

Detailed instructions for New Portal Completing & Submitting 2023 Tax Organizer & Tax Documents



Minert & Associates, PLLC

CERTIFIED PUBLIC ACCOUNTANTS

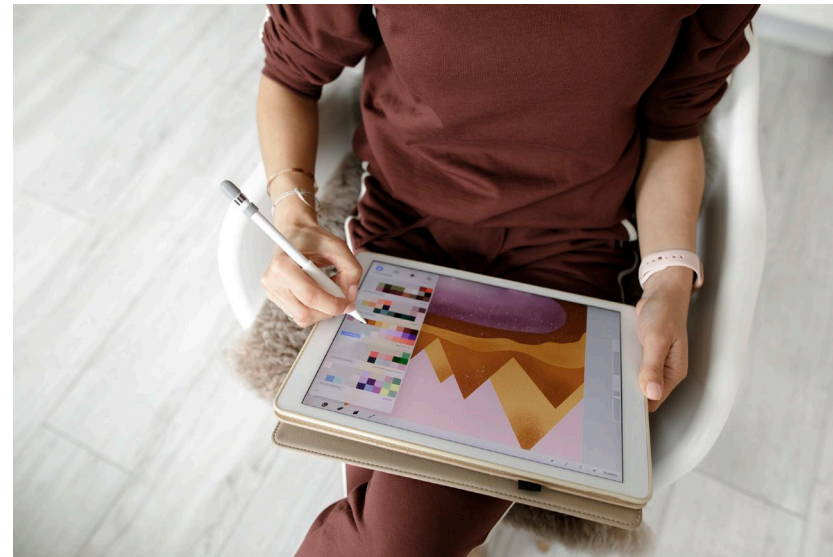
Relieving Your Financial Stress.

Welcome to our new Portal with Soraban <https://app.soraban.com>.

OR go to our website www.RelieveFinancialStress.com.

Click on **Portal/**[Login New Portal Account](#)

- User friendly
- May use on any electronic device, ie. laptop, phone, Ipad...etc.
- E-sign capability for Tax Return



STEP 1: Receive email from Minert & Associates, PLLC

Please Complete 2023 Recurring Client 2023 Tax Organizer

The screenshot shows the Yahoo! Mail interface. At the top, there is a navigation bar with links for HOME, MAIL, NEWS, FINANCE, SPORTS, ENTERTAINMENT, LIFE, GAMES, SHOPPING, Holiday Deals, MORE..., and SEARCH. Below this is a blue header with the Yahoo! logo and a search bar containing "Spam" and "Search in spam...". A "Compose" button is visible on the left. The main inbox area shows a list of emails under the heading "Today". The first email is an advertisement for Capital One. The second email is from "Minert & Associates, PLLC" with the subject "Please complete 2022 Recurring Client 2022 Tax Organizer US". This email is circled in red. The preview text for this email reads: "Hi Stephanie! Minert & Associates, PLLC is inviting you to complete the 2022 ...".

Focused **Other**

From	Subject	Received
Minert & Associ...	Please complete 2022 Trust & Estate Tax Organizer	Wed 12/27/2023 6:03 PM
Minert & Associ...	Please complete 2022 Recurring Client 2022 Tax Organizer US	Wed 12/27/2023 5:33 PM

There are more items in this folder on the server

[Click here to view more on Microsoft Exchange](#)

***Be sure to check your Spam folder**

STEP 2: Open Email

When you open the email, it will look something like this: Scroll to the bottom and click on Open Questionnaire



Hi Stephanie,

Minert & Associates, PLLC is inviting you complete the **2023 Recurring Client 2023 Tax Organizer US**.

Accessing Your Portal Account:

- Click on the Button Below to Begin – **Open Questionnaire**
- Create a password.
- Access your Tax Organizer or portal account at any time by visiting <https://app.soraban.com> and enter your email & password.

Components of Tax Organizer

Introduction – Scroll to the bottom & Click **Next** to complete this section of the Tax Organizer

Engagement Letter – Review, type in signature, and then click **Sign** at the bottom of the page.

Tax Questionnaire – Complete General Information and Questionnaire.

Document Upload – Upload your tax documents to your portal while completing the Tax Organizer.

Document Checklist – Review all of your tax documents to be uploaded when Tax Organizer is submitted.

Submit Tax Organizer & Tax Documents – Once the Tax Organizer is complete, you'll click the **I Agree** button & then click **Submit Answers**.

