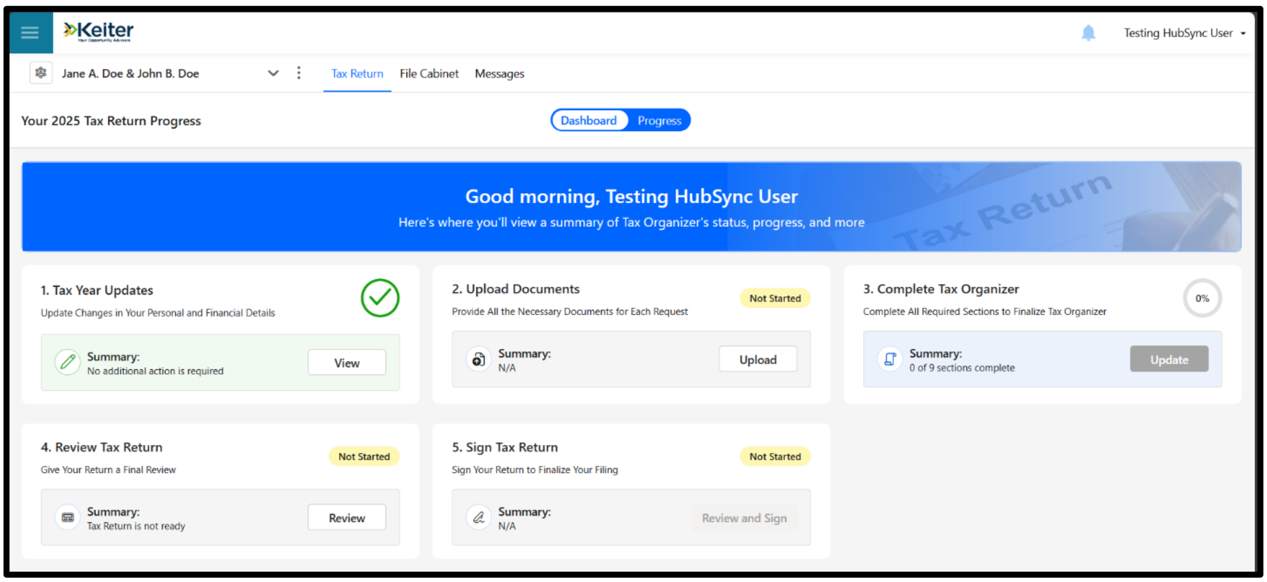
HubSync
How to Complete your Tax Organizer

Your HubSync Workspace allows you to easily review and submit your Tax Organizer to your Engagement Team.

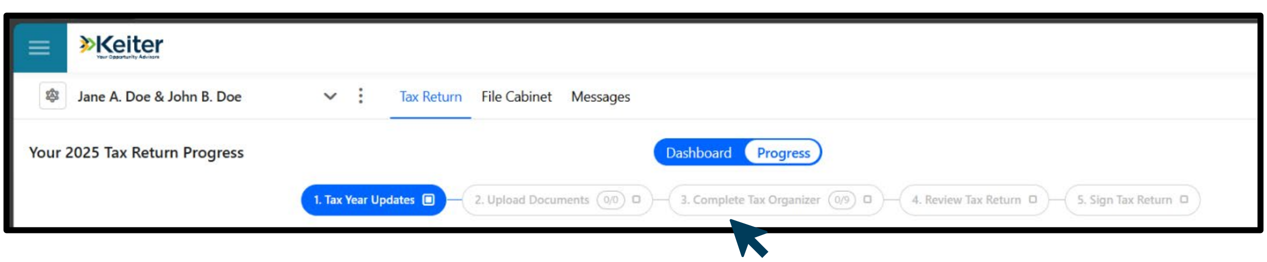
Tax Organizer Dashboard

Your dashboard provides a quick overview of your tasks and progress. You can select the task you wish to complete from this screen.



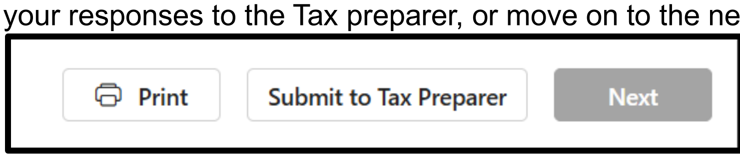
1. **Review Your Progress**

   The completion status of each step is clearly displayed in each section. You may select the "Progress" tab toward the top of your screen to get a more detailed view of each step.



