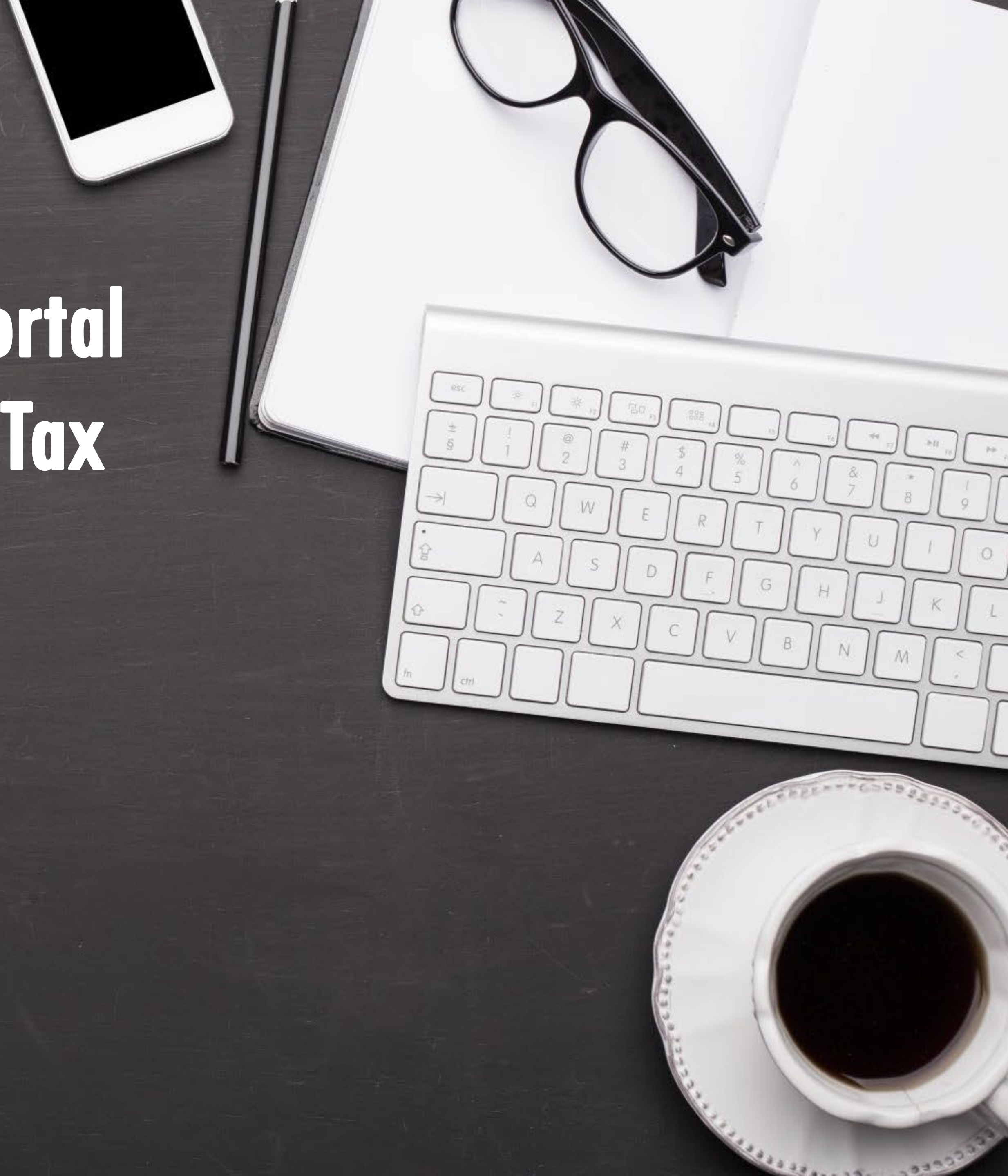
Detailed instructions for New Portal Completing & Submitting 2024 Tax Organizer & Tax Documents



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 2024 Tax Organizer

Please complete 2024 Tax Organizer for Carrera , Brittany

Minert & Associates, PLLC <noreply@withsoraban.com>

Minert & Associates, PLLC
CERTIFIED PUBLIC ACCOUNTANTS
Relieving Your Financial Stress.

Hi Brittany!

Minert & Associates, PLLC is inviting you to complete the **2024 Tax Organizer for Carrera , Brittany.**

*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

Minert & Associates, PLLC
CERTIFIED PUBLIC ACCOUNTANTS
Relieving Your Financial Stress.

Hi Brittany!

Minert & Associates, PLLC is inviting you to complete the **2024 Tax Organizer.**

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 – Instructions for completing the 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.
Review & Submit – Once the Tax Organizer is complete, you'll click the I Agree button and then click Submit Answers.

If you have any technical problems with the portal or the Tax Organizer, please email us at admin@minertcpas.com or call us at 918-742-1616. You can also contact the portal Soraban at **hello@soraban.com**.

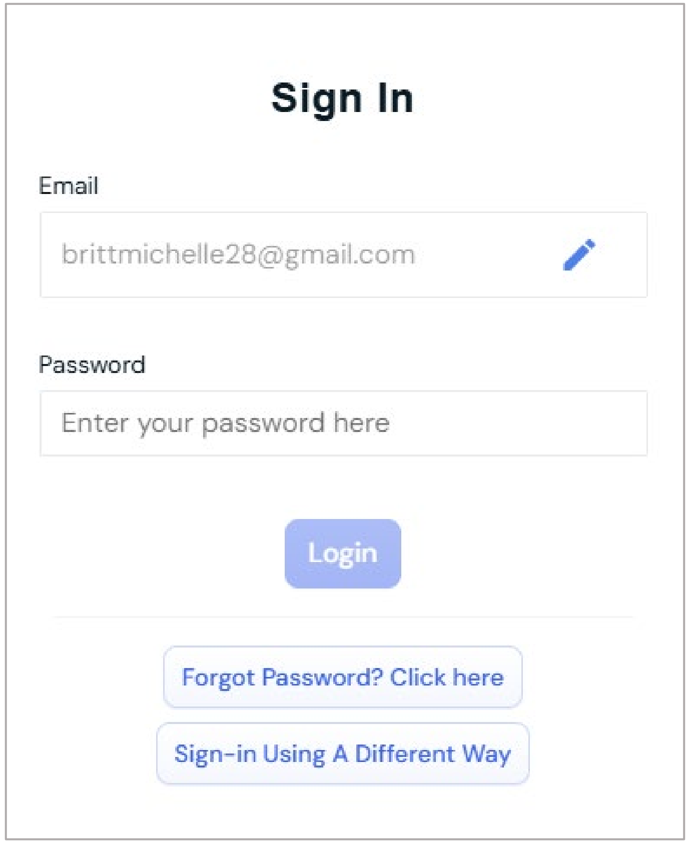
Click the Button Below to Begin!

Open Questionnaire

STEP 3: **Click on Open Questionnaire – Recurring Client**

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

- Enter email address
- Enter password you created

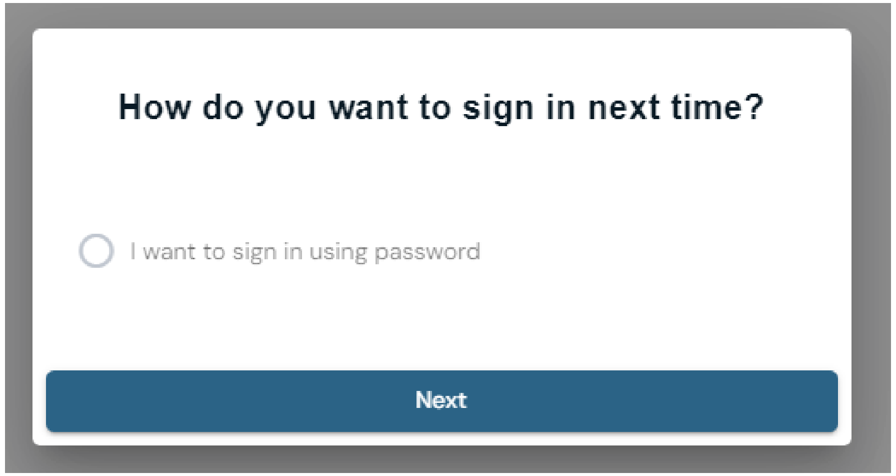


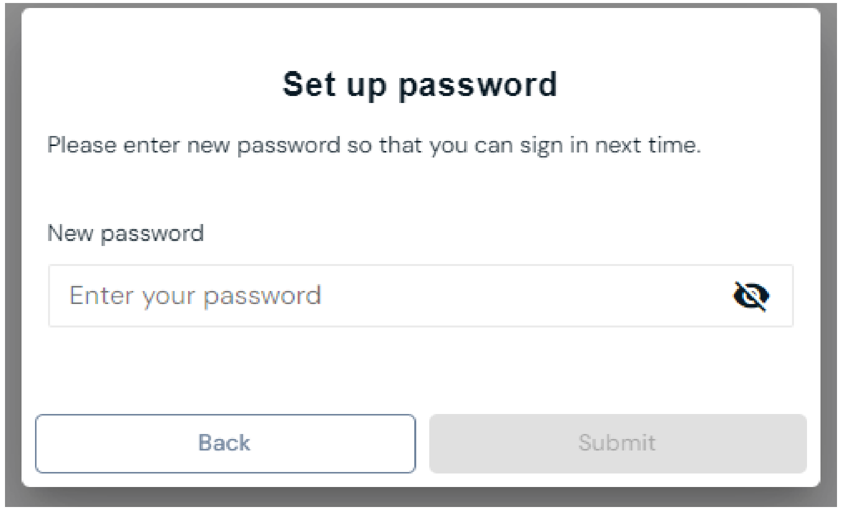
***If Open Questionnaire button has timed out, see next slide, Step 3B**

STEP 3A: **Click on Open Questionnaire – New Client**

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

It will take you to set up a password – *ONLY if you are a new client





Please save this password.