If you have any technical problems with the website or the Tax Organizer, please email us at admin@minertcpas.com or call at 918-742-1616

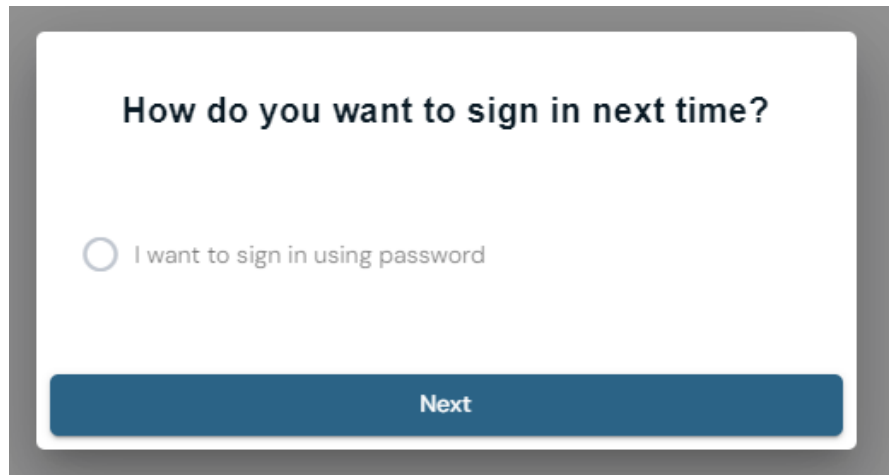
Click the Button Below to Begin!

Open Questionnaire

STEP 3: Click on Open Questionnaire

Scroll to the bottom of the Email and Click on **Open Questionnaire**.

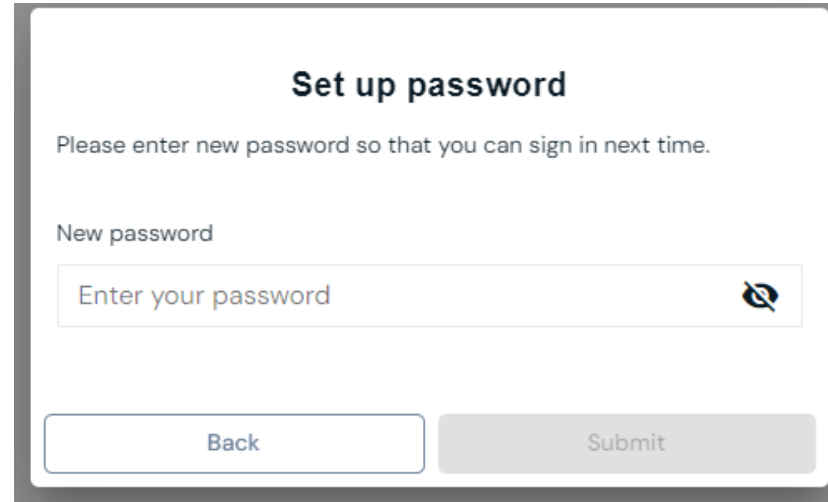
It will take you to set up a password.



How do you want to sign in next time?

I want to sign in using password


Next



Set up password

Please enter new password so that you can sign in next time.

New password

Enter your password 

Back Submit

Please save this password.

***If Open Questionnaire button has **timed out**, see next slide, Step 3B**

STEP 3B: If the email **Open Questionnaire** button **times out...**

Go to the portal link <https://app.soraban.com> OR go to our website www.RelieveFinancialStress.com

Click on **Portal/Login** New Portal Account

1

Sign In

Email


Next

2

A sign-in link has been sent to your email address. Please make sure to check your spam, junk, or filtered inbox if you don't see an email within the next minute.

Back

3



Hi Stephanie LI

Please click the button below to sign in. This link will expire in 24 hours.

If you have any problems with your login or the website, please email us at hello@soraban.com.

Open link

1. Enter your email

2. Sign-in link sent to your email

3. Open link

4. Set up a password

5. Taken to **Dashboard** to **Get Started** on your Tax Organizer.

4

How do you want to sign in next time?

I want to sign in using password

Next


Set up password

Please enter new password so that you can sign in next time.

New password

Back Submit

5



Current Entity: Minert, Tax [Switch Entity](#) Tax Minert

Welcome, Tax Minert!

Dashboard Documents Profile

2023 Recurring Client 2023 Tax Organizer OS

Minert & Associates, PLLC is inviting you to complete the Recurring Client 2023 Tax Organizer OS. Please click the button below to fill it out.

- 1 Introduction
- 2 Engagement Letter
- 3 General Information

Show All

Get Started

*Forget your password


Use the same link <https://app.soraban.com>.

After you enter your email address on the Sign In Page.

Click on **Forgot Password?** You will be sent an email to update your portal password.

