

PPL Organizer Instructions

Notification email: notifications@pplcpa.clientportal.com

1) Click "Start the Organizer"

Emily Calkins has sent you an organizer to complete Inbox x

 **PPL CPA** <notifications@pplcpa.clientportal.com>
to me ▾



PPL
Certified Public Accountants
pplcpa.com

Action Required

Client: John Doe

Hi Emily,

To better serve you, we need you to do two things:

1. Answer some tax-related questions
2. Upload your tax documents

We'll walk you through each step, and please include any questions or concerns in the areas for comments.

Please log in to complete the organizer.

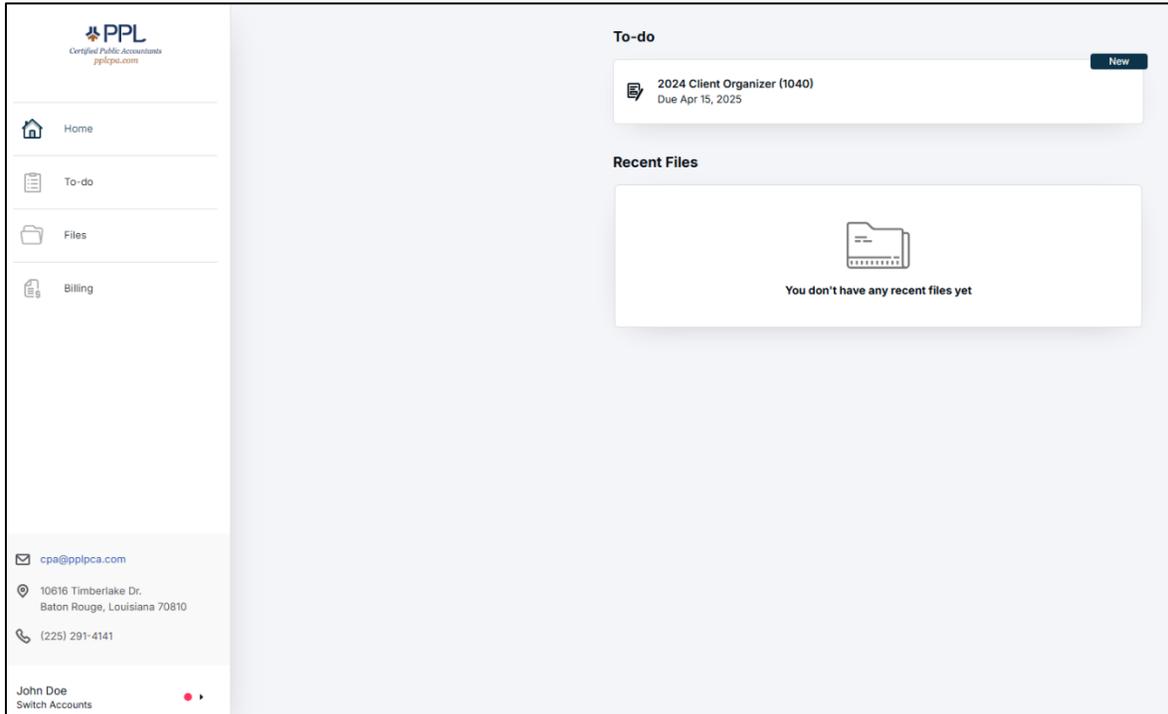
[Start the organizer](#)

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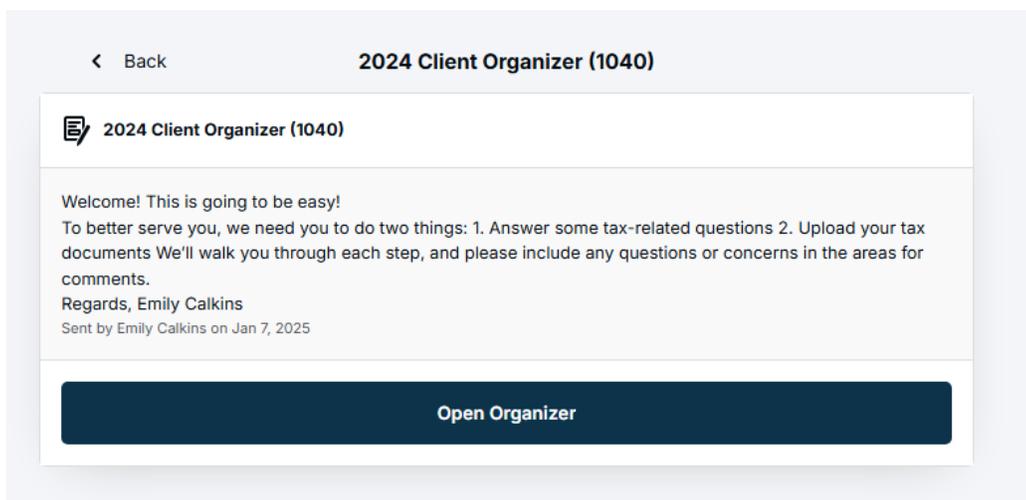
2) Once logged into the portal, you should see the 2024 Client Organizer in the To-Do section.

Click the To-do to access the Organizer.

Note: If you have multiple accounts, you can toggle between them using the Switch Account feature in the bottom left corner.



3) Click "Open Organizer"



4) The Organizer will track your status as you complete it. The first 5 sections are the survey.

A screenshot of the Organizer interface. At the top left is a back arrow and the text "Back". Below this is a "Progress" section showing "0/5 Sections Complete" with a progress bar that is almost empty. A list of sections follows, each with an unselected radio button: Personal, Taxpayer, Filing status, Dependents, Address, Questionnaire, Income, Expenses, Additional Information, Upload documents, and Submit to practitioner.

A screenshot of the Organizer interface. At the top left is a back arrow and the text "Back". Below this is a "Progress" section showing "5/5 Sections Complete" with a progress bar that is completely filled. The list of sections follows, each with a selected radio button (indicated by a green checkmark): Personal, Taxpayer, Filing status, Dependents, Address, Questionnaire, Income, Expenses, Additional Information, Upload documents, and Submit to practitioner.

5) The 6th section is for document uploads. Based on your answers in the previous 5 sections, you may have a list of suggested documents here. Please upload whatever you have and be aware that you can always upload additional documents even after the Organizer has been submitted.

A screenshot of the "2024 Client Organizer (1040)" interface. On the left is a sidebar with a "Progress" section showing "0/5 Sections Complete" and a list of sections: Personal, Questionnaire, Income, Expenses, Additional Information, Upload documents, and Submit to practitioner. The main content area is titled "Upload Documents" and contains the text: "Here are the documents we think you'll need to upload. If there's anything else your tax pro should look at, upload that here as well." Below this text is a large dashed box for document uploads. To the left of this box is a message: "We need more information to recommend files. In order to view a list of required files, please complete your personal information using the tabs on the left side of this page." To the right of the dashed box is the text "Drag and Drop or Upload" with an "Upload" button. At the bottom of the main content area are two buttons: "Previous section" and "Next section".

6) The 7th section is "Submit to practitioner".

Please make sure to **submit your Organizer** so that we receive the notification that you have provided your information.

2024 Client Organizer (1040)



Ready for us to review the survey?

If you're happy with your answers, then hit "Submit" below. We will then review the survey, and let you know if there's any additional information that we need.

Submit

As always, please reach out if you have any questions or need assistance.