



New Tax Organizer and Tax Return Delivery Experience

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New Client Dashboard with progress tracking

Introducing our new streamlined process for 1040 Tax Organizer and Tax Return Delivery. This new intuitive interface was designed to enhance client experience. Click “Get Started” to begin the process.

The screenshot shows a client dashboard for 'Your 2024 Tax Return Progress'. At the top, there is a navigation bar with a menu icon, the 'CRI FAMILY OF COMPANIES' logo, a notification bell with '121', and a user profile for 'John Smith'. Below the navigation bar, there are tabs for 'Tax Return', 'Files', 'Messages', 'People', and 'Activity'. The main content area has two tabs: 'Dashboard' and 'Progress'. A large blue banner contains the text 'Good afternoon, [redacted]' and 'Get started now, and we'll guide you through each step to ensure everything is accurate and ready for submission'. A red arrow points to a yellow-bordered 'Get Started' button. Below the banner is a progress tracking section with six steps:

- 1. Tax Year Updates**: Update Changes in Your Personal and Financial Details. Status: Complete (green checkmark).
- 2. Upload Documents**: Provide All the Necessary Documents for Each Request. Status: 50% (blue progress circle).
- 3. Complete Tax Organizer**: Complete All Required Sections to Finalize Tax Organizer. Status: 11% (blue progress circle).
- 4. Review Tax Return**: Give Your Return a Final Review.
- 5. Sign Tax Return**: Sign Your Return to Finalize Your Filing.
- 6. Tax payments**: Submit your Payments Timely to Avoid Penalties.

Questionnaire

Client users will start the process by completing their Tax Year Updates questionnaire. You now have an option to mark all responses within each section as “yes” or “no” to expedite answering these questions. In addition, progress % will be shown at the top right and once all questions are answered, the green check will appear.

Your 2024 Tax Return Progress

Dashboard Progress

Upload File Area

1. Tax Year Updates 2. Upload Documents 1/2 3. Complete Tax Organizer 2/19 4. Review Tax Return 5. Sign Tax Return 6. Tax Payments

Tax Year Updates

✓

Home and Family

Mark all as Yes No

1. Did your marital status change since last year? Yes No

2. Did you move to a different home during the tax year? Yes No

3. Were there any changes in dependents from the prior year (or if a new user, select Yes to enter dependents)? Yes No

4. Did you purchase or sell a home or other real estate during the tax year? Yes No

5. Are you an active duty member of the Armed Forces that incurred moving expenses due to a military order or a permanent change of position? Yes No

6. Do you have a home office? Yes No

Tax Year Updates 7 Update Changes in Your Personal and Financial Details

Next

Tax Documents

Next, you will proceed to upload relevant tax documents to the new and improved Upload Documents section. The form type and institution name will pre-populate based on your prior year info, and you can indicate if a given document is still applicable to the current year as well as whether it's been uploaded into HubSync.

Your 2024 Tax Return Progress

Dashboard Progress

Upload File Area

1. Tax Year Updates 2. Upload Documents (1/2) 3. Complete Tax Organizer (2/19) 4. Review Tax Return 5. Sign Tax Return 6. Tax Payments

File Requests

Current Year Documents Export List New Request

2 All Requests 1 Not Uploaded 1 Uploaded

Form Name	Name	<input checked="" type="checkbox"/> Applicable To Current Year	<input type="checkbox"/> Uploaded	Actions
<input type="text" value="Select"/>	<input type="text" value="Search"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	
W-2	Macy's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
K-1	XYZ Enterprises	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Rows: 2

Upload Documents (5)

All files are stored in the File Cabinet File Cabinet

Upload Files, Folder or Drag & Drop

Dec 18, 2024

- Mortgage Stmt.pdf
- Prior Years
- Future Year - 2024
- Current Year - 2023

Upload Documents

Provide All the Necessary Documents for Each Request

Tax Documents

To create a new record in the document request list, users will click the New Request button and select the Form Name via the dropdown while also inputting a custom name.