Sign In

Email

Password

Login

[Forgot Password? Click here](#)

[Sign-in Using A Different Way](#)



*For Couples Only: Shared Portal Account

For couples that have **different email addresses**, the Taxpayer & Spouse will each have their **own portal login**, email & password, to their **shared portal account**, and shared Tax Organizer.

*For Taxpayer & Spouse, we need **2 different email addresses to e-sign Tax Return**.

Taxpayer

Spouse

The screenshot shows the Taxpayer's portal dashboard. At the top right, there is a user profile dropdown menu with a question mark icon and the text "Tax Minert". A red circle highlights this menu. Below the navigation bar, the main content area displays "Welcome, Tax Minert!" in a red circle, with a red arrow pointing to it. The dashboard includes a "2022 Recurring Client 2022 Tax Organizer US" section with a progress list: "1 Introduction", "2 Engagement Letter", and "3 General Information" (checked). A "Continue" button is at the bottom left, and "Due in 14 days" is at the bottom right. The footer contains "Terms of Service · Privacy Policy · Help".

The screenshot shows the Spouse's portal dashboard. At the top right, there is a user profile dropdown menu with a question mark icon and the text "Dolores Minert". A red circle highlights this menu. Below the navigation bar, the main content area displays "Welcome, Dolores Minert!" in a red circle, with a red arrow pointing to it. The dashboard includes a "2022 Recurring Client 2022 Tax Organizer US" section with a progress list: "1 Introduction", "2 Engagement Letter", and "3 General Information" (checked). A "Continue" button is at the bottom left, and "Due in 14 days" is at the bottom right. The footer contains "Terms of Service · Privacy Policy · Help".

*Both are the same portal account. 2 Logins, 1 portal account.

Either person can complete the Tax Organizer, or both can work on it.

***Don't have to complete organizer in one sitting.** It saves your work as you go.

STEP 4: Start Completing Tax Organizer

Introduction – Review Instructions for completing the Tax Organizer

< Back to Dashboard

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- Introduction
- Engagement Letter
- General Information
- Foreign Country Information
- Dependents
- Purchases, Sales, Debt, & Income
- Foreign Income
- Retirement Information
- Education Information
- Health Care Information
- Itemized Deductions
- Miscellaneous Information
- Additional Information
- ✓ Document Checklist
- Review & Submit

2023 Recurring Client 2023 Tax Organizer OS

*You **don't** have to complete the **Tax Organizer** in one sitting. It saves your work as you go.
Basic instructions below for completing Tax Organizer or click on [link](#) for **detailed instructions**.

[Access Our PDF For Instructions](#)

Engagement Letter

***Taxpayer only:** review, type in your full name, and then you **must click Sign** at the bottom of the page. Only one signature required.

Tax Questionnaire

Starting at the beginning of the General Information Section it says, "Please complete all questions."

Please complete all questions.

*** Required**

All questions with a **red star *** at the end are required to be answered.

Document Upload

Throughout the Tax Organizer there will be requests for you to Upload your tax documents. You will be prompted by an Upload button. Which will open a box for you drag & drop files into & then click upload all.

Upload

Document Checklist

Review all of your documents to be uploaded when Tax Organizer is submitted.

Review & Submit

When a section is complete there will be a green check mark by that section. Also, in the Review & Submit section, it will show when a section is complete. When all sections are complete, check the **I Agree** box at the bottom of the page and then click **Submit Answers**.

***FYI: Don't have to complete Tax Organizer in one sitting. It saves your work as you go.**

Scroll to the bottom and Click **Next** to complete this section of the Tax Organizer.

Next

STEP 5: Engagement Letter

- Review the Engagement Letter. Only one Signature needed.
- Type in your full name
- Click **Sign**

[< Back to Dashboard](#)

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- Introduction
- Engagement Letter**
- General Information
- Foreign Country Information
- Dependents
- Purchases, Sales, Debt, & Income
- Foreign Income
- Retirement Information
- Education Information
- Health Care Information
- Itemized Deductions
- Miscellaneous Information
- Additional Information
- ✓ Document Checklist
- Review & Submit

2023 New Client 2023 Tax Organizer OS

i Please e-sign the letter with your full name.

Dear Tax Minert:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. To ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2023 federal and state personal income and/or business tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your personal income/business tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income/corporate tax returns.

Signature

By clicking 'Sign', I agree that the

×

Tax Minert

By clicking 'Sign', I agree that the signature above will be the electronic representation of my signature. **Opt out and print.**

Sign

Next

[Terms of Service](#) · [Privacy Policy](#) · [Help](#)

Tax Minert

Signed: Jan 18, 2024 — [Download Signed Document](#)

Next

- The date you clicked Sign will appear.
- Click **Next**

STEP 6: General Information

Green check mark appears beside Engagement Letter, on left hand side, to show that section is complete

General Information is highlighted, on left hand side, to show you which section you are in currently.

