VITA/TCE

Using the Customer Portal

Contents

Using the Customer Portal

After completing this lesson, you should be able to:

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8. Guide a taxpayer through creating a Customer Portal account.
9. Guide a taxpayer through uploading or reviewing files in the Customer Portal.
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Purpose of the Customer Portal

The Customer Portal is a feature available to all VITA/TCE sites with a Taxpayer Pro Online license. It can integrate with Scanned Documents to allow taxpayers to send, receive, and review documents. The administrator controls preparer access to the Customer Portal through security templates.

The Customer Portal allows you to do the following:

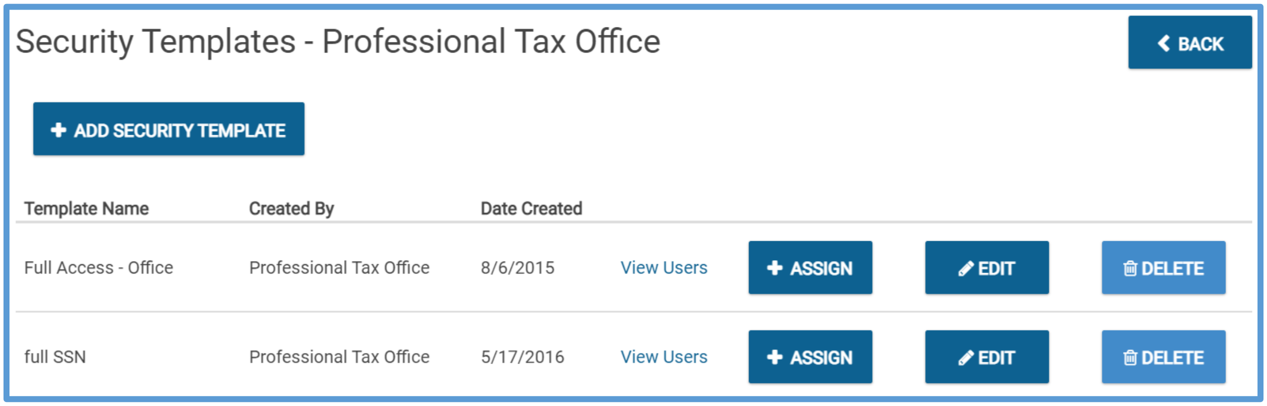
- Request that the taxpayer upload electronic documents.
- Share a copy of the return for Quality Review.
- Request that the taxpayer sign documents.
- Share a copy of the signed return.
- Open a communication channel with the taxpayer through chat.
- Let the taxpayer know of a quick way to check IRS status of returns.

Setting Up Customer Portal Access

The site administrator controls access to the Customer Portal through security templates. To allow preparers to access to the Customer Portal, use the following steps from the **Configuration Menu**:

1. Click the **Security Templates** line.

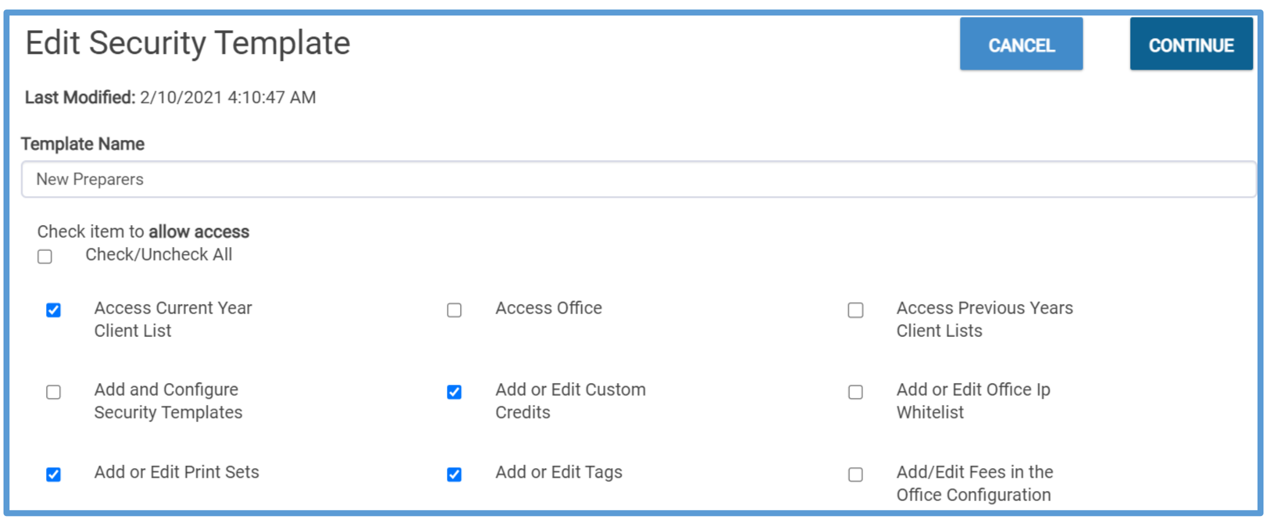
TaxSlayer Pro Online displays the **Security Templates** page:



2. Click **EDIT** for the security template to which you want to add Customer Portal access.

TIP: You can also add Customer Portal access when creating a new security template. See the *Setting up Security Templates* lesson for full instructions on setting up and editing security templates.

TaxSlayer Pro Online displays the **Edit Security Template** page:



3. Select the **Customer Portal** check box.

Note: If the security template does not allow Scanned Documents access, select the check box(es) for that feature. See the *Scanned Document Program* lesson for full instructions on setting up access to Scanned Documents.

4. Click **CONTINUE**.

Preparers with that security template can now access the Customer Portal.

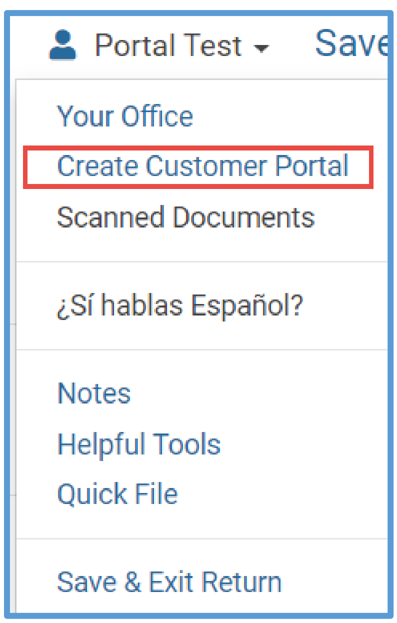
NOTE: Security templates assigned by TaxSlayer will have both Customer Portal and Scanned Documents enabled.