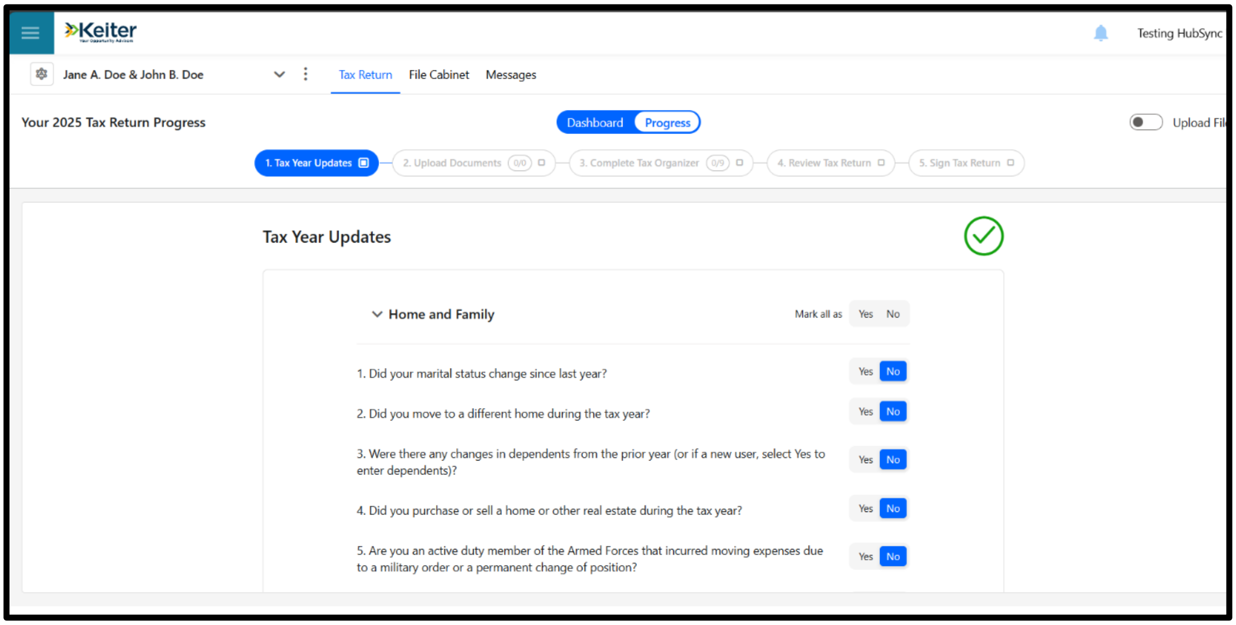
2. **Next Steps**

   Toward the bottom of this section, you will see an option to print your responses, Submit your responses to the Tax preparer, or move on to the next step.



Tax Year Updates

On the Tax Year Updates page, users will see a list of questions requiring “Yes” or No” answers. As steps are completed your progress bar will update to reflect where you are in the signing process. Users must answer all questions within the Tax Year Updates section in order to complete Step 3 of the Tax Organizer section.



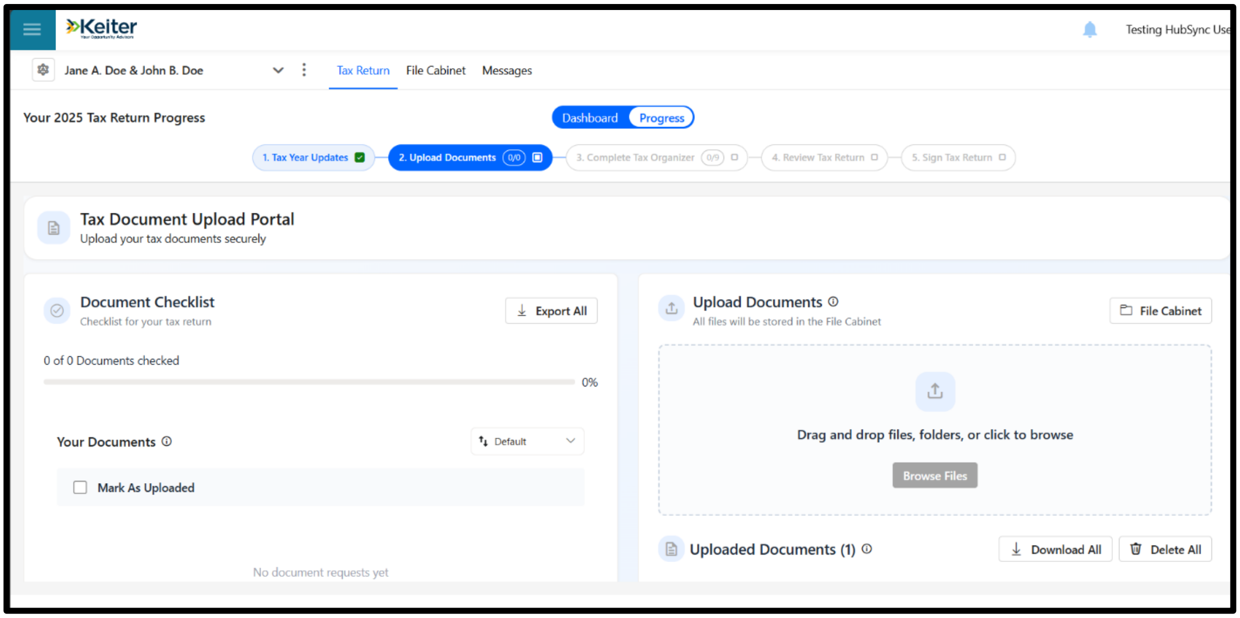
Note: Some of the questions are dynamic, meaning if you answer yes, more questions will appear.