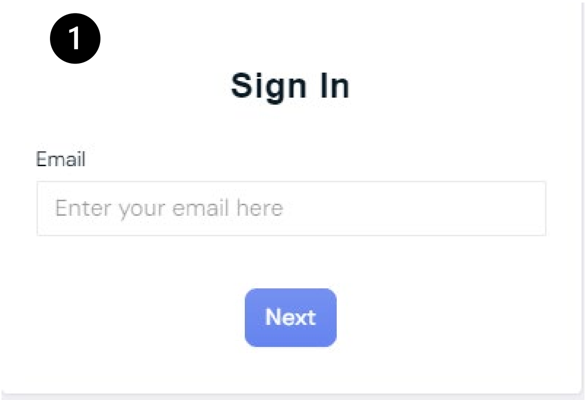
***If Open Questionnaire button has timed out, see next slide, Step 3B**

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



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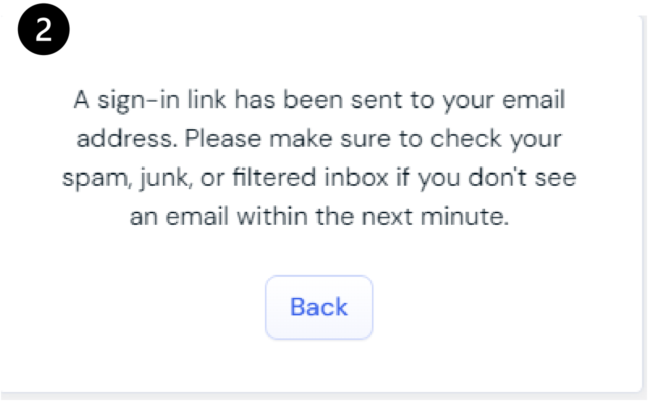

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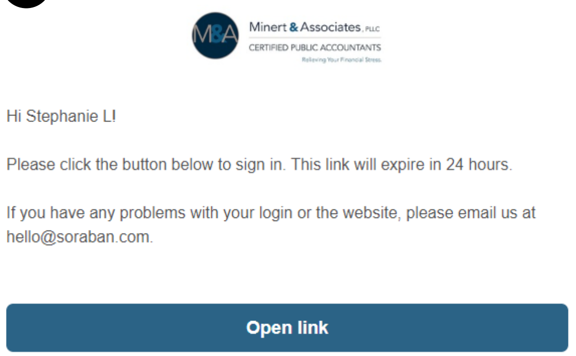
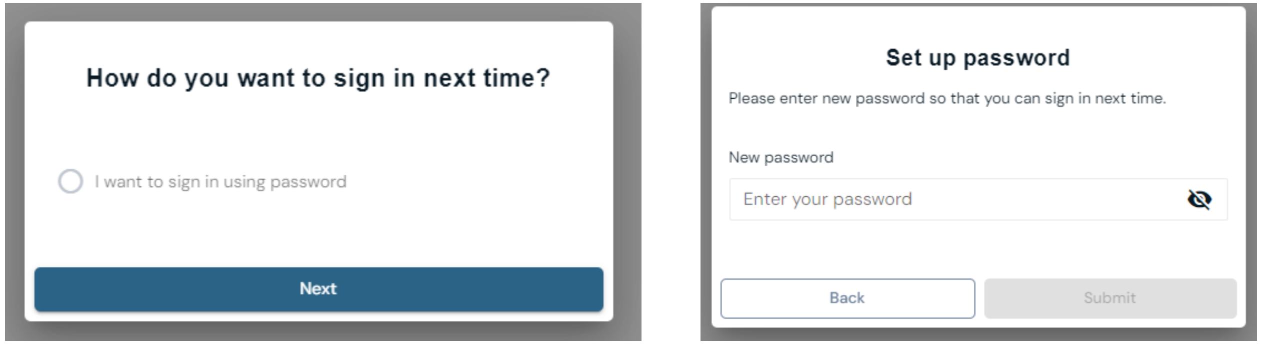


1. Enter your email
2. Sign-in link sent to your email
3. Open link
4. Enter the password
5. Taken to **Dashboard** to **Get Started** on your Tax Organizer.

4



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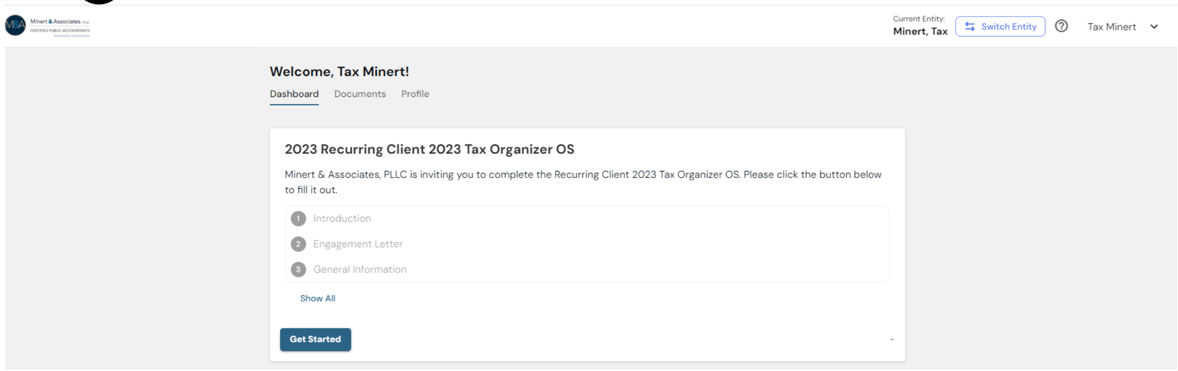
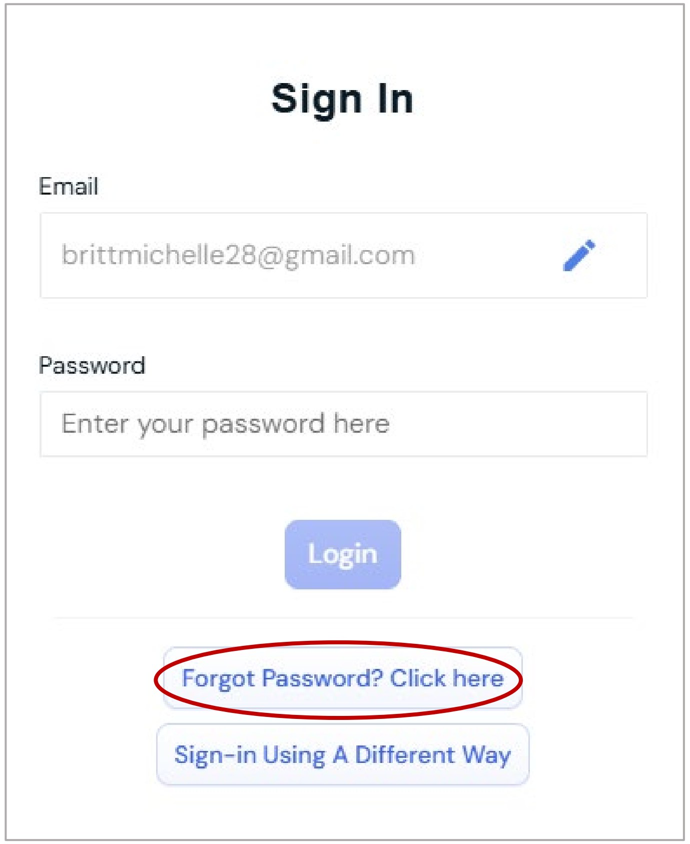


*Forgot your password

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.

