The TAX Office Inc.
Checking your bottom line.

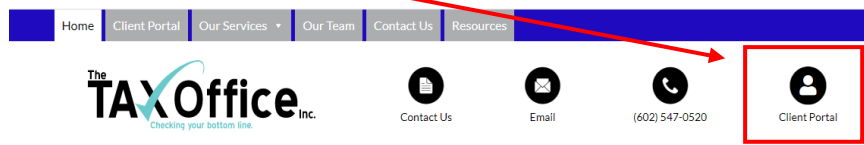## Client Portal Instructions

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 or give us a call.
Phone: 602-547-0520   Email: Support@thetaxofficeaz.com

1. **Visit our website:**
   - **www.thetaxofficeaz.com**
     - Click on the Client Portal link

| Home | Client Portal | Our Services ▾ | Our Team | Contact Us | Resources |

The TAX Office Inc.

Contact Us   Email   (602) 547-0520   Client Portal

Accounting
For Families, Individuals & Businesses

==*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 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)

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Wednesday, April 27, 2022

Client Portal Login 🔒

Login selection
Login Selection ⌄

Password
Password

Login ➜

Need a Password or Forgot Password?

==**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 clicking your name at the top. You==

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. Your screen should now look like this:

5. Uploading your documents…

- Click on "Upload Documents"
- 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"
- 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 tax payer's full social, no dashes.
  - For Business Accounts, this is your EIN#, no dash.

7. How to pay us for our services…

- Click on "Pay My Bill" (You should see a balance due if there is an open invoice on your account)
- Then, click on the option to "Pay with 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 next to " View My Documents/Uploads " in red reading "*E-Signature required*"

- Click on "View My Documents/Uploads"
- Scroll Down until you see the following links on your screen and click on the red link for "Client E-Sign Required":

Account Year:	2022		Upload Type: - ALL -		☐ Show All Years	

	Year	File	Description	Upload Type	Electronic Signature	Account Balance	Modified Date
🗑	2022	Engagement & Consent Letters.pdf	Letter of Engagement & Consent to Disclose Info. *Please read & E-Sign*	ENGAGEMENT LETTER	Client E-Sign Required Spouse E-Sign Required	Balance Pending	4/27/2022 1:36:26 PM
🗑		Tax Prep Questionnaire.pdf	2022 Tax Docs	Client Uploads			4/27/2022 5:15:56 PM
🗑		Doe, Jane 2022_Tax Docs.pdf	2022 Tax Docs	Client Uploads			4/27/2022 5:15:56 PM

- **After Clicking on the RED LINK, you should see this screen and will need to enter the main tax payer'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 PIN for Client: ••••• SSN/EIN (No Dashes): ••••••••• Date Of Birth (Dashes Required): 01/23/2000 Zip Code: 85308 Signed On:

[E-Sign Client] [Cancel]

- **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"

	Year	File	Description	Upload Type	Electronic Signature	Account Balance	Modified Date
🗑	2022	Engagement & Consent Letters.pdf	Letter of Engagement & Consent to Disclose Info. *Please read & E-Sign*	ENGAGEMENT LETTER	Spouse E-Sign Required	Balance Pending	4/27/2022 1:36:26 PM

- 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   PIN for Spouse: •••••   SSN (No Dashes): •••••••••   Date Of Birth (Dashes Required): 02/23/2000   Zip Code: 85308   Signed On:

[E-Sign Spouse] [Cancel]

- ***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 and select "E-Sign Client"
  - There is an example below of what the screen would like:

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: THE TAX OFFICE INC   PIN for Client: •••••   SSN/EIN (No Dashes): •••••••••   Zip Code: 85308   Signed On:

[E-Sign Client] [Cancel]

- After E-Signing for the document is complete, you will see a red printer icon. You can click on that to print proof of E-Signatures if you would like.

	Year	File	Description	Upload Type	Electronic Signature	Account Balance	Modified Date
🗑	2022	Engagement & Consent Letters.pdf	Letter of Engagement & Consent to Disclose Info. *Please read & E-Sign*	ENGAGEMENT LETTER	🖨	Balance Pending	4/27/2022 1:36:26 PM

9. Sending & Receiving Messages…

- If you have a New Message, it will display at the top of your screen…
- To send us a message or view messages, click on "Message Center"
- To open a message, 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.

You have 1 new message(s) ✉

Message Center   JANE DOE (1234) ⌄

Main Menu
Message Center
View My Documents/Uploads
Pay My Bill **(BALANCE: $123.00)**
Upload Documents
Leave A Review
Helpful Links
Request an Appointment
Update My Address / Email / Phone / Password
Logout

[Compose Message ✉]   [Archive ▾]

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

Total Count: 1   Display: Received ⌄   Account Year: -- Unread Items -- ⌄   ☐ Show All Years   ☐ View Archives

☐	From	Subject	Received Date
☐ 👁		Tax Prep Questions	Wednesday 4/27/2022 03:41 PM