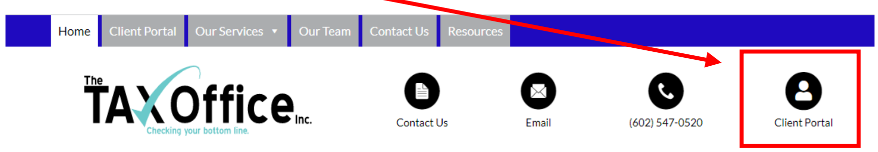
Client Portal Instructions

Please read these instructions <u>thoroughly</u> before you attempt to log in and/or E-Sign any documents, as everything you need to know is in this guide. 😊

Should you have any questions, you may contact our office via portal message, email us, txt us or give us a call.
Text: 623-556-3320 Phone: 602-547-0520   Email: Support@thetaxofficeaz.com

1. Visit our website:

- www.thetaxofficeaz.com
  - Click on the Client Portal link

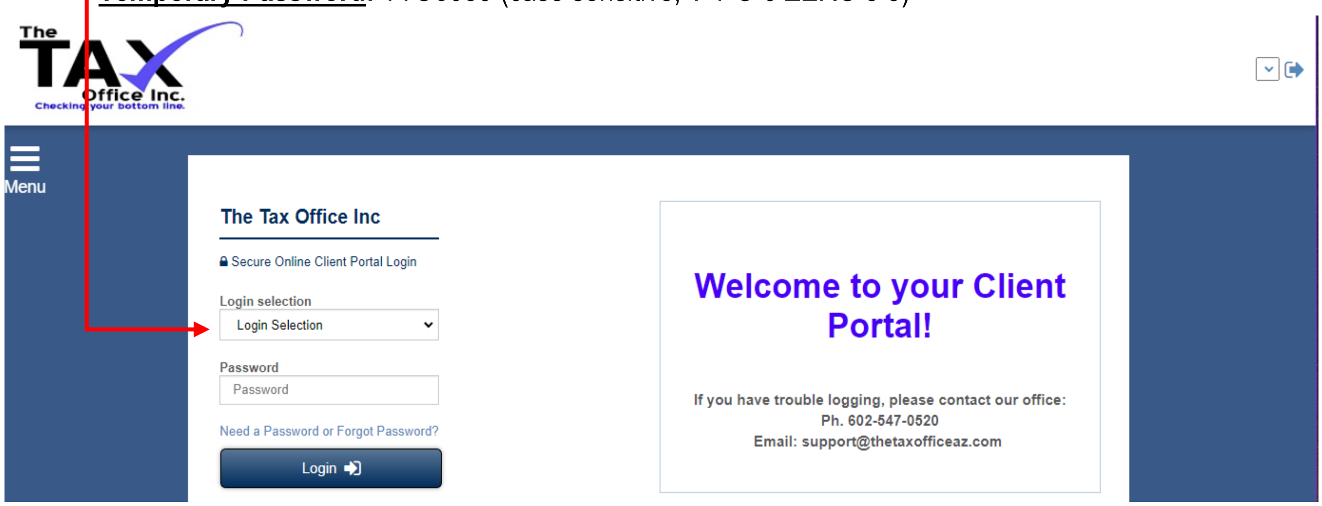


***You can bookmark this page on your web browser for easier access in the future**

2. Login Information:

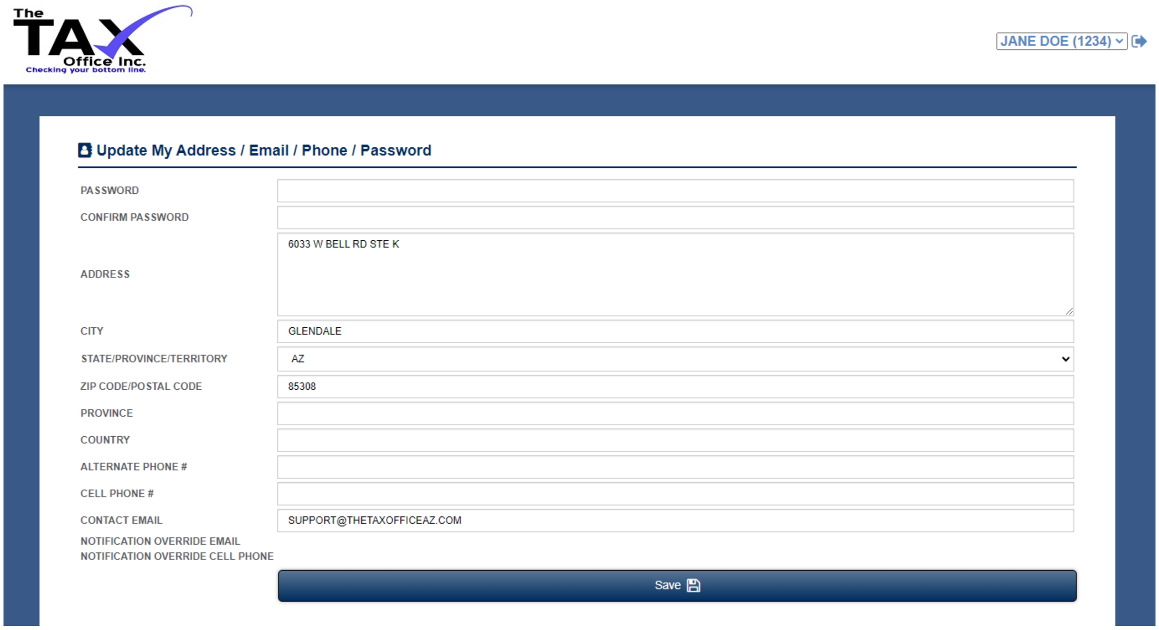
- Click on "Login Selection" and select an option from the drop-down menu to either use your ID (SSN with no dashes) or your email as the username. (If you filed joint, this is the primary taxpayer's SSN.)