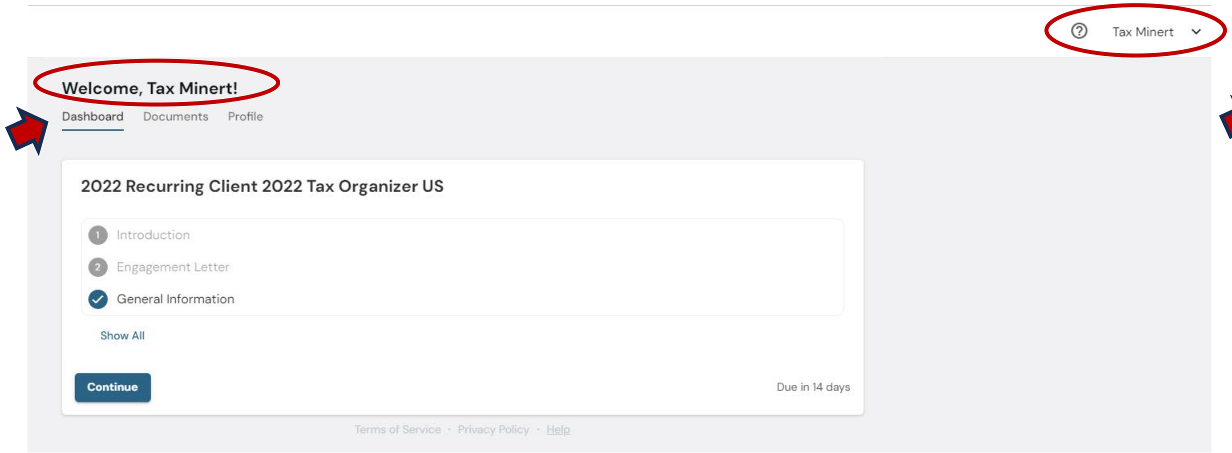


*For Couples Only: Shared Portal Account

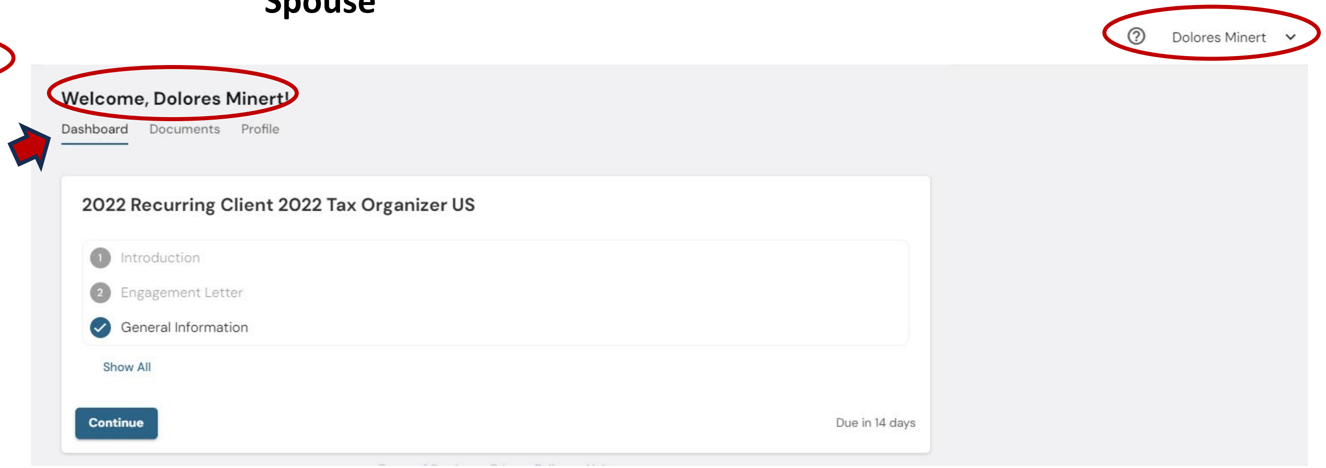
For couples that have **different email addresses**, the Taxpayer & Spouse will each have their **own portal login**, email & password, to their **shared portal account**, and shared Tax Organizer.

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

Taxpayer



Spouse

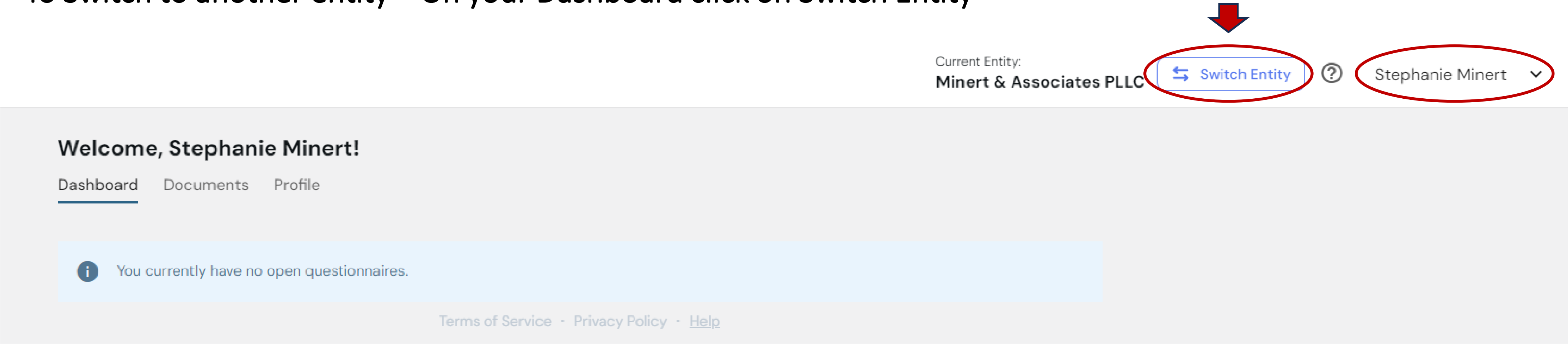


*Both are the same portal account. 2 Logins, 1 portal account.

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.

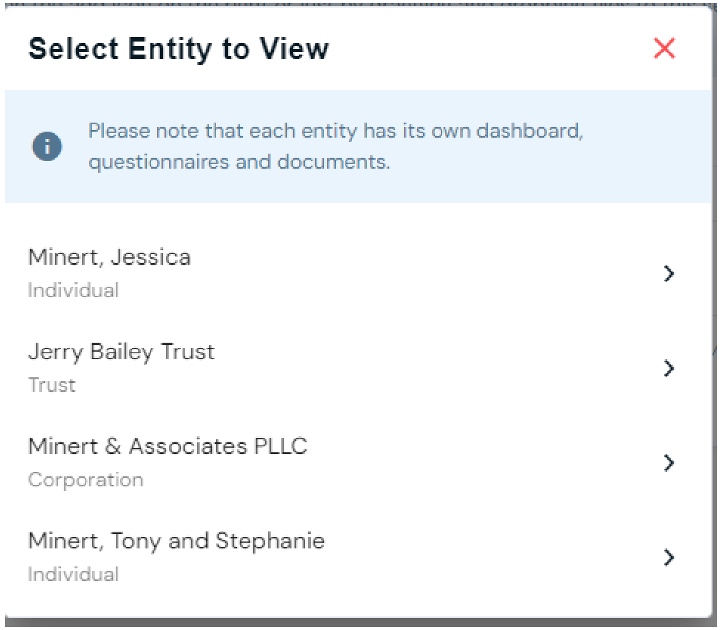
***For Multiple entities only**: such as dependents or businesses

To Switch to another entity – On your Dashboard click on Switch Entity



Select Entity you wish to view.

You'll be taken to that entity's Dashboard



STEP 4: **Start Completing Tax Organizer**

Introduction – Review Instructions for completing the Tax Organizer

1 / 14

Introduction
Engagement Letter
Client Status
Purchase, Sales, & Debt
Income
Foreign Income
Retirement Information
Education Information
Health Care Information
Itemized Deductions
Miscellaneous Information
Additional Information
✓ Document Checklist
Review & Submit

2024 Tax Organizer

Scroll to the bottom of this page & click NEXT to complete this section of the Tax Questionnaire.

*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
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.

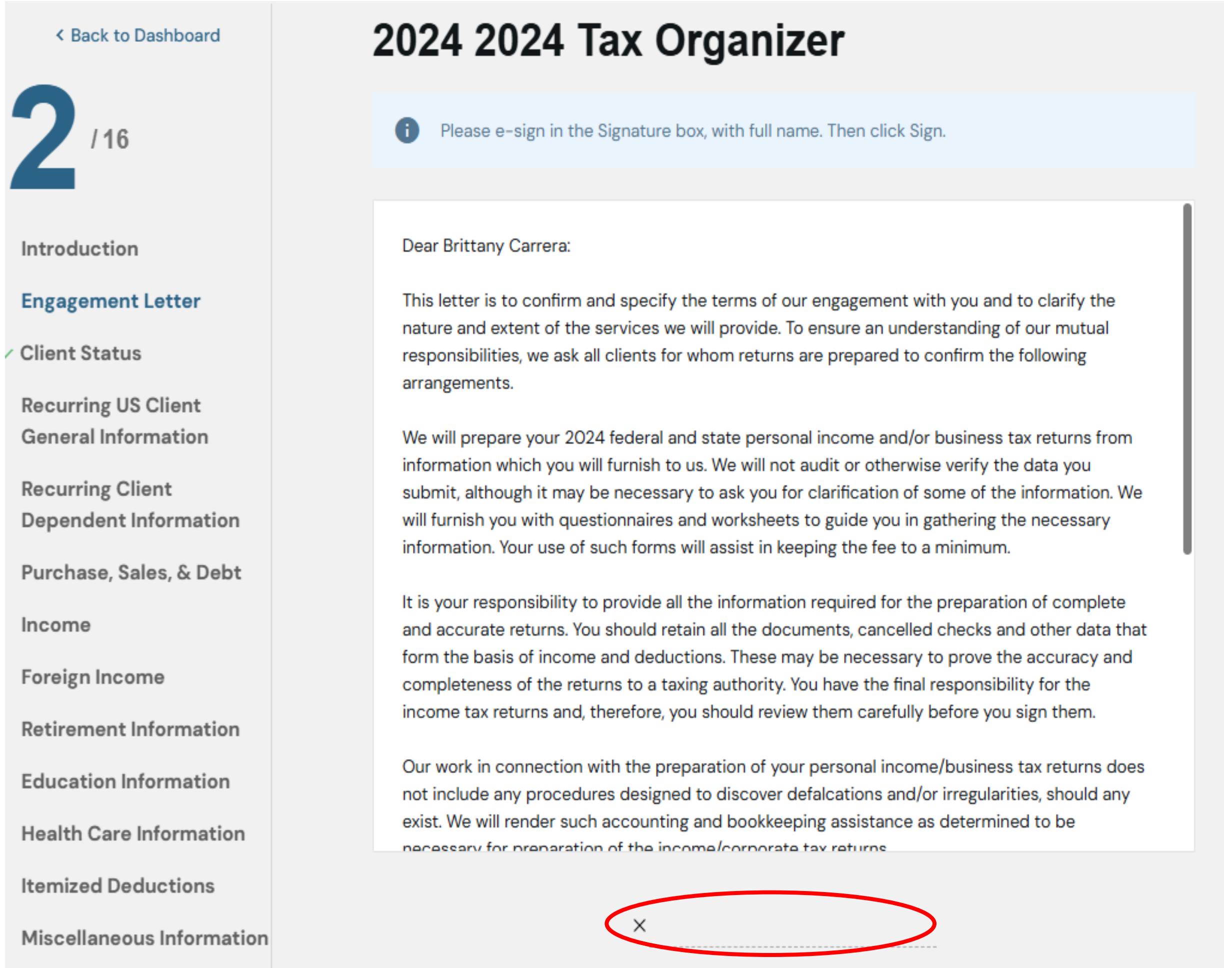
*FYI: **Don't have to complete Tax Organizer in one sitting.** It saves your work as you go.

