Tax Portal Guide

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Client Guide for Tax Services Portal

TaxDome is an all-in-one practice management platform that helps clients securely communicate, upload documents, e-sign forms, and manage their tax needs in one place.

What to expect:

- At the beginning of the year, you will receive an invitation via email welcoming you to set up your email and password to the TaxDome portal. Shortly after you will also receive a welcome email for the tax season with a brief overview of what to expect.
- Once logged in, you will see on your dashboard notifications about important updates such as required documents for signature and pending organizers. These are items that will need to be completed when you are ready for our team to start the tax return preparation process.
- To sign the engagement letter and consent disclosure, click on the contracts option in the left hand navigation bar. Open the letters, review, and sign at the bottom.
- To complete the organizer, click on the organizers option in the left hand navigation bar. You have the option of completing a shorter questionnaire where you upload all documents in mass or the lengthier version where you itemize out the details and documents for your return. We ask that at minimum you complete the shorter questionnaire.
- To speak with your team, you can ask questions using the “Chats & Tasks” option in the left hand navigation bar.
- For a detailed look at all of the items explained above, watch the Welcome to TaxDome video below which walks through the emails, client portal, contracts, organizer, and chat features.

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Portal Features:

- Documents: This is the document vault where you can upload documents as needed as well as get access to signed documents and the completed return for review.
- Chats and Tasks: You can easily and directly contact our team as needed with questions, updates, and responses. Communication is vital and this portal makes it seamless.
- Organizers: Here you will fill in the necessary questionnaire that will be provided to our tax team. You have the option of completing a shorter questionnaire where you upload all documents in mass or the lengthier version where you itemize out the details and documents for your return.
- Contracts: You can find your annual engagement letter within this section which is a letter consenting for our firm to complete the tax returns for the specific tax season year.

Video and Document Resources:

- How to Install the TaxDome Client Portal on Your Mobile Device
- Client Portal Mobile App: How to complete an organizer
- Client Portal Mobile App: How to e-sign document on mobile
- Client Portal Mobile App: How to use chats
- Paper Filing of Tax Return Guide

Contact Details:

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