- **<u>Temporary Password</u>:** TTO6033 (case sensitive, T T O 6 ZERO 3 3)



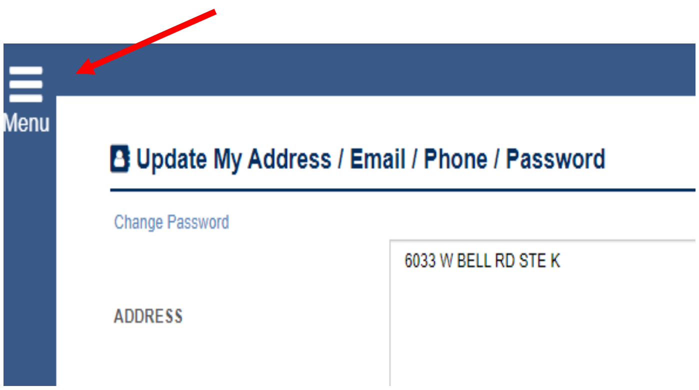
If you have your individual taxes done here, we will link the accounts, so you will be able to access your business portal by logging in to your personal portal and clicking your name at the top. You should see a drop down with your business name. If you do not have your individual taxes prepared with us, your username will be the business EIN or the email we have associated with your business

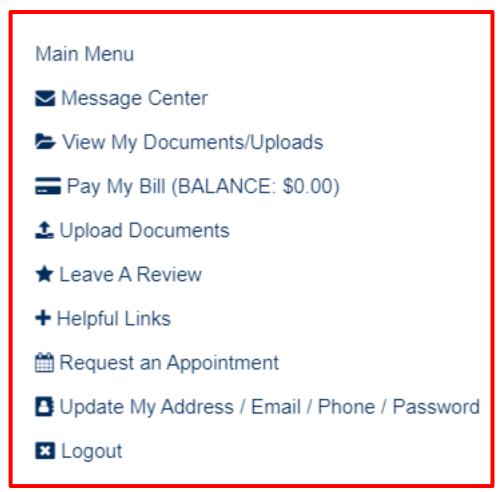
3. After your initial login, you will be required to create a new password.



- Your new password *must* contain the following:
  - ✓ Minimum of 8 characters
  - ✓ Mix of upper & lowercase letters
  - ✓ At least one number OR special character
  - ✓ **Enter password, confirm password, enter contact information & Click SAVE.**