< Back to Dashboard

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Introduction

✓ Engagement Letter

General Information

Dependents

Purchases, Sales, Debt, & Income

Foreign Income

2022 Copy of Recurring Client 2022 Tax Questionnaire US

i Please complete all questions.

1 Did your marital status change in 2022? * Required

Yes

No

Add Note

2 Did your address change since the last tax filing? *

At the top of General Information Section it says, “Please complete all questions.”

i Please complete all questions.

All questions with a red * at the end of it are required to be answered before Tax Organizer can be submitted.

* Required

Add New Entry:

Some questions require completing an **Add New Entry Box**.

1.) When you are prompted to click on **Add New Entry**, complete the information & Click **Save**.

6 Did you take out a home equity loan? *

Yes
 No

Add Note

Provide the following information in Add New Entry. *

Add New Entry

Edit Entry

When? Answer

Provide dollar amount of home equity loan: Answer

What was the money used for?

✓ Save Cancel

Edit Entry

When? December 10, 2023

Provide dollar amount of home equity loan: \$50,000

What was the money used for? For home repairs.

✓ Save Cancel

*If you need to add information for two separate college students, for instance, click **Add New Entry twice**, once for each college student.

Did you, your spouse, or dependent(s) attend a post-secondary school this year? *
(Education after high school)

Yes
 No

Add Note

Provide the following information for each student in Add New Entry. *

Add New Entry

Provide the following information for each student in Add New Entry. *

Add New Entry

Entry 1:
Stephanie Minert Edit Delete

Entry 2:
Jessica Minert Edit Delete

Add New Entry

Check one of the following: Graduate school

Provide students first and last name: Stephanie Minert

Upload out-of-pocket educational expenses here or provide information below. [Steph's college expenses.pdf](#) Upload

Provide details of out-of-pocket educational expenses here if wasn't uploaded above.

✓ Save Cancel

Add New Entry

Check one of the following: Associates or bachelor's degree

Provide students first and last name: Jessica Minert

Upload out-of-pocket educational expenses here or provide information below. [Jess's college expenses.pdf](#) Upload

Provide details of out-of-pocket educational expenses here if wasn't uploaded above.

✓ Save Cancel

Document Upload

Throughout the Tax Organizer there will be requests for you to Upload your tax documents.

You will be prompted by an Upload button.


A blue button with a white upward-pointing arrow and the word "Upload" in white text.

5 Did you refinance a principal residence, second home, or rental property? *


Yes
 No


Add Note

Upload **Closing/Settlement Statements** for refinance, here or at end of questionnaire.

 Upload


Upload Documents


 You can drag and drop files here. You can also access this page through your phone and take a picture of the document. Do not use slash (/) in the document name.



 Drag and drop files here or [browse](#)
(Max Size 150MB)


Upload All Cancel

Upload Closing or Settlement Statements for refinance.

 You can drag and drop files here. You can also access this page through your phone and take a picture of the document. Do not use slash (/) in the document name.

 Drag and drop files here or [browse](#)
(Max Size 150MB)

 Steph's Driver's License .pdf 

 Upload All Cancel

Clicking on the **Upload** button opens a box for you to drag & drop files into.

When file appears click **Upload All**.

STEP 7: Complete all Sections of the Tax Organizer

General Information through Additional Information

[← Back to Dashboard](#)

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- Introduction
- ✓ Engagement Letter
- General Information
- Dependents
- Purchases, Sales, Debt, & Income
- Foreign Income
- Retirement Information
- Education Information
- Health Care Information
- Itemized Deductions
- Miscellaneous Information
- Additional Information**
- ✓ Document Checklist
- Review & Submit

- Go directly to any section. Skip any question and answer it later.
- Although, all *** Required** questions **must be completed**, and Engagement letter **e-signed by the Taxpayer** before the Tax Organizer will **Submit**.

***Drop off or mail tax documents but, complete Tax Organizer electronically?** When prompted to Upload a document, click **Provided Elsewhere**.



- Choose **Non-Applicable** if didn't receive a document...etc. and make a note in Additional Information Section.

1 Did you purchase a principal residence this tax year? * required

Yes
 No

Upload **Closing/Settlement Statements** for principal residence purchase here or at end of questionnaire. * required

STEP 8: Document Checklist

Review all your documents to be uploaded when Tax Organizer is Submitted.

