

Illustrated guide to the ATS Client Portal

From the webpage www.affordable-tax-service.com Click on the ATS Client Portal



You will see the Access instructions:

ACCESS INSTRUCTIONS

The [ATS Client Portal](#) has been approved by the IRS in accordance with personal data protection. This is the mechanism to allow you to upload your tax documents securely. I ask you to please call or text 210-563-9095 after you have uploaded your documents so I can verify and review. At this time the ATS Client Portal is used to upload Tax Documents. Thanks

Read these instructions carefully, Gather your documents, scan or take a picture then Click on the highlighted [ATS Client Portal](#)
This opens the Client Portal for access.

Powered by

 Sign in to your account to continue

SSN#

Enter your SSN#

Password

Enter your password

Forgot password? [Reset here](#)

If you were a customer of ours last year try your default password. The default password would be: Capital First Initial Capital Last Initial then last 4 of SSN

For Example if your name is: John Smith and last 4 of SSN is: 4321 then the default password will be: JS4321

If this doesn't work, make sure to contact our office directly

Don't have an account yet? [Create one](#)

If you are an existing client or have contacted me with your Social Security Number and primary taxpayer name then you enter those and select Log in

If you are a new client, then go the bottom and Select "Create Account" The following will appear

528 Private Road 1511 Bandera, Texas 78003

Powered by

Tax Payer Information

Primary SSN#:

Date of Birth:

Create Password:

Confirm Password:

Primary Spanish

First Name: *

Last Name: *

Email:

Home Phone:

Cell Phone:

Fax:

Address: *

City: *

State: *

Zip: *

You will need to complete all the blocks in Red., Scroll down and select "Create Account"

Address: * City: * State: * AL Zip: *

Spouse Information

SSN #: Date of Birth: Spouse: Spanish

First Name: Last Name: Email:

Spouse Home Phone: Spouse Cell Phone:

Create Account

Already have an account? [Click here to login](#)

Once you login, you will see this screen:

210-563-9095
528 Private Road 1511 Bandera, Texas 78003

Select Language Powered by Google Translate

Welcome Clint Smith! Today's Date: 04/06/20

Tax Return Status | My Personal Information | **My Documents** | My Appointments

Contact Us | Change Password | Log Out

At this time We are only utilizing the "My Documents" feature, how ever you can use the "My Personal Information", "Contact Us" and "Change Password". So then click on "My Documents and your will see:

Back to DashBoard

2019 My Documents

View Documents for Tax Year: 2019

Show 10 entries

Search:

File Name ↑	Note	Uploaded	File Type	Cust Permission	Tax Year	Options
2019 Clint Smith Tax Return	Signed Tax Return Password Hint: Last 5 of Primary SSN	03/27/20 10:09 PM EDT	Tax Return	View Only	2019	Options
2019 File copy		03/27/20 9:47 PM EDT	Tax Document	View Only	2019	Options

Showing 1 to 2 of 2 entries

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From here select "Upload New File" From your file explorer, select the documents to upload. (You can upload multiple documents at one time if you can select multiple document through file explorer.) You will see them instantly upload. You will need to refresh your browser to see the documents you uploaded.

Please text or call when you have uploaded all your documents so I can review and acknowledge.

Once I have completed your tax return I will upload 1) Your taxpayer file copy 2) the IRS form 8879, Authorization to electronically file your tax return 3) a separate copy of the Form 1040V if you chose to mail your payment if you owe the IRS, and 4) my Invoice for tax preparation.

To download your copies select the "options" button to the right of the file and "Retrieve File"

The file will appear then you can print or save to your computer.

The IRS Form 8879 Must be retrieved, printed out signed and returned. You can upload the signed form to the Portal. If you are paying me via a mailed check then you can include that signed form in the same envelope and return to me at Affordable Tax Service , 528 Private Road 1511 Bandera, Tx 78003