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VII. Support

Support by Email: [taxprosupport@mytaxauction.com](mailto:taxprosupport@mytaxauction.com)

Website Address: [www.mytaxauction.com](http://www.mytaxauction.com)

Reading Section III is recommended prior to starting the enrollment process.

\*\*\*\*\*

Before taking a look at the Tax Preparer enrollment details, it is important to understand what MyTaxAuction looks like from a tax payer’s perspective. The information below is intended to provide an overview of the tax payer experience. Tax payers will be able to start auctions the 2<sup>nd</sup> week of January. A tax payer free app will be available in the iTunes store in January and the app mimics the website.

Product exclusions include; access to bank products, access to direct email for both the tax payer and tax professional and individual ERO marketing outside of the tax professional business card.

**I. TAX PAYER PROCESS**

The Tax Payer process is simple after they log in. A tax profile is created by selecting from the following items:

1. **Filing Status:** Married Filing Jointly, Widowed, Single, Head of Household, Married Filing Separately
2. **Life Events:** Choosing a combination of the following eight items:
  1. Home Owner
  2. Dependents
  3. Charitable Donations
  4. Student Loan Interest
  5. Contributions to Retirement Fund
  6. Dental/Medical Expense (HSA)
  7. Employed
  8. Self Employed
3. **Federal and State:** Identify one state to prepare in addition to their federal return.  
\*\* Bids by tax preparers include preparation and electronic filing for a federal return and state return.
4. **Auction End:** Tax payer picks a date to end auction, from 1 to 7 days after the start of the auction.

## MyTaxAuction \*\* New RedGear Product\*\*

The combination of items above creates a complexity score for tax preparers to review and place bids. The example tax payer below, Dionne Demo, has a **Medium** ■■■■ complexity score based on the Life Events of Home Owner, Dependents, Charitable Contributions and Medical Expenses. Dionne also needs a Federal and Utah State return completed. This tax payer is now available to receive bids by MyTaxAuction tax preparers.

The screenshot shows the MyTaxAuction user interface. At the top, there's a navigation bar with 'My Dashboard', 'My Auction', 'My Messages', and 'My Taxes'. Below that, a progress bar indicates the current step: '2 Accept Bid'. The main content area is titled 'Next Step : Accept a Bid.' and includes a countdown timer for 'Your auction ends Friday, December 23, 2011' showing 3 Days, 23 Hours, 59 Minutes, and 43 Seconds. A large 'Accept a bid' button is present. Below this, there are two sections: 'My Summary' for Dionne Demo (Federal & UT, Medium complexity) and 'Recent Activity' showing 'Your auction has been started' on Monday, December 19, 2011 at 11:16 AM.

Creating an account and starting an auction is easy for the tax payer. Below are impacts for the tax preparer.

## II. COST AND FEES

First, **Cost** and **Fees** to participating tax preparers. There is no cost to enroll and no cost to Bid, Browse or Win an Auction, which are the key tax preparer activities. The best news is all returns are prepared using the RedGear tax software, which means no complicated and redundant tax software to learn. Returns are prepared using your RedGear software, MyTaxAuction is another way to access a pool of waiting clients.

**Distribution of Tax Preparation Fees:** Tax payer fees are collected through PayPal after they review a tax summary. The client pays for 100% of the preparation through PayPal. PayPal deducts 3% for their fees and sends the tax preparer, or office, 82.45% of the preparation fee and sends RedGear 14.55%. An example of how the fees are divided is provided below.

<b>Total Tax Preparation Fee</b>	<b>\$100.00</b>	<b>100.0%</b>
PayPal	\$3.00	3.0%
Tax Preparer	\$82.45	82.45%
RedGear	\$14.55	14.55%

Tax preparers are in control of their individual bids. While price plays an important part in most purchasing decisions, research indicates tax payers want credibility, experience, and control in their tax preparation experience. As a tax preparer, you bid only the amount you are willing to accept for the effort you feel it will take to complete the return. The tax payer chooses the tax preparer they want to work with based on credentials, experience and price. Price is important, but price may be third or fourth in the decision making process.

