Tax Guard Portal FAQs

TAX GUARD®
FUND WITH CONFIDENCE

General FAQs

What days of the year will Tax Guard be closed?
Tax Guard operates on the federal holiday schedule. For the most current listing of the holiday schedule, please refer to the office of personnel management website. In addition, there will always be a public posting on the Tax Guard Portal.

What web browsers work best with the Tax Guard Portal?
To make sure you have the best experience possible, we recommend using the most up-to-date version of one of the following browsers:

- Mozilla Firefox
- Google Chrome
- Internet Explorer (above IE 8.0)

Who do I contact with questions?
For questions regarding your account, orders, or reports, contact your account manager. For portal support or technical issues, contact the Tax Guard team at support@tax-guard.com.

How do I add another user to our account?
To add an additional user, please contact your account manager who will either send an invitation to the new user, or give you administrator privileges so you can add additional users going forward.

Is my data secure within the portal?
Yes! Several layers of security exist to ensure your data is secure including enhanced password strength, session timeouts after 30 minutes and advanced encryption.

Order FAQs

Why must I enter my client's phone number when creating the Form 8821?
The phone number is required by the IRS in case they need to contact your client directly regarding their tax account.

What do the client categories mean?

- **Active:** An order has been placed for these clients.
- **Inactive:** These clients have been created, but no order has been placed.
- **Rejected:** The submitted Form 8821 for these clients has been rejected by the IRS. A Tax Guard Report cannot be ordered until the 8821 has been updated.
- **Closed:** These clients are not active. To obtain a Tax Guard Report for these clients; a new 8821 is required and you must order a report to reactivate them.
- **Pending:** Your Same Day, Next Day, and Thirty Day reports are awaiting completion.
- **Completed:** Your Same Day, Next Day, and Thirty Day reports that are complete.

Oops! How do I cancel an order?
Please contact your account manager immediately. If we have already contacted the IRS for the report, we will not be able to cancel the order.

How do I place an order for a closed client?
To place an order for a closed client, visit the Manage Clients page>Closed Clients tab and select the place order icon for the specific client.

How do I run a Tax Guard report on a Sole Proprietorship?
If your applicant is a Sole Proprietor conducting business without an EIN, create the client as an Individual using his/her Full Name and SSN. Some Sole Proprietorships register for an EIN with the IRS, in which case you can select 'Sole Proprietorship' from the client creation menu.

Post-Order FAQs

What events or changes qualify for a lender alert?

- New Lien
- New 1058 (Final Notice of Intent to Levy)
- New Liability
- Liability total grows by >$10,000
- An Installment Agreement changes from 'Good Standing' to any other status
- An Installment Agreement changes from 'None' to 'Potential for Default'
- An Installment Agreement changes from 'Potential for Default' to 'None'

Where can I find a list of all my orders?
On your dashboard select the "pending" tab. This section lists all your orders - turnaround times, order dates, client names, and the individual from your organization who placed the order.

How do I get help with a client that has a tax problem?
We have tax experts available as a resource for you to negotiate Installment Agreements, lien subordinations, and resolve any issues that your prospects and clients may have with the IRS. Please contact your account manager to discuss the nature of the issue and they can direct you to our expert resolution team.

What does the category for "high risk" clients mean?
If your client has a total IRS liability over $50,000 or an Installment Agreement status listed as "None" or "Not in Good Standing" they will be listed in the "High Risk" category. Please contact your account manager to discuss the nature of the issue and they can direct you to our expert resolution team.