

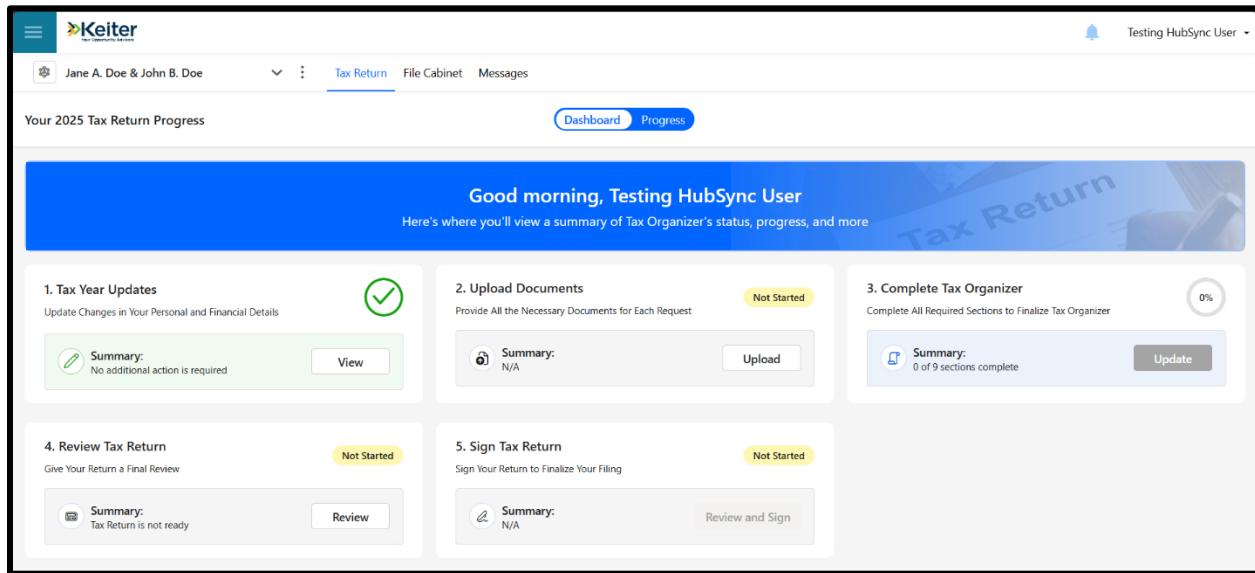
HubSync

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.

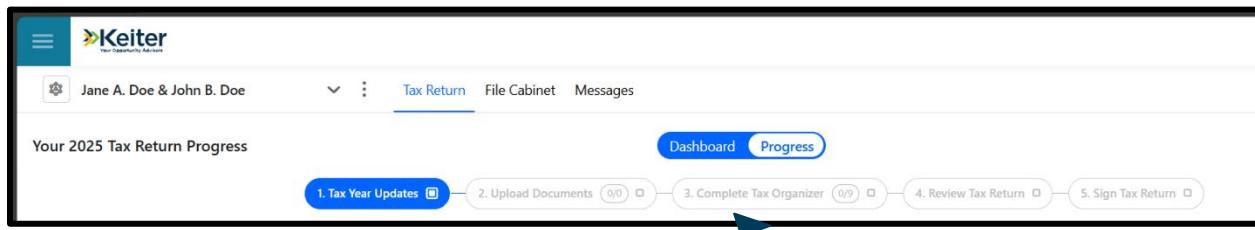


The dashboard displays a summary of tax return progress. It includes a greeting, a summary of the status, and five numbered tasks:

- 1. Tax Year Updates**: Completed (green checkmark). Summary: No additional action is required. View button.
- 2. Upload Documents**: Not Started (yellow button). Summary: N/A. Upload button.
- 3. Complete Tax Organizer**: 0% complete (yellow button). Summary: 0 of 9 sections complete. Update button.
- 4. Review Tax Return**: Not Started (yellow button). Summary: Tax Return is not ready. Review button.
- 5. Sign Tax Return**: Not Started (yellow button). Summary: N/A. Review and Sign button.

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.

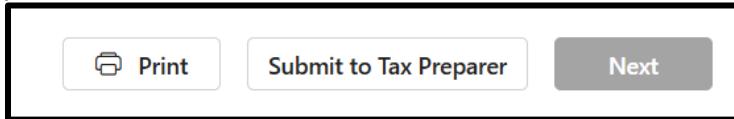


The 'Progress' tab is selected, showing a horizontal timeline of the five steps. Each step is represented by a rounded rectangle with a progress bar and a 'View' or 'Update' button.

