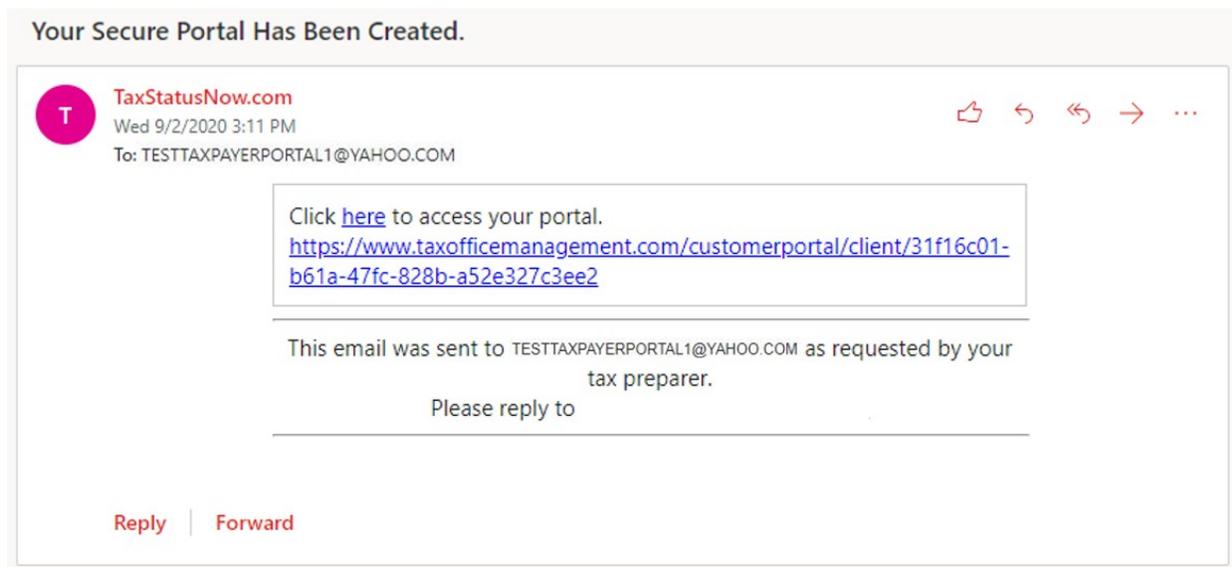


Customer Portal

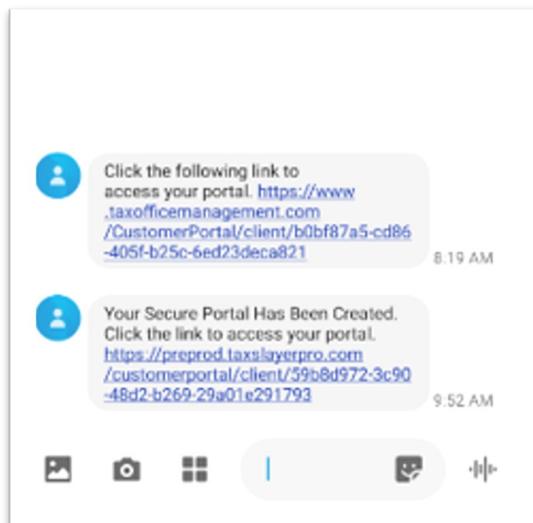
Access Your Portal?

You will access your portal either through a text message or an email.

By Email: The you will receive an email from TaxStatusNow.com with the subject line **Your Secure Portal Has Been Created**. The email will contain a link to access your portal.



By Text Message: You will receive a text message for our automated system with a link to access your portal account.



The links will prompt you to create the Customer Portal Account.

After you click on the link from either the email or phone, you will be guided to a page like this. You will need to pick a username, create a password, and fill out your phone, email, last name and last four of your SSN.

Register Your Account

User Name

Password

- One lowercase character
- One uppercase character
- One special (@\$!%*?&)
- One number
- 8 characters minimum
- 25 characters maximum

Email

Phone Number

Last Name

Last Four Of your SSN



IMPORTANT! To successfully register the account, the **your last name, SSN and mobile phone number or email address must match** what has been entered in your tax return:

After submitting the registration, you will be prompted to verify your account. You can select to have a verification security code sent via email or text. When the code is received, you will enter it in the space provided and click **Verify**.