Several ways to upload your Tax Documents

- Within the questionnaire
- In the **Additional Information** Section of the questionnaire
- In the **Document Checklist** Section of the questionnaire

This screenshot shows the 'Additional Information' section of a questionnaire. The left sidebar lists various categories, with 'Additional Information' highlighted in red. The main content area contains three questions. Question 2, 'Please upload any other document(s) you wish to provide regarding your tax filing that hasn't already been uploaded?', is circled in red and has an 'Optional' label. Below it is an 'Upload' button. Question 3, '*Please type your name and date with the same legal effect as a handwritten signature, verifying that all of the above information is correct to the best of your knowledge.', is also circled in red. At the bottom, there is a 'Next' button.

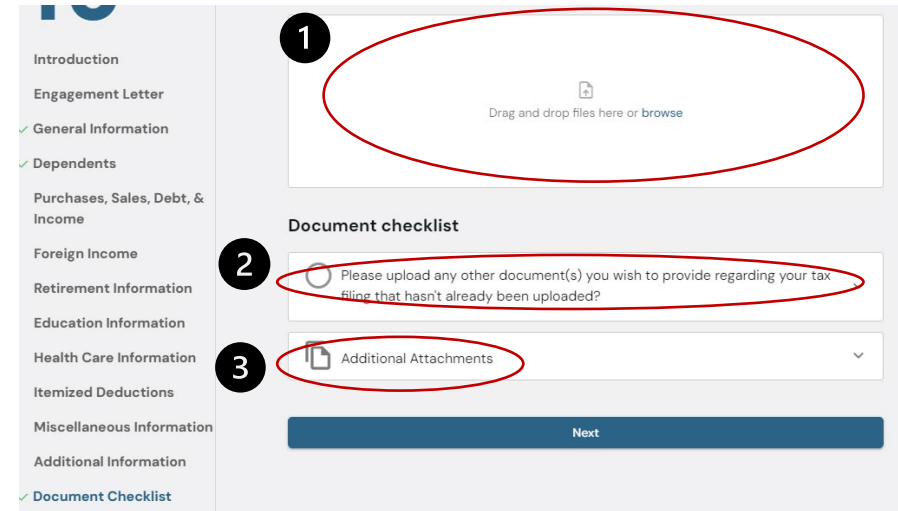
This screenshot shows the 'Document Checklist' section. The left sidebar lists categories, with 'Document Checklist' highlighted in red. The main content area shows a list of documents with checkboxes. The document 'Please upload any other document(s) you wish to provide regarding your tax filing that hasn't already been uploaded?' is circled in red. Other documents include 'Closing or Settlement Statements for principal residence purchase', 'SSA-1099', 'Annual 529 Statement', and '1099-SA'. At the bottom, there is a 'Next' button.

*All documents uploaded within the questionnaire show up in Document checklist.

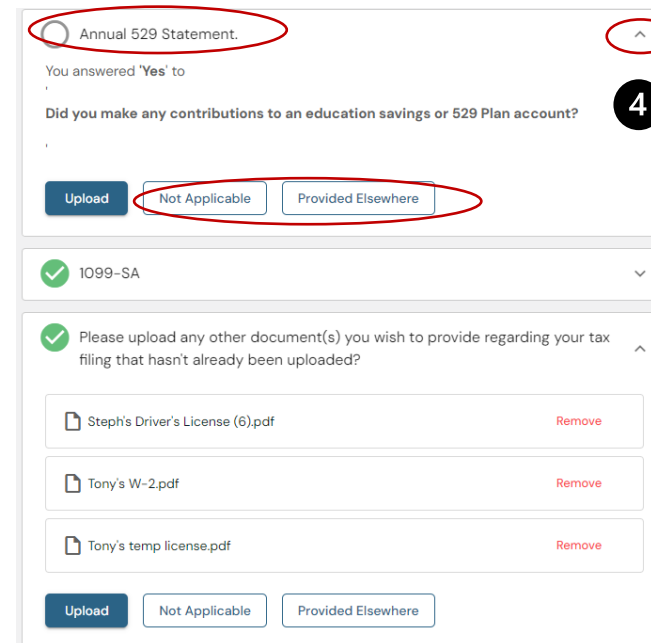
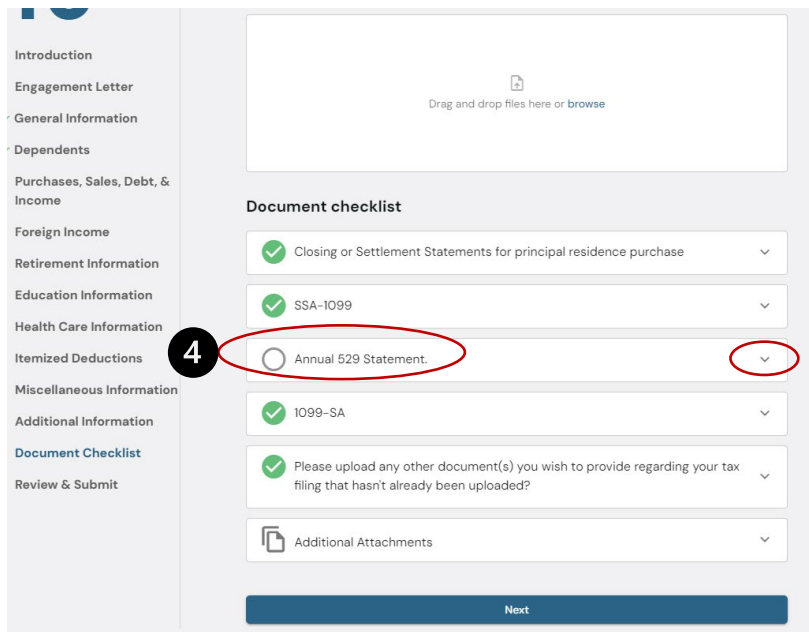
Document Checklist - Continue

