# FileLocal™ Tax Preparer QuickStart Guide

Go to www.FileLocal-wa.gov

## Set Up Your Preparer Account

- Click CREATE TAX PREPARER ACCOUNT.
- Read the information presented to determine if you need a preparer account. CONTINUE
- Create a username and password.
- Enter your name, company, contact info. SIGN UP
- We will send you an email message to confirm your account. Click the link inside to continue.
- Choose or enter a security question to safeguard your account.
- Enter the answer to the question. SAVE
- Your Account Setup is complete. Now you can add your clients.

## Work with a Client's Account

- Log in with the username and password you created when you set up your tax preparer account.
- Your client list will be displayed. Click **SELECT** next to the client you want to work with.
- The Portal will navigate into the client's account, showing your user name and the client's user name in the black banner at the top of the screen.

NOTE: If the client is not listed, follow the steps outlined in this QuickStart Guide to connect to or create the client's account.

For detailed training on FileLocal features, click the YouTube channel links on www.FileLocal.org/news

## Connect to a Client Account

If the client already has an account set up in FileLocal, you can request permission to manage the account. Before you begin, you need to know the email address the client uses on the account.

- Log in with the username and password you created when you set up your tax preparer account. ADD EXISTING ACCOUNT
- Enter the client's email address. SEARCH
- Any business account with that email address will appear under Existing User Accounts.
- Select the client's account(s) using the checkbox in the left column. REQUEST TO MANAGE
- We will send an email message to the client with your request to manage the account. The client's account will appear as PENDING in your client list until approved.
- The email message will inform the client of your request and provide a unique confirmation code. The client must click the link to log into FileLocal and enter the confirmation code to approve your request. NEXT
- When the client approves your request, the PENDING status of the account in your client list will change to a SELECT option. SELECT

NOTE: If the client's account remains in PENDING status for an extended period, you may want to contact them directly to determine why approval has not been granted.

## FileLocal Support Desk

- Direct Line: 225-215-0052
- Toll Free: 1-877-693-4435
- Email: filelocal@e-govsystems.com

## Create a Client Account

If the client does NOT already have an account set up in FileLocal, you can set up the account. Before you begin, you need to know the client's email address.

- Log in with the username and password you created when you set up your tax preparer account. ADD NEW ACCOUNT
- Read the information provided to ensure that you need to set up an account. CONTINUE
- Complete Step 1 to create a business account using the client's email address. SIGN UP
- We will send the client an email message to confirm account setup and to grant you permission to manage the account.
- The email message will instruct the client to forward the message to you if you are approved to manage the account.
- When the client forwards the message to you, click the link inside the email message to connect to the client's account and complete account setup. (See the Business User QuickStart Guide for step-by-step instructions for business account setup.) LOG OFF

## Stop Working with a Client

- If you are currently working in a client's account and you want to return to your account, click GO TO PREPARER ACCOUNT on the black banner at the top of the screen.
- If you no longer want to manage a client's account, click REMOVE LINK in your client list.

Menus and FAQs on Reverse

**FileLocal**™ Tax Preparer QuickStart Guide

**Go to www.FileLocal-wa.gov**
**Your one stop for local business licensing and tax filing**

## Menus

- <u>HOME</u> – go to your client list.
- <u>ACCOUNT CENTER</u> > *USER INFORMATION* – manage your contact information and personal settings.
  > *CHANGE PASSWORD* – change your password.
  > *CHANGE SECRET QUESTION* – update your security question.
  > *SECURE MESSAGES* – a secure mailbox to send and receive messages containing sensitive info that should not be sent via regular email.
- <u>LOOKUP</u> – find contact info for the city and form you select.
- <u>SUPPORT</u> > *CONTACT US* – contact info for the FileLocal support desk.
  > *EMAIL US* – send an email to open a support ticket with the FileLocal support team.
- <u>FAQ</u> – conduct a keyword search of all FAQs. Filter results based on city, form, or category.

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## Frequently Asked Questions

- **<u>What is a tax preparer account?</u>** A tax preparer account lets you manage FileLocal activities for multiple businesses under a single login. For example, if you are an accountant with several clients, you can log in once to manage any of them. Their data is kept separately, so one client can't see another client's information. When you request preparer access, the client must agree before you can manage the FileLocal account.
- **<u>I added a client's account, but it still shows as pending. Why?</u>** When you request to manage an existing account, we will send the client a confirmation code via email. The client must click the link in the email and enter the code to approve your request. If you have waited a reasonable amount of time, you may want to contact the client directly.
- **<u>I found my client's account, but there is an error that says another manager is using the account. What does that mean?</u>** The client has given a different preparer permission to manage the account. The other tax preparer will have to be removed from the client's account before you can request to manage the account. Contact the client directly.
- **<u>I can't find my client's account. What should I do?</u>** You may not have the right email address for the client. Contact the client directly to determine what email address is associated with the account. If the client has not set up an account on FileLocal, you may set up an account for the client.
- **<u>My client only wants me to file and pay taxes. How do I get that level of access to the account?</u>** The client will need to add a clerical user with File & Pay permissions and then give you the email address associated with that user account. Then you can connect to that user account instead of the client's primary user account.
- **<u>How do I tell which client's account I am using?</u>** The black banner at the top of your screen shows your user name and the client's user name.
- **<u>How do I switch to using a different client's account?</u>** Click **GO TO PREPARER ACCOUNT** on the black banner at the top of your screen.
- **<u>I am no longer managing a client's account. How do I remove the account from my client list?</u>** Go to the client list and click **REMOVE LINK** next to that client's account.
- **<u>Can I assign an employee to manage a client's account?</u>** An account can have only one preparer. Remove the client from your client list, and have your employee log in and request access to the client's account. We will send an email to the client, so you may want to advise the client of the change so your employee's request will be expected.