



Instructions for

Logging into Your VDTA Client Portal

VDTA's secure client portal is hosted through a program called ATOM. The portal allows secure communication and document sharing between our clients and our office. Once you request access to your client portal, you will be receiving an email from VDTA with a link to our portal and your temporary password for your first login. The portal link can also be found at the top of our website, www.vdtapro.com, by clicking on the  button on the upper righthand corner of the home page. **For portal troubleshooting see page 2.**

Step 1: Enter taxpayer's SSN, ITIN or business' EIN. Then, enter the temporary password that VDTA has given you in email or over the phone.

VDTA

Secure Online Client Portal Login

Please enter your SSN / ITIN / EIN (No Dashes):
Please enter your SSN / ITIN / EIN (No Dash)

Password
Password

Need a Password or Forgot Password?

Login →

Step 2: Enter a new password for your account on the next screen & update any contact information you would like (you do not have to update your contact

Update My Address / Email / Phone / Password

Password

Confirm Password

Address
1234 Main Street

City Taxlandia

State/Province/Territory MI

Zip Code/Postal Code 01234

Province

Country

Alternate Phone #

Cell Phone # 616-840-6352

Contact Email testclient@gmail.com

Save

information to use your portal, just your password). Click SAVE.



Step 3: Choose from an action item on the left-hand menu to begin using your portal.

Where's My Refund?
Get a Copy of My Tax Return
Get a Copy of My Invoice and Receipt (BALANCE: \$0.00)
Upload Documents
Send a Message to VDTA
Additional Links
Update My Address / Email / Phone / Password
Logout

Portal Troubleshooting

I was locked out of signing into my portal for too many incorrect attempts.

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, let VDTA know and we will reset your password manually for you.

I was locked out of 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, or b) print out the signature documents, sign them, and scan or take a picture of the document and upload it back to us.

There may be a pop-up blocker on web browsers that disallow the e-sign box to appear.

E-signing is often easier from a computer or tablet. There may be formatting issues when using a mobile device so this is something to try also.

If you are still having issues, clearing your cache on your web browser may also help. It is possible your browser has saved some of the information we are trying to reset & we want to update that information. An easy keyboard shortcut to do this is CTRL+F5 while you are in your web browser.