

Hey, it's Siobhan here. This is a quick video to tell you about our new portal system. We are so excited about this system, I can't tell you. So this new portal system is through Tax Dome and we're really excited. We've actually been testing it out for a couple of months with new client inquiries and new clients. You may not know this, but we always test new stuff on new people before we convert existing clients over into new systems, just in case stuff doesn't work out. So we try to protect our existing clients from upheaval unless there's really a good reason for it. We test stuff out on new clients, but I'll tell you, we've been getting extremely positive feedback on this system. It's really user friendly and it actually does a lot more than our prior portal system. So we're really excited about it.

This client portal is going to be used for a lot of things. It's going to be used for signing documents with us, so signing your engagement letter, signing the authorization form, and any other things that come up that need to be signed, they will be through your portal. Uploading your tax documents to us. That's always been done through our portal, and that will continue to be true with this portal. There are actually more new ways to do it. In this portal. You can download the Text Dome app. It's designed for clients to use. It's so easy to use. Oh my gosh. So if you have a document, you've submitted everything to us, and then one more straggler document comes in the mail. With your phone, you can take a picture of it and upload it using the app, it will go directly into your secure portal. It's encrypted through the app so it is secure. It's so simple and so easy and really quick. So you'll be uploading your tax documents to us there. As always, receiving everything digitally, electronically helps. They keep things more efficient for us. But if you are not a tech person at all or you're not comfortable with it, you always can mail us documents or walk them in the door in hand. But just so that you know, the digital version is more efficient for us to work with because all of our systems now are digital. Internally when we get paper products, we just scan them and use them digitally.

Completing your tax questionnaire is in this new portal system. So it's going to look and feel very different from what you've done in the past. I'm pretty excited about this. We've worked really, really hard on setting these questionnaires up in this new system because it gives us the ability to basically hide whole sections when they don't apply to you. So that will make it more efficient for people who have less that they need to share. You won't be going through a bazillion questions that don't apply to you and so it should be more efficient but also more targeted. And then there are areas where we are asking more questions because it is very targeted to your specific situation. So you'll be completing your tax questionnaire through this portal system.

And then finally it is designed for communication with us. Now this is optional. You don't have to use the messaging system that's built into the portal. And I'll tell you, it's pretty slick. We have been, again, testing this with some new clients recently and it's working really well. So if you choose to use the messaging system again, you can log into your portal to use it. If you install the app on your phone, you can use the messaging through the app. It's really, really efficient and really convenient. When we send you a message you will get a notification if you have the app installed and notifications turned on, you'll get an immediate notification. You have a message from us that might be, oh, we need one more thing, or we have three questions, or your tax return is done, you need to sign for it, or whatever it might be right now, of course you can still email us, you can still phone call to us. Those are absolutely okay. We're not shutting down other communication systems. But I do want to give you a heads up that the messaging system within the portal is actually pretty great. It's working really well.

So here's what you need to do now. Built into that system, there's a lot of educational videos available for you as you're navigating the system so that if you need to learn how to use something, there's a lot built in there to help you with that. And if we see pretty consistent questions coming up from people, we'll make some training videos for folks as well. The idea here is this should be user friendly and easy for you to learn and use. And so far it appears to be that way.

Here's what you need to know and what you need to do. You will receive an email invitation from us to join the tax dome system. So just follow the instructions in the email, sign up, you're going to create your own password. Please create a secure password because your tax data is in there. Now, it is a secure system, it's encrypted in there but if you use a really easy to guess password, you are jeopardizing the security of your social security number, your date of birth, your financial information, et cetera. So follow the instruction in the email, create a secure password for yourself, and then you'll see, you'll have some items from us there.

You'll have a message from us that has a to-do list, a checklist for getting your tax documents to us, signing the engagement letters, doing the questionnaire, sending your items and so forth. So you'll receive an email from us inviting you to the tax dome system. Just follow the instructions in the email. So far, all of the new clients we've tested with this have had no problems at all with signing up into the system. It's running very easily. Create a secure password for yourself and then start working through your tax packet items.

Not required, but definitely recommended is to download the app to your phone and turn on notifications for the app. You will then get immediate communication notification of our communications with you, and it will just help facilitate the communication with our office and keep things moving really smoothly for us all. So that's it, it's pretty simple.

There are lots of detailed trainings as needed, but let us know how it goes for you. So like I said, we're getting great feedback. It seems to be pretty easy to use for folks, but we are open to all feedback. It's all helpful for us in making the best possible use of this new tool and making it as easy as possible for all of you, all of our clients. So that's it. This is a pretty quick video, but more detailed training as needed. In the meantime, just watch for that email, follow the instructions, and start working on that tax packet.