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### III. TAX PREPARER PARTICIPATION

Next, determine how payments will be received for completed returns. If you have tax preparers in your office who work for you, you may choose to have them use an **Office PayPal** account and all funds will be sent to the Office PayPal account. Reporting will be provided to assist the *Office* in compensating the tax preparers for completed returns. **Or**, Tax Professionals may use their **Personal PayPal** account. The tax preparer portion of the fees will be directly deposited into the individual tax preparer's PayPal account.

**NOTE:** *The PayPal address tied to the tax professional who won the bid and prepared the taxes, will receive the tax professional portion of the fees.*

What do you need to participate in MyTaxAuction?

#### OFFICE INFORMATION

1. A valid RedGear Account Number
2. A valid RedGear Software License Key
3. A valid IRS EFIN
4. A valid PayPal Account where tax preparation fees will be deposited
  - \* Only individuals with correct *Office* credentials may register and create an account
  - \* Office Information may be used by multiple tax professionals, but Tax Professional Information should be **unique** to each tax professional

The MyTaxAuction web address is: <https://www.mytaxauction.com/>. Use the quick link in the brown footer to navigate to the tax preparer registration page. Once a tax preparer account is established, use the **Log In** button.

my tax auction

How It Works · Browse Professionals · Start An Auction

Log In

Thousands of tax preparers one winner... you!

Start an Auction

Take the Stress Out of Filing Your Taxes. Let a Professional Do It For You.

We know you're busy and you don't want to figure out complex tax law. This is why MyTaxAuction is the perfect solution for your tax preparation needs. MyTaxAuction preparers are ready to prepare and file your taxes for you, all from the comfort of your own home. The best part is you'll have a variety of tax preparers to choose from. Getting started is easy and finishing is even easier.

3 Easy Steps

1. Create an account
2. Create a tax profile
3. Start an auction

Let the bidding begin...

Recommend Send 2 people recommend this. Be the first of your friends.

privacy policy by TRUSTe terms and conditions contact us tax preparer registration

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## IV. ENROLLMENT PROCESS

The two sections of the registration page, Office Information and Tax Professional Information, are detailed below.

The screenshot shows a registration form for tax preparers. It has a yellow header with the text 'Tax Preparer Registration'. Below this, there are two main sections: 'Office Information' and 'Tax Professional Information'. The 'Office Information' section contains five input fields: 'Software Account Number', 'Software License Key', 'EFIN', 'PayPal Address', and 'Confirm Paypal Address'. To the right of these fields is a blue button that says 'Don't have a PayPal account? Sign up now!' with a right-pointing arrow. The 'Tax Professional Information' section contains six input fields: 'First Name', 'Last Name', 'PTIN', 'Email Address', 'Confirm Email Address', and 'Confirm Password'. Below these fields is a checkbox labeled 'I agree to the terms and conditions of use.' and a grey 'Register' button.

1. **OFFICE INFORMATION:** Software Account and License Key must be active to enroll.
  - a. Software Account Number
  - b. Software License Key Number
  - c. Electronic Filing Identification Number (EFIN)
  - d. PayPal Address, a link is provided to help set up a PayPal account

Tax professionals using an **OFFICE PayPal** address

- Office provides **a-d** above to eligible tax preparers to create an account
- Office receives all tax preparation fees and pays the tax professional

Tax Professionals using a **PERSONAL PayPal** address

- Office provides **a-c** above to eligible tax preparers to create an account
- Tax preparers receive their portion of tax preparation fees directly
- Tax Professionals use their personal PayPal address for section **d**

2. **TAX PROFESSIONAL INFORMATION: Unique information for the tax professional.**
  - a. First and Last name. Example First name: **Joe** Last Name: **Demo** displayed as **Joe D**
  - b. PTIN – issued by the IRS
  - c. Email address to send notifications. Email address not displayed to users
  - d. Agree to Terms and Conditions, also provided **here**

The **Register** button activates once all key information is entered and validated

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**V. BUSINESS CARD**

The next step is to fill out what is referred to as the **Business Card**. The Business Card provides details to tax payers who are in the process of selecting a tax preparer. The business card for every tax preparer who placed a bid is displayed to help the Payer decide who to work with. The sections of the business card are as follows:

- a. Change Photo: A professional picture is suggested
- b. Location: The state where you conduct business
- c. Years in Business: The number of years in the tax industry
- d. Business Card: A description of who you are for clients to review
- e. Memberships & Affiliations: List groups / memberships
- f. Areas of Expertise:
 