Inviting Taxpayers to the Customer Portal

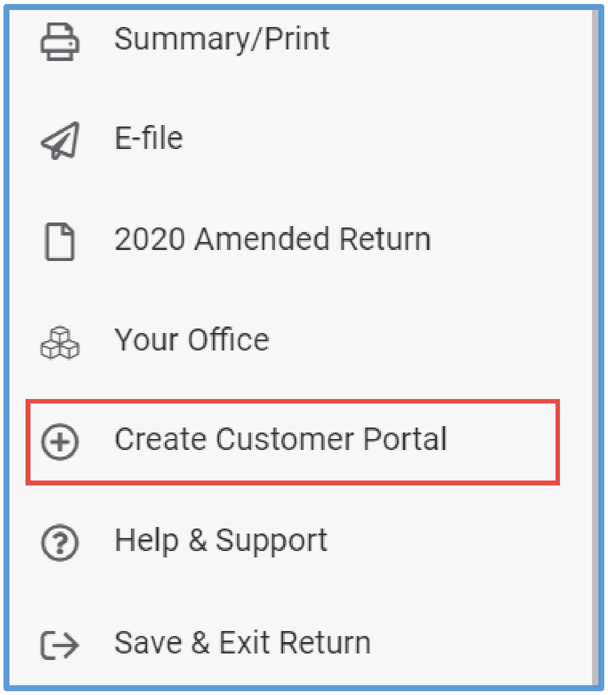
Initial Invitation

You can invite the taxpayer to the Customer Portal at any point after you complete the taxpayer's Basic Information pages. To begin the invitation to the Customer Portal, use the following steps:

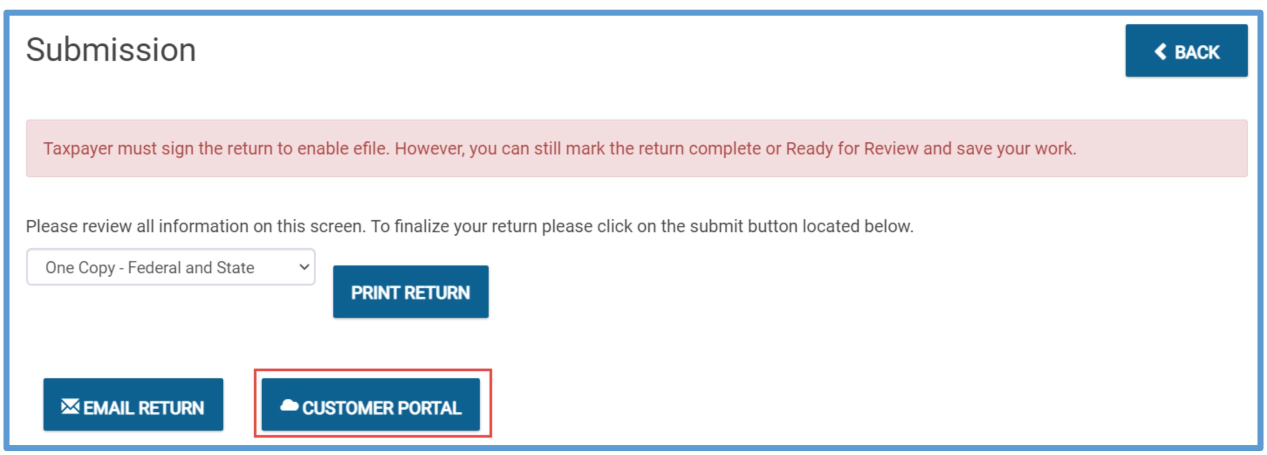
1. Do one of the following:
    a. Click **Create Customer Portal** from the taxpayer drop-down menu, as shown below:



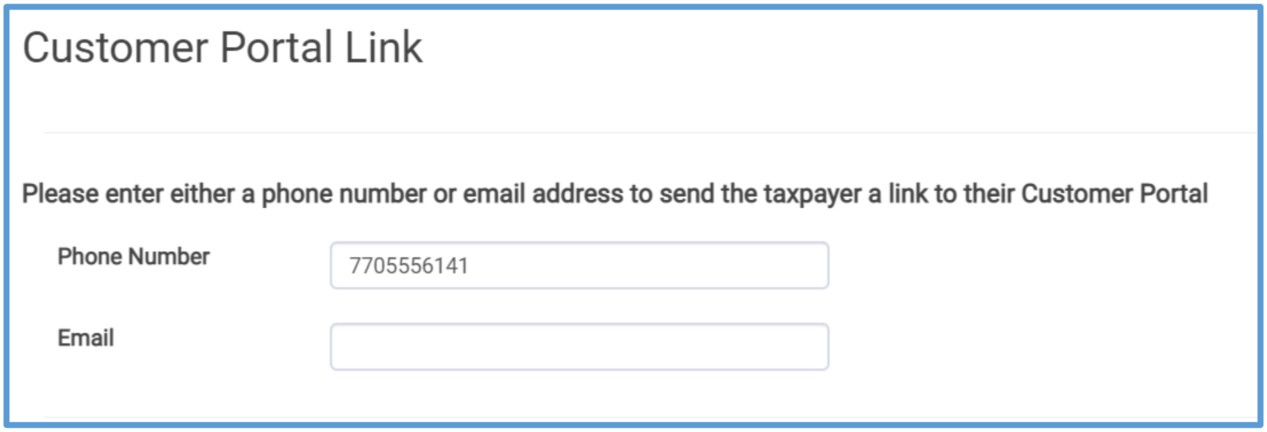
b. Click **Create Customer Portal** from the left navigation panel, as shown below:



c. Click **CUSTOMER PORTAL** on the **Submission** page, as shown below:



TaxSlayer Pro Online displays the **Customer Portal Link** page, defaulting the taxpayer's phone number and/or email address from **Basic Information** (if entered):



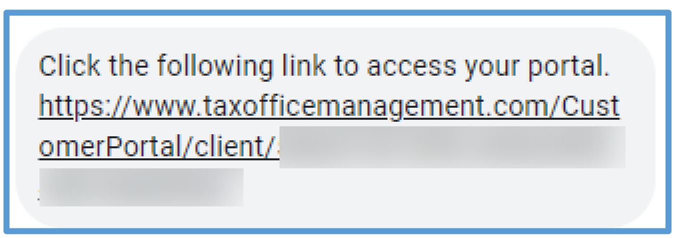
2. Verify the taxpayer's phone number or email address, or type the information in the appropriate box.

Note: If you type both a phone number and email address, the Customer Portal defaults the invitation to the taxpayer's email address.

3. Click **CONTINUE**.

TaxSlayer Pro Online displays a message that the link was sent to the taxpayer successfully.

The taxpayer receives either a text or email (as designated) with a link to create a Customer Portal account:



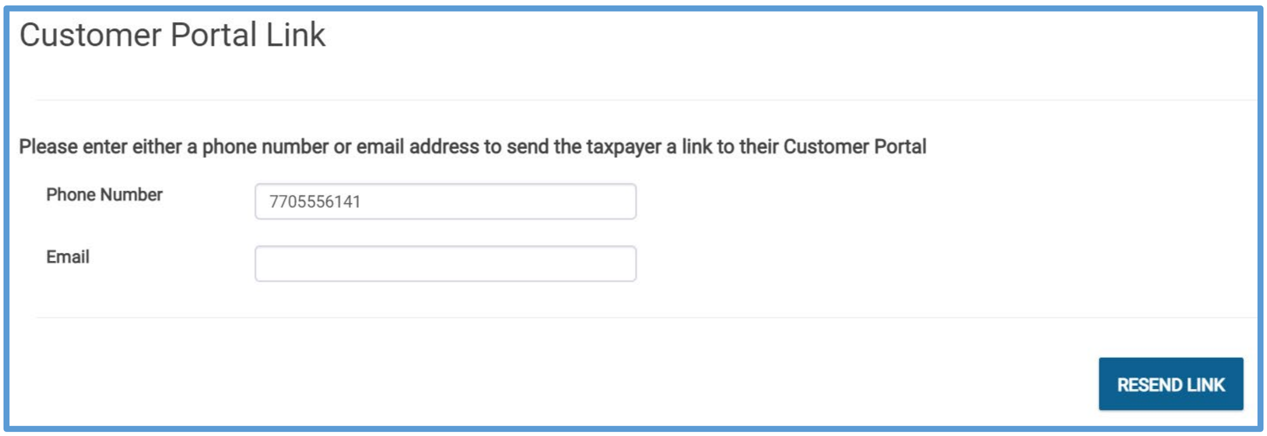
Note: Each link is unique to the taxpayer. It cannot be used to create a Customer Portal account for another taxpayer.

