www.greenbacktaxservices.com

Tax Preparation Process INSTRUCTION GUIDE

Step 1

Register and meet your accountant

Get started by registering on our website.

A Greenback accountant will contact you directly within one business day to kick off the process.



Step 2

Answer our simple tax questions

We will email you a straightforward questionnaire to help your accountant gather the information needed to work on your tax return.

You will also receive the login info for your personal, secure folder where you can safely upload taxrelated forms.

8	Client Login
	Email:
	Password:
	Forgot your password?
	LOG IN F

Step 3

Share your tax info securely

Upload your completed questionnaire to your secure folder. This is also where you will upload additional tax documents, such as W2s or other forms that show income earned during the tax year.



Step 4

Work with your accountant

Your accountant will do the heavy lifting from here, but if you have any questions during the process, simply ask!



If there is a need for additional information or clarification, your accountant will contact you via email, phone or online chat.



Step 5

Review and approve your return

Your accountant will upload a draft of your completed return to your secure folder for review.

At this time you will also receive a convenient link where you can pay. Your accountant will make revisions at this time, if necessary.

Approve your final draft and pay your bill.

Step 6

Your accountant will electronically file (or e-file) your tax return when possible; it's more convenient and may allow you to receive any refunds more quickly. If e-filing is not an option, your accountant will let you know how to file by mail.





