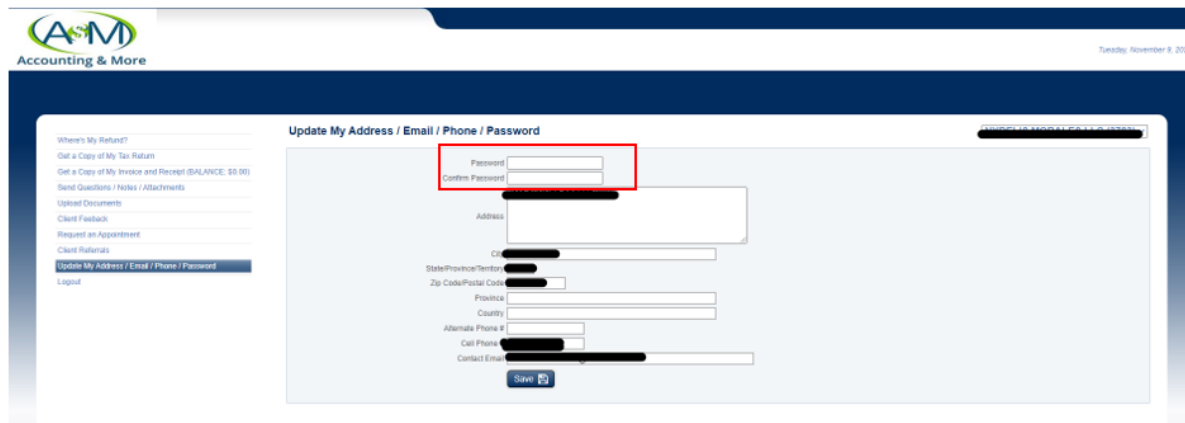


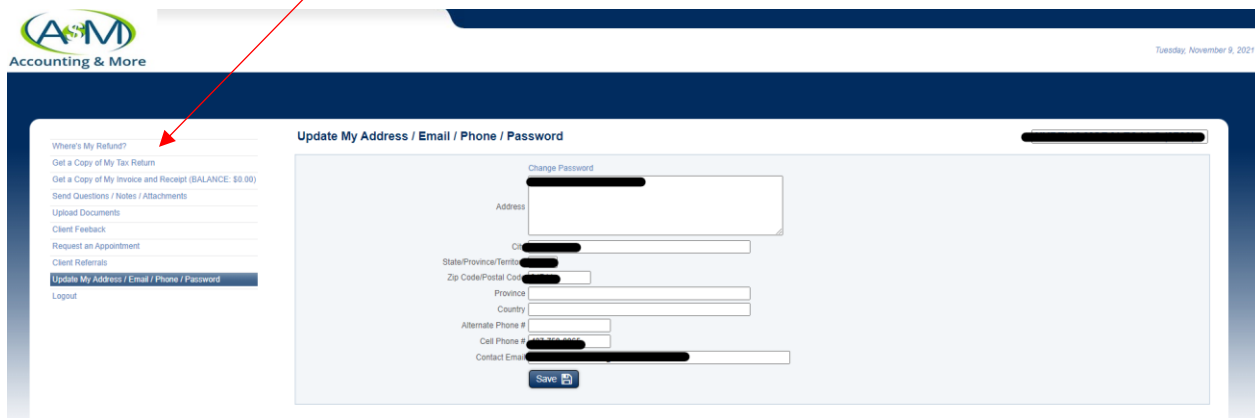
ATOM CLIENT PORTAL

How clients will access the portal and use menu to upload documents, get a copy of their tax return, request an appointment, etc.

- Client will receive link to access their portal
 - https://login2.atomanager.com/ATOM_AMI/WebInfo.aspx
- Login with *Employee ID Number, Social Security Number, or Email*
- Password: **1040**
- Client will then be prompted to create a new password



- Client's menu of items to do:



- Verify status of return
- Get copy of their return
- Upload documents
- Request appointments

- How to **upload documents**?
 - Click on upload documents
 - You can browse and look for the file
 - Or drop files on gray box

- Where's My Refund?
- Get a Copy of My Tax Return
- Get a Copy of My Invoice and Receipt (BALANCE: \$0.00)
- Send Questions / Notes / Attachments
- Upload Documents**
- Client Feedback
- Request an Appointment
- Client Referrals
- Update My Address / Email / Phone / Password
- Logout

Upload Documents

To upload one or more documents, select the **Browse** button below to select the files. You can also drag and drop the files you want to upload to the box labeled "Drop Files Here". Once you have selected the files and entered a description, select **Upload**.

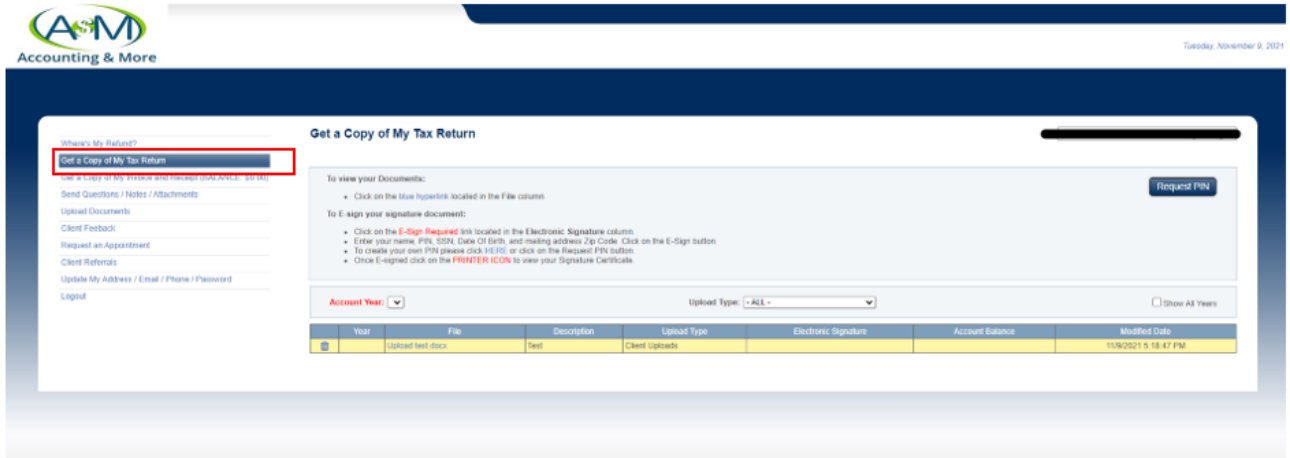
If you want to view a list of all your uploaded files please click [HERE](#).

Upload Document

Drop Files Here

Description

- Once uploaded you may find under Get a Copy of My Tax Return
- Client can also see their tax return in Get a Copy of My Tax Return



Get a Copy of My Tax Return

To view your Documents:

- Click on the blue hyperlink located in the File column.

To E-sign your signature document:

- Click on the **E-Sign Required** link located in the Electronic Signature column.
- Enter your name, PIN, SSN, Date Of Birth, and mailing address Zip Code. Click on the E-Sign button.
- To create your own PIN please click **HERE** or click on the Request PIN button.
- Once E-signed click on the **PRINTER ICON** to view your Signature Certificate.

Account Year: Upload Type: Show All Years

Year	File	Description	Upload Type	Electronic Signature	Account Balance	Modified Date
	Upload test.docx	Test	Client Uploads			11/9/2021 5:18:47 PM