File Requests ⊙

Current Year Documents ⌵ Export List + New Request

2 All Requests 1 Not Uploaded 1 Uploaded

Form Name	Name	<input type="checkbox"/> Applicable To Current Year	<input checked="" type="checkbox"/> Uploaded	Actions
<input type="text" value="Select"/>	<input type="text" value="Search"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	
W-2	Macy's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
K-1	XYZ Enterprises	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-2	HubSync 2024 W-2	<input type="checkbox"/>	<input type="checkbox"/>	

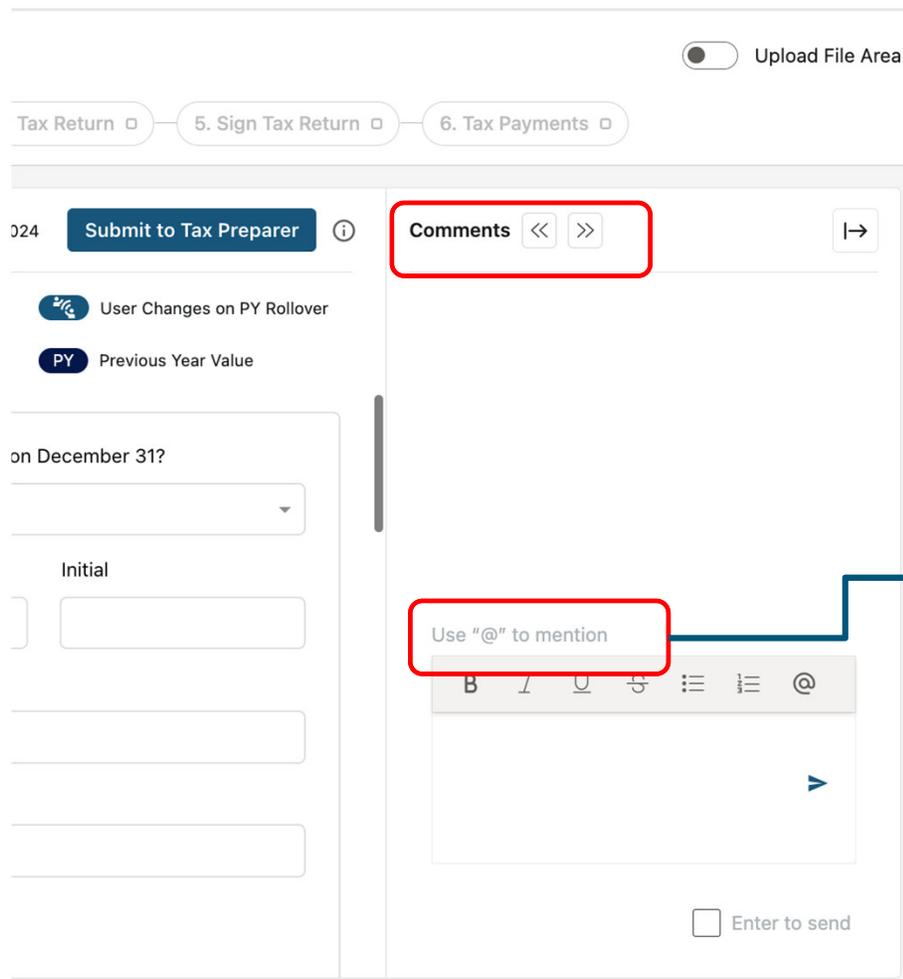
Organizer

After uploading tax documents, users will navigate to the Complete Tax Organizer section. Based on your responses provided during the earlier questionnaire, the organizer sections are automatically customized to you. If you don't see a relevant section of the dynamic organizer, you can simply select Hidden or All to see other sections of the organizer. **After all sections have been completed, click on “Submit to Tax Preparer” button.**

The screenshot displays the 'Complete Tax Organizer' interface. At the top, a navigation bar shows 'John Smith' and tabs for 'Tax Return', 'Files', 'Messages', 'People', and 'Activity'. Below this, a progress bar indicates the current step: '3. Complete Tax Organizer' (2/19), with other steps like '1. Tax Year Updates' and '2. Upload Documents' (1/2) also visible. A 'Submit to Tax Preparer' button is highlighted with a red box and a blue arrow. The main content area is titled 'Tax Organizer' and includes a 'Personal Information / Taxpayer' section with various input fields for marital status, filing status, name, occupation, SSN, and date of birth. A sidebar on the left shows a list of sections: 'Personal Information' (2/5), 'Income' (0/4), 'Deductions & Credits' (0/7), 'Alimony', 'Tax Payment', and 'Household Employment Taxes'. The 'Required' filter is selected in the sidebar. At the bottom, there are 'Print', 'Previous', and 'Next' buttons.

