Jennings County United Way
707 N State St
North Vernon, IN 47265

VITA Program | Customer Portal

The Customer Portal provides a secure environment for our VITA Program clients to send, receive, review and sign documents.

Quick Start Guide | Overview of Features | Excerpts from TaxSlayer

Customer Portal | Table of Contents

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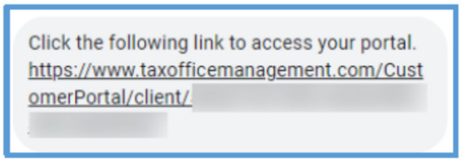
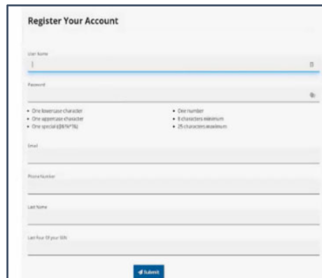
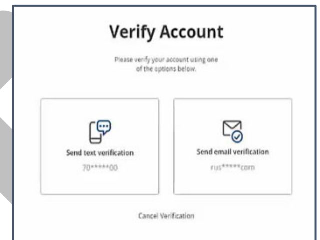
Customer Portal | Quick Start Guide

Set Up | Use from phone, tablet or computer You will receive an e-mail and/or text

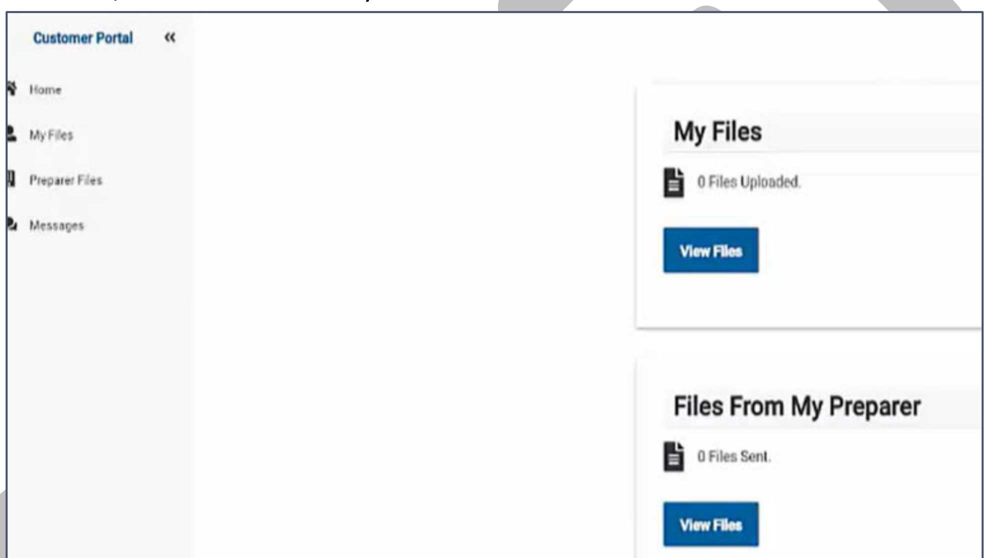
Click, Register & Verify |



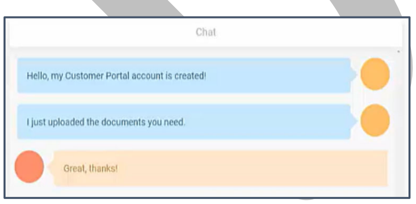


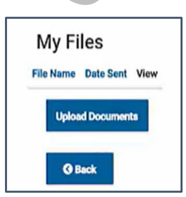


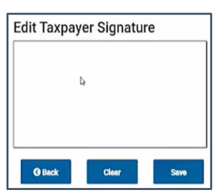
Log in | bookmark/save the link for easy access.

