

Uploading Documents to TaxCaddy – Best Practices

To ensure a smooth and efficient process, here are helpful recommendations for uploading source documents to your TaxCaddy account:

- 1. Please direct download source documents from your financial institution(s), when possible.**
This can easily be completed by setting up TaxCaddy's Smart Links option, which connects your financial institution(s) with TaxCaddy. For info on Smart Links, visit TaxCaddy's help center and find "Adding Smart Links".
 - If you prefer to **not** use Smart Links, please download the document direct from your financial institution, save to your PC, and upload directly to TaxCaddy as you would any other document.
- 2. Taking photos:** Please use the [TaxCaddy app for iPhone and Android](#) to take photos of documents. For best quality, please do **not** upload photos taken outside of the app.
- 3. Scanning documents:** When scanning documents please keep these tips in mind:
 - ✓ **Scanner settings of 300 DPI, black and white scans are preferred.**
 - ✓ **Ensure the pages are scanned in the correct orientation** (i.e. Landscape documents (e.g. 1099 broker statements) scanned in landscape format, portrait documents in portrait format).
 - ✓ **Keep all pages of a multi-page document together.**
 - ✓ **Only scan one document per page** (i.e. Do not scan two different source documents to one single page).
 - ✓ **Save documents as PDF or TIFF only.**
 - ✓ **Source document files should be deskewed**, if this option is available on your scanner.
 - ✓ **Please do not use the despeckle function** when scanning for submission to our office.
- 4. As a rule, if you are having trouble reading the scanned document; we will also have difficulties.** Please rescan and adjust scanner settings if necessary. Examples of scenarios when adjustments are necessary:
 - Image too light
 - Watermark appears on the document
 - Image background too dark
- 5. If sending documents via email and not uploading in TaxCaddy, please use our ShareFile secure upload platform.** Go to www.CoverRossiter.com and click on **Client Support / Secure File Sharing**. Under **File Upload**, use intake@coverrossiter.com for recipient email address. If you are unsure what options are available, please contact us for more details.
- 6. If mailing documents to the office, please send the original document** and keep a copy for your files. Your original documents will be returned to you when your tax return is assembled.

If you have any questions, send a message in TaxCaddy or email Intake@CoverRossiter.com