3 Ways to Upload Documents in Document Checklist:

1. Drag & Drop
2. Upload any other docs you wish to provide...
3. Additional Attachments



4. The white dot next to a document indicates you answered **yes**, to a question but, didn't upload the corresponding document. **Document Checklist** gives you the opportunity to **Upload** or click **Not Applicable** or **Provided Elsewhere**.



STEP 9: Review & Submit

When section is complete a **green check mark** is by the Section on the left-hand side. In **Review & Submit** section, it will also show when a section is complete.



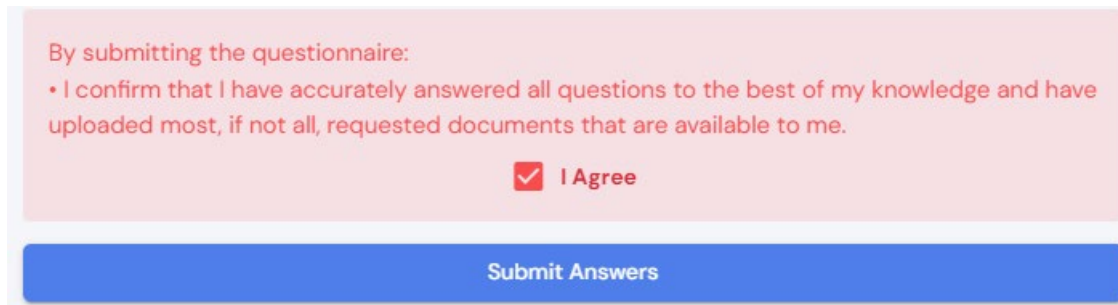
< Back to Dashboard

2023 Recurring Client 2022 Tax Organizer US

Please check box below that says I Agree to submit.

General Information	Completed
Dependents	Incomplete
Purchases, Sales, Debt, & Income	Incomplete

When **all sections** are complete, check the **I Agree** box at the bottom of this page. Then click **Submit Answers**.



By submitting the questionnaire:

- I confirm that I have accurately answered all questions to the best of my knowledge and have uploaded most, if not all, requested documents that are available to me.

I Agree

Submit Answers

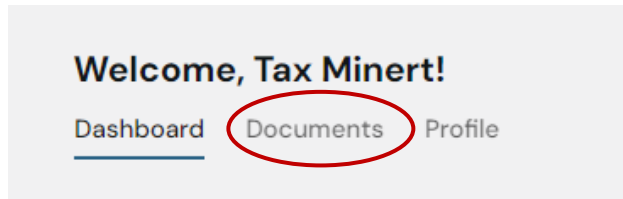
Upload directly to Portal- To upload a document after you've submitted or outside of your Tax Organizer...

Login to your Portal account at <https://app.soraban.com>.

Enter your email & password.

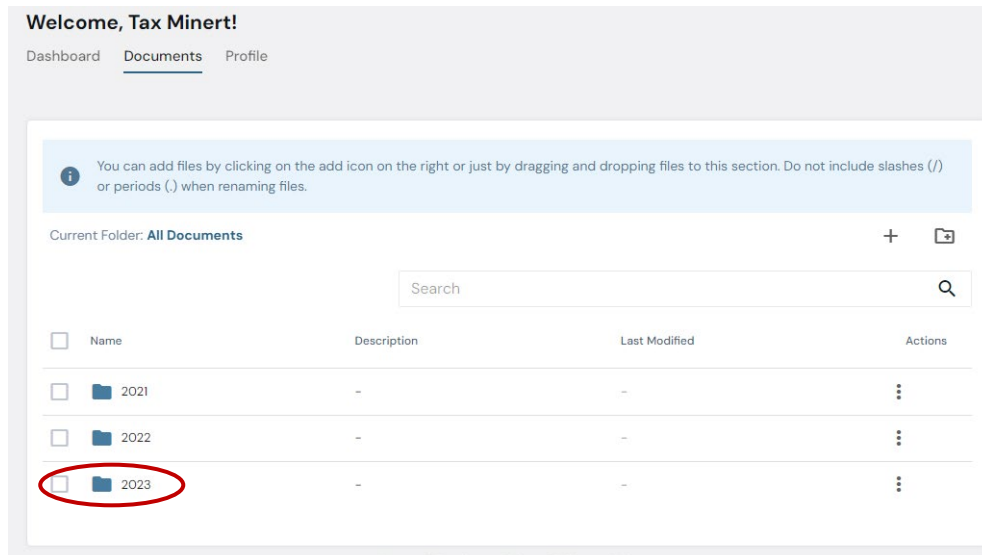
OR on our website www.RelieveFinancialStress.com.