Resend Invitation

If the taxpayer later loses the link, you can resend it. To do so, use the following steps:

1. Click **Create Customer Portal** from either the Taxpayer drop-down menu, left navigation panel, or **Submission** page.

TaxSlayer Pro Online displays the **Customer Portal Link** page with a **RESEND LINK** button:



2. Verify the phone number or email address.
3. Click **RESEND LINK**.

Working in the Customer Portal

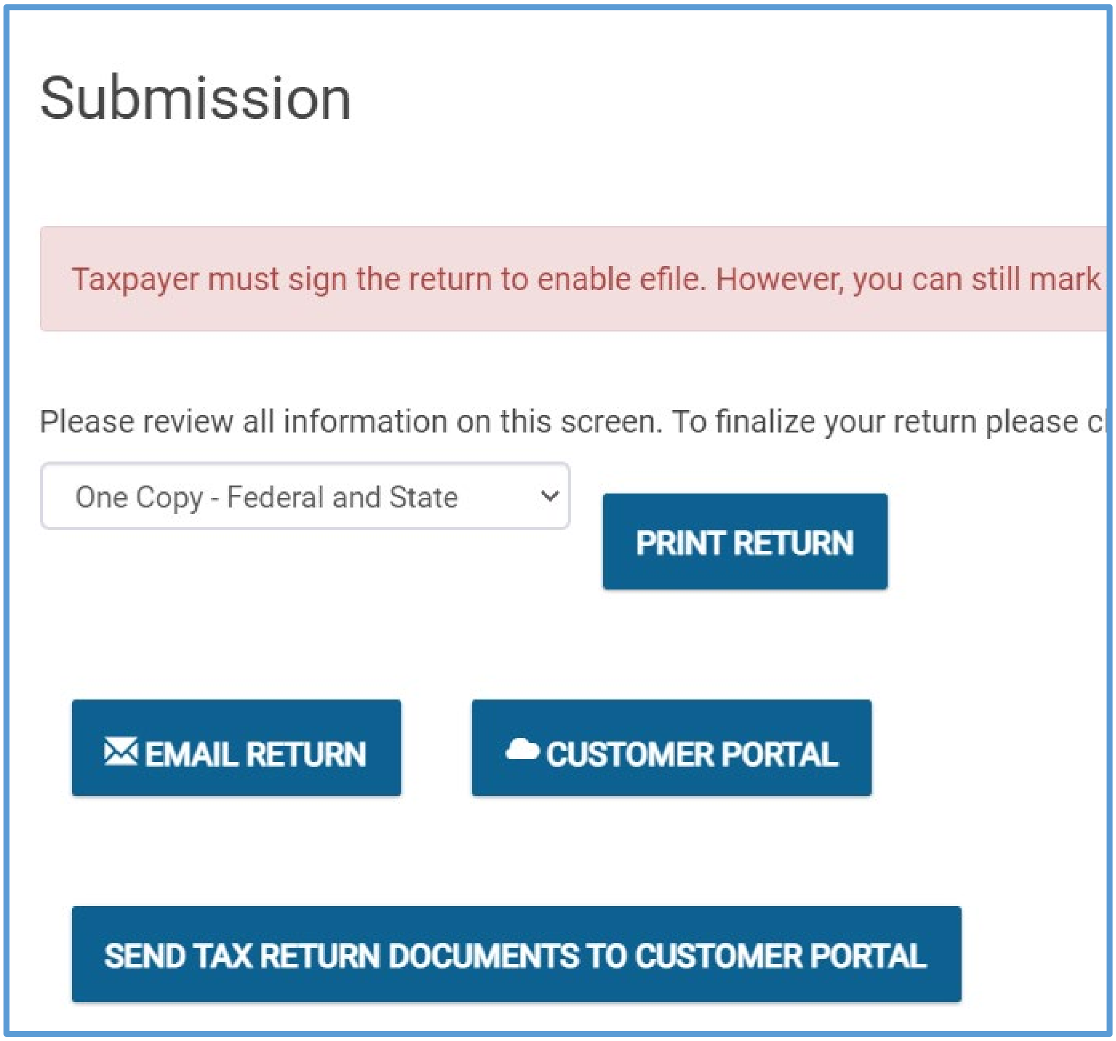
As the tax preparer, you can send tax documents to the taxpayer, access files when the taxpayer uploads them, and chat with the taxpayer. This provides a full range of communication and document sharing options when working with a taxpayer on a tax return.

Making Tax Documents Available to the Taxpayer

When you need a taxpayer to review tax documents, whether as a review before filing or after filing, you can make those documents available through Customer Portal. To do so, use the following steps:

1. Navigate through the return to the **Submission** page.

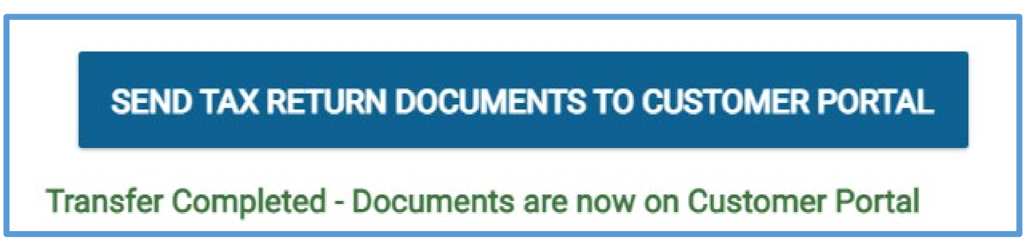
TaxSlayer Pro Online displays the **Submission** page:



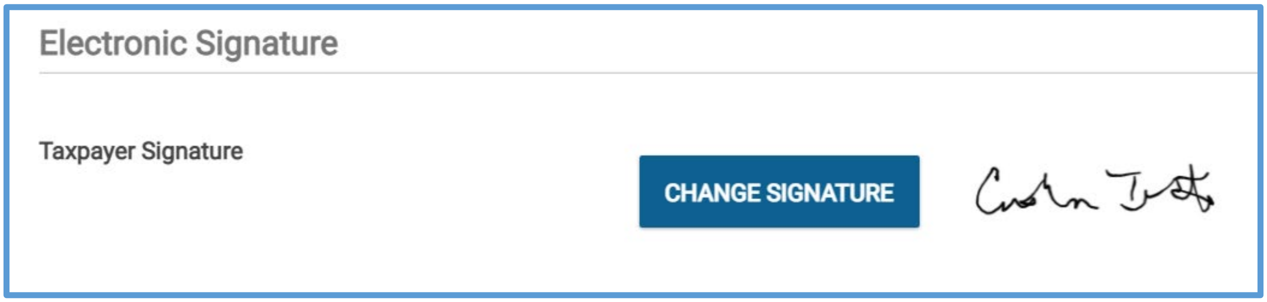
2. Click **SEND TAX RETURN DOCUMENTS TO CUSTOMER PORTAL**.

Note: This button is only available after the taxpayer sets up their Customer Portal account.