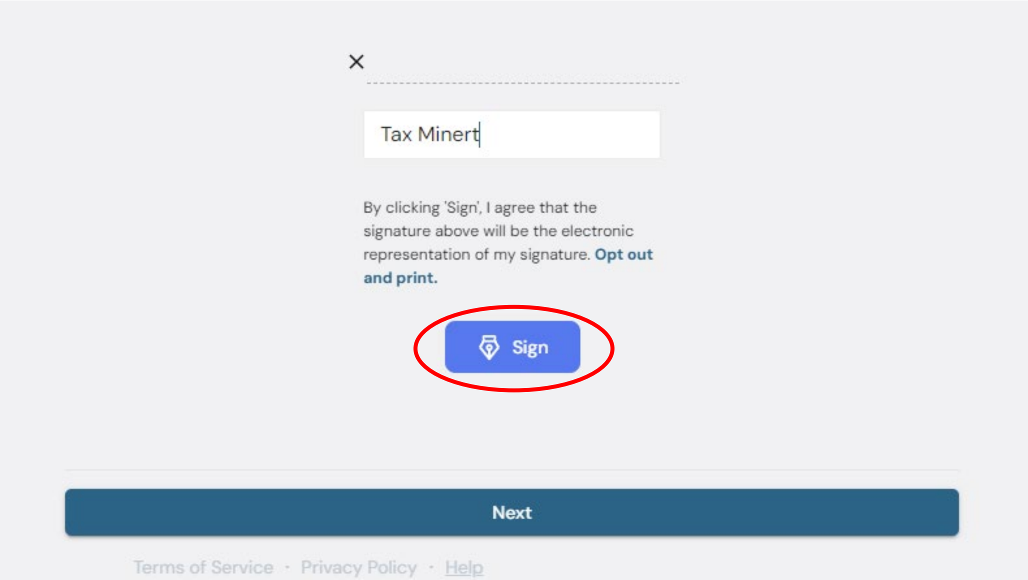
Scroll to the bottom and Click **Next** to complete this section of the Tax Organizer.

Next

STEP 5: **Engagement Letter**

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



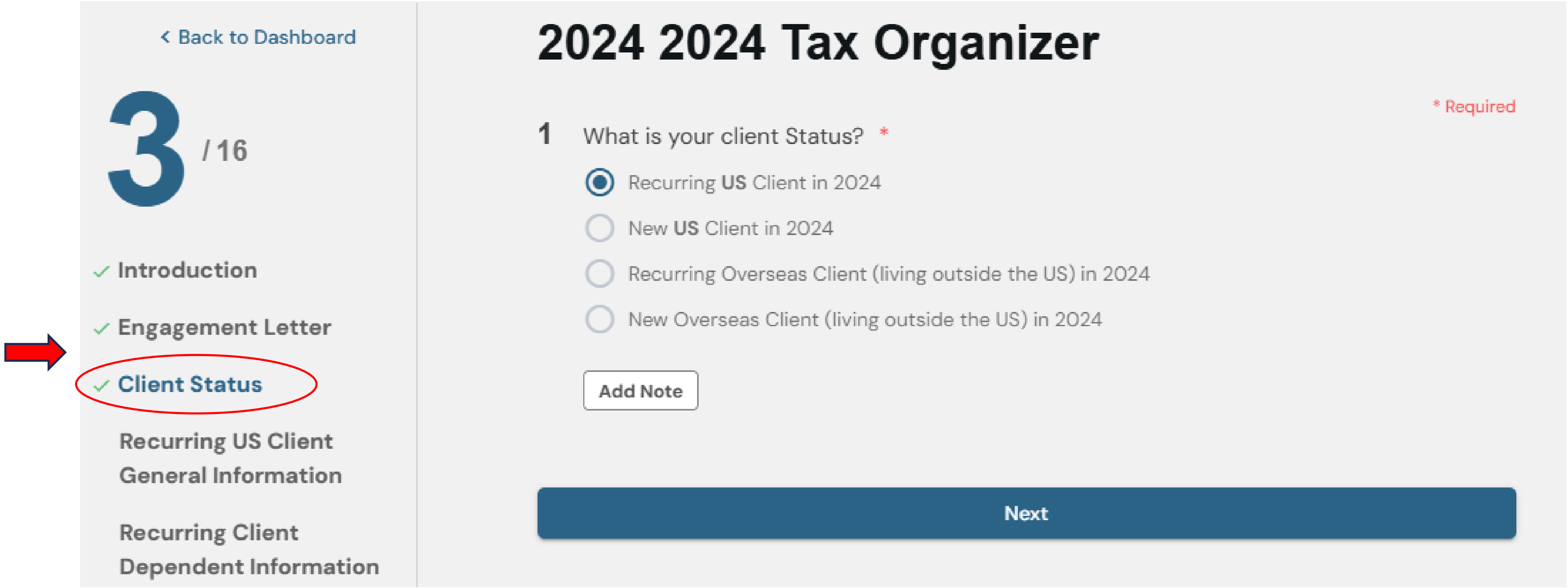


- The date you clicked Sign will appear.
- Click **Next**

STEP 6: **Client Status**

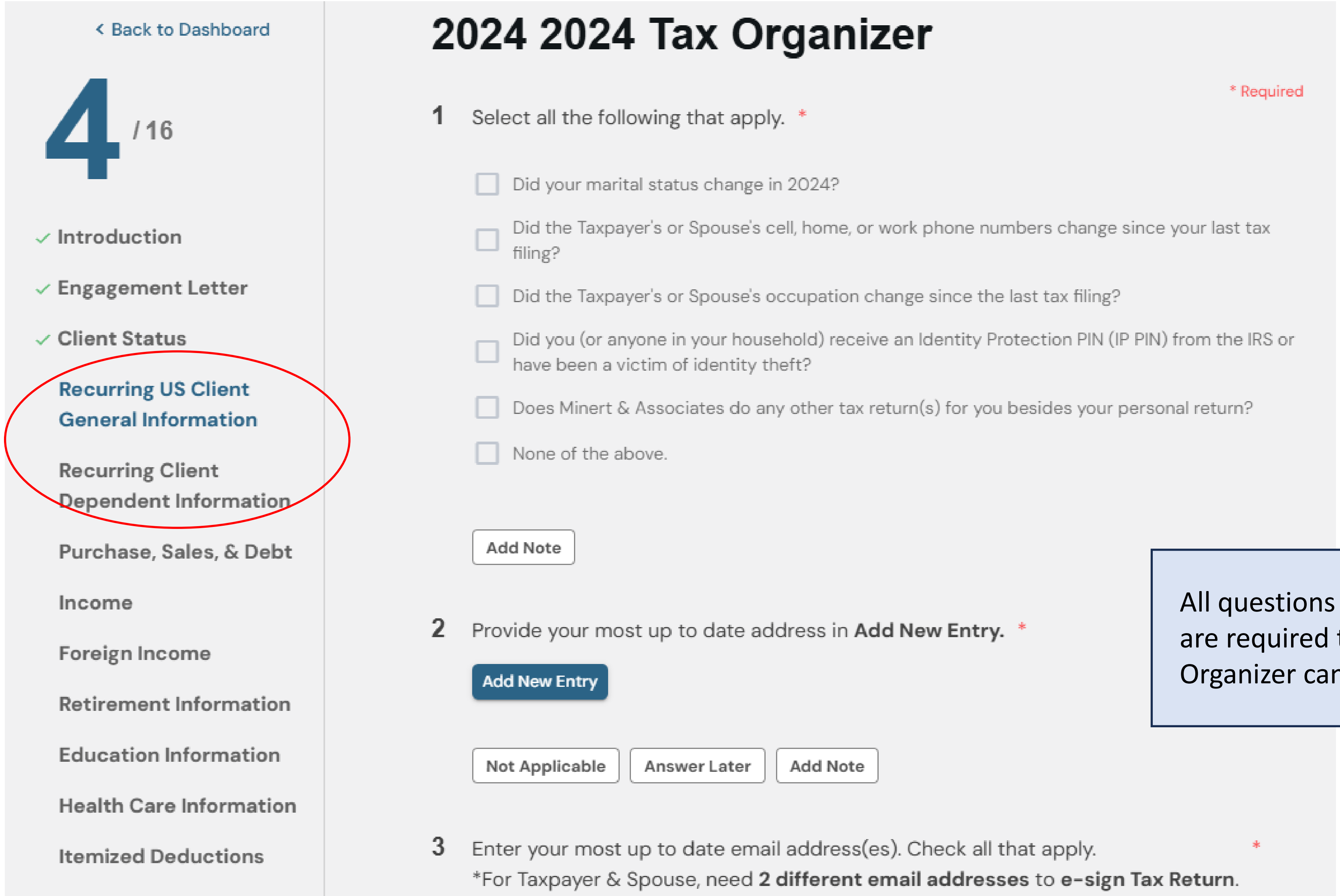
Green check mark appears beside Introduction and Engagement Letter, on left hand side, to show that those sections are complete