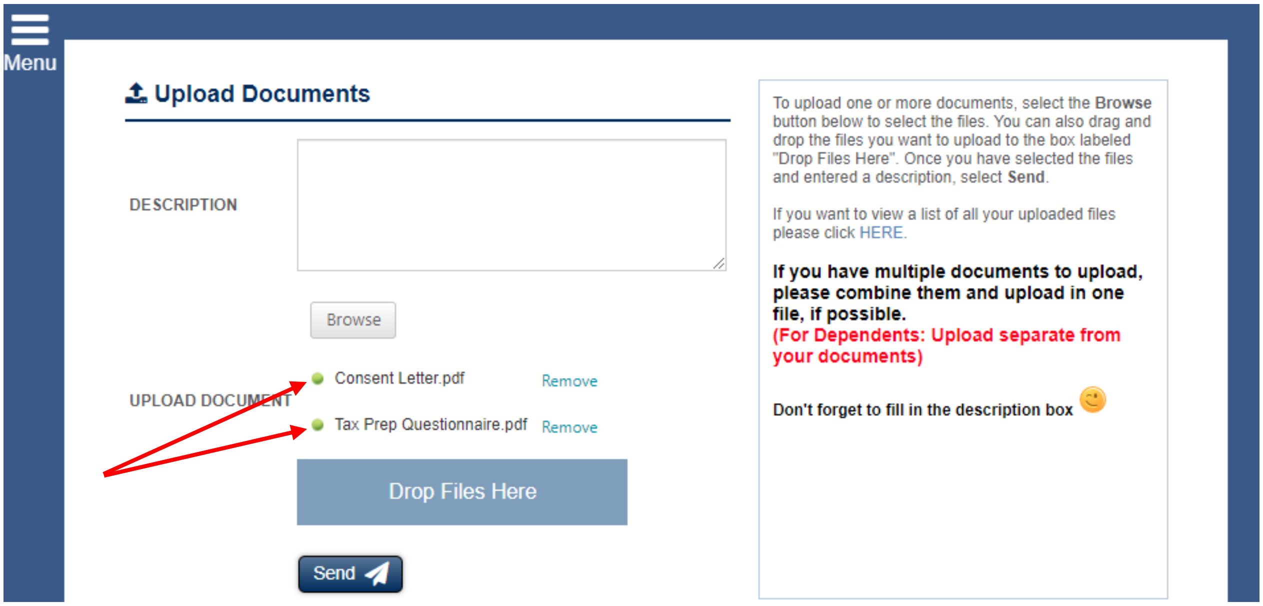
4. Once you see the message banner "Your information was updated successfully", you may click on the menu link on the left side of the screen to select an option.





5. Uploading your documents…

- Click on "Upload Documents" on the main menu.
- Select "Browse" or drag and drop the file you are uploading from your computer
- Make sure the little circle next to the file is green and that you fill in the description box before clicking "Upload".

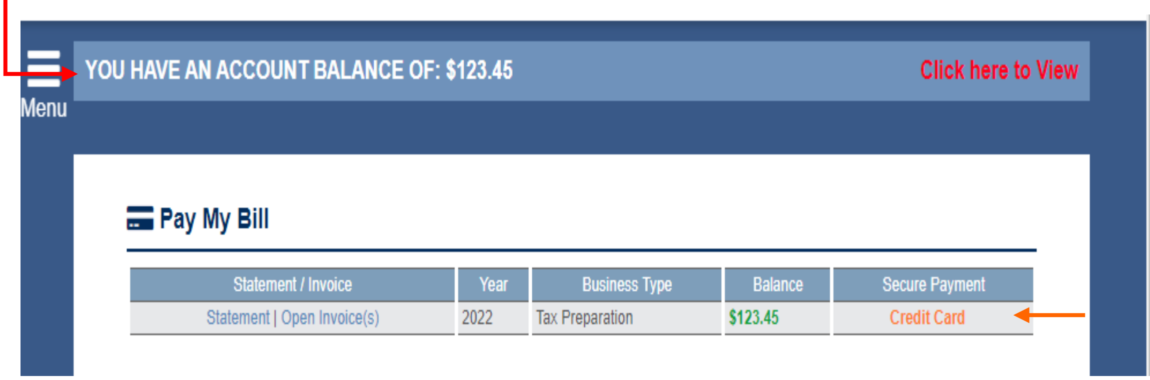


6. Viewing your documents…

- Click on "View My Documents/Uploads" on the main menu.
- Be sure you are in the correct "Account Year"
- For the documents that have a password, the password to open the document is the primary taxpayer's full social, no dashes.
    - For Business Accounts, this is your EIN#, no dash.