Verify Account

Please select an option below to send a security code to your account for verification.

Code sent - please check your account for your personalized Security Code.

Send Email: she*****com

Send Text: 70*****97

123456|

Verify

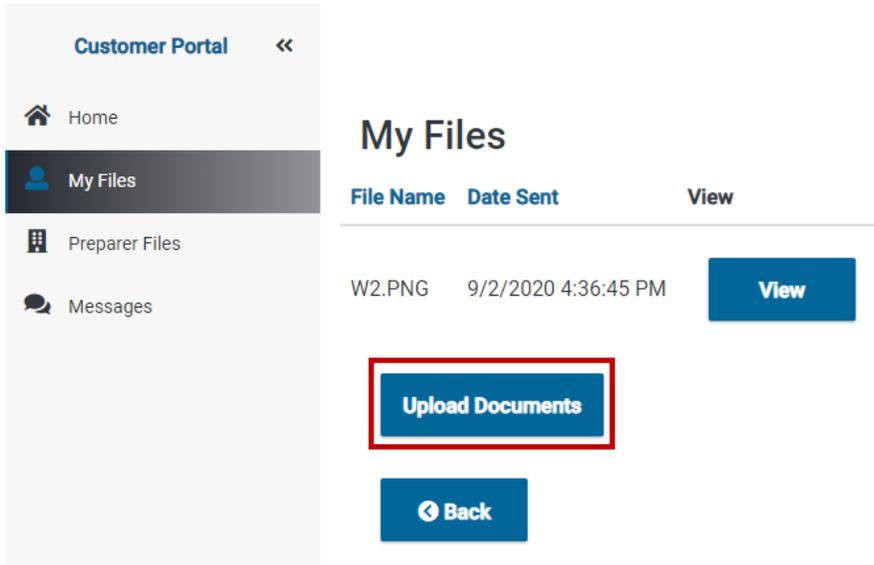
Cancel Verification

Your portal is displayed on the screen:

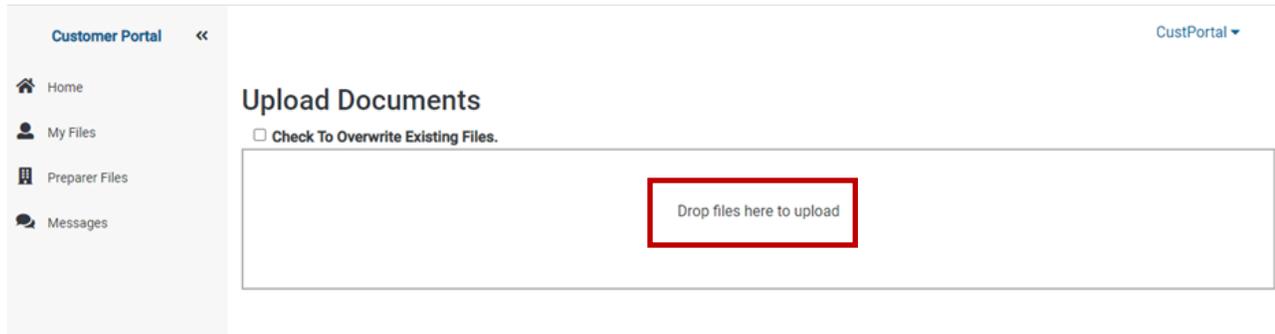
The screenshot displays the Customer Portal interface. On the left is a navigation sidebar with the following items: Home, My Files, Preparer Files, and Messages. The main content area is titled "Customer Portal" and includes a "CustPortal" dropdown menu. It features two primary sections: "My Files" and "Files From My Preparer". The "My Files" section shows "0 Files Uploaded" and a "View Files" button. The "Files From My Preparer" section shows "0 Files Sent" and a "View Files" button.

My Files:

You can use the **My Files** area of your portal to upload documents to send to Davis Tax Services (W-2s, 1099s, etc.) To upload a document, click **Upload Documents**.