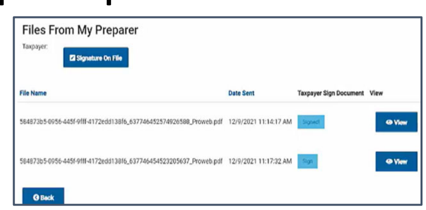


Features | Messages/chat | Send files | Sign return | Save | View Status









Your Customer portal is a secure channel to communicate with our VITA site. Messages are live while you are logged into your portal and appear when you log back in. (You will not be notified.) Forgot something? Upload electronic documents, or use your phone to take a photo and upload. View your return for quality review, sign and save a copy of the signed return for your record. Once the IRS has acknowledged your return you can view the status.

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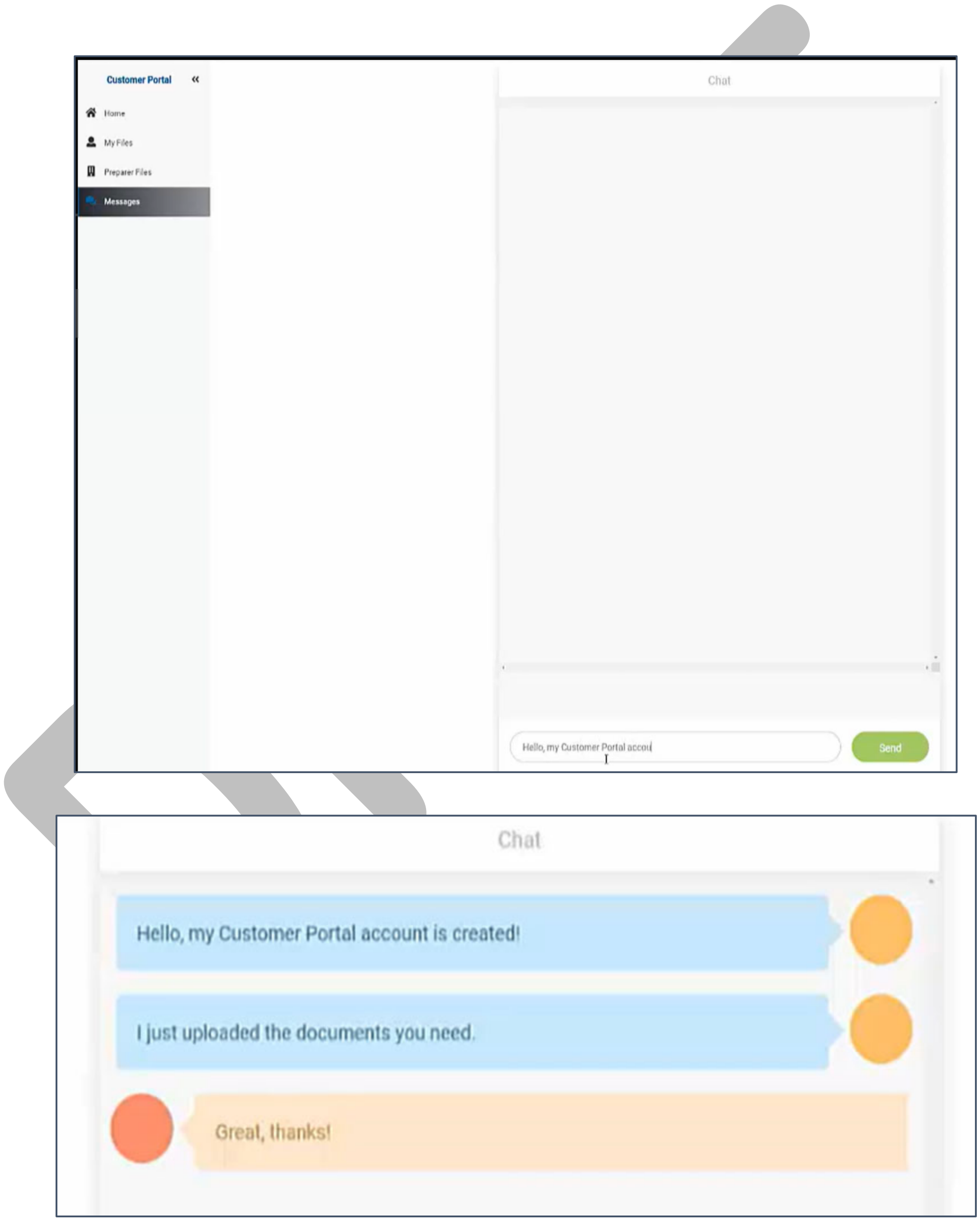
Customer Portal | Messages / chat