Organizer

The comments feature allows you to comment back and forth with your CRI Professional at the page level.



To have your CRI professional notified of your comment, type @CRI Person's Name in the body of your comment. Alternatively, comments may be left without calling out a user.

Note: only users assigned to a workspace will be able to receive comments.

Delivery

Once the Tax Organizer is completed, your CRI team will analyze your data, prepare and review your return, and reach out to you with any questions.

The Review Tax Return step will show this status screen up until the tax return is delivered.



We have received your information and are working to prepare your return. We will notify you as soon as we are ready!

Tax Year Updates	✓ Completed
Upload Documents 6/6	✓ Completed
Complete Tax Organizer 6/6	✓ Completed

Delivery

When your tax return is ready, you'll be notified and directed to the Review Tax Return step. You'll be able to download returns for your records as well as review directly on-screen within HubSync.

John Smith

Tax Return Files Messages People Activity

Your 2024 Tax Return Progress

Dashboard Progress

1. Tax Year Updates 2. Upload Documents 1/2 3. Complete Tax Organizer 6/19 4. Review Tax Return 5. Sign Tax Return 6. Tax Payments

Your returns and forms are stored in the File Cabinet

File Cabinet

^ Entire Return

- ^ Federal
 - Cover Letter
 - Federal Filing Instructions Standard...
 - Form 8879 - IRS e-file Signature Auth...
 - Form 1040 - U.S. Individual Income T...
- ^ States
 - ^ DC
 - (DC) State City Filing Instruction...
 - D-40E - Sub Individual Income Tax...

JOHN SMITH
2717 CHESAPEAKE ST NW
WASHINGTON, DC 20008

WE HAVE PREPARED THE FOLLOWING TAX RETURNS PRIMARILY FROM THE INFORMATION YOU FURNISHED. SINCE YOU HAVE THE FINAL RESPONSIBILITY FOR THE TAX RETURNS, YOU SHOULD REVIEW THEM CAREFULLY BEFORE YOU SIGN AND FILE THEM OR AUTHORIZE THEM TO BE ELECTRONICALLY FILED.

2021 U.S. INDIVIDUAL INCOME TAX RETURN
2021 DISTRICT OF COLUMBIA INDIVIDUAL INCOME TAX RETURN

WHERE'S MY IRS REFUND?
AFTER YOUR FEDERAL RETURN HAS BEEN FILED, YOU CAN CONTACT THE IRS REFUND HOTLINE AT (800) 829-1054 TO CHECK ON THE STATUS OF YOUR REFUND. PLEASE WAIT 24 HOURS AFTER THE IRS HAS RECEIVED YOUR E-FILED RETURN AND BE PREPARED TO PROVIDE YOUR SOCIAL SECURITY NUMBER, FILING STATUS AND EXACT IRS REFUND AMOUNT.

PLEASE RETAIN ALL TAX RECORDS, CANCELLED CHECKS AND OTHER DOCUMENTS THAT WERE USED IN THE PREPARATION OF THESE RETURNS, AS THIS INFORMATION MAY BE REQUESTED SHOULD A FEDERAL OR STATE TAXING AUTHORITY EXAMINE YOUR RETURN. YOUR COPY HAS EITHER BEEN INCLUDED IN THIS PACKAGE OR SENT TO YOU ELECTRONICALLY. PLEASE RETAIN FOR YOUR FILES.

INSTRUCTIONS FOR FILING THE ABOVE ARE INCLUDED FOR EASY REFERENCE.
WE SINCERELY APPRECIATE THE OPPORTUNITY TO SERVE YOU. PLEASE CONTACT US IF YOU HAVE ANY QUESTIONS CONCERNING THE TAX RETURNS.