TaxSlayer Pro Online makes the documents available and displays a message confirming that the transfer is complete:



Once the taxpayer signs the document, TaxSlayer Pro Online displays the signature in the **Electronic Signature** section of the **Submission** page and uses it for necessary signatures on Form 1040, Form 8879, and any consents:

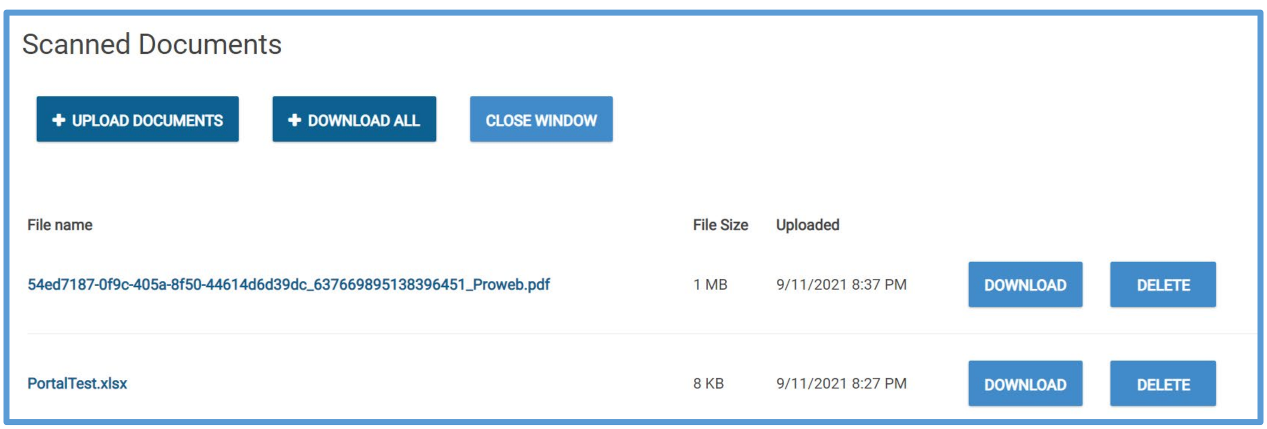


Accessing Documents After Taxpayer Upload

After a taxpayer uploads documents, you can access them from Scanned Documents. To do so, use the following steps:

1. Click **Scanned Documents** from the Taxpayer drop-down menu.

TaxSlayer Pro Online displays the **Scanned Documents** page, which includes any tax return documents you have made available to the taxpayer through Customer Portal and any documents the taxpayer has uploaded:



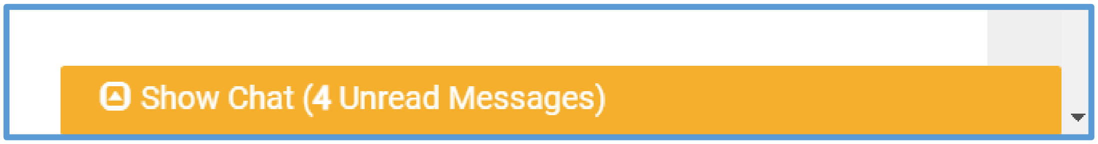
2. Download the documents as needed.

TIP: See the *Scanned Document Program* lesson for detailed information on using Scanned Documents**.**

Chatting with a Taxpayer

Taxpayers can exchange chat messages with you through the Customer Portal. To view chat messages from taxpayers, use the following steps from any page after logging in to TaxSlayer Pro Online:

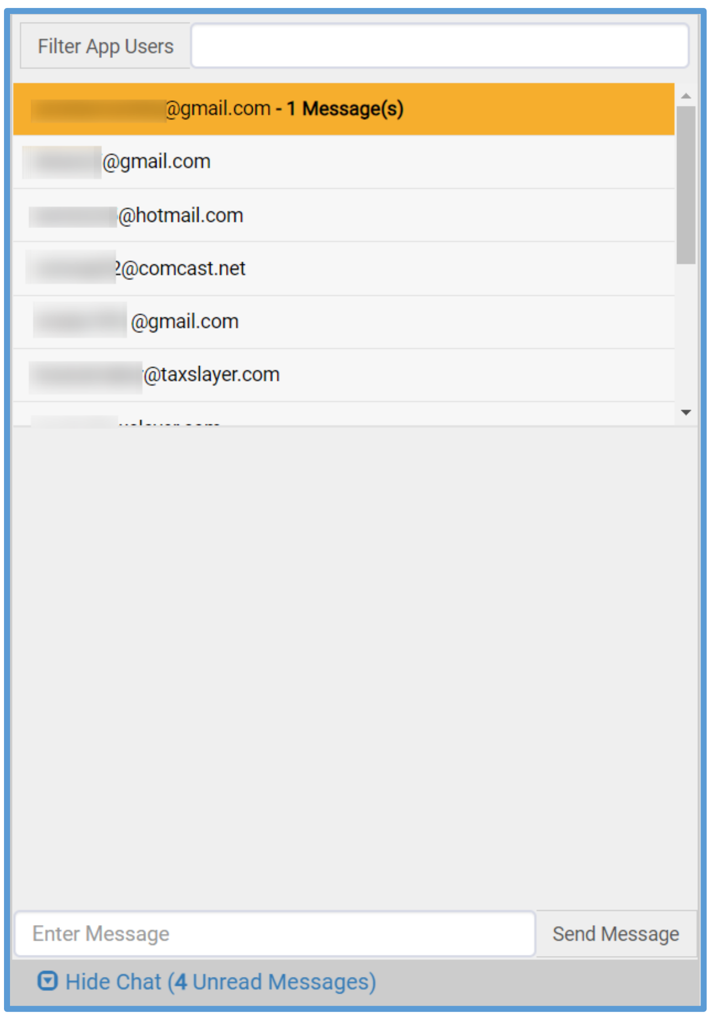
1. Find the **Show Chat** box at the lower left of the page.



Note: The chat box displays how many unread messages you have.

2. Click the box to expand it.

TaxSlayer Pro Online displays a chat window with the email addresses of all taxpayers for whom you have a tax return in progress:

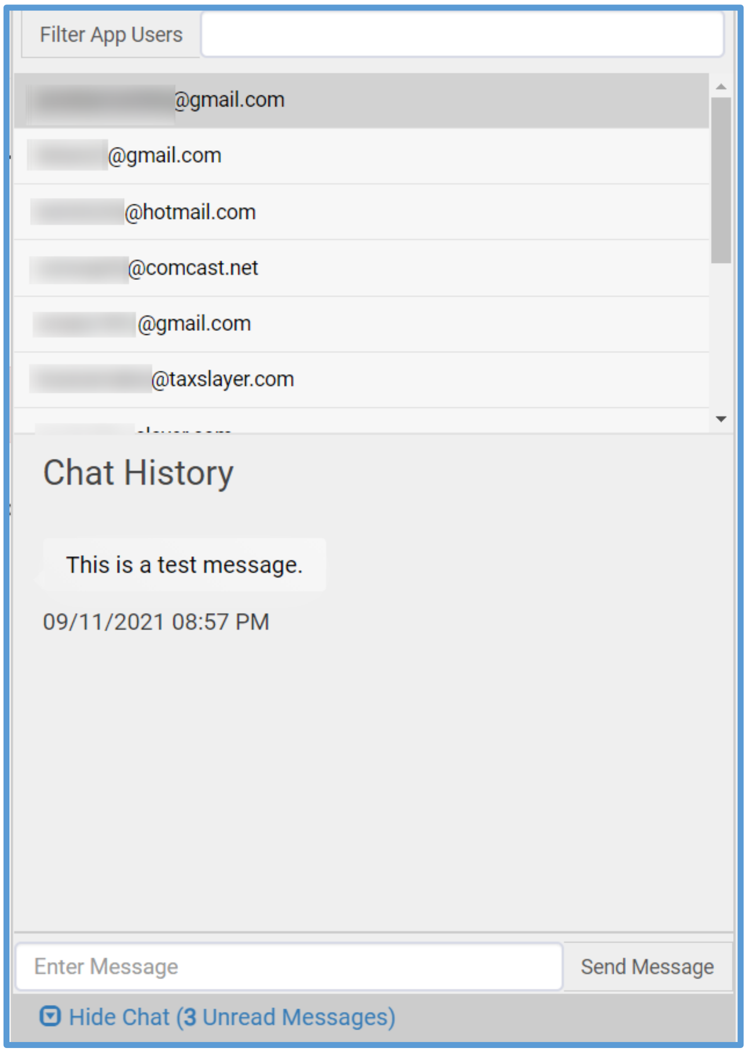


Note: If a taxpayer has sent you a message that you have not read, TaxSlayer Pro Online displays that email address in orange with the number of unread messages in bold.