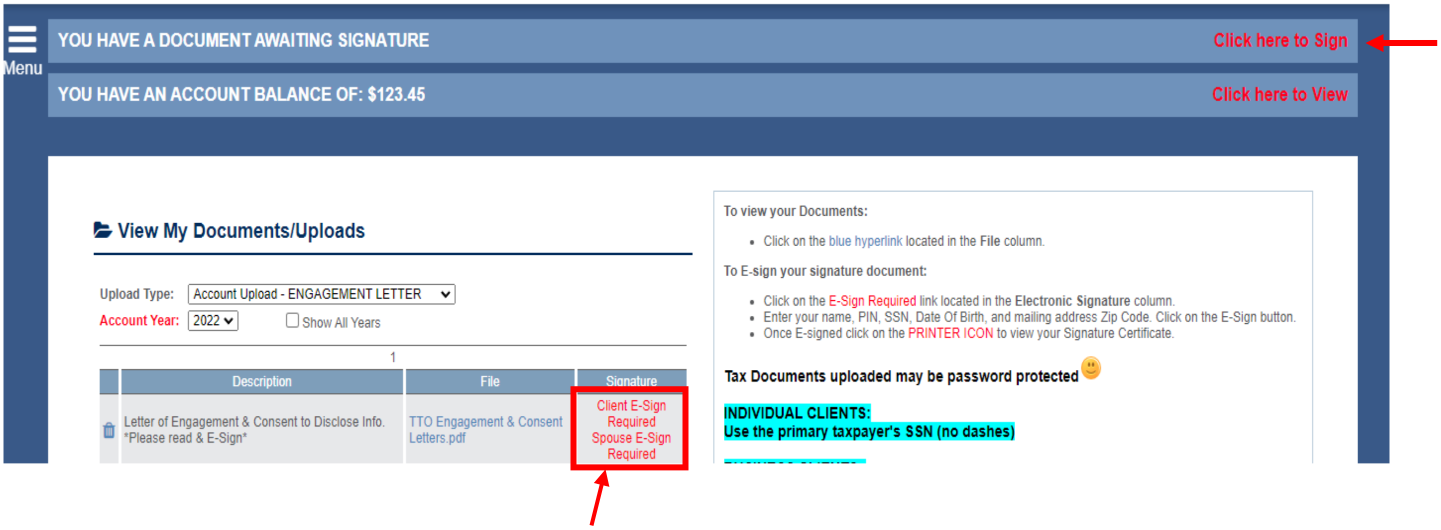
7. How to pay us for our services…

- If you have a balance due, you will see a message banner at the top of the screen. If you click "Click here to View" it will bring you to the same screen you would see if you clicked "Pay My Bill" on the main menu.
- Then, click on the option under the secure payment column for "Credit Card" and follow the prompt.
- To View the invoice or statement click on the blue hyperlink: "Statement" or "Open Invoice(s).

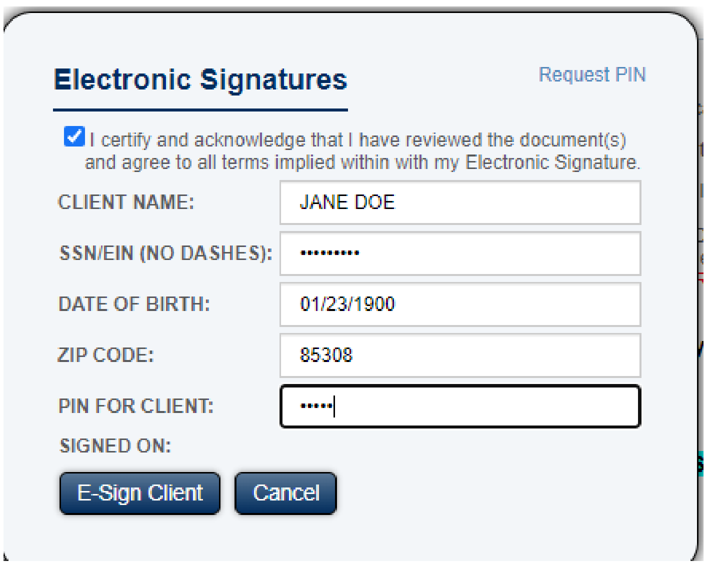


8. E-Signing documents…

- You will see a message banner that reads "You have a document awaiting signature" "Click here to sign" at the top of your screen or if you click on the menu next to " View My Documents/Uploads " you will see "*E-Signature required*"
- Click on either one and it will bring you to the screen below. Scroll down until you see the red link for "Client E-Sign Required" and click on it.



