

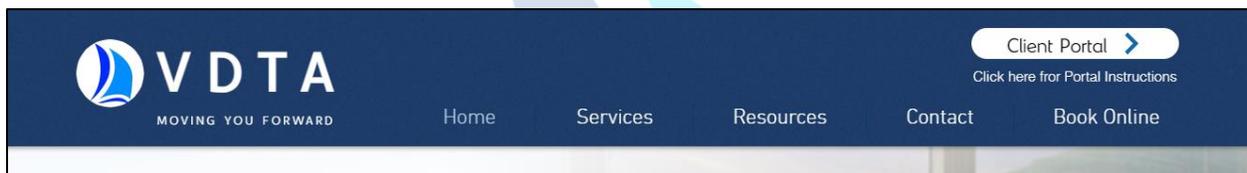
INSTRUCTIONS FOR FIRST USE OF YOUR VDTA CLIENT PORTAL

VDTA's client portal provides secure communication and document sharing between clients and our office. ATOM Software is the company VDTA has thoroughly vetted and trusts for its client portal and relationship management systems.

The steps to begin accessing your VDTA portal are shown below.

See Page 3 for portal and e-sign troubleshooting.

STEP 1: Go to vdtapro.com, then click "Client Portal" button (upper right)



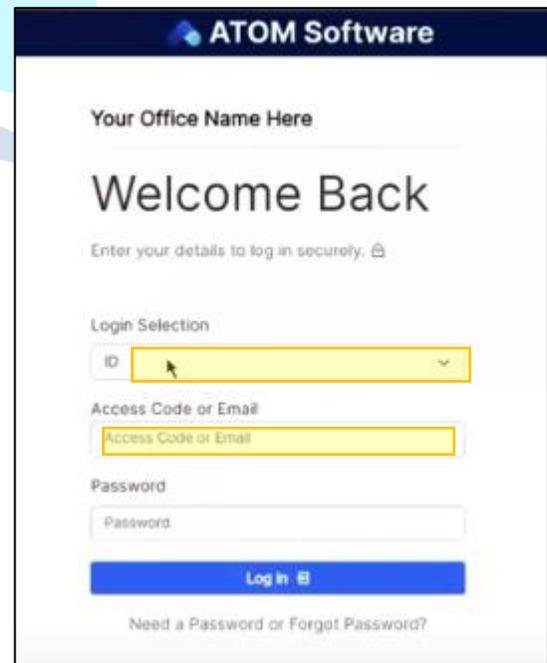
If you prefer, copy the web address below to bring you to the portal:

https://login.atomanager.com/ATOM_VDTA/WebInfo.aspx

STEP 2: Make Login Selection, then enter ID or email

- Use drop-down for Login Selection
 - ID (Taxpayer's SSN or EIN) or
 - Email (Taxpayer's email)Default is ID.
- Enter "Access Code" or Email
 - *Taxpayer's SSN or Company EIN
 - or
 - *Taxpayer's email address.

*Portal cannot be created under a spouse's SSN or spouse's email.