3. To start a new chat to a taxpayer, click the taxpayer's email address.

TIP: To find a specific taxpayer in the list, begin typing the taxpayer's email address in the **Filter App Users** box.

TaxSlayer Pro Online displays the chat window with any chat history:



4. Type the message you want to send to the taxpayer in the **Enter Message** box.
5. Click **Send Message**.

TaxSlayer Pro Online sends the message to the taxpayer.

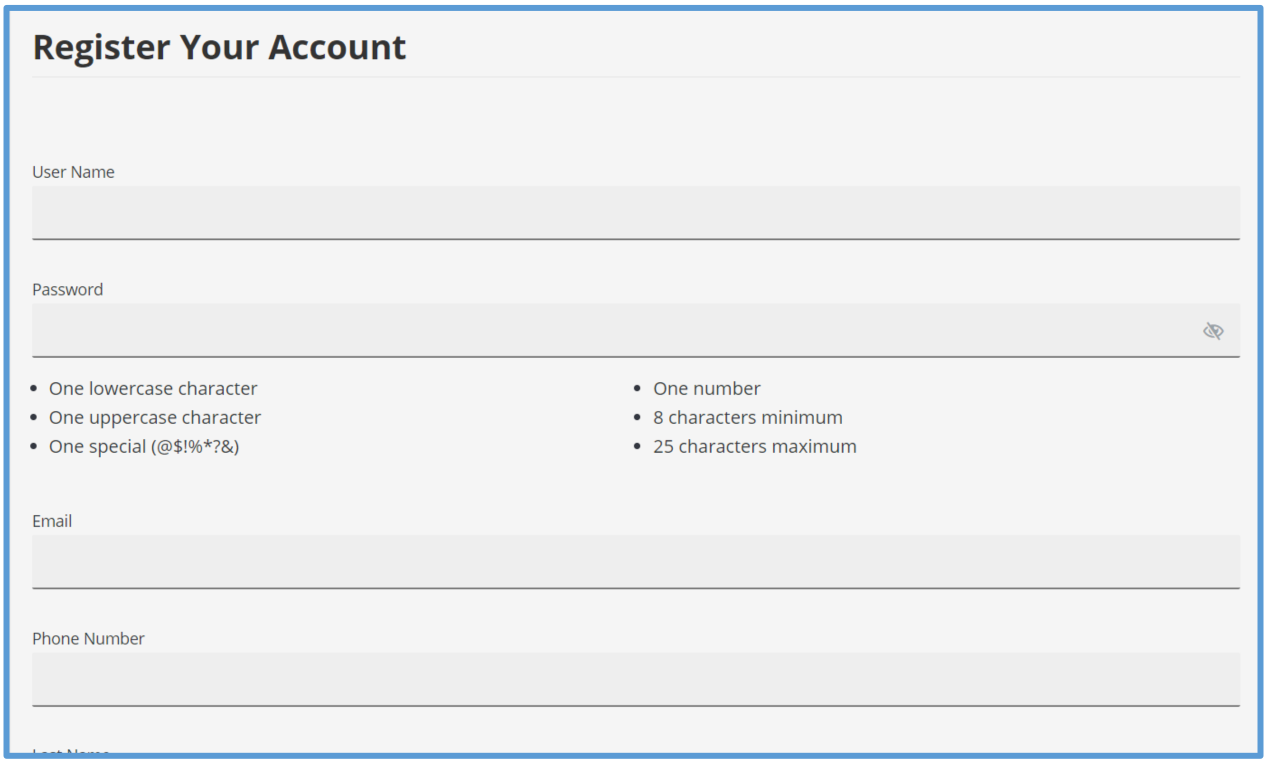
Guiding the Taxpayer in the Customer Portal

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:



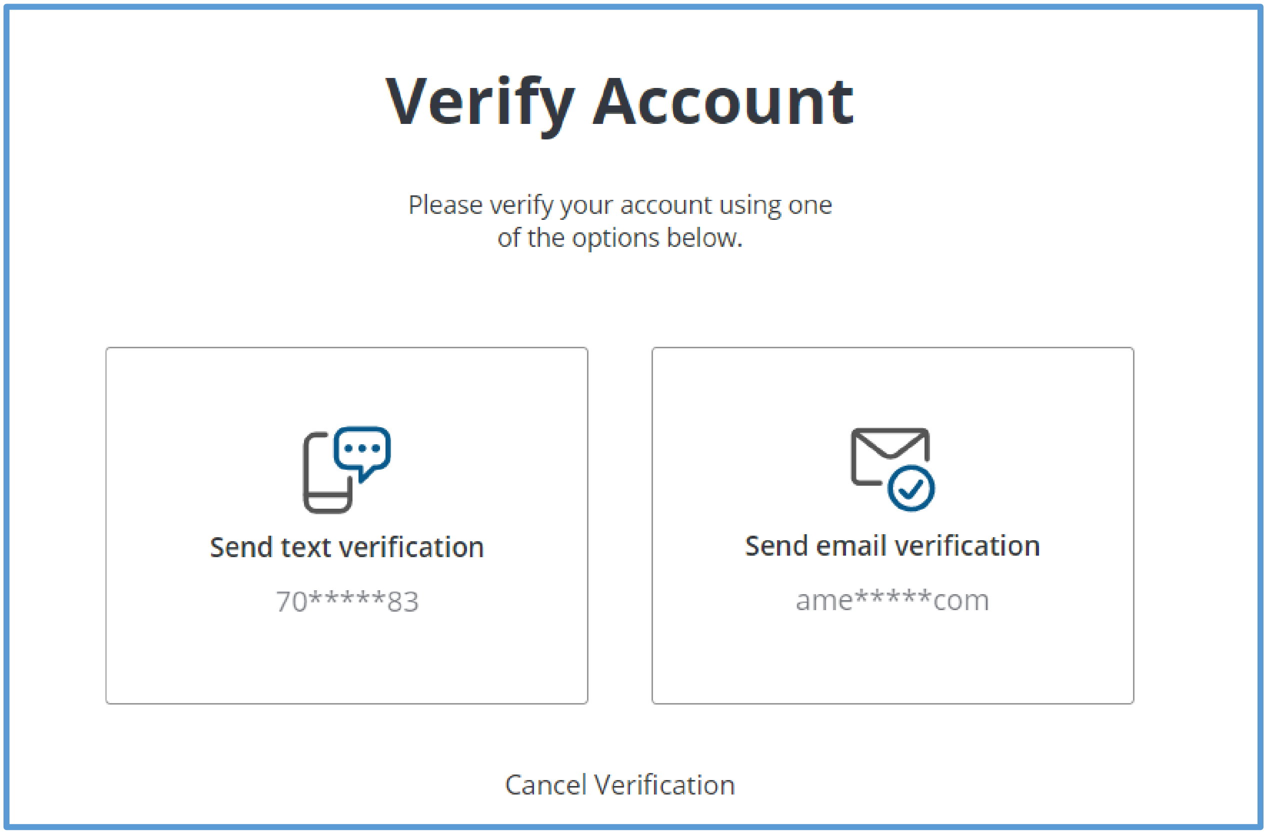
2. Type a new user name.