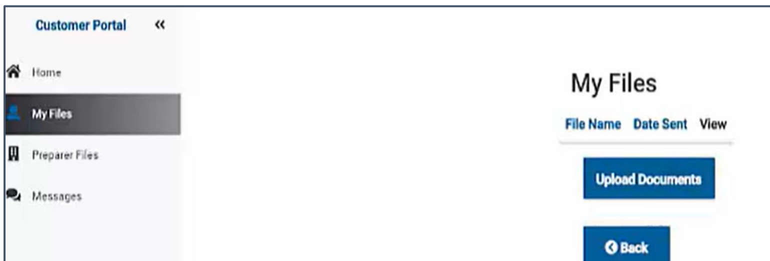
Tax payers will see messages while logged in (live) and when they log back in to the portal. Taxpayers do not receive text/email.

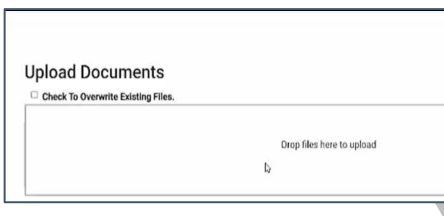
Send a message if you upload documents.



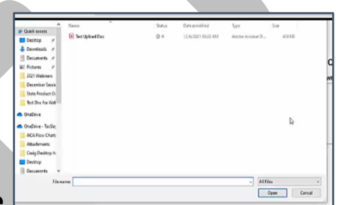
Customer Portal | My Files

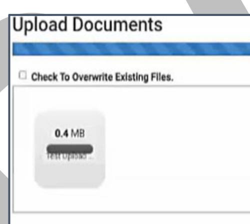
You can use your phone or tablet to take a picture to upload, or upload documents you have scanned. Individual files can be up to 5MB. The total space available for all documents your return is 25MB. (including all documents we have scanned)