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



- Please select the option that applies to your client status with Minert & Associates.
- Once you select, you will see another tab on the left-hand side.

STEP 6A: **Client Status**



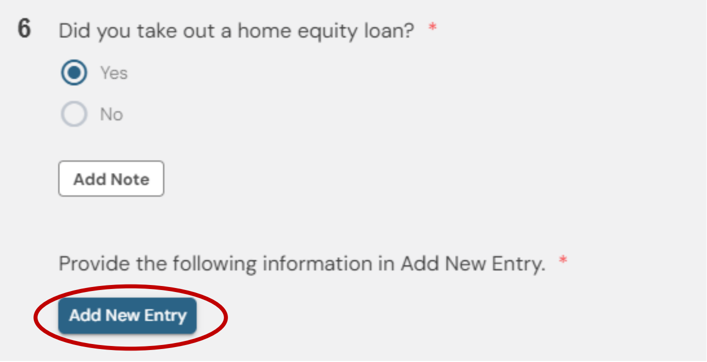
All questions with a red * at the end of it are required to be answered before Tax Organizer can be submitted.

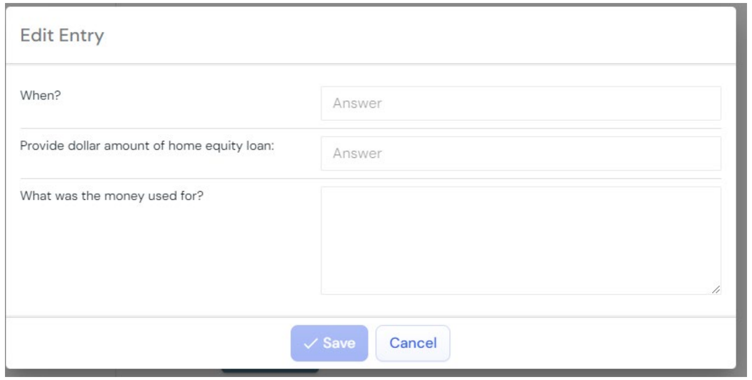
- Provide the general information based on the client status you previously selected.
- For question #1, select ALL the options that apply to you. If none, select “none of the above” and move on with question #2.

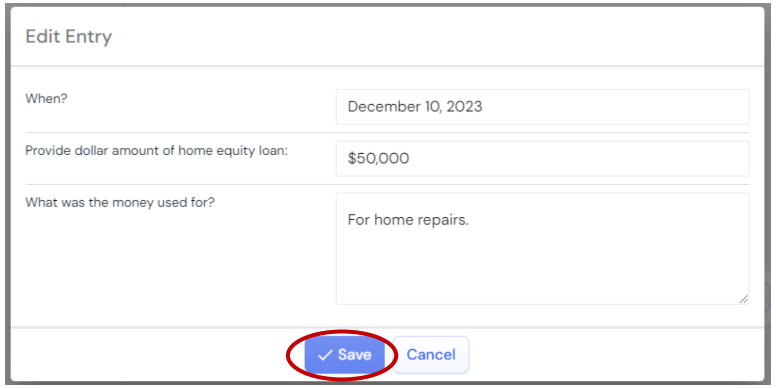
Add New Entry:

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

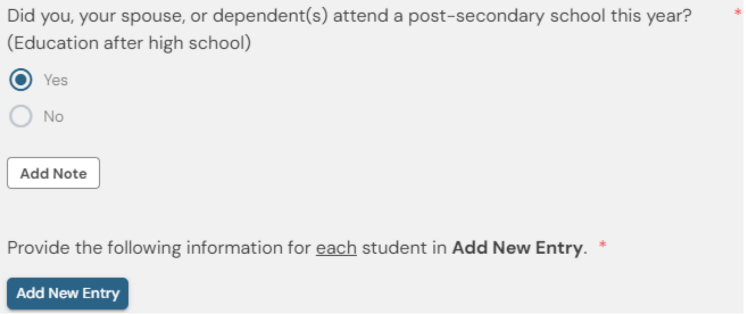
1.) When you are prompted to click on **Add New Entry,** complete the information & Click **Save.**

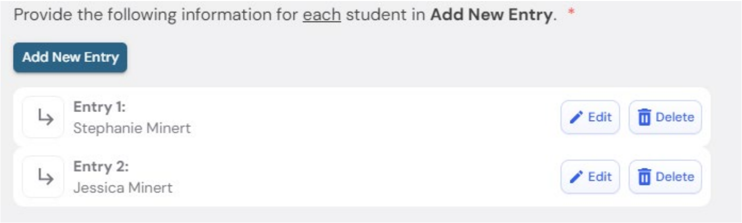


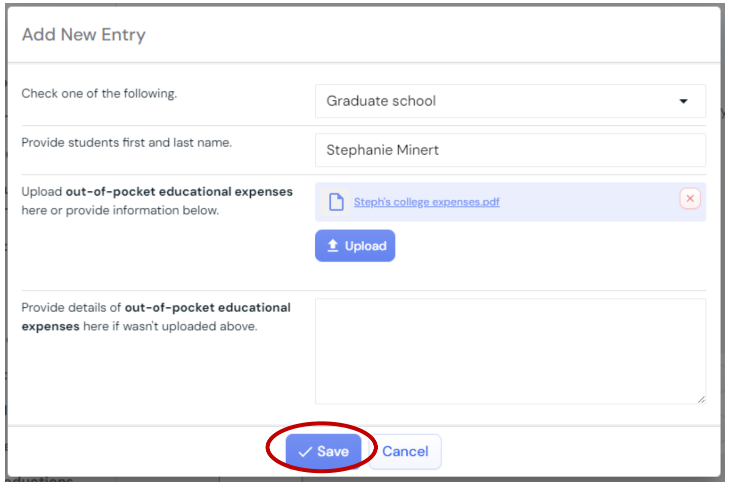


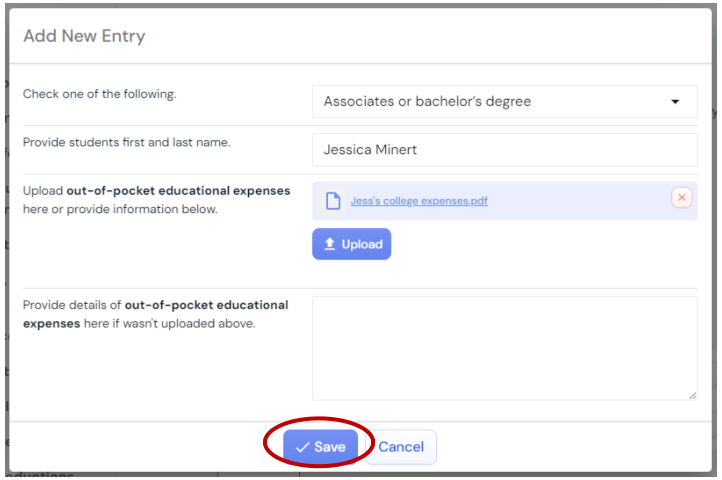


*If you need to add information for two separate college students, for instance, click **Add New Entry *twice***, once for each college student.



