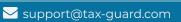


USER GUIDE

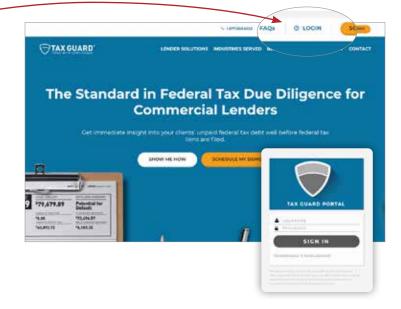
Tax Guard Portal v. 2021



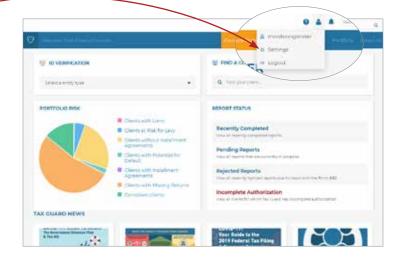


Login and Account Settings

The **Login** for the portal is at the top right of the Tax Guard home page. www.tax-guard.com



Go to **Account Settings** to update your general information, password and notification settings.









The Portal Dashboard

Alerts Icon Find all updates and alerts Invoices about your portfolio here. View and Click the icon to quickly **Portfolio Risk** download navigate to the client and This easy to read chart invoices. view alert details. summarizes your portfolio risk. Click on a section to see which clients are included. **Portfolio** FIND A CLIENT **WID VERIFICATION** Use this feature to Q Find your client. Select a entity type explore your portfolio. PORTFOLIO RISK REPORT STATUS Clients with Liens Recently Completed Clients at Risk for Levy View all recently completed reports. Clients without Installment Agreements **Pending Reports** Clients with Potential for Default View all reports that are currently in progress. Clients with Installment Rejected Reports Agreements View all recently rejected reports due to issues with the Form 8821. Clients with Missing Returns Incomplete Authorization Compliant clients TAX GUARD NEWS **Report Status** Your Guide to the Track the progress of 2019 Federal Tax Filing your reports and quickly identify those that require your attention. **Tax Guard News** Keep up-to-date on all of Tax Guard's new features, blog

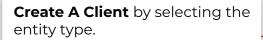


posts, and webinars.

High Risk

Customers that utilize the monitoring service will see a break down of high risk clients on the portal dashboard.

Create a New Client





Link A Guarantor Report by checking yes in the Tax Guard

Instantly **Verify** the client's name and EIN and/or SSN.



| ID Verification Results:

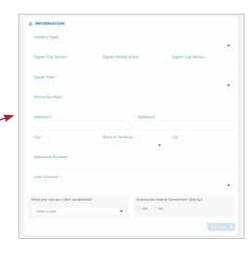
Success: The information you have provided matches IRS records.

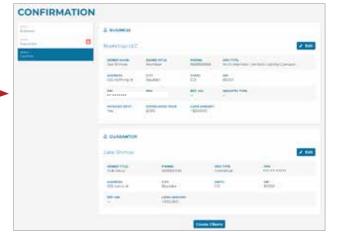
Fail: The information you have provided does not match IRS records.

Error: The ID Check feature is unavailable. Please continue to the next step.

Input the remaining client information that will be used to generate Form 8821.

Once you have reviewed and/or edited the information, Create Client(s) and download the associated Form 8821.









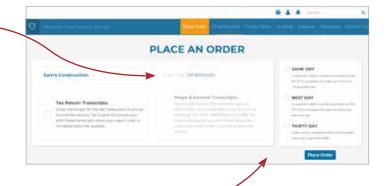
Place an Order

Select **Place Order** and enter client name.



Upload the signed Form 8821.

Choose desired turn around time and add-ons, then Place Order.



Once you've ordered a report, you can track its progress on the portal dashboard.





