

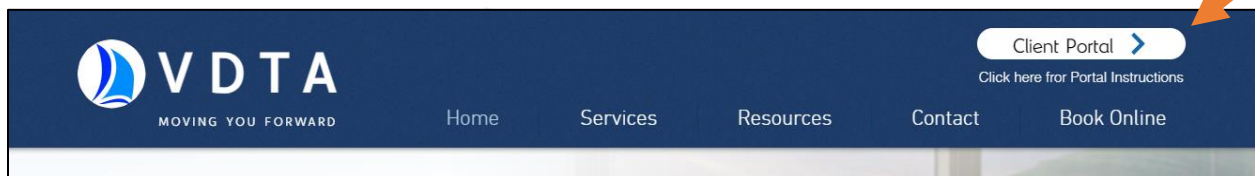
Instructions for First Use of Your VDTA Portal

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)

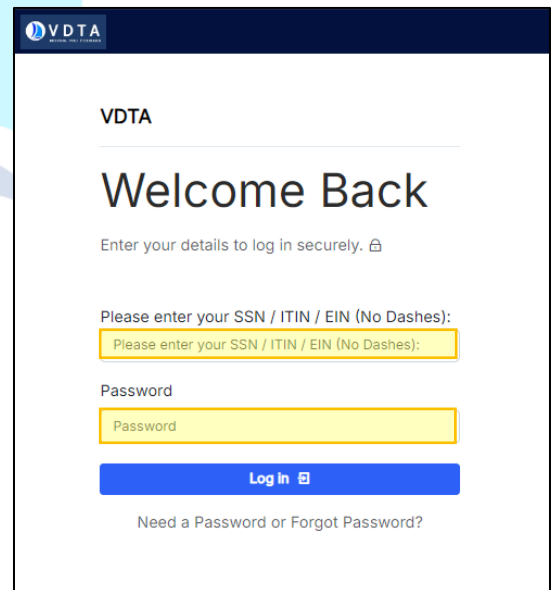


If you prefer, copy the web address below to bring you directly to the portal:

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

Step 2: Logging into your account

- Enter Taxpayer's SSN (or Company EIN).
- Enter your temporary password:
 - The VDTA office may have created a temporary password for you: **1040**
 - or
 - A temporary password may have been emailed to you from VDTAPro@ATOManager.com
- Click Log In.



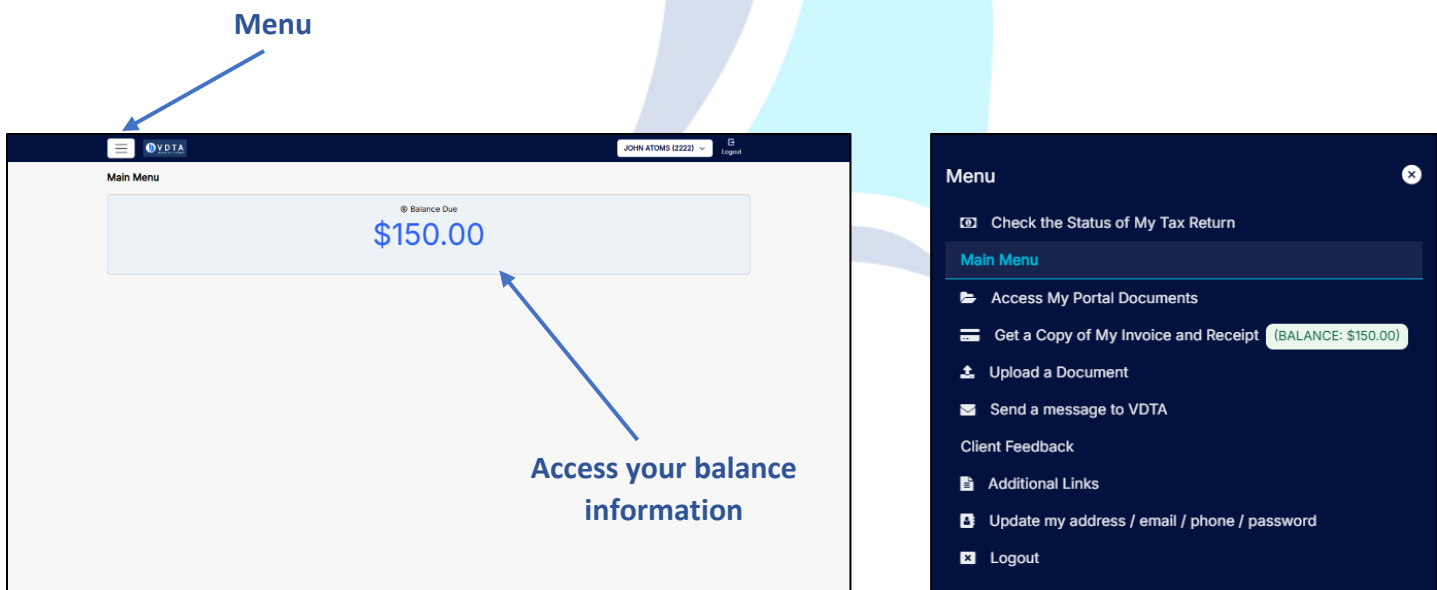
Step 3: Creating a new password

- Enter the password you would like to use for your VDTA portal.
- Confirm all contact information is current.
- Click **Save**.

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

Step 4: Using your portal

- View statements, invoices, and receipts from the home screen “
- Select Menu (upper left)
 - Choose from actions in the left-hand menu



The screenshot displays the VDTA portal interface. On the left, a dark blue sidebar menu is open, listing various actions such as 'Check the Status of My Tax Return', 'Access My Portal Documents', 'Get a Copy of My Invoice and Receipt (BALANCE: \$150.00)', 'Upload a Document', 'Send a message to VDTA', 'Client Feedback', 'Additional Links', 'Update my address / email / phone / password', and 'Logout'. The main content area shows a 'Main Menu' with a prominent 'Balance Due' of '\$150.00'. A blue arrow points from the 'Menu' label to the hamburger menu icon in the top left corner. Another blue arrow points from the text 'Access your balance information' to the '\$150.00' balance display.



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**. At this time a spouse's SSN 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 out the signature documents, sign them, then upload or text it to us at **616-426-6524**.

Other

A **pop-up blocker** on your web browser may prevent the e-sign box from appearing. 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.)