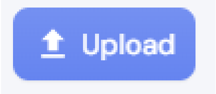


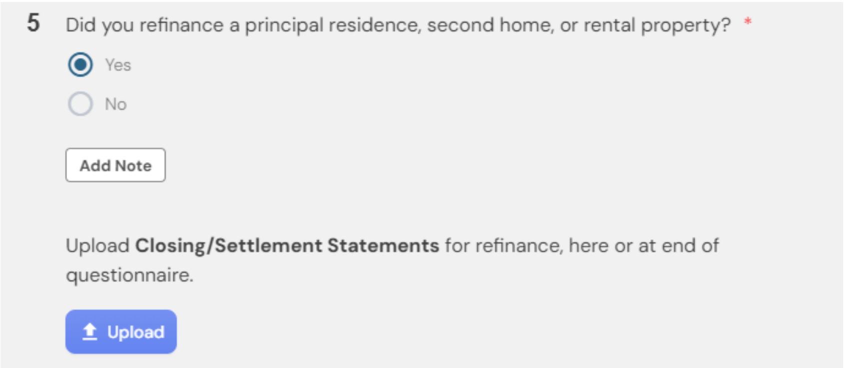


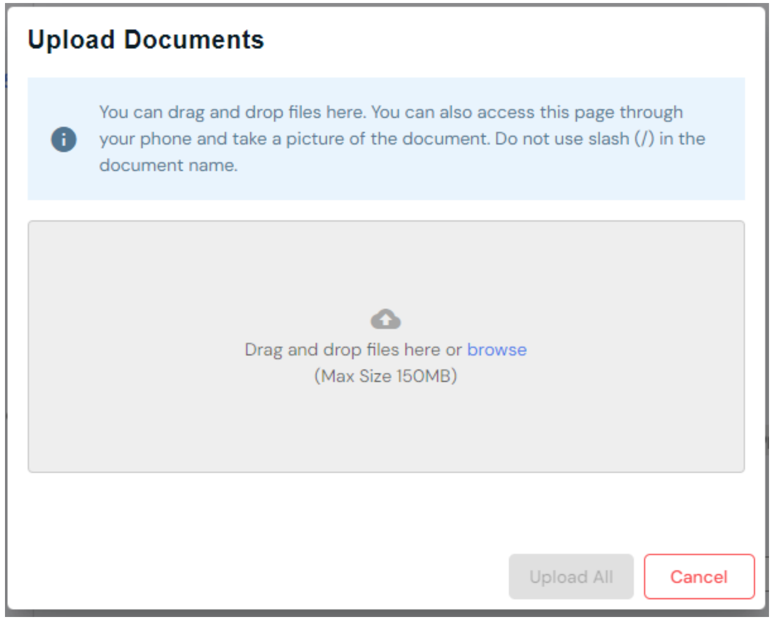


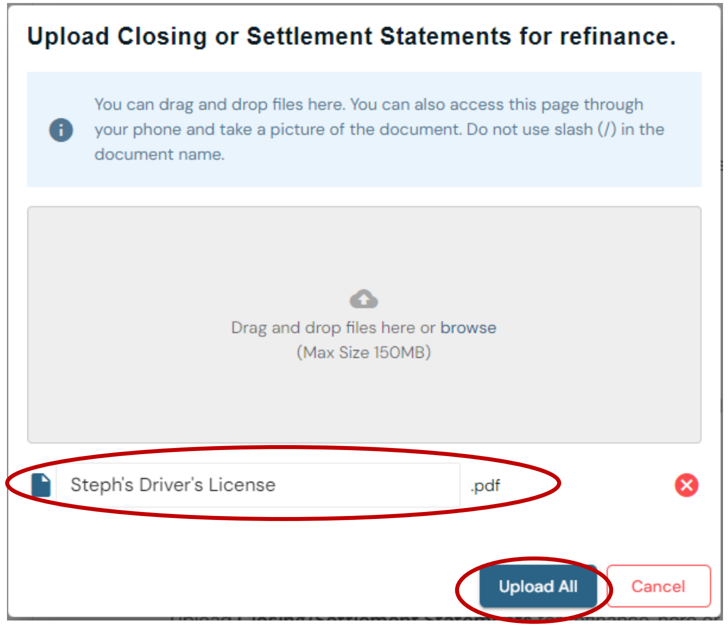
Document Upload

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

You will be prompted by an Upload button. 





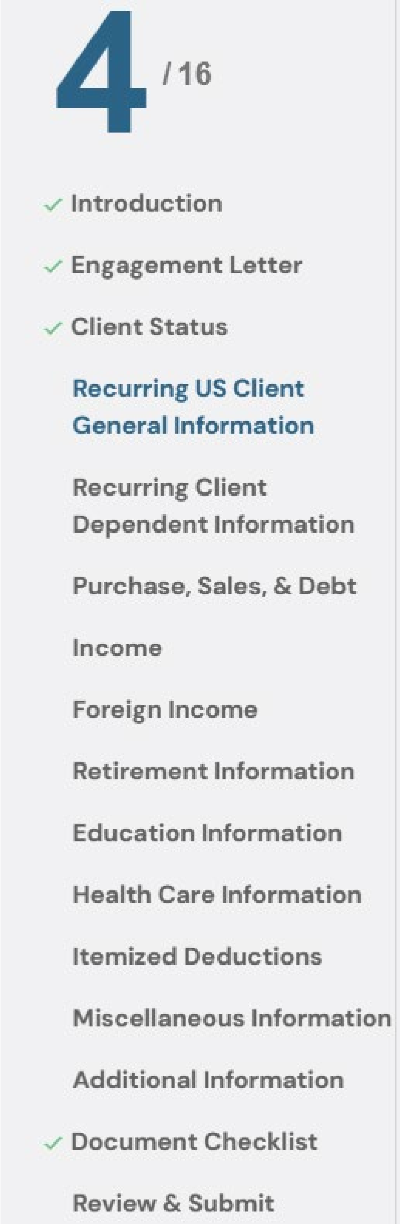


Clicking on the **Upload** button opens a box for you to drag & drop files into.

When file appears click **Upload All**.

STEP 7: **Complete all Sections of the Tax Organizer**

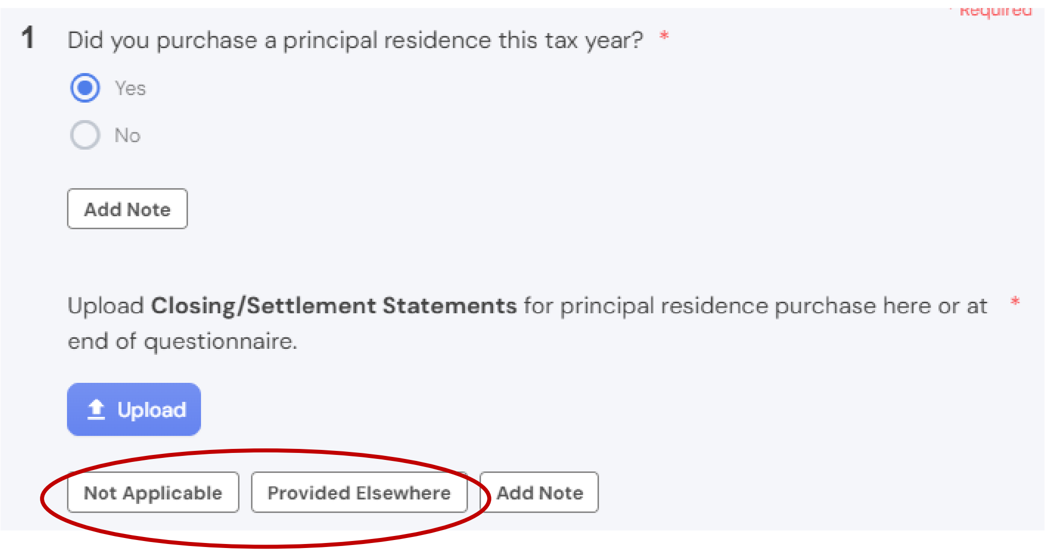
General Information through Additional Information



- 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 [Upload] a document, click **Provided Elsewhere.**