Real Estate	Dependents
Charitable Contributions	Retirement Contributions
Education Expenses	Medical Expenses
Small Business	Other income

MY TAX AUCTION    My Dashboard    My Auctions    My Clients    [Log Out](#)

**TOM P.**

**Business Card**

[Change Photo](#)

Location:

Years in Business:

**Memberships & Affiliations**

**Areas of Expertise**

- Real Estate
- Charitable Contributions
- Education Expenses
- Small Business
- Dependents
- Retirement Contributions
- Medical Expenses
- Other Income
- CPA
- MBA
- Tax Professional
- Enrolled Agent
- Attorney

**Save Profile**


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Below is an example of a completed Business Card. At the bottom is a Feedback section, which is a summary of the ratings and feedback from tax payers who have worked with this tax preparer. Feedback is only viewable by other tax payers when they are deciding on a tax preparer. Your specific feedback is viewable only if you place a bid on a new tax payer.

**NOTE:** *If changes to the business card are necessary after it has been created, tax preparers select Edit Profile and make changes as deemed appropriate.*

## Don Professional [Edit Profile](#)



### Business Card

I view preparing a tax return as putting together a puzzle - all the pieces have to be in the right place. There is such a feeling of accomplishment when the return is finished correctly to the client's satisfaction. Preparing taxes saves people from having to navigate through the tax laws by themselves and I enjoy helping people find their maximize refund.

### Memberships & Affiliations

20 years in business  
Location: UT  
Better Business Bureau

<h4>Areas of Expertise</h4> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Real Estate</li><li><input type="checkbox"/> Charitable Contributions</li><li><input type="checkbox"/> Education Expenses</li><li><input checked="" type="checkbox"/> Small Business</li><li><input checked="" type="checkbox"/> Dependents</li><li><input type="checkbox"/> Retirement Contributions</li><li><input checked="" type="checkbox"/> Medical Expenses</li><li><input type="checkbox"/> Other Income</li></ul>	<h4>Certifications &amp; Licenses</h4> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> CPA</li><li><input checked="" type="checkbox"/> MBA</li><li><input type="checkbox"/> Tax Professional</li><li><input type="checkbox"/> Enrolled Agent</li><li><input type="checkbox"/> Attorney</li></ul>
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### Feedback

Average Rating: 5.00 stars

★★★★★ by virginia v. on 12/3/2011 He was awesome. Very fast and friendly.	★★★★★ by Staci K. on 12/5/2011 Don was fantastic. He even found a credit I overlooked. Thanks Don
★★★★★ by quinton q. on 12/5/2011 Don is awesome!	★★★★★ by Inga I. on 12/5/2011 Fast, simple, and accurate!
★★★★★ by Scott S. on 12/5/2011 Don was great!	

Now you've seen the enrollment process. The following pages provide a brief overview of the rest of the tax preparer screens. Additional details about the process will be made available. If you have questions about the product, send an email to [taxprosupport@mytaxauction.com](mailto:taxprosupport@mytaxauction.com) with the details of your question.

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**VI. OTHER TAX PREPARER SCREENS**

**A. My Dashboard – Tax Preparer Overview**

- My Clients:** A quick overview of the Clients where the tax preparer has won the bid. The client may be in any status of the process. New documents and messages are displayed as well. Messages show up as a pink envelope in the system.
- My Bids:** Shows current low bid, bid placed by this tax preparer, complexity score and when the auction expires. To access the specific tax payer information, a simple click will go to the details.
- My Next Actions:** A list of what needs to be done next on each tax payer.
- Recent Activity:** An overview for all the activity the tax preparer has taken in the product.

The screenshot shows the 'My Dashboard' interface for a tax preparer. At the top, there is a navigation bar with the 'my tax auction' logo on the left, a 'Log Out' button on the right, and a breadcrumb trail: 'My Dashboard · Auctions · My Clients'. Below the navigation bar, the user's name 'Don Professional' is displayed next to a profile picture. The main content area is divided into four sections:

- My Clients:** A table listing clients with columns for Name, Status, New Msgs, and New Docs.
 