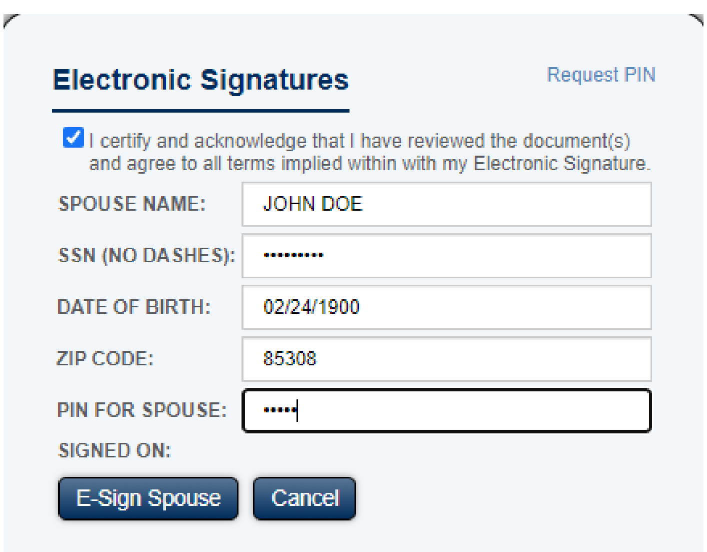
- **After Clicking on the RED LINK, you should see this screen and will need to enter the main taxpayer's information in the boxes.**



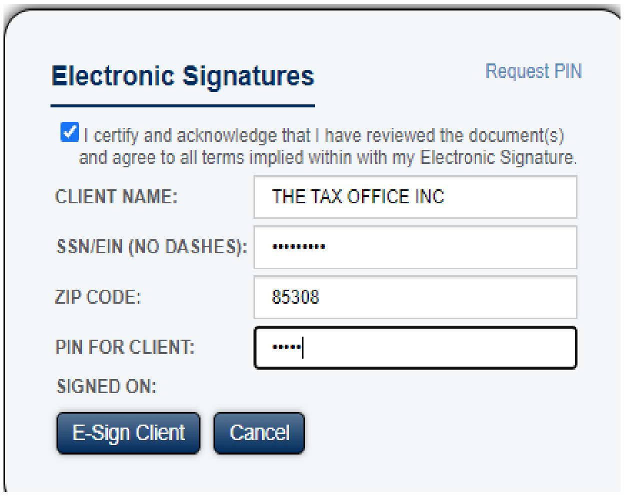
- **Tips for E-Signing:**
  - Check the box that you certify & acknowledge….
  - Enter your first & last name ONLY
  - PIN is your Zip code…DO NOT REQUEST ONE or it won't let you E-Sign!
  - Enter your social without dashes
  - Enter your entire date of birth WITH forward slashes (xx/xx/xxxx)
  - Enter your Zip code (should be the same as your pin)
  - Click E-Sign Client

- **If you have a spouse**, they will have to E-sign by clicking on the RED LINK "Spouse E-Sign Required"

- Spouse is to follow the same tips above using **their** information and clicking "E-Sign Spouse"

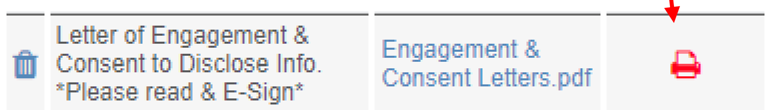


- **Tips for E-Signing:**
  - Check the box that you certify & acknowledge….
  - Enter your first & last name ONLY
  - PIN is your Zip code…DO NOT REQUEST ONE or it won't let you E-Sign!
  - Enter your social without dashes
  - Enter your entire date of birth WITH forward slashes (xx/xx/xxxx)
  - Enter your Zip code (should be the same as your pin)
  - Click E-Sign Spouse



- ***If you are E-Signing for a business, it will look a little different:***
  - Check the box that you certify & Acknowledge
  - Enter the business name as it is shown at the top of your screen
  - PIN is the business zip code…DO NOT REQUEST ONE or it won't let you E-Sign!
  - Enter the full EIN with no dash
  - Enter the zip code again
  - Click "E-Sign Client"

- After E-Signing for the document is complete, you will see a red printer icon. You can click on that to print an E-Signature certificate for your records if you would like.



9. Sending & Receiving Messages…

- If you have a New Message, it will display at the top of your screen in the banner.
- To open a message, click on the "Click here to View" at the top or go into your message center and click on the eyeball icon next to the highlighted message.
  - This will open the message and give you the option of replying or saving it in the Archives.
- To send us a message, click on the "Message Center" Link on the main menu.