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

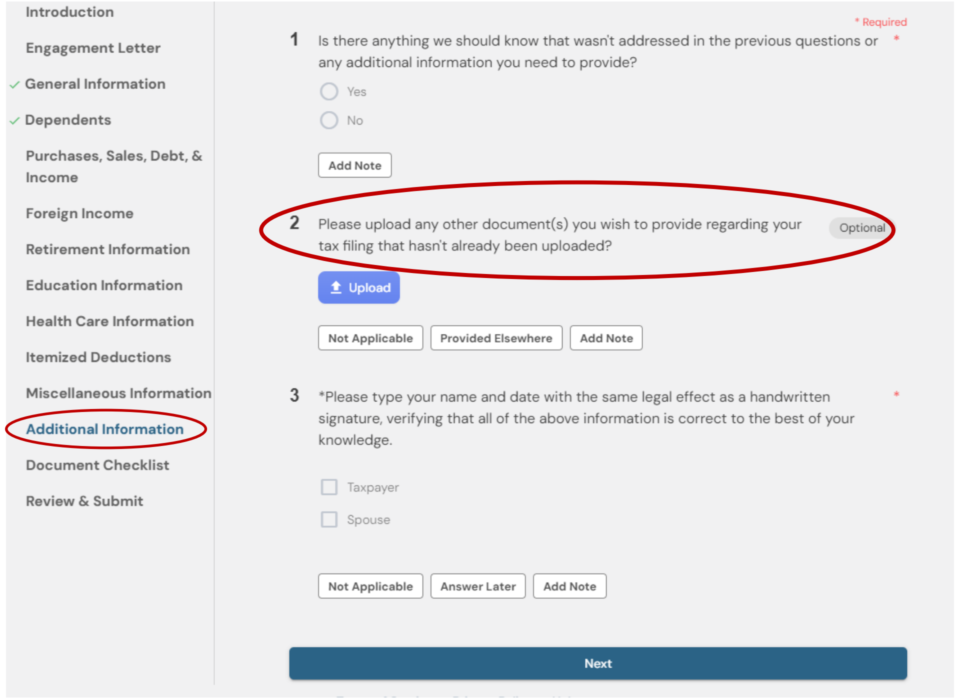


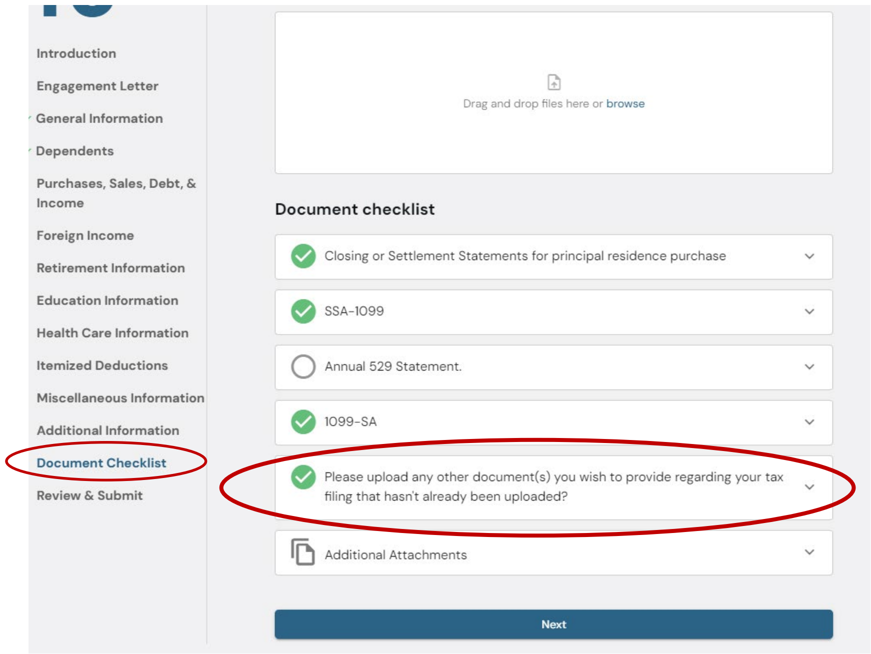
STEP 8: **Document Checklist**

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



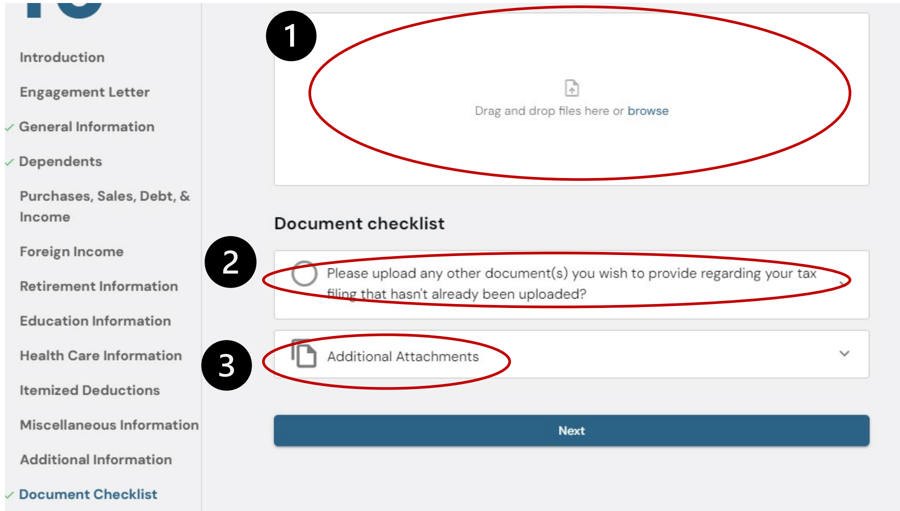


*All documents uploaded within the questionnaire show up in Document checklist.

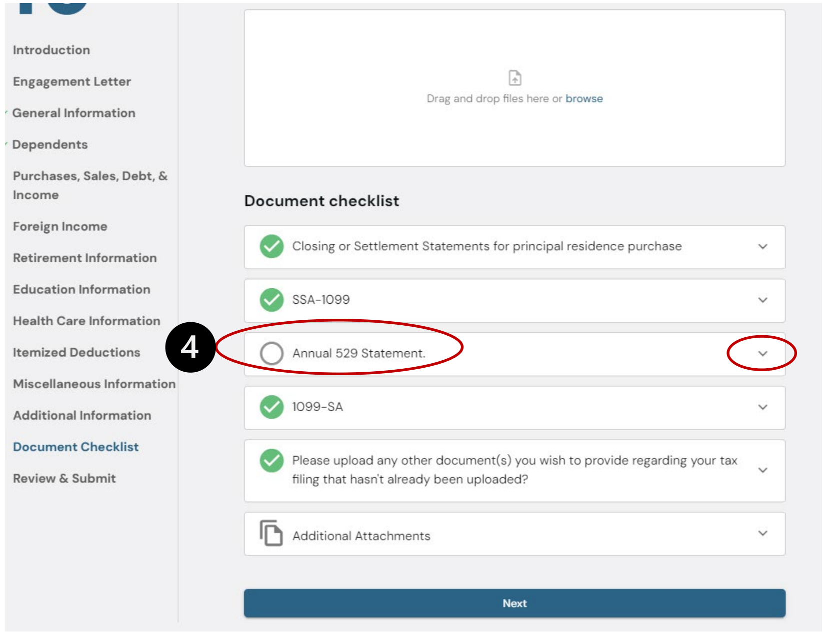
Document Checklist - Continue

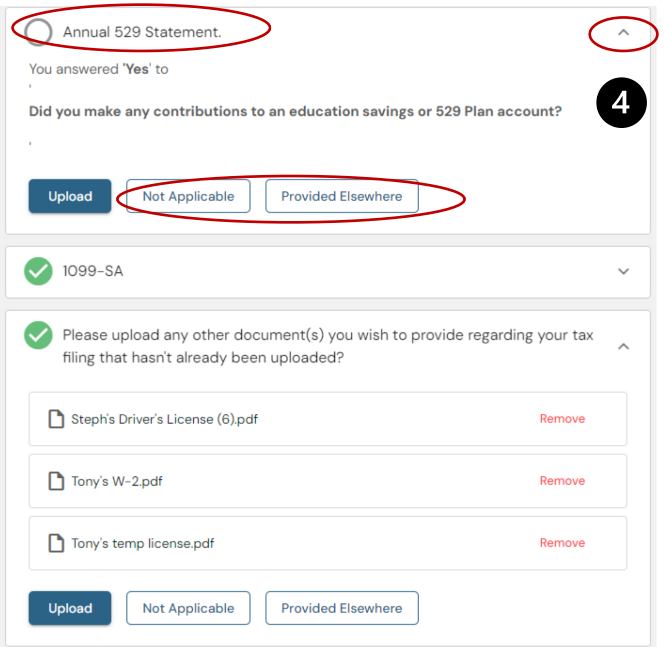
3 Ways to Upload Documents in **Document Checklist:**

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**.

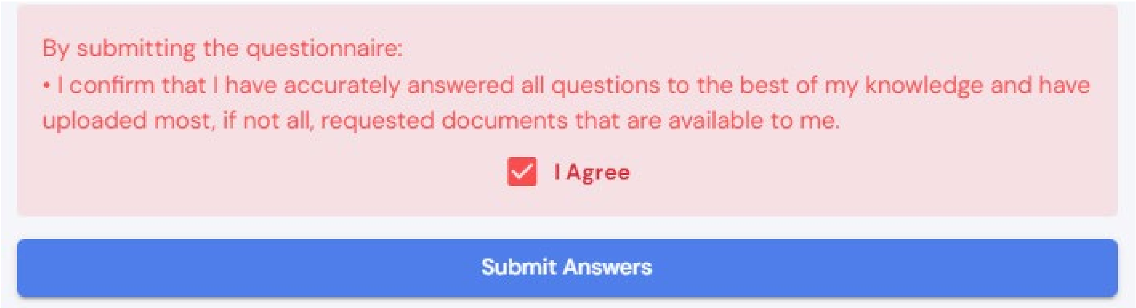




STEP 9: **Review & Submit**

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.

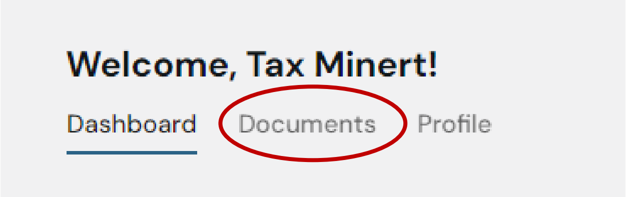
When **all sections** are complete, check the **I Agree** box at the bottom of this page.
Then click **Submit Answers.**



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

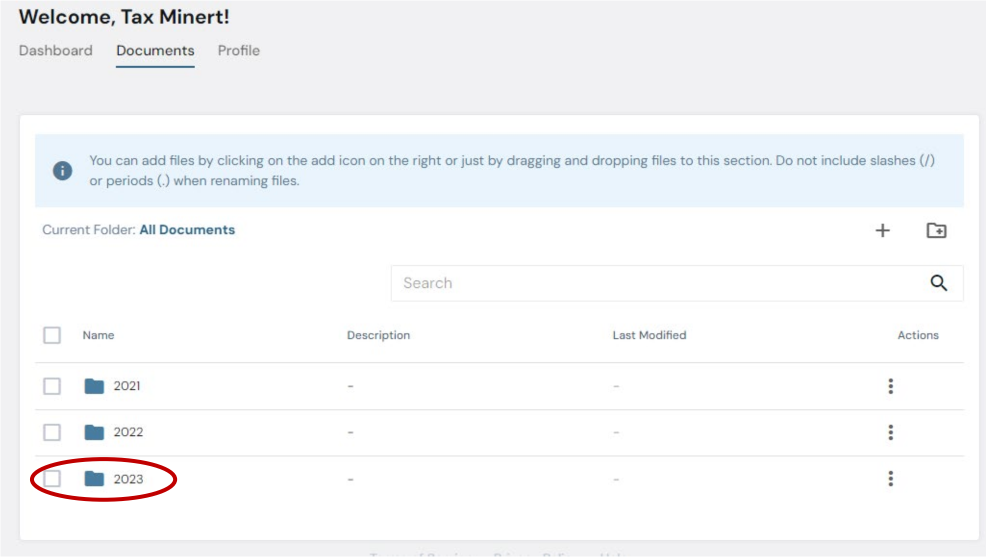
Login to your Portal account at https://app.soraban.com.
Enter your email & password.