Name	Status	New Msgs	New Docs
virginia vasquez	E-Filed		10
frederica fredette	Tax Preparation Completed		5
Randy Allan	Tax Preparation Completed		1
Dylan McDermott	E-Filed		5
Inga iglesias	E-Filed		7
Staci Kinshella	E-Filed		6
quinton quasimoto	E-Filed		5
Scott Smith	E-Filed		4
lauro lauro	E-Filed		5
- My Bids:** A table showing bid details with columns for My Bid, Low Bid, Complexity, and Expires In.
 

My Bid	Low Bid	Complexity	Expires In
\$85	\$75	Progress indicator (3 orange, 1 grey)	2d 23h 46m
- My Next Actions:** A list of tasks with dates and descriptions.
 

12/12/11	Complete brandon b.'s tax return.
12/09/11	E-File lauro l.'s tax return.
12/09/11	Complete Steve S.'s tax return.
12/08/11	E-File danielle d.'s tax return.
12/08/11	Complete danielle d.'s tax return.
- Recent Activity:** A list of events with dates and descriptions.
 

12/16/11	You have been underbid on John D.'s auction.
12/16/11	You have been underbid on John D.'s auction.
12/16/11	You placed a bid for \$85.00 on John D.'s auction.
12/12/11	You have been underbid on Suzy Q.'s auction.
12/12/11	You placed a bid for \$245.00 on Suzy Q.'s auction.

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**B. Auctions: Auctions Tax Preparer has Bid On and the Available Auctions**

- Total number of auctions (Auctions 4), the auctions the tax preparer has bid on (1) and available auctions (3).
- In the **Auctions Available to Bid On** section there are state filters as well as a complexity filter.
- Sorting capabilities are available for the State, number of bids, lowest bid and when auction expiration.
- The example shows the tax preparer has bid on one client, John Doe, and there are three available auctions to bid on.
- John Doe has had 5 bids. This tax preparer has bid \$85 and the current lowest bid is \$75.00.

The screenshot shows the MyTaxAuction dashboard. At the top left is the logo 'my tax auction'. At the top right is a 'Log Out' button. Below the logo is a navigation bar with 'My Dashboard', 'Auctions', and 'My Clients'. The main content area is titled 'Auctions (4)'. It is divided into two sections: 'Auctions I've Bid On (1)' and 'Auctions Available To Bid On (3)'. The 'Auctions I've Bid On' section contains a table with one row for 'Doe, John' in CA, with 5 bids, a my bid of \$85.00, and a lowest bid of \$75.00. The 'Auctions Available To Bid On' section has filters for 'All States' and 'All Complexities'. It contains a table with three rows: 'Bush, Josh' (2 bids, lowest bid \$175.00), 'Huff, Jenn' (1 bid, lowest bid \$265.00), and 'Demo, Dionne' (0 bids, lowest bid \$75.00). A 'More Auctions...' button is at the bottom.

Name	State	Bids	My Bid	Lowest Bid	Complexity	Ends In
Doe, John	CA	5	\$85.00	\$75.00	3 of 4	3d 0m

Name	State	Bids	My Bid	Lowest Bid	Complexity	Ends In
Bush, Josh		2		\$175.00	2 of 4	16h 45m
Huff, Jenn		1		\$265.00	3 of 4	18h 42m
Demo, Dionne	UT	0			2 of 4	3d 11h 20m


[More Auctions...](#)

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- After selecting Jenn Huff, from the **Auctions Available To Bid On** section, the client details are shown.
- The tax preparer determines whether or not to place a bid based on the client details.
- This client has business income, dependents, education expenses and retirement contributions.
- To place a bid, enter the amount in the box to the left of **Bid!** and click Bid!

**Meet Jenn H.**



**Federal**  
Complexity: High ■ ■ ■ ■

Business Income      Dependents  
Education Expenses  
Retirement Contributions

This auction ends on  
Tuesday, December 20, 2011

**4** **40** **1**  
Hours      Minutes      Second

---


**Bid on this Auction**

**Current low bid is \$265<sup>00</sup>**

**Bid!**

---

**Bid History**

	Randall F.	Bid placed Tuesday, December 13, 2011 at 6:41 PM	<b>\$265.00</b>
--	------------	--	-----------------

- The section below shows what a new bid of \$280.00 by Dave B. (tax preparer) looks like. The new bid displays at the top of the bid history section.