Click on **Portal/Login New Portal Account**

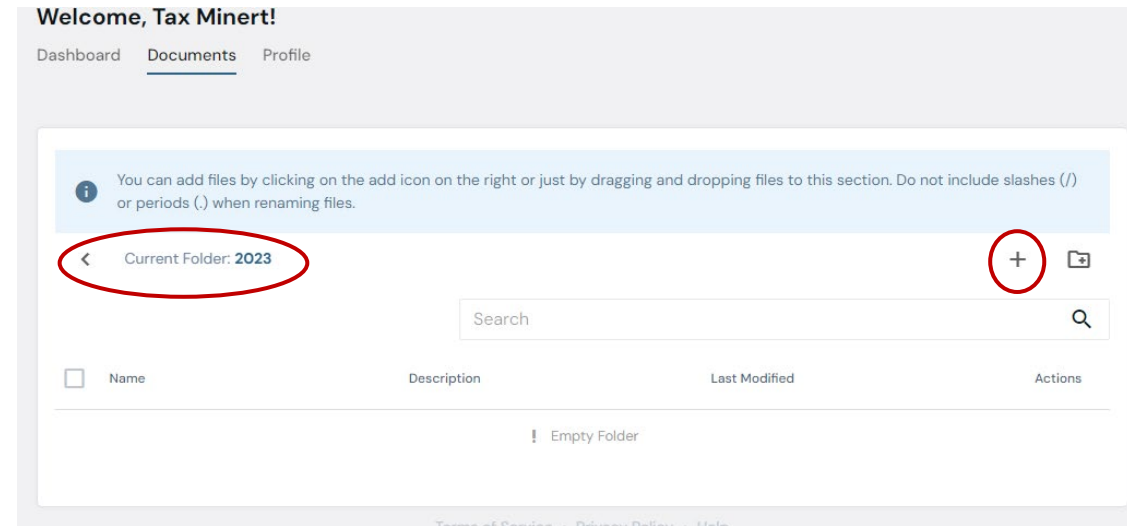


1- Login takes you to your Dashboard. Click on Documents.

2- In Documents, click on **2023** folder

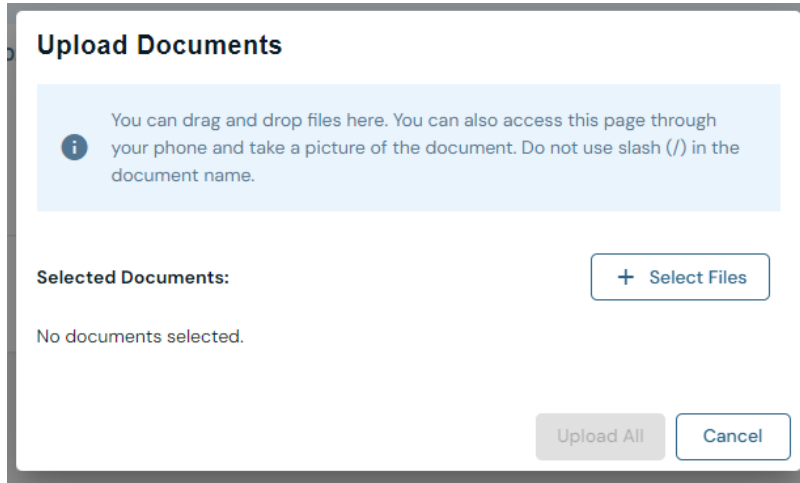


3- In **2023** folder. Click the **+** sign in the top right.