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graph LR; A[1. Tax Year Updates] --- B[2. Upload Documents]; B --- C[3. Complete Tax Organizer]; C --- D[4. Review Tax Return]; D --- E[5. Sign Tax Return]
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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.

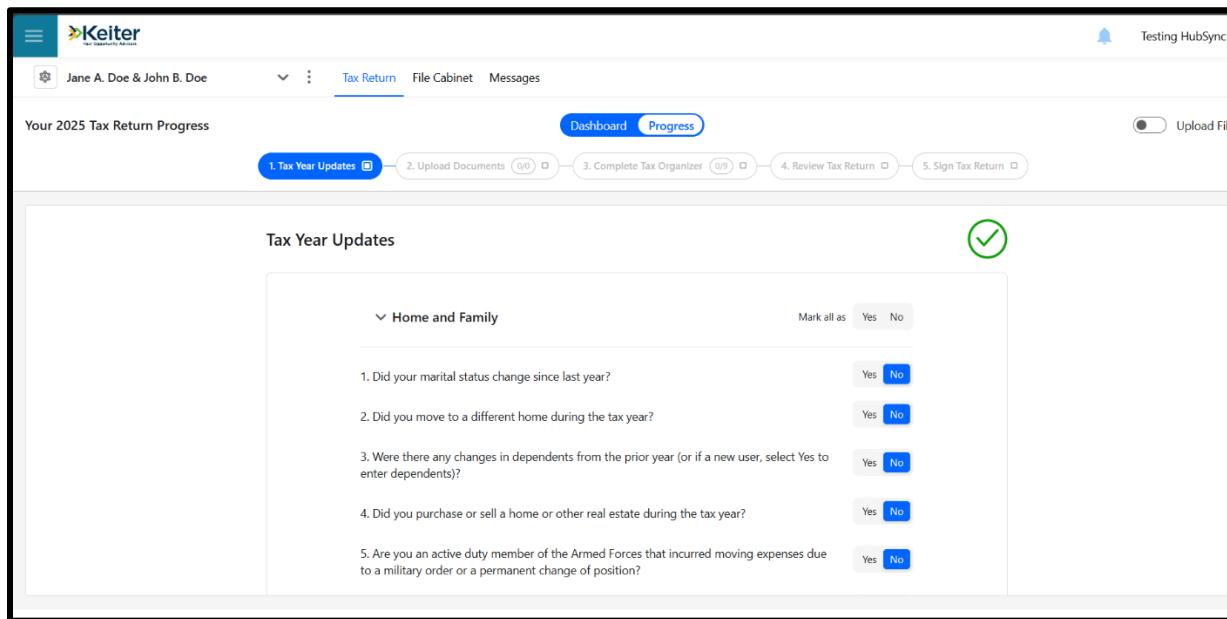


Buttons at the bottom of the screen:

- Print
- Submit to Tax Preparer
- Next

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.



The screenshot shows the Keiter software interface for tax year updates. At the top, there's a navigation bar with the Keiter logo, user information (Jane A. Doe & John B. Doe), and tabs for Tax Return, File Cabinet, and Messages. Below that is a progress bar titled "Your 2025 Tax Return Progress" with five steps: 1. Tax Year Updates (100% complete, highlighted in blue), 2. Upload Documents (0/0), 3. Complete Tax Organizer (0/0), 4. Review Tax Return (0/0), and 5. Sign Tax Return (0/0). The "Progress" tab is selected. The main content area is titled "Tax Year Updates" and contains a section for "Home and Family". It includes a "Mark all as" button with "Yes" and "No" options, and a green checkmark icon in the top right corner. Below this are five questions with "Yes" and "No" radio buttons:

- 1. Did your marital status change since last year? (No selected)
- 2. Did you move to a different home during the tax year? (Yes selected)
- 3. Were there any changes in dependents from the prior year (or if a new user, select Yes to enter dependents)? (Yes selected)
- 4. Did you purchase or sell a home or other real estate during the tax year? (No selected)
- 5. Are you an active duty member of the Armed Forces that incurred moving expenses due to a military order or a permanent change of position? (No selected)