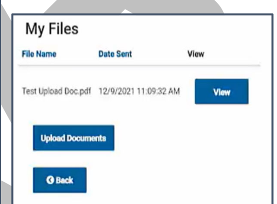


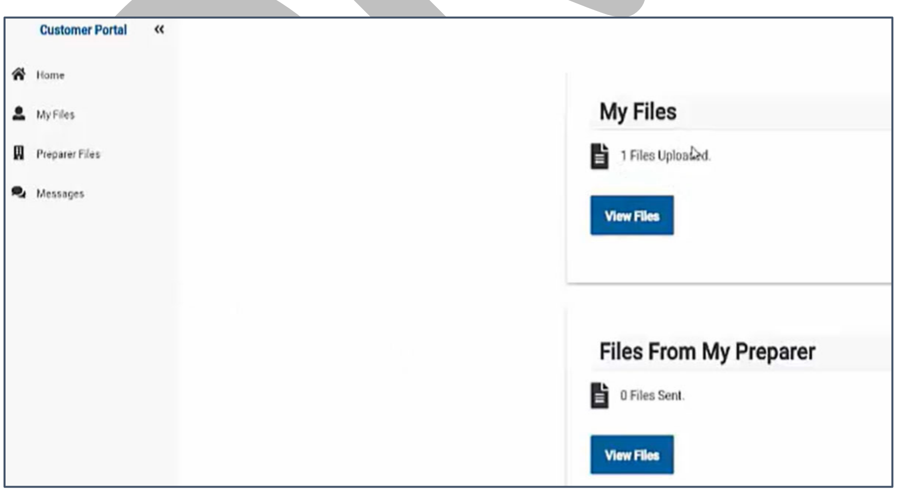


Drag & Drop OR browse









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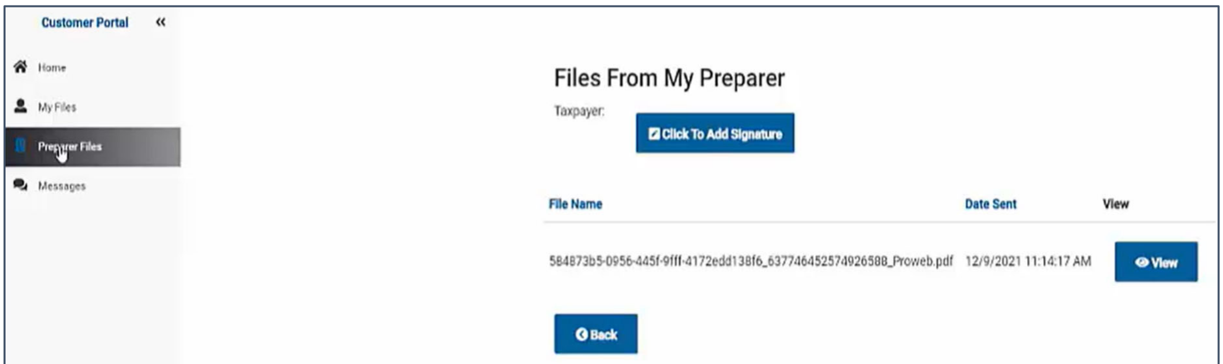
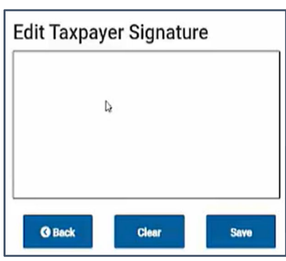
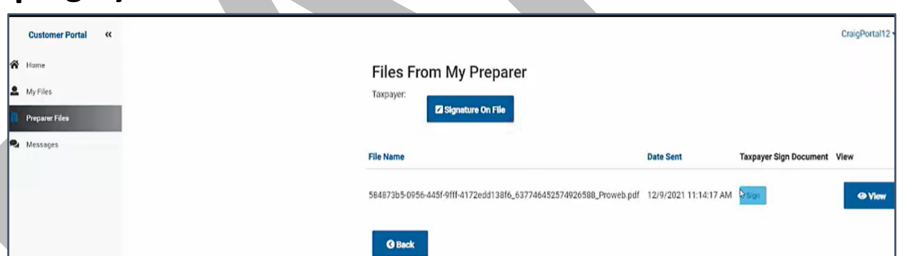
Customer Portal | View your Return

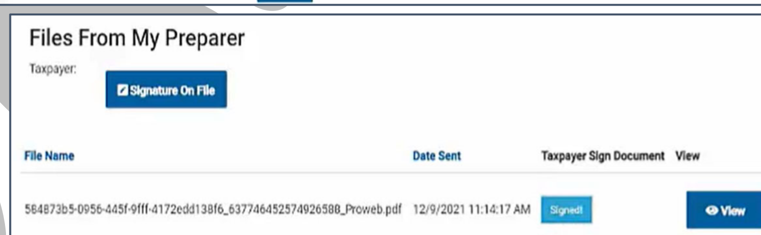
When your return is ready for review, we will send it through your customer portal. You must review the return with a volunteer to ensure it is accurate before we can e-file. Taxpayers are responsible for the information sent to the IRS in their tax returns.