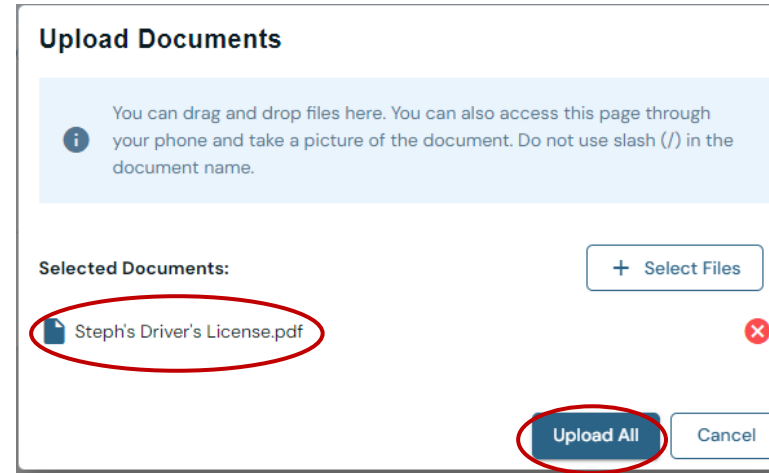


Upload directly to Portal - Continue

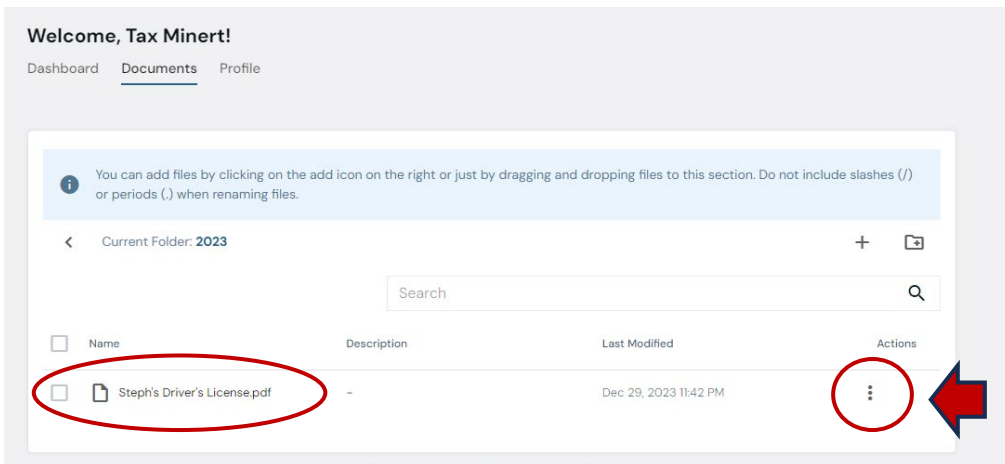
4- Upload Documents box pops up.
Drag & drop file or Select file.



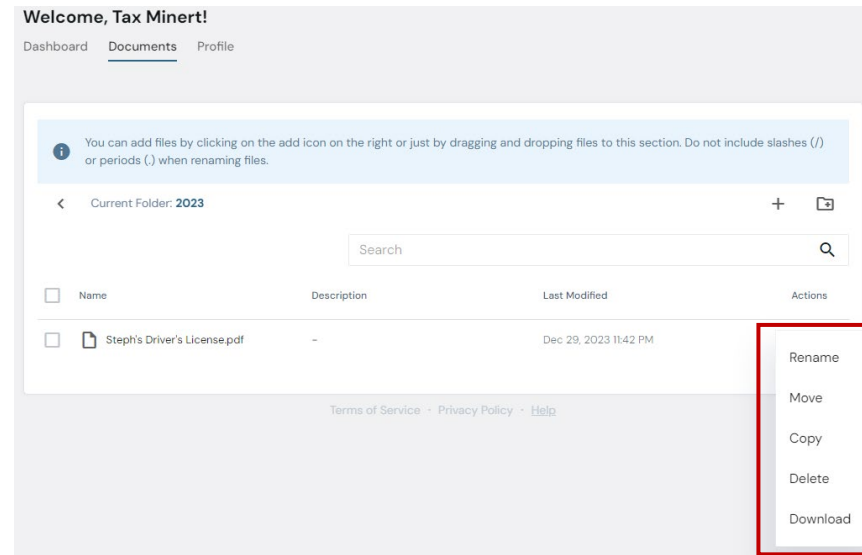
5- When file appears click **Upload all**.



6- File appears in your **2023** folder



7- Three Vertical dots at the end of File name under Actions.
Click 3 dots to **Rename, Move, Copy, Delete, or Download** the file.



Thank you for your patience as we transition to our new Portal with Soraban

- The portal will send us an email letting us know you submitted your Tax Organizer &/or uploaded document(s).
- Please give us **several days** to process & send a confirmation email that we received your Tax Organizer &/or documents.
- We can always be contacted at admin@minertcpas.com or 918-742-1616.



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