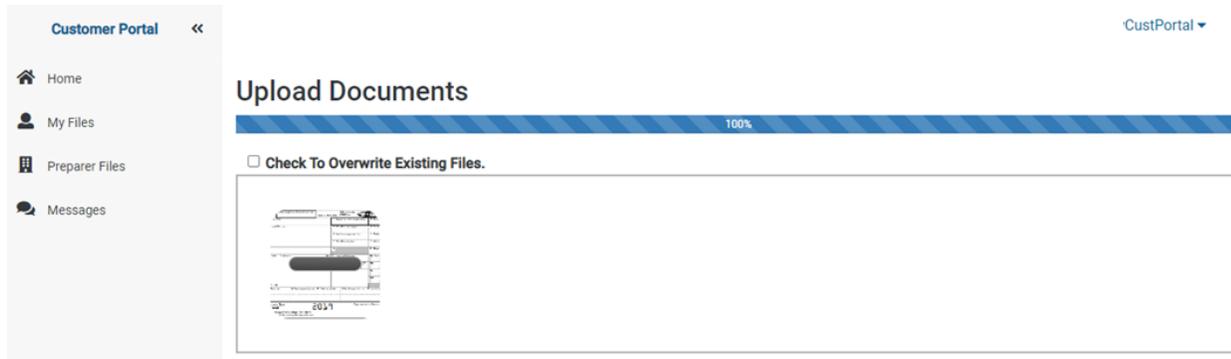


The **Upload Documents Window** is displayed on the screen:



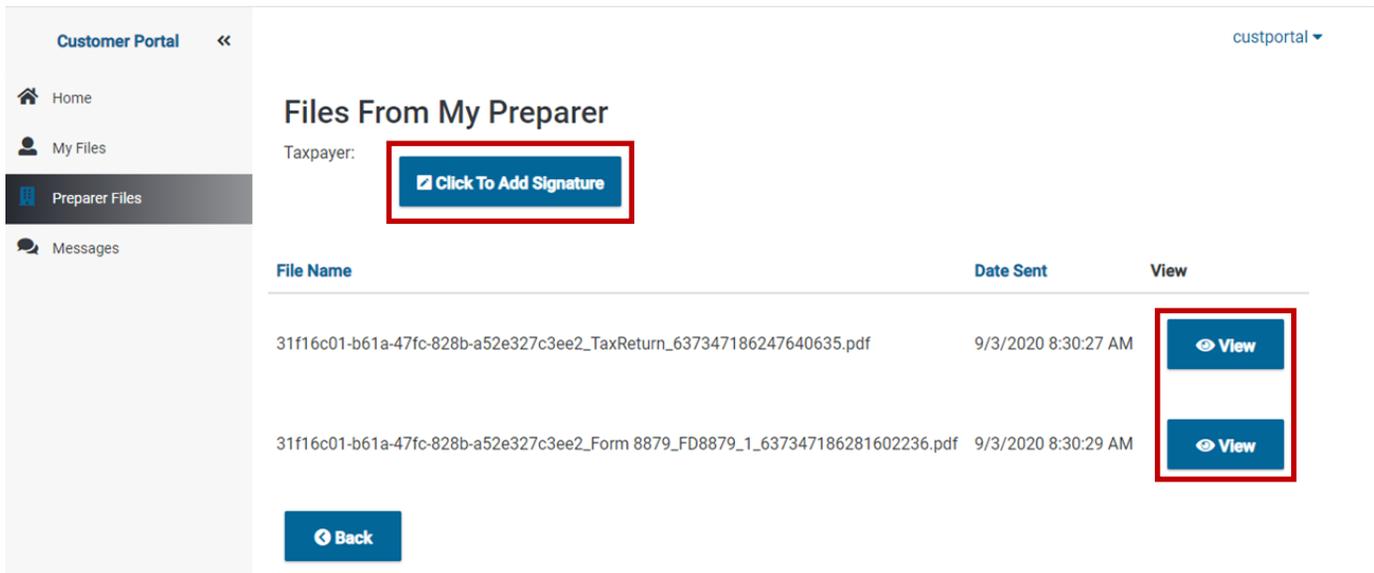
Click **Drop files here to upload** to browse and select documents to upload to Davis Tax Services. Navigate to the local copy of the document to upload and either drag and drop it into the file area in the portal or click on the file and select **Upload**.