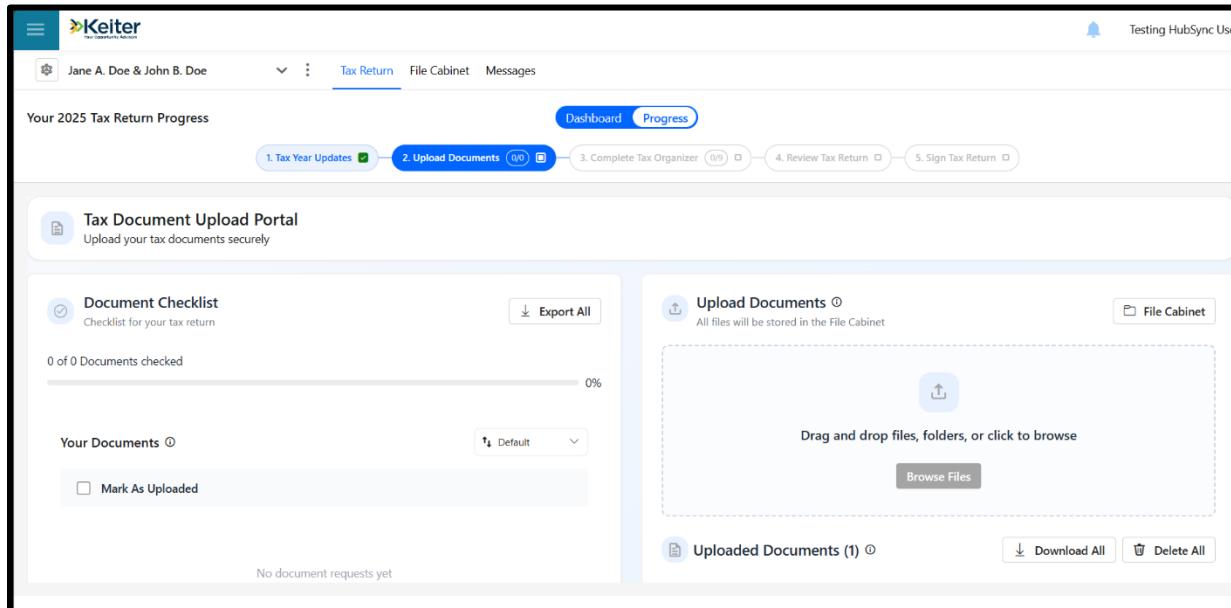
Note: Some of the questions are dynamic, meaning if you answer yes, more questions will appear.

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

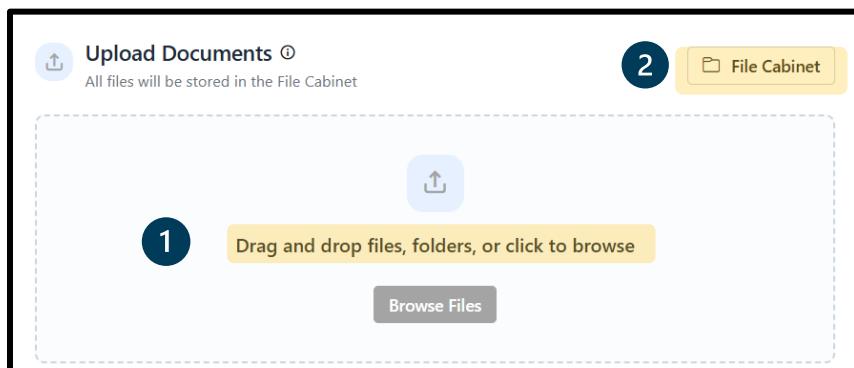
The Document Uploads section is a list of required documents that your engagement team is requesting of you. This list is generated from last year's tax return. Uploaded documents will be stored in a centralized folder under the "File" tab for easy access.



The screenshot shows the Keiter Tax Document Upload Portal. At the top, there's a navigation bar with the Keiter logo, user information (Jane A. Doe & John B. Doe), and a progress indicator for the "Your 2025 Tax Return Progress" (Step 2: Upload Documents). Below this is a "Tax Document Upload Portal" section with a sub-section for "Document Checklist". The checklist shows "0 of 0 Documents checked" and an "Export All" button. To the right is the "Upload Documents" section, which includes a "File Cabinet" button, a large dashed box for file upload with a "Browse Files" button, and a list of "Uploaded Documents (1)".

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.