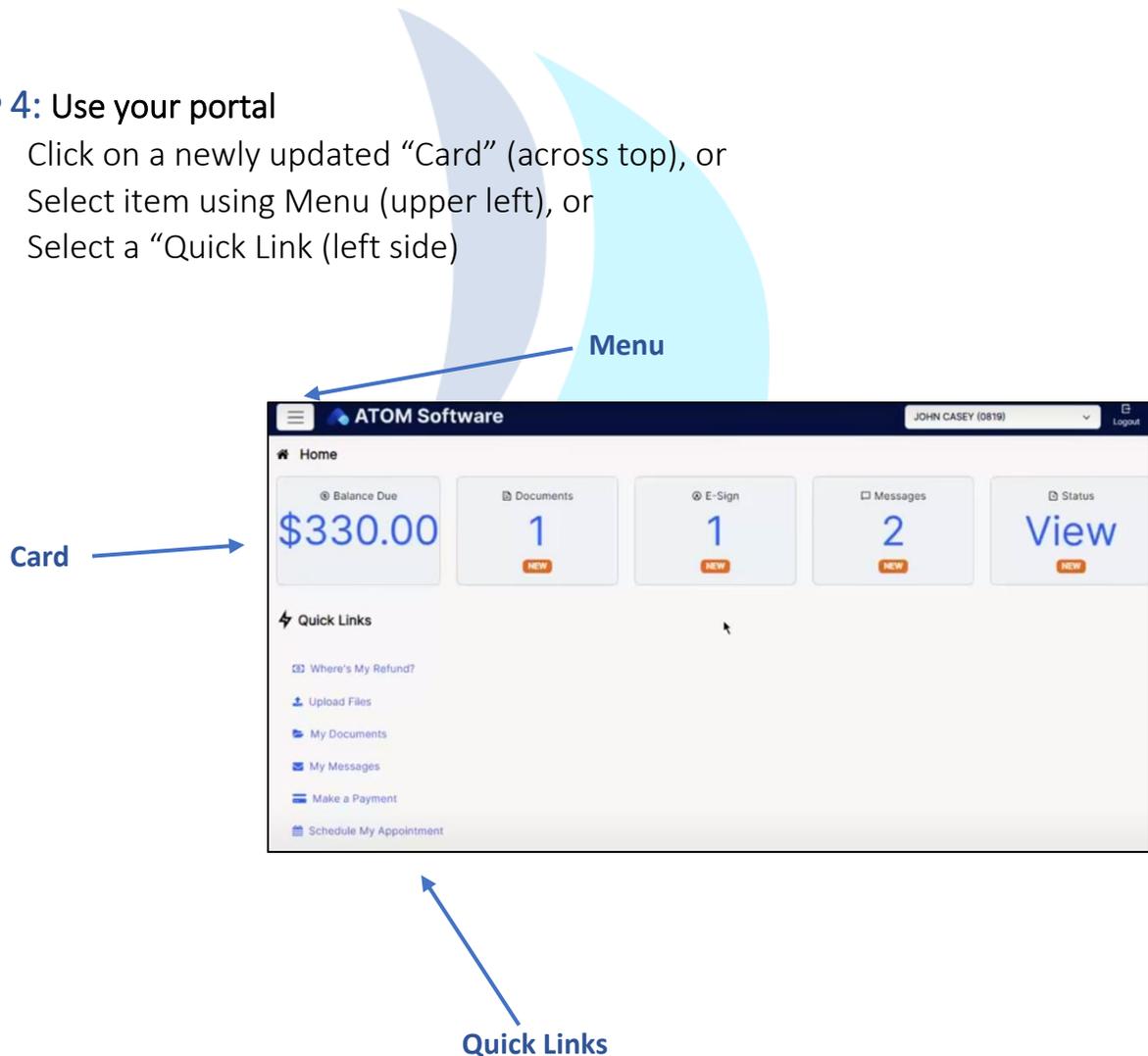
A screenshot of the ATOM Software login page. At the top is the "ATOM Software" logo. Below it is a placeholder for "Your Office Name Here". The main heading is "Welcome Back" with a subtext "Enter your details to log in securely." Below this are three input fields: "Login Selection" (a dropdown menu with "ID" selected), "Access Code or Email" (a text input field), and "Password" (a text input field). A blue "Log In" button is at the bottom, with a link "Need a Password or Forgot Password?" below it.

STEP 3: Enter a new password for your account & update any contact information.
Click SAVE.

- A 2-Factor Identification Code may be required. Select between receiving the code by a phone call, text, or email.
- Enter the code and continue.

STEP 4: Use your portal

- Click on a newly updated “Card” (across top), or
- Select item using Menu (upper left), or
- Select a “Quick Link (left side)





Portal and E-Sign Troubleshooting

Locked Out?

Portal: You may find yourself locked out of signing into your portal after 5 attempts. If this happens, wait 15 minutes, and try again. If the issue is not resolved, contact VDTA and we will reset your password manually for you.

Note: A VDTA portal is set up under the **taxpayer's** SSN and uses the **taxpayer's** email address. At this time a spouse's SSN and email address cannot be used to access the portal.

E-Sign: After 3 failed attempts, e-sign will automatically lock you out. You can either:

- a) Call the office and we can determine if a reset is possible.
- b) Print the signature documents, sign them, and scan or take a picture of the signed document and upload or text it back to us.

Texts should be sent to us at a 2nd VDTA line: 616-426-6524.

Other

A **pop-up blocker** on your web browser may prevent the e-sign box to appear. You may need to go into your web browser settings and turn off this pop-up blocker or change your browser settings to allow pop-ups to view the e-sign box.

E-signing is often easier from a computer or tablet. There **may be formatting issues when using a mobile device**.

If other issues arise, **clearing the cache** on your web browser may be helpful. It is possible your browser has saved some of the information we are trying to reset, and we want that information updated. The keyboard shortcut to clear your cache is CTRL + F5 (Command + Fn + F5 on Mac.)