OR on our website www.RelieveFinancialStress.com.
Click on **Portal/Login New Portal Account**

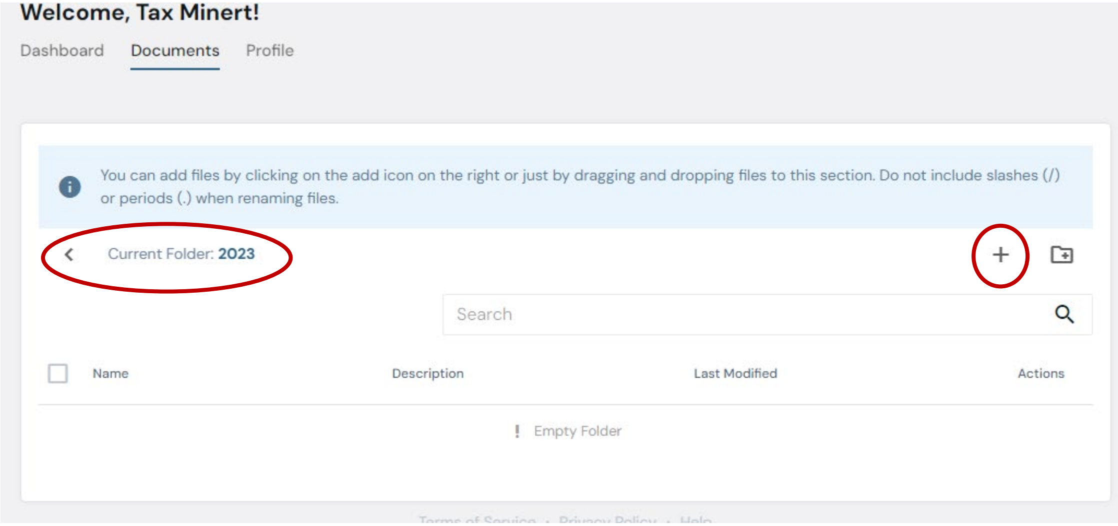


1- Login takes you to your Dashboard. Click on Documents.

2- In Documents, click on **2024** folder

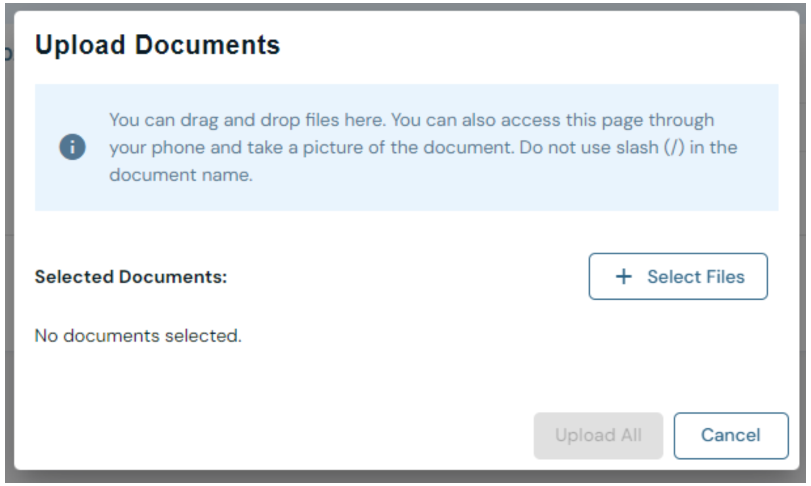


3- In **2024 folder**. Click the **+** sign in the top right.

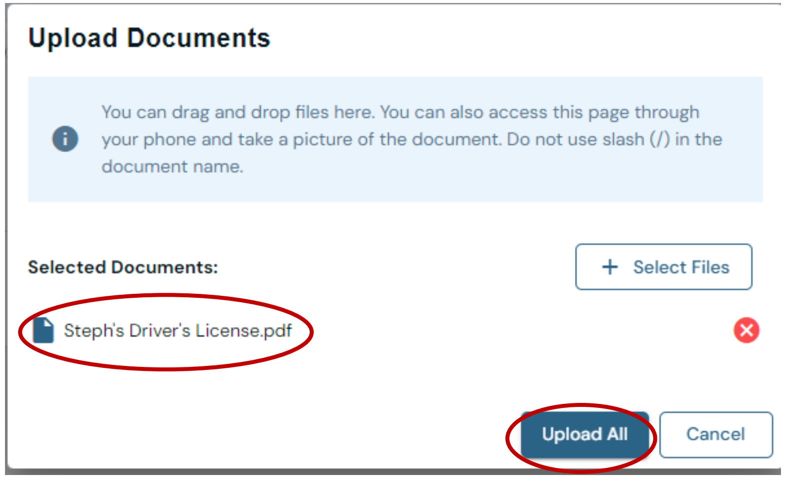


Upload directly to Portal - Continue

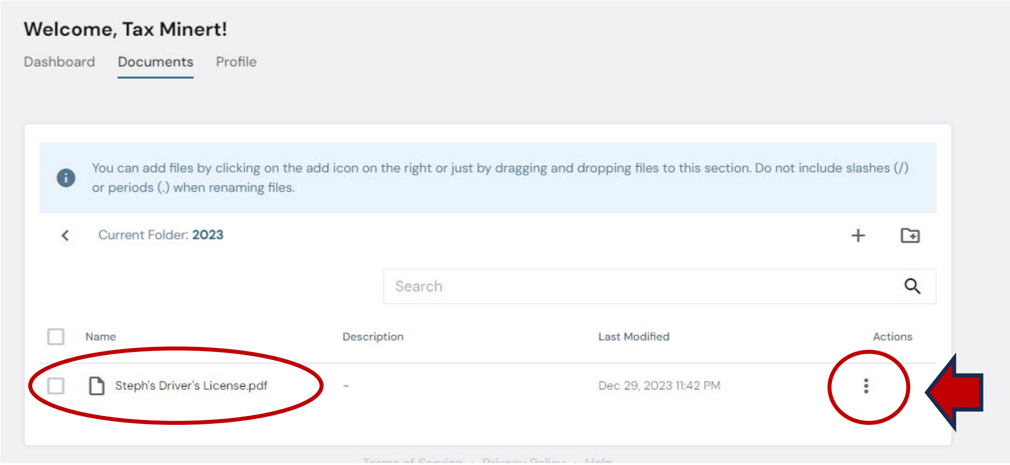
4- Upload Documents box pops up.
Drag & drop file or Select file.



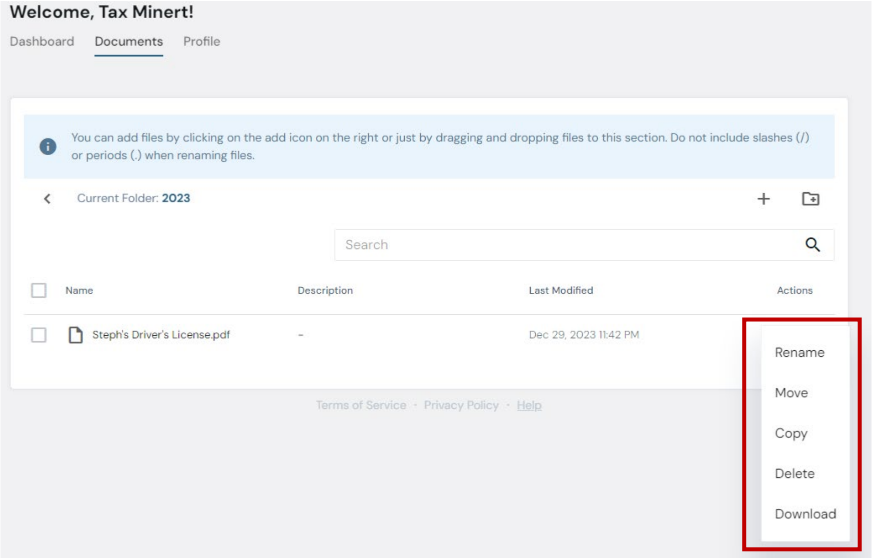
5- When file appears click **Upload all.**



6- File appears in your **2024** 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 continue to 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.

M&A Minert & Associates, PLLC

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