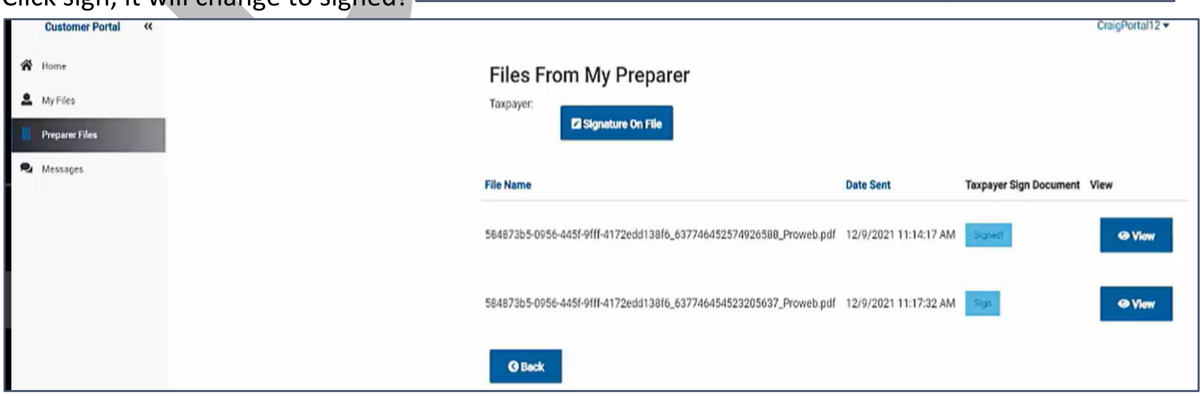
Customer Portal | Sign your return







Click sign, it will change to signed!



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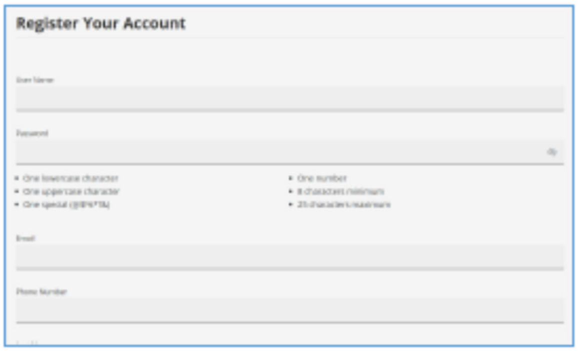
Customer Portal | Screenshots from the TaxSlayer Guide | page A

Registering for Customer Portal

When the taxpayer receives the link either through text or email, he or she needs to register before their Customer Portal account is set up. To guide the taxpayer through setting up a Customer Portal account, have the taxpayer use the following steps:

1. Click the Customer Portal link in the text or email.

Customer Portal displays the **Register Your Account** page:

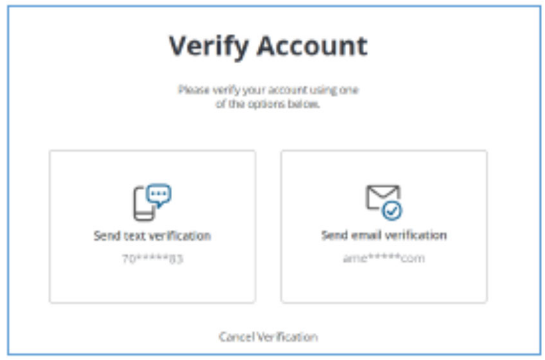


2. Type a new user name.

Note: Each user name must be unique. If the taxpayer types a user name that has been used by another taxpayer, Customer Portal displays a warning. The taxpayer should choose another user name.