The Upload Documents Window will display the uploaded file:



Ready To Sign?

The **Files From My Preparer Window** will display the files sent from Davis Tax Services:



The screenshot shows the 'Files From My Preparer' section of the Customer Portal. On the left is a navigation menu with 'Preparer Files' selected. The main area displays a 'Taxpayer:' field with a red-bordered button labeled 'Click To Add Signature'. Below this is a table with columns for 'File Name', 'Date Sent', and 'View'. Two PDF files are listed, each with a red-bordered 'View' button. A 'Back' button is located at the bottom left of the main content area.

| File Name | Date Sent | View |
|--|---------------------|----------------------|
| 31f16c01-b61a-47fc-828b-a52e327c3ee2_TaxReturn_637347186247640635.pdf | 9/3/2020 8:30:27 AM | View |
| 31f16c01-b61a-47fc-828b-a52e327c3ee2_Form 8879_FD8879_1_637347186281602236.pdf | 9/3/2020 8:30:29 AM | View |

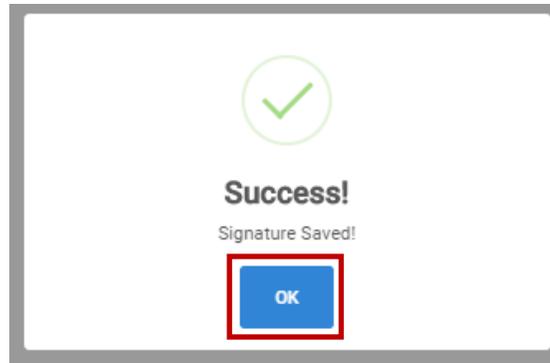
To view the documents to be signed you will click on the **View** button **next to each document**. The document will open in a new tab in the taxpayer's browser.

To sign the documents, you will click on the **Click to Add Signature** button. The **Edit Signature Window** will be displayed. You can use your mouse to enter your electronic signature from a desktop or laptop computer or use your finger to enter your electronic signature from a mobile device. To save your signature, click on the **Save** button:



The screenshot shows the 'Edit Taxpayer Signature' window. It features a large text area containing a handwritten signature that reads 'Sign'. Below the text area are three buttons: 'Back', 'Clear', and 'Save'. The 'Save' button is highlighted with a red border.

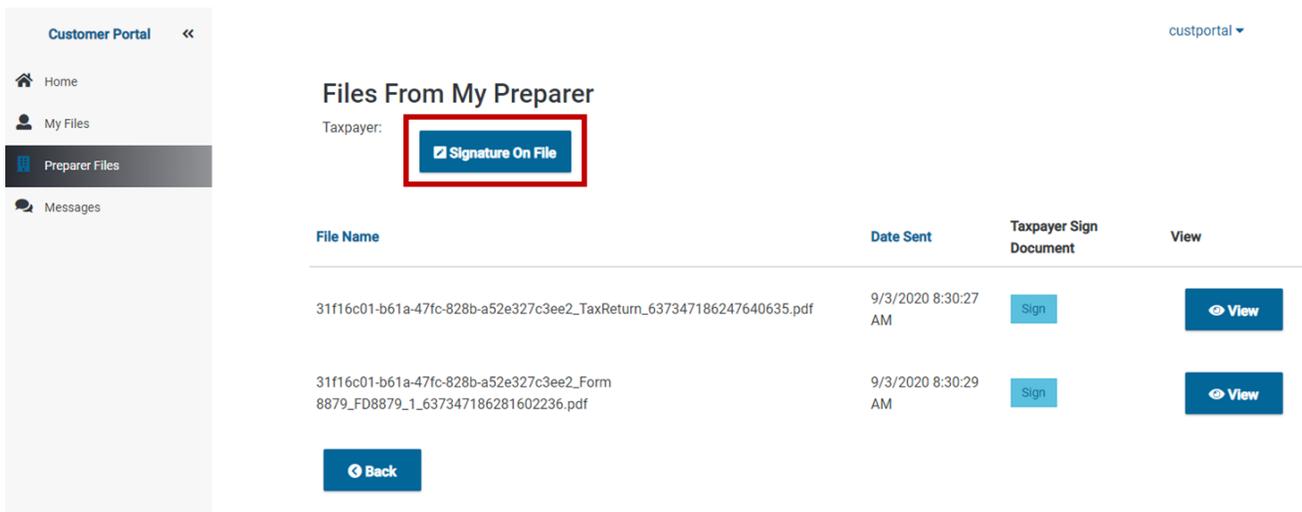
A message is displayed when the signature has successfully saved.



