



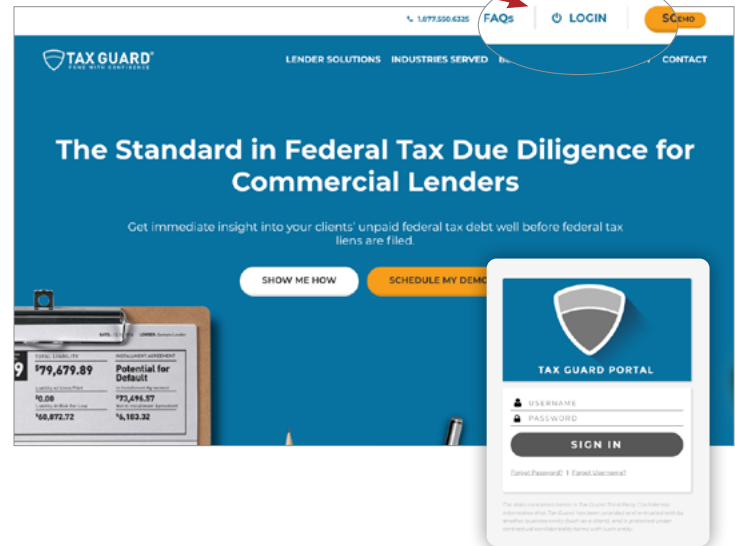
TAX GUARD
A Cogency Global Company

USER GUIDE

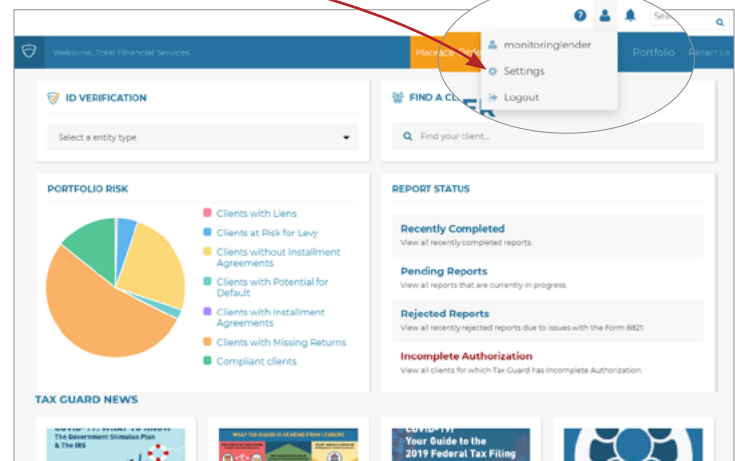
Tax Guard Portal
v. 2025

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

Portfolio Risk

This easy to read chart summarizes your portfolio risk. Click on a section to see which clients are included.

Alerts Icon

Find all updates and alerts about your portfolio here. Click the icon to quickly navigate to the client and view alert details.

Invoices

View and download invoices.

Portfolio

Use this feature to explore your portfolio.

Search...

Place Order

ID Verification

Create Client

Portfolio

Invoices

Resources

Contact Us

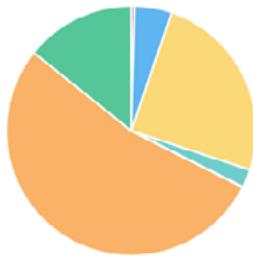
ID VERIFICATION

Select a entity type

FIND A CLIENT

Find your client...

PORTFOLIO RISK



- Clients with Liens
- Clients at Risk for Levy
- Clients without Installment Agreements
- Clients with Potential for Default
- Clients with Installment Agreements
- Clients with Missing Returns
- Compliant clients

REPORT STATUS

Recently Completed

View all recently completed reports.

Pending Reports

View all reports that are currently in progress.

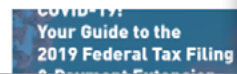
Rejected Reports

View all recently rejected reports due to issues with the Form 8821.

Incomplete Authorization

View all clients for which Tax Guard has Incomplete Authorization.

TAX GUARD NEWS



Report Status

Track the progress of 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

Create A Client by selecting the entity type.

Link A Guarantor Report by checking yes in the Tax Guard Tip.

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



ID Verification Results:

Success: The information you have provided matches IRS records.

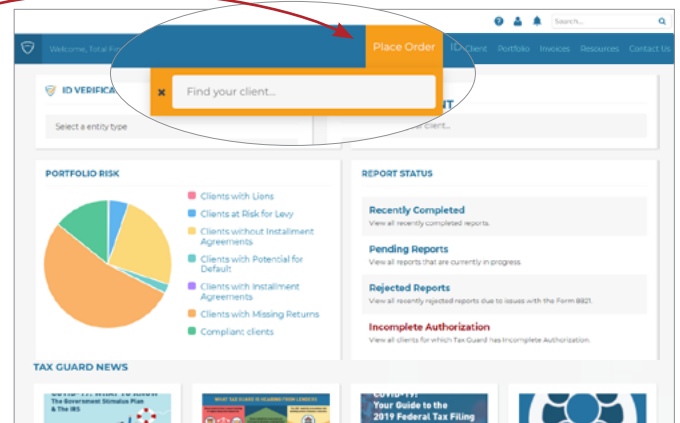
Fail: The information you have provided does not match IRS records.

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

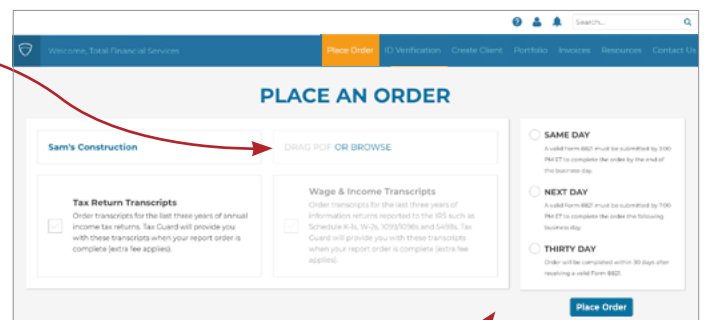
Once you have reviewed and/or edited the information, **Create Client(s)** and download the associated Form 8821.

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.