The TAX Office Inc.
Checking your bottom line.

ATOM Client Portal Instructions

To access your client portal please follow the steps below:

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:**
    - **Username:** You may select either to enter your Social Security Number *(without dashes) or E-mail*
        - *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 typically link the accounts, so you will be able to access your business portal by logging in to your personal one and vice versa

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

    Please be sure to keep track of your new password as you will need this to login to your portal each time, However if you forget it, just call us and we will reset it for you

4. **Feel free to explore your new portal by clicking on the links to the left of the screen:**
    - Get a Copy of My Tax Return and Documents
    - Get a Copy of My Invoice and Payments
        - Here you are able to view your balance, invoice and previous transactions.
    - Upload Documents
    - Send Questions/Notes/Attachments
    - Client Feedback
        - We would love to hear how we are doing and if you think there is anything we can work on to better your experience with our office.
    - Request an Appointment
    - Client Referrals
        - If you refer a friend/family member to us and they use our services, YOU receive a gift card 😊
    - Update Contact Information

Uploading Documents & Files

1. Click on "Upload Documents" and here you can either drag and drop files from your computer to your portal or you can select to use the "browse" option.
2. After you have chosen your files, you can add a description if you'd like, and then click "Upload".
3. You will receive a message in your client portal from us, stating that we have received your documents/messages.

DOCUMENTS UPLOADED BY OUR OFFICE ARE PASSWORD PROTECTED,
THE PASSWORD IS THE PRIMARY TAXPAYER'S SOCIAL SECURITY NUMBER WITHOUT THE DASHES

E-Signing Your Documents

1. You will see a message next to " My Documents/Uploads " in red reading "*E-Signature required*"
2. Click on the blue link, and it will bring you to all the documents that have been uploaded.
3. You will see it says *"E-Signature Required"* next to the documents and will have to click on this red link.
4. Once opened, you will then enter the information below in the appropriate boxes:
   - **Check the box** ☐ Agreeing to E-Sign the document
   - **First & Last Name** - (No Middle Initial)
   - **PIN** - Do Not Request A PIN, we have already set it for you. The PIN is your *zip code*.
     - *If there are asterisks ***** in the box, please overwrite it with your zip code*
   - **Social Security #** (no dashes)
   - **Birthdate - 00/00/0000** (MUST include the slashes)
   - **Zip Code** (again)

   If you have a spouse, they will have to e-sign following the same instructions above, then you can submit signatures once all boxes are filled with correct information
5. You will receive a note: You have successfully E-signed your document, once the signature(s) have been submitted.

Payment

The balance for our services will show on the menu to the left-hand side (BALANCE: $_____).

You may pay with a credit card through your portal, stop by our office or you can mail us a check, please be sure to include your invoice number on the check and make it payable to "The Tax Office, Inc".

To make a payment in your portal:

1. Click on the link " Pay My Bill "
2. You should see a balance due and a link that says: Pay by Credit Card (Click this link and follow the prompt)

Please don't hesitate to call if you are having trouble with your portal…We are more than happy to help! 😊