

**PLEASE DO NOT REPLY TO THIS EMAIL.**  
IF YOU HAVE QUESTIONS, PLEASE REFER TO THE STAFF EMAIL LINKS  
AT THE BOTTOM OF THIS PAGE, OR CALL US AT 972.669.2370.



## March 2023 Tax & Business Alert



**PLEASE READ THIS IMPORTANT INFO!**  
**(Yes. . . seriously!)**

- You need to **Activate your TaxDome portal** to access your account info, to be able to sign the Contract and 8879 Signature Documents electronically, to upload your supporting documents, and to see your return as soon as we complete it.
- TaxDome uses a **KBA (knowledge-based authentication) signature** and it **REQUIRES THAT EACH TAXPAYER on a joint Account have their OWN personal email address** to sign electronically.
- **You can be a non-signing CONTACT on an Account**, where you are still able to log in to see the Account and upload or view documents. As a CONTACT on someone's account (like an elderly parent for example), the only thing you are not able to do is sign the Contract and 8879 on their behalf. Everything else is accessible!
- **You do NOT have to fill out the Tax Organizer, but you MUST, at a minimum, SUBMIT a Tax Organizer** in order for the return to progress to the next phase. It is helpful in determining what to send to us for the preparation of your return, and prompts you to upload certain documents based on your answers to questions. **If you**

**choose NOT to fill it out**, simply go to the bottom of the Tax Organizer to "CONFIRMATION YOUR SUBMISSION IS COMPLETE" and SUBMIT the Organizer to prompt it to the next phase. It's just a CLICK to submit it.

- **To upload additional documents or info (outside of the Tax Organizer)**, click on DOCS at the top of your portal page and select UPLOAD DOCUMENTS.
- **If you choose to bring in your supporting documents** (as opposed to uploading them to TaxDome), it is still important to activate your Account so that you can get the automated updates as we progress through the prep work of your return. "Paper Clients" do take a bit longer to process, but you can still choose to do things this way if it is your preference - just let us know!
- It is very important to **SIGN the Contract** and **SUBMIT the Tax Organizer** even if it's blank so that your return is moved to the stage to be assigned to a Tax Preparer. You must only fill out **ONE Tax Organizer** if you have multiple accounts, **HOWEVER, docs need to be uploaded to the specific account that they pertain to.**
- If you have multiple Accounts on TaxDome (personal, businesses, a parent's account, etc.) **PLEASE be sure when you upload docs that you are in the correct Account.**
- **We are NOT currently accepting payments through TaxDome.** Please contact our office to pay.
- Please note that **messages/emails sent after regular office hours will not be responded to immediately.**
- **TDReply@falgoutcpa.com is NOT a monitored email; if you need assistance, please email a staff member directly.**
- **If you choose to NOT activate our TaxDome portal, please note that while we can still do things the "old" way (paper), you will miss the automated updates on your return.** As much as we love our clients, we simply do not have enough staff or time to call them at every stage of the return.
- Need a link to activate? Contact [jennifer@falgoutcpa.com](mailto:jennifer@falgoutcpa.com) if you did not receive one!
- **If you've already activated your TaxDome Account(s), you can login by going here: <https://falgoutcpa.taxdome.com/>**

**Automation is a beautiful thing and helps YOU to stay updated on your return status!** It is very important to complete items we ask you to sign, submit, or upload so that WE can then complete your return in a timely manner.

We do recognize there is a learning curve for both you and us! As with anything new, there is an adjustment period, but we truly feel it will ultimately help us communicate with you better and keep the document submissions secure. **We appreciate your patience as we navigate this new program.**

#### **OFFICE HOURS:**

\*Monday-Friday 8 a.m.-5 p.m.

\*Our staff takes lunch from 12-1 p.m., however, a staff member is available during this

time

should you need to drop off or pick up any returns or supporting documents



### **MARCH 2023 TAX & BUSINESS ALERT**

- SECURE 2.0 LAW MAY MAKE YOU MORE SECURE IN RETIREMENT
- CAN YOU DEDUCT THE COSTS OF A SPOUSE ON A BUSINESS TRIP?
- HAVE A FOREIGN ACCOUNT? FILE AN FBAR
- RECONSIDERING YOUR PERSONAL EMERGENCY FUND

We value you as our client and hope that you find some helpful information in this month's e-newsletter.

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**E-MAIL LINKS FOR OUR STAFF MEMBERS ARE BELOW:**

**APPOINTMENTS**  
Receptionist

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Jim Falgout,  
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