VERY TRULY YOURS,

ERIN BLANDING

Review Tax Return ?
Give Your Return a Final Review

Download Tax Return Previous Next

List of returns by jurisdiction and form.

E-Signature

Once reviewed, you'll e-sign the e-File authorization forms via the Sign Tax Return step. Note, signers will be prompted to respond to the identity verification questions (as required by the IRS).

- 1. Tax Year Updates
- 2. Upload Documents 2/2
- 3. Complete Tax Organizer 9/20
- 4. Review Tax Return
- 5. Sign Tax Return
- 6. Tax Payments

Finalize Your Tax Filing

You're almost done! To complete your tax return, please review the document and sign it electronically. Your signature is the final step to authorize us to file your return.

James King lakshmlb.qa21@gmail.com	Review and Sign	←
Seem James lakshmlb.qa25@gmail.com	Review and Sign	←

Finalize Your Tax Filing

You're almost done! To complete your tax return, please review the document and sign it electronically. Your signature is the final step to authorize us to file your return.

	<input checked="" type="checkbox"/> Signed
	<input checked="" type="checkbox"/> Signed

You're almost done. You have entered all requested information and signatures. When ready, select Submit to complete the signing process.

Back

Submit

2024_Tax Return.pdf Page 1 of 2

Institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at: 1-888-953-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize _____ to enter or generate my PIN **7 6 7 8 9** as my ERO firm name signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ Helen Baker Date ▶ _____

Spouse's PIN: check one box only

I authorize _____ to enter or generate my PIN **3 4 3 2 1** as my ERO firm name signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ _____ Date ▶ _____

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

Tax Payment Vouchers

If you have payment vouchers due with the return or estimated tax vouchers, those documents will be easily accessible in the tax payments section. The vouchers will be presented in the Tax Payments step and available for individual review and download.

The screenshot displays the 'Your 2024 Tax Return Progress' interface. The progress bar shows six steps: 1. Tax Year Updates (checked), 2. Upload Documents (1/2), 3. Complete Tax Organizer (6/19), 4. Review Tax Return, 5. Sign Tax Return, and 6. Tax Payments (active). The 'Tax Payments' section is highlighted in blue. On the left, a 'File Cabinet' sidebar shows a list of payments under the 'Payments' heading, circled in red:

- 2021 1040 Stellar Innovations - DC.pdf
- 2021 1040 Stellar Innovations - Federal.pdf

A red text annotation next to the list reads: "List of payments by jurisdiction and form." The main content area displays the '2021 TAX RETURN FILING INSTRUCTIONS' for the District of Columbia Income Tax Return for the year ending December 31, 2021. The instructions include sections for 'PREPARED FOR', 'PREPARED BY', 'AMOUNT OF TAX', 'OVERPAYMENT', 'MAKE CHECK PAYABLE TO', 'MAIL TAX RETURN AND CHECK (IF APPLICABLE) TO', 'RETURN MUST BE MAILED ON OR BEFORE', and 'SPECIAL INSTRUCTIONS'. A large blue arrow points down from the 'Download All Vouchers' button at the bottom right of the interface.

Tax Payments ⓘ
Submit your Payments Timely to Avoid Penalties

Download All Vouchers Previous Next

Payment Reminders

In addition, you have the ability to set payment reminders as due dates approach. You can set multiple reminders for before, after, or on your due date. Each reminder can be assigned to one or multiple people, but keep in mind that only users in your HubSync workspace can set or receive those reminders.

Your 2024 Tax Return Progress

1. Tax Year Updates 2. Uploa

Your returns and forms are stored in the File Cabinet

File Cabinet

^ **Payments**

2021 1040 Stellar Innovations - DC.pdf  

2021 1040 Stellar Innovations - Federal.pdf  

Add Reminder

2021 1040 Stellar Innovations - DC.pdf

Date
12/30/2024

Send reminder to
Tiffany Testing 

When
1 Day After 12/30/2024

+ New Rule

Add a message

Cancel Save

Select a user from the drop-down menu.



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