

# Remote Hybrid Tax Service

**The online Remote- Hybrid method will give you a cost efficient method to complete your taxes at home with a coach**

Print a description of our Remote-Hybrid service by clicking on the print button above.

## **What is the Remote-Hybrid service?**

Remote-Hybrid service is having your taxes done at our office and doing them yourself with your home computer. Using the Remote-Hybrid way, you put in all your information on your computer and it is relayed to your designated computer in our office. You will be on a conference call with a coach and other people preparing their taxes at the same time but each client will be using a different computer in our office assuring confidentiality.



The coach will help you all the way.

## **The old way**

The traditional way of doing your taxes is with a series of forms and schedules that you have to wade through and complete.

## **The new way**

The modern way is to buy a computer program at a retail store and do your taxes by yourself. Let's explore this method for a moment. We have many clients that have gone this route and tell stories such as:

- Complaint: Time that it takes to go to the store and purchase this software
- Complaint: Installing the software some have said takes 2 or 3 hours. Some gave up and had the child (not the parent) next door install it.
- Complaint: The cost is typically \$39.95
- Complaint: Entering the information is a long and drawn out process and some have told us it took hours or days.
- Complaint: Bottom Line. Clients have to pay more than they expected and decided they should have come to us in the first place.
- Complaint: Additional cost and work, including returning to the store for the state return program, another \$29.95
- Finally if filed electronically: additional input and cost.

## **The Remote-Hybrid way:**

Using the Remote-Hybrid tax service you will save time, gasoline and money.

What do we charge? --We charge \$69.95 which includes the expertise of a coach.

# **The Remote-Hybrid Tax service --- How you do it!**

Please read this through

**You need to have at the ready:**

- Name, address, social security numbers, and date of births: you, spouse & all dependents
- W-2's 1099's and anything that came that said "Important Tax Document"
- Your credit card information –
- Your driver license if you are going to pay us from your refund.

If well organized, we anticipate it will take about 30 minutes to complete a routine return.

1. PRINT THIS!!! PRINT THIS PRINT THIS!!!!
2. Make an appointment by calling us: 203-481-0468 or 800-677-7008
3. Approximately 1/2hour before your appointment we will send you an e-mail with conference call instructions
  - A) Call an 800 number to connect to the conference
  - B) Enter a participant code
  - C) Establish voice contact with your coach, remember others will be in this conference room phone call
4. At this point we will send a second e-mail to invite you to your assigned computer in our office by clicking on the link which will direct you to a website "[gotomypc.com](http://gotomypc.com)" automatically. Go with defaults such as "ok, "yes" "grant" etc
5. You will be brought to a numbered computer with a general information screen
  - Part I, II, III- the taxpayer, spouse, dependent information and filing status
  - Part IV- Filing Info-- Check the fed & state e-file boxes, then select state
  - Part V- if you want direct deposit
  - Part VI - review
  - Part VII- Select your resident state
  - Part VIII & IX - review
6. Complete other forms as needed. The lower left side of the screen is "Add form" button. For example if you need to enter a w-2 click on the add form and type w-2 and a w-2 worksheet will appear.
7. Lucky 7 When in doubt ASK YOUR COACH if Charlie is the coach and Sue is using computer 6—"Charlie this is Sue on 6 I am having trouble with my w-2" "Charlie this is George on 4 I got this social security slip how do I handle it?"
8. Finish the federal return first then look to the lower left and click on the "Switch to State/city" button. Select the state(s) and the information should flow.
- 9.

The “switch to state/city now reads “Switch to Federal click on this and return to federal

10.

Click on the “Check for errors” button. This will produce window listing all the errors. Click on each error and click go to error and your will be brought to the exact spot that needs to be fixed. Correct or complete what is needed and repeat this until all the “errors are fixed. Select the state again and check for errors again.

11.

Wrap up

l Save your work File\_save

l Create a PDF file File\_create pdf

l Your coach will direct you to the green border “Tools” “Transfer files” and send your return to your computer for your record and printing

q **You need to print your return PDF file**

q **Sign the 8879**

q **Sign the state equivalent**

q **If you are paying us from your refund the “refund transfer application”**

q **Send or fax these to us 1052 Main Street Branford, CT 06437 fax 1-203-481-7088**

q **We will electronically file for you.**

**REMEMBER WE CANNOT FILE WITHOUT YOUR SIGNATURE IN OUR HANDS**

We thank you for using our Remote tax service. We welcome your comments and suggestions.

### **Technical Requirements**

We require a high-speed DSL or cable connection. Remember, there’s a lot of information going back and forth. You also need an available telephone line to call us, perhaps a cell phone.

### **Terms of service**

Remember, you are in a phone conversation with others who can hear what you say. By utilizing the Remote-Hybrid service you are agreeing to be courteous and respectful of everyone on the conference call, and agreeing to keep any and all confidences that may be inadvertently presented by the other attendees.