

# FAQs

**Q: How do I get my clients started with OnBalance Self-Employed?**

**A:** You can get your clients started by sending them a registration email through UltraTax CS®. Once your client successfully registers for an account, their data will automatically be connected with your UltraTax CS software. Your client can access their data on our mobile app or by visiting [onbalance.tr.com](http://onbalance.tr.com). The app is available in the **Apple® App Store** or the **Google Play™ Store**.

**Q: What type of client is OnBalance Self-Employed best suited for?**

**A:** OnBalance Self-Employed is designed for your self-employed clients who don't have employees. Professionals like tutors, consultants, plumbers, contractors, landscapers, builders, home or child care providers, florists and caterers — to name a few — would benefit from the OnBalance app.

**Q: How much does OnBalance Self-Employed cost?**

**A:** OnBalance Self-Employed is currently available at no charge for a limited time.

**Q: Is OnBalance an online application or is there a software download necessary?**

**A:** OnBalance Self-Employed is available as a mobile app or through your internet browser, so there are no downloads or software installations needed.

**Q: What are the system requirements?**

**A:** To use OnBalance Self-Employed, a high-speed internet connection or a cellular data connection is required. Apple Safari, Google Chrome, Microsoft® Internet Explorer, Microsoft Edge and Mozilla® Firefox® are all supported browsers.

**Q: Is there a contract required to use the app?**

**A:** There is no contract required to use OnBalance Self-Employed.

**Q: How do my clients get access to technical product support?**

**A:** OnBalance Self-Employed is supported through the **OnBalance Help & How-To Center**, an online portal that includes resources that your clients need to manage their OnBalance. Through the **CS Professional Suite® Help & How-To Center**, you can find detailed instructions on client setup, data imports to UltraTax CS, and how to help your clients use OnBalance. For additional questions or suggestions about the application, your clients can complete the feedback form within the OnBalance app once they are registered for an account.



**Q: What if my clients need more functionality than what is available?**

**A:** We're working on adding additional features and capabilities. Stay tuned as additional functionality is released. We'll communicate that as it becomes available.

**Q: I don't use UltraTax CS, but I have clients that could benefit from using OnBalance Self-Employed. How do I proceed?**

**A:** OnBalance Self-Employed is available to any self-employed business, but is most beneficial to you, the accountant, when you use UltraTax CS as well. Businesses can register [here](#) and begin using the app to organize and track their finances.

**Q: How does using OnBalance Self-Employed benefit my firm?**

**A:** Upon invitation to use the mobile app, your clients will automatically be connected with you so you can import their data at any time with UltraTax CS. The integration with UltraTax CS is seamless, so no bridge or additional applications are needed to gather data. You can simply populate their Schedule C with their data for easy tax preparation.

**Q: Are there video tutorials on how to get started using OnBalance Self-Employed?**

**A:** Video tutorials are currently being recorded and will be posted in the Help & How-To Center once complete.

## Discover OnBalance Self-Employed

The OnBalance Self-Employed app is available in the **Apple App Store**, the **Google Play Store**, or by visiting [onbalance.tr.com](http://onbalance.tr.com).



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