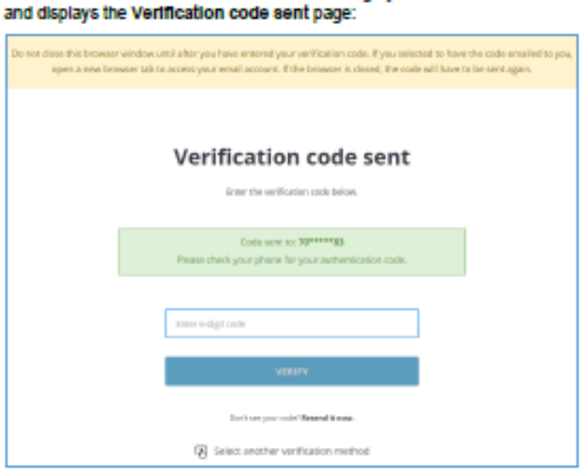
3. Type a password. The password must contain at least 8 characters but not more than 25 and must contain at least one of each of the following:
   a. Lowercase character
   b. Uppercase character
   c. Number
   d. Special character (@$!%*?&)
4. Type the email address and phone number you want associated with the Customer Portal account.
5. Type your last name for verification.
6. Type the last four digits of your Social Security number for verification.
7. Click **Submit**.

Customer Portal displays the **Verify Account** page:



8. Click either **Send text verification** or **Send email verification**.

Customer Portal sends a verification code through your selected method and displays the **Verification code sent** page:



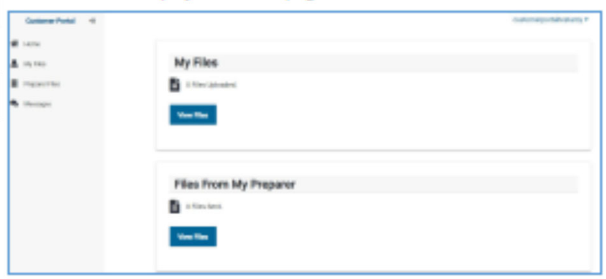
9. Find the code in your text or email and type it in the box.

TIP: If you have not received your code within a few minutes, click **Resend it now** to resend the code.

TIP: If you still do not receive the code, you can change the verification method. Click **Select another verification method** and repeat Step 8.

10. Click **VERIFY**.

Customer Portal displays the home page:



Uploading a File

If you need additional forms or documents to complete a taxpayer's return, he or she can upload them through Customer Portal. Customer Portal accepts the following file types up to 5 mb each, with a maximum of 25 mb:

- .pdf
- .png
- .jpg
- .tif
- .doc
- .docx
- .xls
- .xlsx

To guide the taxpayer through uploading a file, have the taxpayer use the following steps:

1. Click **View Files** in **My Files**.

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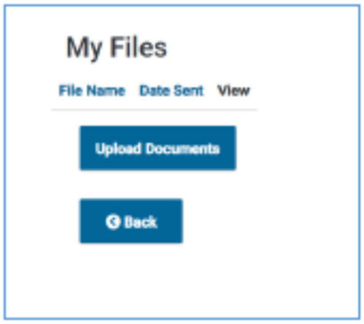
Customer Portal | Screenshots from the TaxSlayer Guide | page B

Customer Portal displays the **My Files** page:



2. Click **Upload Documents**.
3. Do one of the following:
   a. Drag a file from your desktop to the **Drop files here to upload** box.
   b. Click the **Drop files here to upload** box to navigate to the file you want to upload.

Customer Portal uploads the document and displays the file in the box.

TIP: If you want to upload an updated file, select the **Check To Overwrite Existing Files** check box. Customer Portal displays a warning if you attempt to upload a file that already exists.