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

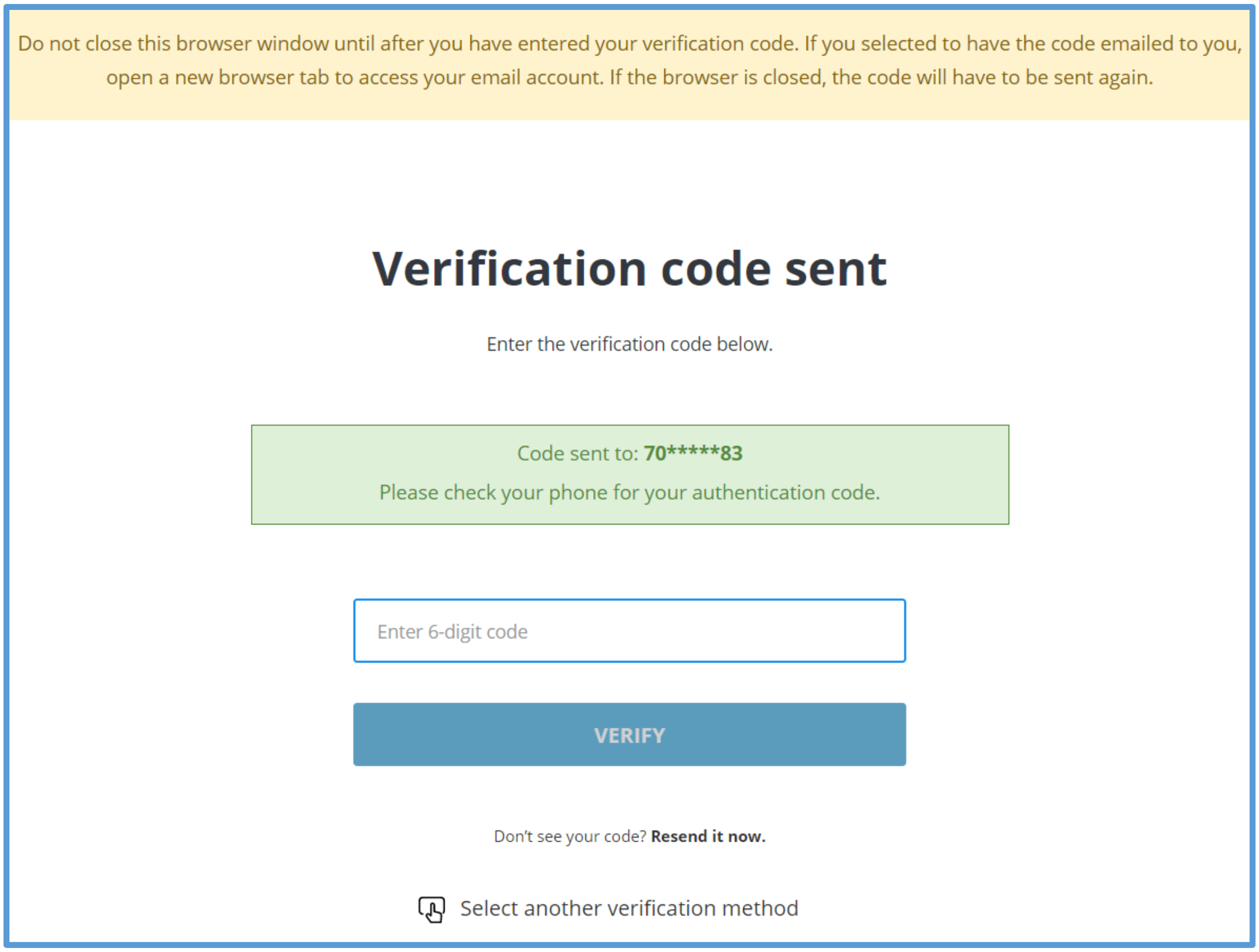
   c. Number
   d. Special character (@$!%*?&)
4. Type the email address and phone number you want associated with the Customer Portal account.
5. Type your last name for verification.
6. Type the last four digits of your Social Security number for verification.
7. Click **Submit**.

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:



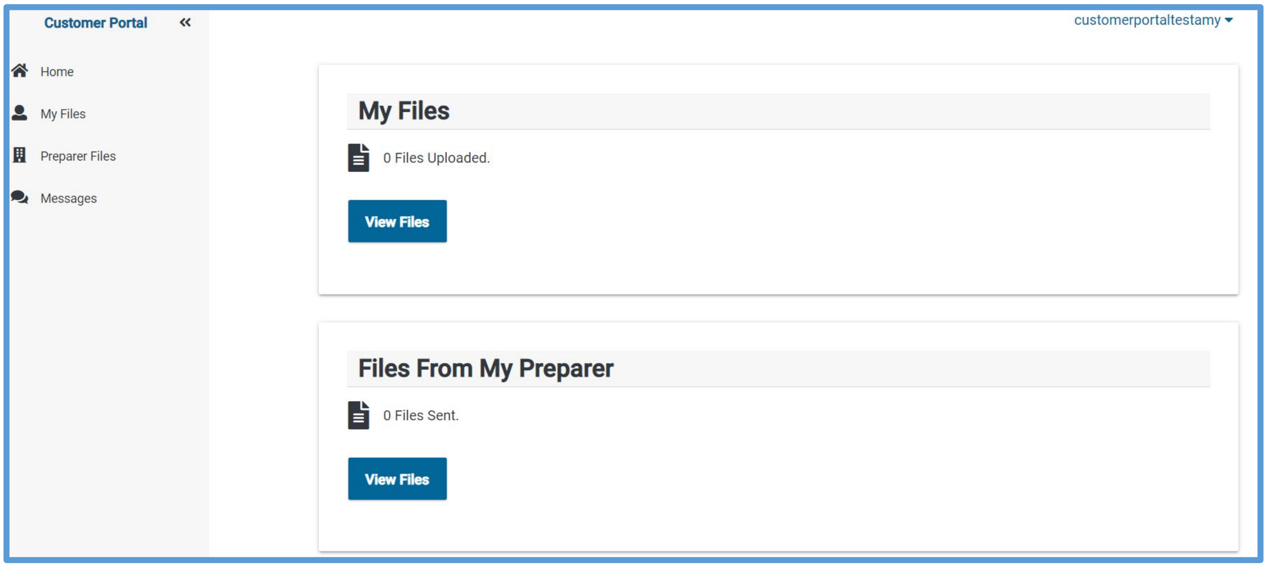
9. Find the code in your text or email and type it in the box.