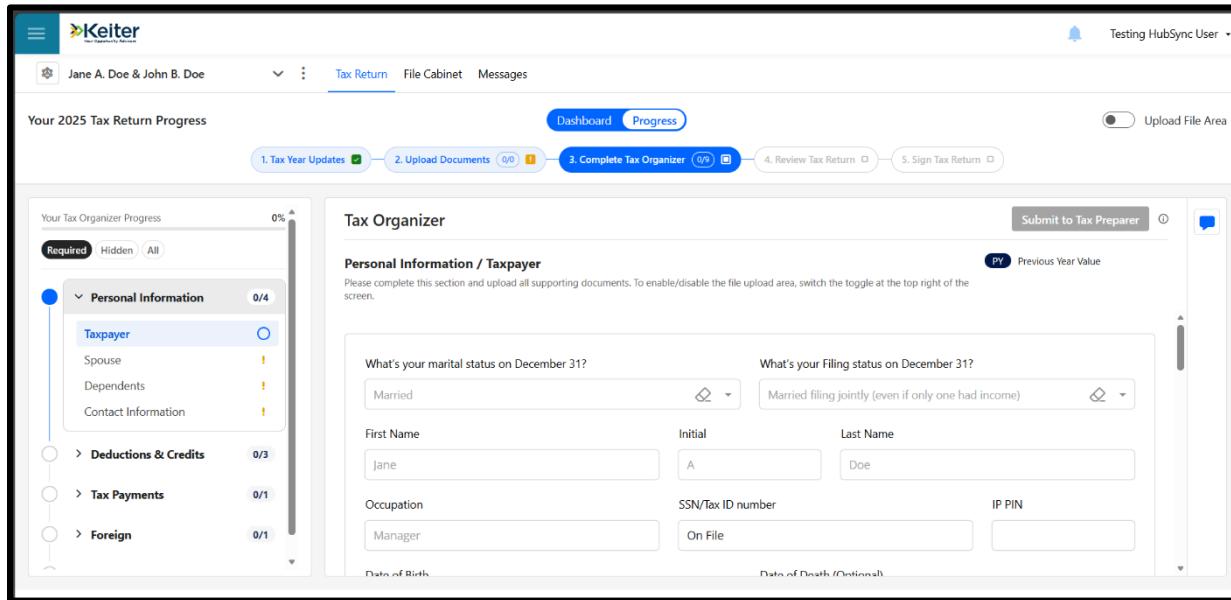


A close-up of the "Upload Documents" interface. It shows a dashed box for file upload with a central "Upload" icon and a "Browse Files" button below it. A callout "1" points to the "Upload" icon, and a callout "2" points to the "File Cabinet" button at the top right of the interface.

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.

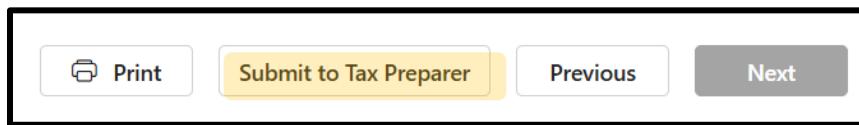
Note: Organizer sections are labeled as Required or Hidden. Hidden sections remain accessible if additional information needs to be entered later.



The screenshot shows the Keiter Tax Organizer interface. At the top, there is a navigation bar with the Keiter logo, user name 'Jane A. Doe & John B. Doe', and links for 'Tax Return', 'File Cabinet', and 'Messages'. A notification bell icon and 'Testing HubSync User' are also present. Below the navigation is a progress bar titled 'Your 2025 Tax Return Progress' with five steps: 1. Tax Year Updates (Completed), 2. Upload Documents (Incomplete), 3. Complete Tax Organizer (Incomplete), 4. Review Tax Return (Incomplete), and 5. Sign Tax Return (Incomplete). A 'Dashboard' and 'Progress' tab are also visible. On the left, a 'Your Tax Organizer Progress' sidebar shows categories: 'Personal Information' (0/4, Required), 'Deductions & Credits' (0/3, Hidden), 'Tax Payments' (0/1, Hidden), and 'Foreign' (0/1, Hidden). The main area is titled 'Tax Organizer' and contains a 'Personal Information / Taxpayer' section. It includes fields for marital status ('Married'), filing status ('Married filing jointly (even if only one had income)'), first name ('Jane'), initial ('A'), last name ('Doe'), occupation ('Manager'), SSN/Tax ID number ('On File'), and IP PIN. A note says 'Please complete this section and upload all supporting documents. To enable/disable the file upload area, switch the toggle at the top right of the screen.' A 'Submit to Tax Preparer' button is at the top right of this section.

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.



A horizontal navigation bar at the bottom of the page. It contains four buttons: 'Print' (with a printer icon), 'Submit to Tax Preparer' (highlighted in yellow), 'Previous', and 'Next'.