Reviewing Forms

You can make the tax return available for the taxpayer to review. To guide the taxpayer through reviewing forms that you have sent, have the taxpayer use the following steps from the Customer Portal home page:

1. Click **Preparer Files**.

→

Customer Portal displays the **Files From My Preparer** page:

2. Click **View** on the line for the tax return document you want to view.

Customer Portal displays the tax return documents in a new tab in Adobe Reader:

3. Use Adobe Reader's features to navigate in or print the documents to review.

Saving a Signature in the Customer Portal

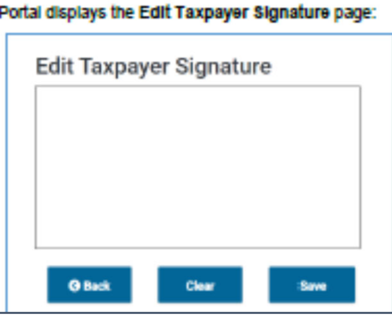
The taxpayer can sign tax return documents through the Customer Portal. Before signing documents, the taxpayer needs to create a signature to have on file. To guide the taxpayer through creating a signature, have the taxpayer use the following steps from the Customer Portal home page:

1. Click **Preparer Files**.

Customer Portal displays the **Files From My Preparer** page:

2. Review the files as needed.
3. Click **Click To Add Signature**.

Customer Portal displays the **Edit Taxpayer Signature** page:



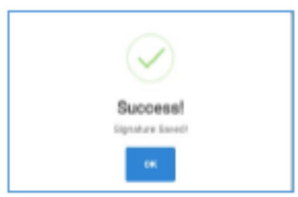
→

4. Using your finger or e-pen on a touch-screen device, or your mouse on a computer, sign within the box.

TIP: If you want to re-sign, click **Clear** to clear the box, and then sign again.

5. Click **Save**.

Customer Portal displays a **Success** window informing you that your signature is saved:



6. Click **OK**.

Customer Portal changes the **Click to Add Signature** box to **Signature On File** and displays a **Sign** button on the line for any tax return documents:

Tip: If the return is Married Filing Jointly, Client Portal also allows the spouse to add a signature.

Signing a Document Through the Client Portal

After the taxpayer saves a signature, he or she can sign documents that you send for review. To guide the taxpayer through signing a document,

Customer Portal | Screenshots from the TaxSlayer Guide | page C

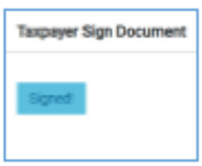
have the taxpayer use the following steps from the Customer Portal home page:

1. Click **Preparer Files**.

Customer Portal displays the **Files From My Preparer** page:

2. Review the document to sign.
3. Click **Sign** on the line for that document.

Customer Portal uses the signature on file to sign the document and displays **Signed!** in the **Taxpayer Sign** column:



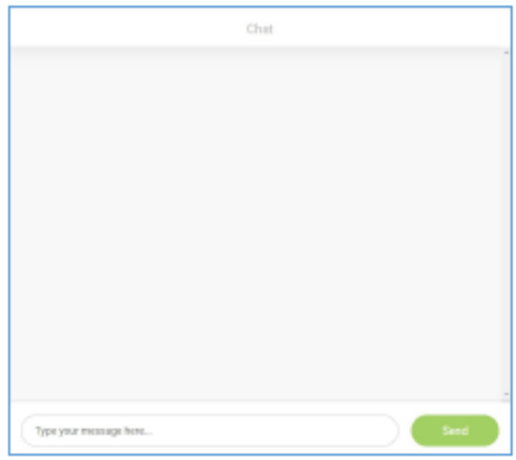
Customer Portal also transfers the signature to the **Submission** page in TaxSlayer Pro Online as a signature for Form 1040, Form 8879, and any necessary consents.

Chatting with the Tax Preparer

The taxpayer can also exchange chat messages with the preparer. To guide the taxpayer through sending and reading chat messages, have the taxpayer use the following steps from the Customer Portal home page.

1. Click **Messages**.

Customer Portal displays the **Chat** page:



2. Type the message you want to send to the preparer in the **Type your message here...** box.
3. Click **Send**.

Customer Portal sends the message to the preparer.

Viewing Return Status

The taxpayer can view the return status after acknowledgement. When the taxpayer logs in to their Customer Portal, they can see whether the return is accepted or rejected.

If the return is rejected, Customer Portal displays a message to contact the VITA/TCE preparer for more information on the rejection reason.