Tax Portal Guide

Version: 1.00 | Updated: 06/09/2025 1:08 pm CDT | Published: 03/31/2025

Tags: TaxDome Tax Tax Portal

Client Guide for Tax Services Portal

TaxDome is a comprehensive practice management platform that allows clients to securely communicate, upload documents, e-sign forms, and manage all their tax-related needs in one convenient location. This portal is specifically for clients whose tax returns are prepared by Financial Gravity Tax Services.

What to expect:

- You'll receive an email invitation to set up your TaxDome portal by creating a username and password.
- Once logged into the portal, your dashboard will display important notifications such as documents requiring your signature and pending organizers. These items must be completed before our team can begin preparing your tax return.
- To review and sign your engagement letter and consent disclosures, click on the Contracts tab in the left-hand navigation menu. Open each document, review it thoroughly, and sign at the bottom.
- To complete your tax organizer, select the Organizers tab from the navigation menu. You can choose between a shorter questionnaire for bulk document upload or a more detailed version where you itemize information and attach documents individually. We recommend that all clients complete at least the shorter version.
- If you need to communicate with your tax team, use the Chats & Tasks feature in the left-hand menu to ask questions or share information directly.
- For a step-by-step walkthrough of everything mentioned above—including emails, the client portal interface, contracts, the organizer, and the chat feature—please watch the "Welcome to TaxDome" video below.

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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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