**Bid on this Auction**

**Current low bid is \$265<sup>00</sup>**

**Bid!**

---

**Bid History**

	Dave B.	Bid placed Tuesday, December 20, 2011 at 2:00 PM	<b>\$280.00</b>
	Randall F.	Bid placed Tuesday, December 13, 2011 at 6:41 PM	<b>\$265.00</b>

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### C. My Clients

- My Clients provides a view of the clients who have selected this tax preparer and the return status.

Name	State	Winning Bid	Started	Status	Complexity	Messages
vasquez, virginia	VA	\$100	12/3/2011	E-Filed	<div style="display: inline-block; width: 25px; height: 10px; background-color: yellow; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New
fredette, frederica	DE	\$105	12/4/2011	Tax Prep Complete	<div style="display: inline-block; width: 25px; height: 10px; background-color: green; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New
Allan, Randy		\$150	12/5/2011	Tax Prep Complete	<div style="display: inline-block; width: 25px; height: 10px; background-color: green; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New
McDermott, Dylan	UT	\$260	12/5/2011	E-Filed	<div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New
iglesias, Inga	NM	\$350	12/5/2011	E-Filed	<div style="display: inline-block; width: 25px; height: 10px; background-color: red; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: red; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: red; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: red; border: 1px solid gray;"></div>	0 New
Kinshella, Staci	MO	\$250	12/5/2011	E-Filed	<div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New
quasimoto, quinton	RI	\$125	12/5/2011	E-Filed	<div style="display: inline-block; width: 25px; height: 10px; background-color: yellow; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: yellow; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New
Smith, Scott	AL	\$200	12/5/2011	E-Filed	<div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: orange; border: 1px solid gray;"></div> <div style="display: inline-block; width: 25px; height: 10px; background-color: gray; border: 1px solid gray;"></div>	0 New

- Selecting an individual client takes the tax preparer to the **Client Detail** page shown below.

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## D. Client Details

**Client Progress:** The next step for the client

**Documents:** A list of all documents sent between the tax payer and the tax preparer and the date added.

**Notes:** A section to allow tax preparers to maintain private client notes

**Messages:** All system messages are encrypted and secure. It is recommended to use the messaging system to communicate with the client

The screenshot shows the MyTaxAuction interface for a client named Frederica Fredette. The page includes a navigation bar with 'My Dashboard', 'Auctions', and 'My Clients'. The client's profile shows a photo of a flower, her name, state (DE), and services (Real Estate, Retirement Fund, Medical Bills). The 'Client Progress' section shows 'Tax Documents Received' on 12/04/11 and 'Tax Prep Completed' on 12/05/11, with a 'Next Step' of 'Waiting for client to review return and make payment.' The 'Documents' table lists several files, including 1099MISC.pdf, 1099G.pdf, 1099RDistributions.pdf, CHARITABLECONTRIBUTIONS.xls, dependents.txt, Tax Return Summary.pdf, and Tax Return FINAL.pdf, with their respective dates and review status. The 'Notes' section is currently empty, and the 'Messages' section has input fields for 'Title' and 'Message'.

Client Progress	
Tax Documents Received	12/04/11
Tax Prep Completed	12/05/11
<b>Next Step:</b>	Waiting for client to review return and make payment.

Documents		
Document Name	Date Added	Reviewed
<a href="#">1099MISC.pdf</a>	12/04/11	<input type="checkbox"/>
<a href="#">1099G.pdf</a>	12/04/11	<input type="checkbox"/>
<a href="#">1099RDistributions.pdf</a>	12/04/11	<input type="checkbox"/>
<a href="#">CHARITABLECONTRIBUTIONS.xls</a>	12/04/11	<input type="checkbox"/>
<a href="#">dependents.txt</a>	12/04/11	<input type="checkbox"/>
<a href="#">Tax Return Summary.pdf</a>	12/05/11	<input checked="" type="checkbox"/>
<a href="#">Tax Return FINAL.pdf</a>	12/05/11	<input checked="" type="checkbox"/>

**Notes** (Visible only to me)

No notes have been added for this client.

**Messages**

Title: \_\_\_\_\_

Message: \_\_\_\_\_

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