Tracking your Progress

As each question is answered, the system tracks progress and updates a circular progress indicator. A green checkmark will appear once all required questions have been answered, and progress reaches 100%.

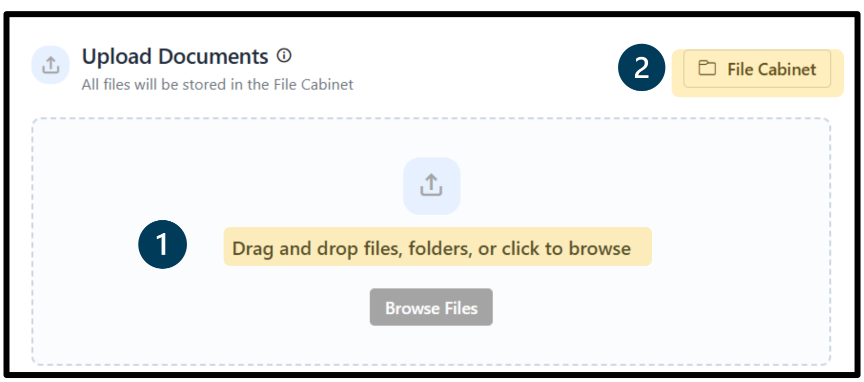
Document Upload

The Document Uploads section is a list of required documents that your engagement team is requesting of you. This list is generated from last year's tax return. Uploaded documents will be stored in a centralized folder under the “File” tab for easy access.



Upload & Save Files

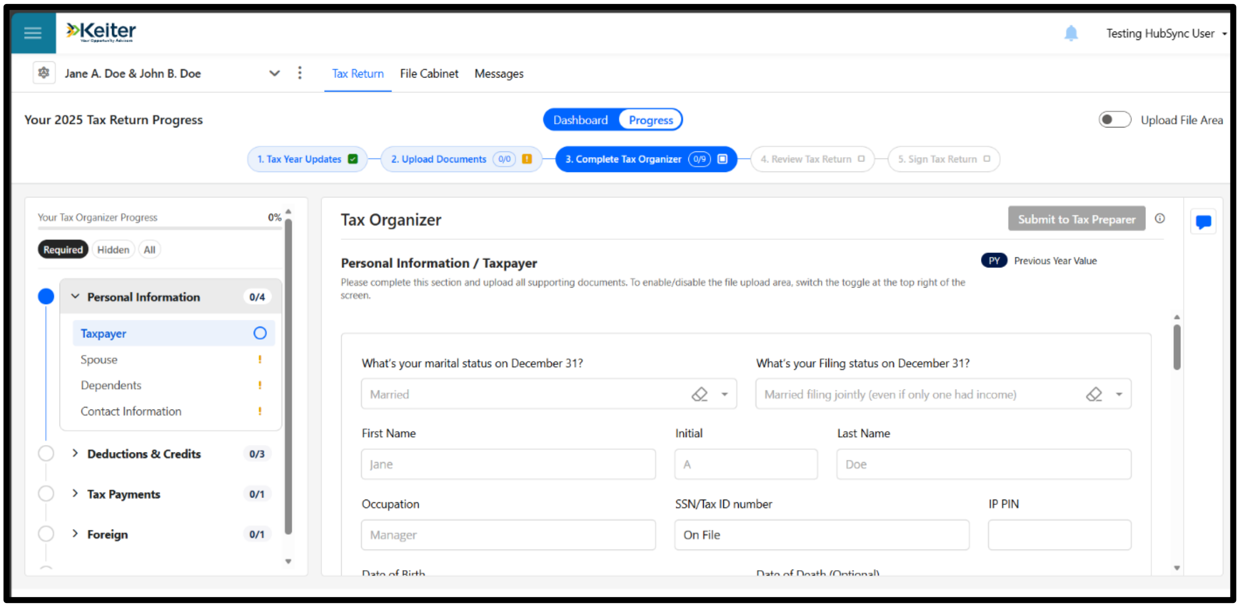
1. You may drag and drop files into the designated area or upload files from a specific folder.
2. Uploaded documents will be stored in a centralized folder under the “File” tab for easy access.



Complete Tax Organizer

To Complete the Tax Organizer, you will be prompted to answer questions across multiple categories. Visual confirmations display as each category is completed, and progress can be tracked using the “Your Tax Organizer Progress Bar” on the left side. This step allows users to complete the full Organizer by answering questions across multiple categories.

Note: Organizer sections are labeled as Required or Hidden. Hidden sections remain accessible if additional information needs to be entered later.



Submit to Tax Preparer

Once all required information is entered, you may submit your Tax Organizer to your Engagement team by scrolling through the bottom of this Complete Tax Organizer section.