

# CLIENT PORTAL INSTRUCTIONS



Valerio Tax Edge Clients can now send and receive secure documents, messages, request appointments and more! Instructions on how to access the portal are below.



## TO ACCESS THE CLIENT PORTAL

If this is your first time accessing the portal, please call our office so we can provide you with an access code.

- Visit our website, **www.valeriotaxedge.com** and go to the Clients tab, then click the Client Portal button:
- Enter in your Social Security number and password (provided to you when you call our office)
- The screen will prompt you to change your password and confirm/edit contact information (*Password must be a minimum of 8 characters, a mix of upper and lower case letters, and at least one number or special character*)
- Click OK to update contact information

You are now inside your client portal!

## TO UPLOAD DOCUMENTS

- On the menu on the left side of the screen, select “Upload Documents”
- Each document should be scanned in its entirety and uploaded as one clearly labeled file.**
- Select Browse to find your file and add a description in the box – i.e. “Jack’s W2 Bic”
- Click “Send”
- Once uploaded, you will see a notification at the top of the box indicating your file was successfully uploaded.

## TO VIEW DOCUMENTS

- Click on the “View Tax Return/Other Documents” link on the left side menu to view tax returns or other documents. You have three options under the Upload Type drop down menu:
  - “All” Documents
    - To view documents sent by you or the office, select “All” under the “Upload Type” drop down box.
    - Select a specific year in the “Account Year” drop down option or click the box next to “Show All Years” to select all years.
    - To view documents, click on the [blue hyperlink](#) located in the “Document” column.
  - “Contact Upload – Client Uploads” Documents
    - Documents that you have sent to the office can be found under the “Contact Upload – Client Uploads” option from the “Upload Type” drop down menu.
    - Select a specific year in the “Account Year” drop down option or click the box next to “Show All Years” to select all years.
    - To view documents that you have sent to the office, click on the [blue hyperlink](#) located in the “Document” column.
  - “Account Upload – OTHER” Documents
    - Documents that the office sends for your review or access should all be found under the “Account Upload – OTHER” option from the “Upload Type” drop down menu. (see screenshot).
    - In the “Account Year” drop down option you can show documents for a specific year, or click the box next to “Show All Years” to select all years.
    - To view documents, click on the [blue hyperlink](#) located in the “Document” column.

Signature	Description	Document	Date	Actions
	1099 INT	<a href="#">Mustakos test_2.pdf</a>	12/5/2023 1:26:36 PM	
	CT License	<a href="#">CT License.jpg</a>	1/28/2023 11:26:46 AM	

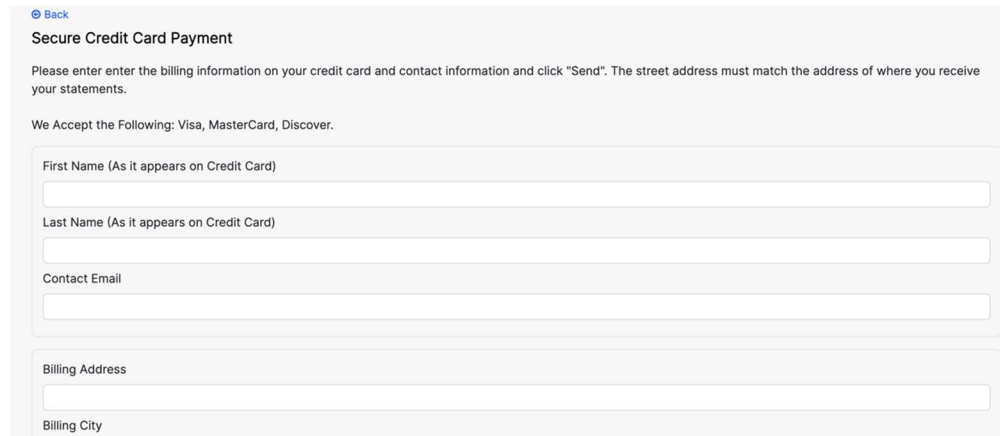
## TO E-SIGN DOCUMENTS

- To E-sign a document
  - Click on the “**E-sign Required**” link located in the **Signature** column
  - Enter in your name, PIN, SSN, Date of Birth and mailing address Zip code. Click on the E-sign Button
  - To request a PIN, please click on the request PIN button/call the office.
  - Once E-signed click on the **PRINTER ICON** to view your signature certificate.

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## TO VIEW & PAY ACCOUNT BALANCES:

- Your account balance will be listed in the section that says, “Get a Copy of My Invoice and Receipt.” Please note that this will list your Total Yearly Balance next to each available document and does not reflect itemized, individual charges. Please see your invoice for detailed information. To view your statement, simply click the [blue hyperlink](#) that says Statement under the “Statement/Invoice” column.
- To pay a balance, go to the “Secure Payment” column and click “Credit Card” A Secure Credit Card Payment screen then appears with instructions on how to pay. Once you’ve entered the payment information, click Send Payment.



The screenshot shows a web form titled "Secure Credit Card Payment". At the top left is a "Back" link. Below the title is a paragraph of instructions: "Please enter the billing information on your credit card and contact information and click 'Send'. The street address must match the address of where you receive your statements." Below this is a line of text: "We Accept the Following: Visa, MasterCard, Discover." The form contains several input fields: "First Name (As it appears on Credit Card)", "Last Name (As it appears on Credit Card)", "Contact Email", "Billing Address", and "Billing City".

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## TO SEND OR VIEW QUESTIONS OR NOTES:

- Select “Send Questions / Notes” from the menu on the left side of the screen to send or view notes or questions. In this section you can compose a message, or view sent, received, and archived messages.
- Compose Message  
Click the “Compose” button, type your message and click “Send.”
- View Messages
  - View Sent Messages  
To see messages you have sent, select “Sent” in the “Display” drop down box.
  - View New Received Messages  
To see new messages that you have received from the office, please select “Received” in the “Display” drop down box, and select “Unread Items” in the “Account Year” drop down box.
  - View Old Received Messages
    - View Old Messages - Show All Years  
If you want to view all old messages that have already been read, select “Received” in the “Display” drop down box, and click the box where it says “Show All Years” (see screenshot below).

- **View Old Messages by Account Year**  
To view messages from a specific account year, select “Received” in the “Display” drop down box, and select the appropriate account year that you are looking for under the “Account Year” drop down box (see screenshot below).
- Click the box where it says “Show All Years” and “View Archives” (see screenshot).

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## SECURE ELECTRONIC TAX RETURN STORAGE

- Secure Electronic Tax Return Storage is a complimentary service. All duplicate paper copies requested of your tax return will be charged at \$15.
- Should you like our office to scan your provided physical copies of supporting documents (like W-2's, 1099's, etc.) and store them electronically into your vault, it is available for \$50/tax year.

Whether you personally upload your supporting documents OR need our assistance in putting them into the portal, we are sure this will be a convenient option for referencing your materials in the future.

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## VIRTUAL DROP OFF SERVICE

- Scan all your tax materials into individual files clearly labeled.
- Upload to your client portal
- Text or call us to let us know all your materials are uploaded
- We prepare your return & communicate once things are ready for signature
- After your return is prepared, we can sit down and review together OR we can have a Zoom to review and then upload your return for virtual signature.

If you have any questions about the portal, please contact our office at (203) 283-9204 and we would be happy to assist you.