



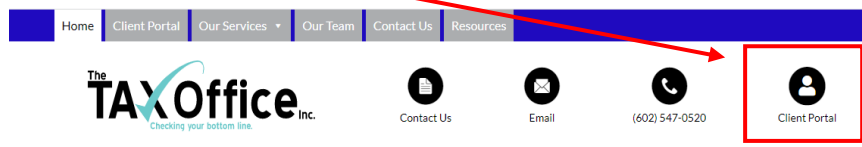
Client Portal Instructions

Please read these instructions thoroughly 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:

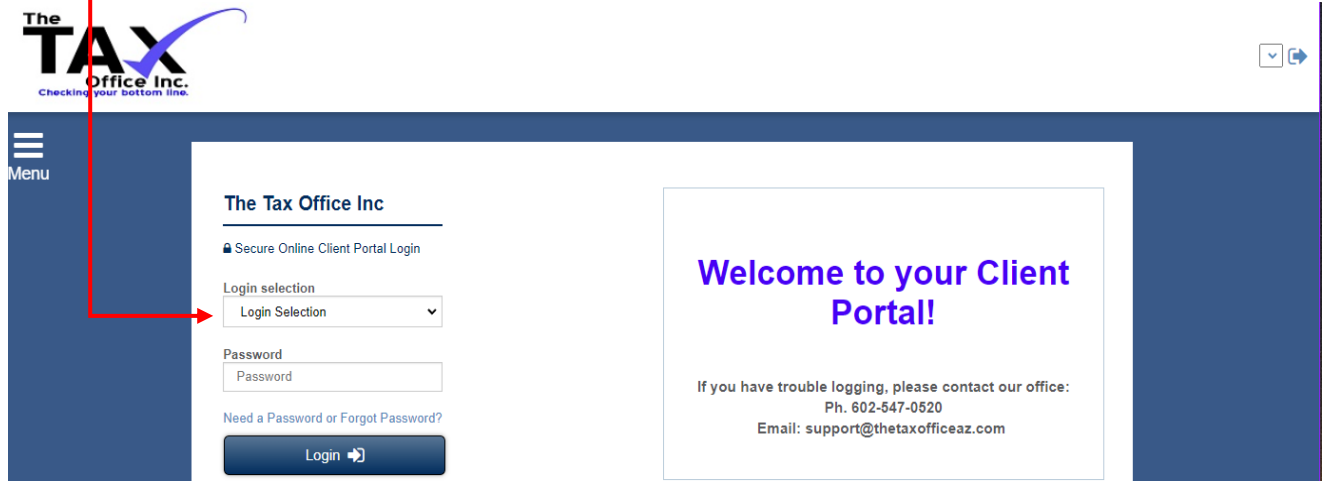
- www.thetaxofficeaz.com
 - Click on the Client Portal link



***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.)*
- **Temporary Password:** 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.

The Tax Office Inc. JANE DOE (1234) ↕

Update My Address / Email / Phone / Password

PASSWORD

CONFIRM PASSWORD

ADDRESS

CITY

STATE/PROVINCE/TERRITORY

ZIP CODE/POSTAL CODE

PROVINCE

COUNTRY

ALTERNATE PHONE #

CELL PHONE #

CONTACT EMAIL

NOTIFICATION OVERRIDE EMAIL

NOTIFICATION OVERRIDE CELL PHONE

Save

- 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.

Menu

Update My Address / Email / Phone / Password

Change Password

ADDRESS

- Main Menu
- Message Center
- View My Documents/Uploads
- Pay My Bill (BALANCE: \$0.00)
- Upload Documents
- ★ Leave A Review
- + Helpful Links
- Request an Appointment
- Update My Address / Email / Phone / Password**
- Logout

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”.

Upload Documents

DESCRIPTION

Browse

UPLOAD DOCUMENT

- Consent Letter.pdf Remove
- Tax Prep Questionnaire.pdf Remove

Drop Files Here

Send

To upload one or more documents, select the Browse button below to select the files. You can also drag and drop the files you want to upload to the box labeled "Drop Files Here". Once you have selected the files and entered a description, select Send.

If you want to view a list of all your uploaded files please click [HERE](#).

If you have multiple documents to upload, please combine them and upload in one file, if possible.
(For Dependents: Upload separate from your documents)

Don't forget to fill in the description box 😊

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)**.

Menu
YOU HAVE AN ACCOUNT BALANCE OF: \$123.45
Click here to View

Pay My Bill

Statement / Invoice	Year	Business Type	Balance	Secure Payment
Statement Open Invoice(s)	2022	Tax Preparation	\$123.45	Credit Card

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.

Menu

YOU HAVE A DOCUMENT AWAITING SIGNATURE [Click here to Sign](#)

YOU HAVE AN ACCOUNT BALANCE OF: \$123.45 [Click here to View](#)

View My Documents/Uploads

Upload Type: Account Upload - ENGAGEMENT LETTER

Account Year: 2022 Show All Years

Description	File	Signature
Letter of Engagement & Consent to Disclose Info. *Please read & E-Sign*	TTO Engagement & Consent Letters.pdf	Client E-Sign Required Spouse E-Sign Required

To view your Documents:

- Click on the blue hyperlink located in the File column.

To E-sign your signature document:

- Click on the **E-Sign Required** link located in the Electronic Signature column.
- Enter your name, PIN, SSN, Date Of Birth, and mailing address Zip Code. Click on the E-Sign button.
- Once E-signed click on the **PRINTER ICON** to view your Signature Certificate.

Tax Documents uploaded may be password protected

INDIVIDUAL CLIENTS:
Use the primary taxpayer's SSN (no dashes)

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

Electronic Signatures [Request PIN](#)

I certify and acknowledge that I have reviewed the document(s) and agree to all terms implied within with my Electronic Signature.

CLIENT NAME: JANE DOE

SSN/EIN (NO DASHES):

DATE OF BIRTH: 01/23/1900

ZIP CODE: 85308

PIN FOR CLIENT:

SIGNED ON:

○ **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"

Electronic Signatures [Request PIN](#)

I certify and acknowledge that I have reviewed the document(s) and agree to all terms implied within with my Electronic Signature.

SPOUSE NAME: JOHN DOE

SSN (NO DASHES):

DATE OF BIRTH: 02/24/1900

ZIP CODE: 85308

PIN FOR SPOUSE:

SIGNED ON:

○ **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

Electronic Signatures Request PIN

I certify and acknowledge that I have reviewed the document(s) and agree to all terms implied within with my Electronic Signature.

CLIENT NAME:

SSN/EIN (NO DASHES):

ZIP CODE:

PIN FOR CLIENT:

SIGNED ON:

- **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.

The TAX Office Inc. *Checking your bottom line.* JANE DOE (1234)

YOU HAVE A NEW MESSAGE [Click here to View](#)

Menu

Message Center

Instructions: To create a new message select the "Compose Message" button. To store a message select the "Archive" button.

Total Count: 2 Display: Account Year: Show All Years View Archives

<input type="checkbox"/>	From	Subject	Received Date
<input type="checkbox"/>		We received your uploads	Wednesday 12/14/2022 09:04 AM