTS

When uploading documents via TaxCaddy, select the **correct tax year** from the dropdown menu. In the Documents tab under Requested Items, scroll down to Documents Requested to upload each tax document individually using the 3 dots to the right, then select **Upload**.

YOUR NAME



PHASE - PROVIDE INFO

TAX YEAR
2021

Documents

Requested Items (56) Uploaded Documents (18)

Documents Requested

Document Name	Requested On	Status
 Davis & Hodgdon Associates CPAs, PLC W-2 (Wages)	01/14/2021 - 08:30 AM	NOT UPLOADED 

Upload
 Reply With Amount
 Already Provided
 Doesn't Apply

If a Requested Document does not apply this year, select the 3 dots, then **Doesn't Apply**.

If we prepare tax documents for you (i.e. K-1 or 1099) or you have already provided hard copies of your tax document requested, we will mark the item **Already Provided**.