

Web Organizer Instructions

Thank you for choosing to try our web organizer. There are just a couple of simple steps to be completed and you will be on your way, organizing your individual income tax return records.

First, a word about ID Theft and security. Thomson Reuters, a large multi-national company, is the provider of the tax and organizer software used by our company. They take security seriously as do we. A couple of simple recommendations and thoughts for you to consider while using our web organizers include:

- The IRS will never contact you by email
- Our office will never call and ask you for your password
- Secure ID theft sensitive information, when you are not working on your organizer
- (Secure information would include your SSN, birthday, bank account info, and other ID numbers)
- Do not share your organizer password **with anyone** or leave this password out
- Make sure your computer software is up to date
- Use up-to-date security software on your PC (firewall, virus, and malware detection)
- Do not use a public computer or public WiFi to complete your organizer

An email will be sent to you with registration and login instructions. If you completed a web organizer last year, you will not need to go through the simple registration process.

If you have used our web organizers before you can simply go to our website www.marplecpa.com and click the Client Portal Login. Once logged in, your new 2015 organizer will be available for use.

If you have forgotten your password or username, there are options for resetting them.

If you are a first time user of our web organizer you will need to first register by choosing the link provided and entering a username and password. Once this process is complete you can login to your organizer through our website.

The login to your organizer will appear as:



Marple & Marple Inc., P.S.

100 N Fruitland St Ste C - Kennewick, WA 99336-3899

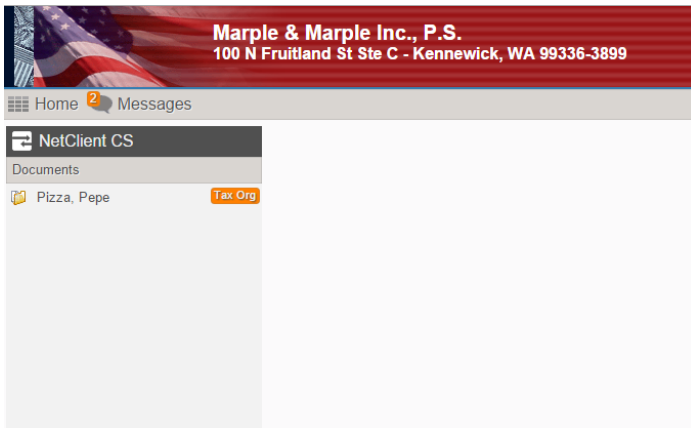
Please log in.

<input type="text" value="Login"/>	<input type="text" value="Password"/>	<input type="button" value="Log In"/>
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[Forgot password?](#)

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Once logged in you can access your organizer. The login also provides you access to other features and this area is collectively known as your client portal. You may upload other documents to us such as a PDF or Microsoft Office documents and we may also deliver your completed tax return to you through your client portal (only if you want to do so). Your client portal will appear as:



Click on the icon Tax Org and your organizer will be opened. Your organizer will appear as:

Tax Organizer Index

Send to Preparer | Save & Close | Create PDF

Last saved: 1/26/2016 1:40 PM

Uploaded Tax Documents

- Questionnaire
- Notes
- General
 - Personal Information**
 - Client Contact Information
- Electronic Filing
- Income

Dividend Income | Add

General > Personal Information

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er))

Mark if you were married but living apart all year

Mark if your nonresident alien spouse does not have an Individual Taxpayer Identification Number (ITIN)

	Taxpayer	Spouse
Social security number	****-**-****	
First name	PEPE	
Last name	PIZZA	
Occupation	PIZZA MAKER	
Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3 = Blank)	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Mark if dependent of another taxpayer	<input type="checkbox"/>	<input type="checkbox"/>
Taxpayer with income less than 1/2 support age 18 or 19 - 23 full-time student? (Y, N)	<input type="checkbox"/>	<input type="checkbox"/>
Mark if legally blind	<input type="checkbox"/>	<input type="checkbox"/>
Date of birth	05/01/1952	
Date of death		
Work/daytime telephone number/ext number		
Home/evening telephone number		
Do you authorize us to discuss your return with the IRS? (Y, N)	<input type="checkbox"/>	<input type="checkbox"/>



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Click the corresponding icons to add information. You can also add new organizer sheets for information types you did not have in the prior year (click the Add icon located at the bottom right of the entry page).

You can work and stop on your organizer in multiple sessions. **Make sure to click the Save & Close icon prior to leaving your organizer. If you do not, your new work will be lost.** Simply log back in to access your organizer if you stop in the middle.

To upload documents (PDF or Microsoft Office), click the Uploaded Tax Documents on the left side of the organizer screen and then click Upload. You will be able to drag and drop into the upload field.

Once you have completed your organizer and uploaded any files you want to send to us, click the Send to Preparer icon and your organizer will be sent to our firm.

Why Use a Web Organizer?

Convenience! You can save commute trips to our office and be digitally organized.

Your finished return can be delivered to your own secure portal (if you choose).

You can keep your returns in your portal giving you access to your return copies 24x7.

Your same portal can be used to securely receive and transfer other documents, between us.

For your ID theft sensitive information, there are less paper copies out for possible theft.

You will be helping to cut down on the use of paper.

Some do not have the best handwriting and the typed organizers are nice to see (thank you).

Web organizers are not for everyone but they may work well for you. We believe it is important to stay up with technology and offer our clients new technology that can benefit them. We see web organizers becoming popular in the future with benefits which are here now.