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

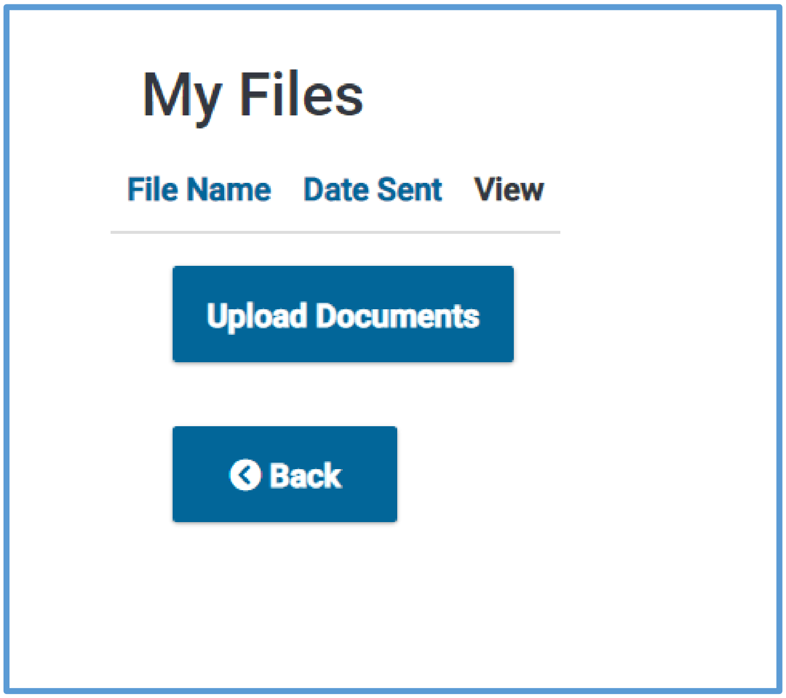
If you need additional forms or documents to complete a taxpayer's return, he or she can upload them through Customer Portal. Customer Portal accepts the following file types up to 5 mb each, with a maximum of 25 mb:

- .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**.

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

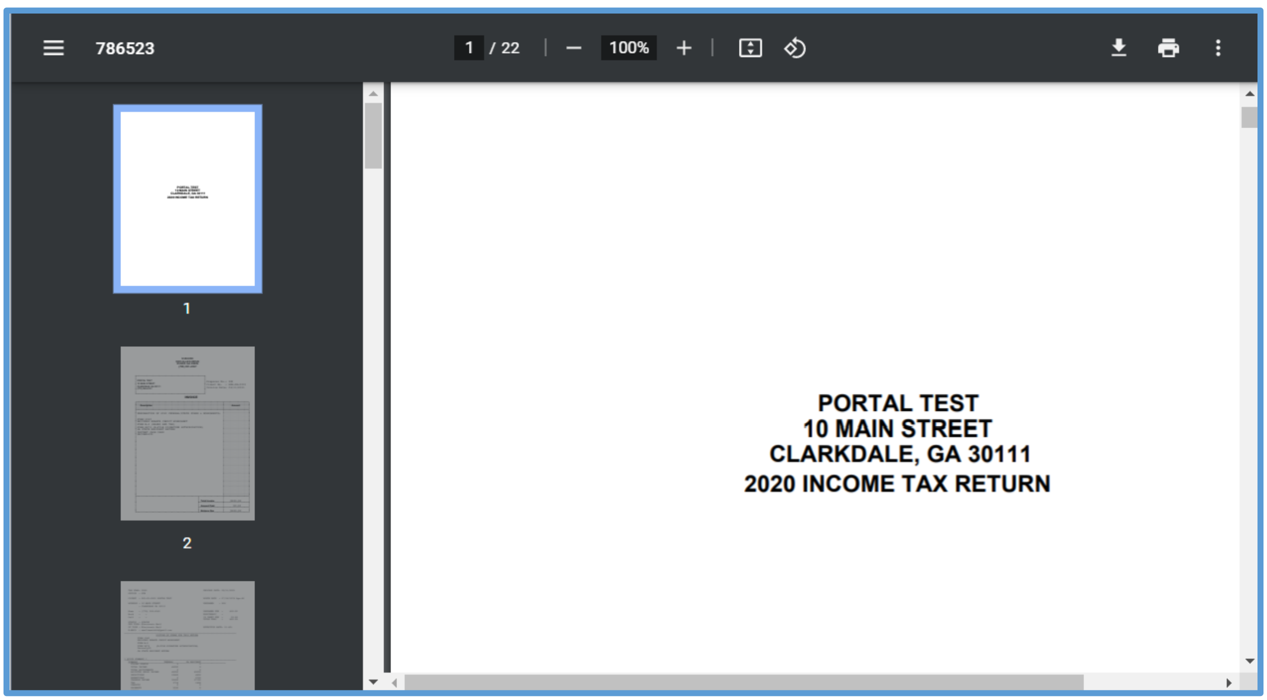
You can make the tax return available for the taxpayer to review. To guide the taxpayer through reviewing forms that you have sent, have the taxpayer use the following steps from the Customer Portal home page:

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

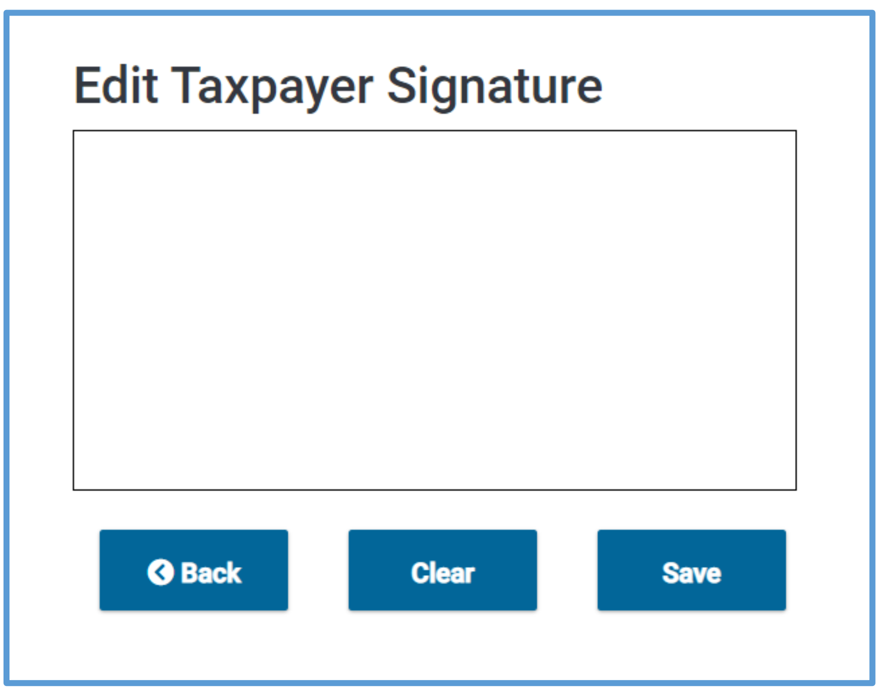
The taxpayer can sign tax return documents through the Customer Portal. Before signing documents, the taxpayer needs to create a signature to have on file. To guide the taxpayer through creating a signature, have the taxpayer use the following steps from the Customer Portal home page:

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:

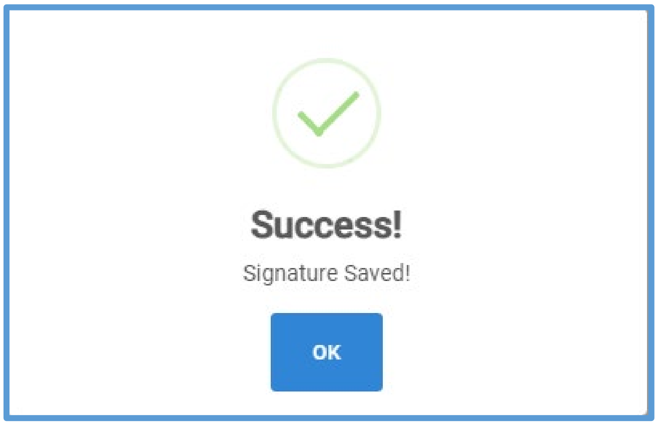


4. Using your finger or e-pen on a touch-screen device, or your mouse on a computer, sign within the box.

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

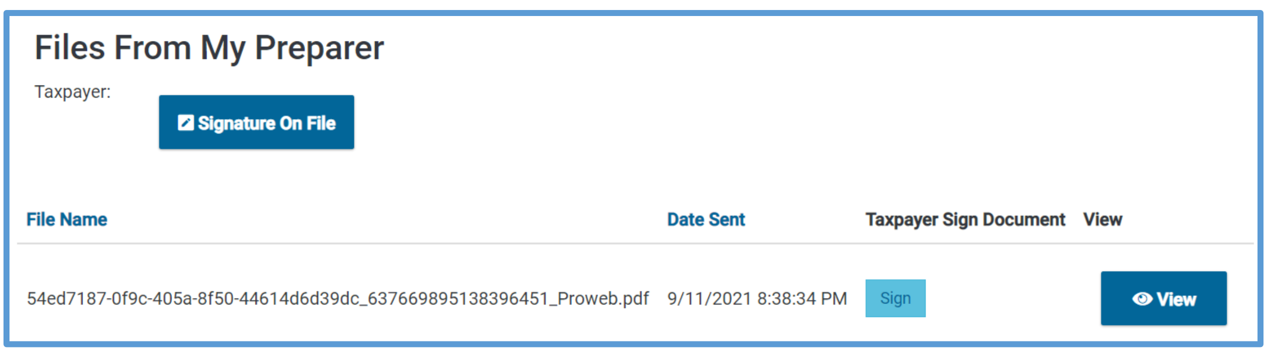
5. Click **Save**.

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:



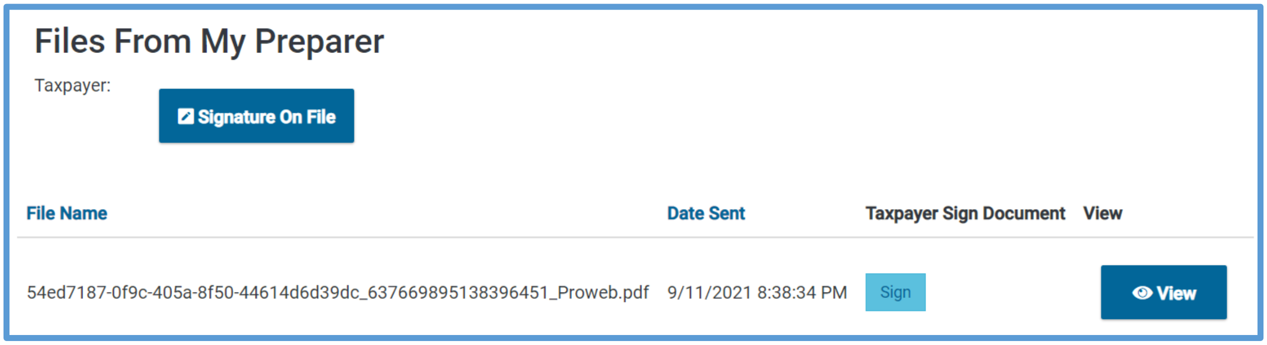
Tip: If the return is Married Filing Jointly, Client Portal also allows the spouse to add a signature.

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

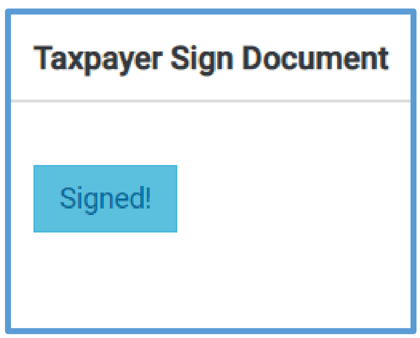
1. Click **Preparer Files**.

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:



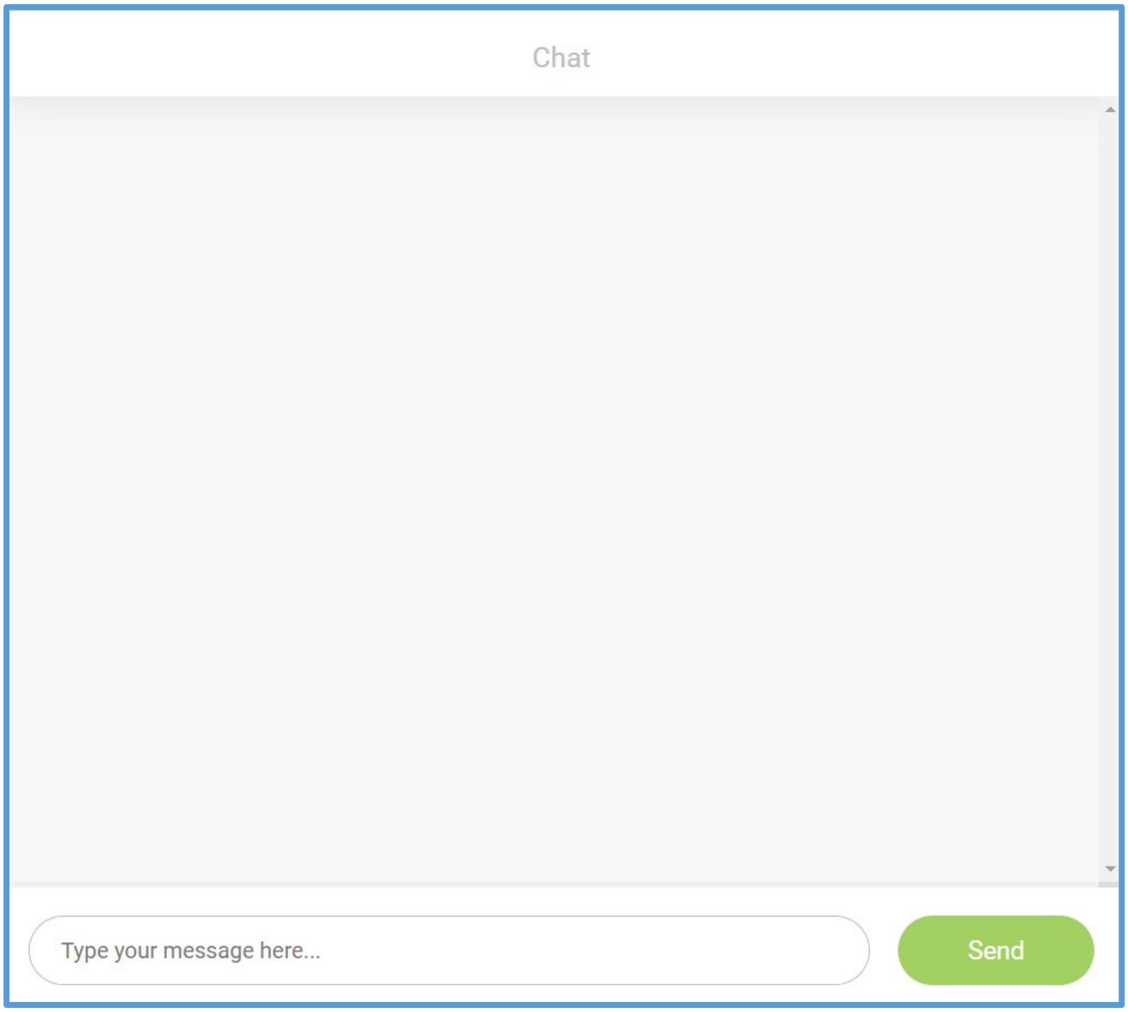
Customer Portal also transfers the signature to the **Submission** page in TaxSlayer Pro Online as a signature for Form 1040, Form 8879, and any necessary consents.

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.

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