To apply your signature to the documents sent from Davis Tax Services, the you will click on the **Back** button:



After hitting the back button, you will see that your signature is **On File**:



Once the signature is On File, you will then see the ability to **Sign** your documents:

The screenshot shows a web interface for a 'Customer Portal'. On the left is a navigation sidebar with options: Home, My Files, Preparer Files (selected), and Messages. The main content area is titled 'Files From My Preparer' and includes a 'Taxpayer:' field with a 'Signature On File' button. Below this is a table with columns: File Name, Date Sent, Taxpayer Sign Document, and View. Two rows of data are shown, each with a 'Sign' button in the 'Taxpayer Sign Document' column. The first 'Sign' button is highlighted with a red rectangular box. A 'Back' button is located at the bottom left of the table area.

| File Name | Date Sent | Taxpayer Sign Document | View |
|--|---------------------|------------------------|------|
| 31f16c01-b61a-47fc-828b-a52e327c3ee2_TaxReturn_637347186247640635.pdf | 9/3/2020 8:30:27 AM | Sign | View |
| 31f16c01-b61a-47fc-828b-a52e327c3ee2_Form 8879_FD8879_1_637347186281602236.pdf | 9/3/2020 8:30:29 AM | Sign | View |

After viewing the documents, you can click **Sign** to **apply your signature to the file**:

This is a close-up view of the table from the previous screenshot. It shows the 'Date Sent', 'Taxpayer Sign Document', and 'View' columns. The first row shows the date '9/3/2020 8:30:27 AM', the status 'Signed!', and a 'View' button. The second row shows the date '9/3/2020 8:30:29 AM', the status 'Sign', and a 'View' button.

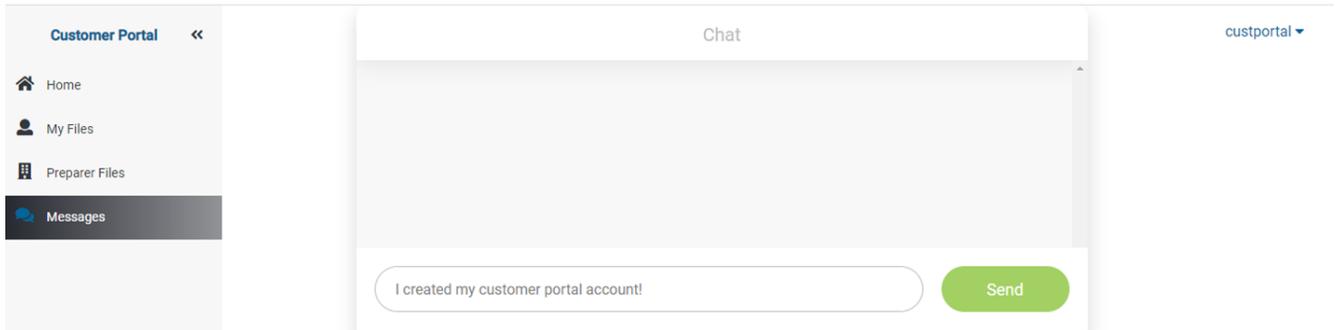
| Date Sent | Taxpayer Sign Document | View |
|---------------------|------------------------|------|
| 9/3/2020 8:30:27 AM | Signed! | View |
| 9/3/2020 8:30:29 AM | Sign | View |

After the signatures have been applied, they will then show in the program.

Please Note: You may need to close and reopen your program to see these changes applied.

How can you communicate with me?

Inside the Customer Portal is a **Chat** feature where you and Davis Tax Services can communicate.



When you send chats through this feature, you will receive the messages through the **Taxes to Go Chat feature** in the program: (Not always in real time. We will respond to all messages.)

