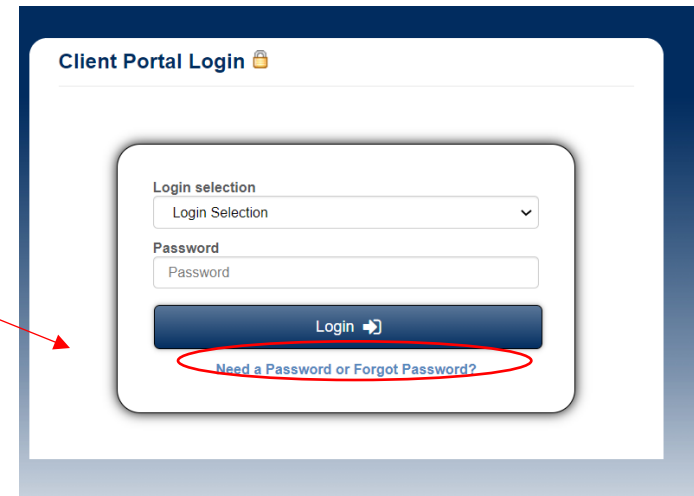




How to Establish Your Portal Account

Step 1: [Click here to access the portal](#)


Step 2: Click on the “Need a Password or Forgot Password?” link



Client Portal Login 

Login selection
Login Selection 

Password
Password

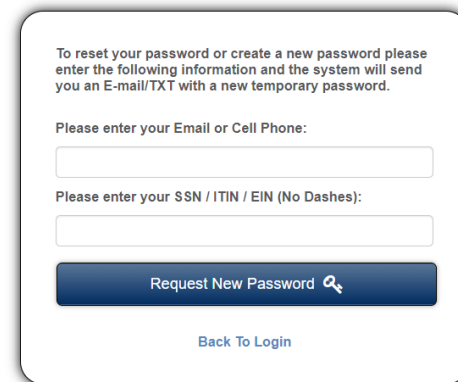
Login 

[Need a Password or Forgot Password?](#)

Step 3: Enter your email or cell phone and social or ITIN.

If it does not recognize your cell phone, please try with your email. You will get an email and/or text with your new temporary password.


Client Portal Login 



To reset your password or create a new password please enter the following information and the system will send you an E-mail/TXT with a new temporary password.

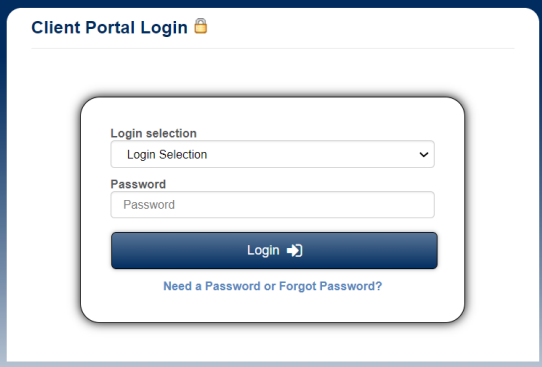
Please enter your Email or Cell Phone:

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

Request New Password 

[Back To Login](#)

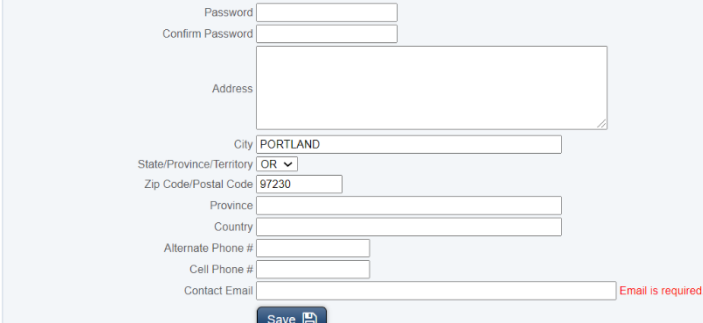
Step 4: Back on the initial login screen, make your login selection. You can login with either your ID (social security number or ITIN) or your email. Enter your temporary password and click Login.



The image shows the 'Client Portal Login' screen. It features a white login box with a blue border. Inside the box, there is a 'Login selection' dropdown menu with 'Login Selection' selected. Below this is a 'Password' input field with 'Password' entered. A blue 'Login' button with a right-pointing arrow is positioned below the password field. At the bottom of the box, there is a link that says 'Need a Password or Forgot Password?'. The entire login box is set against a dark blue background.

Step 5: Enter a new password and confirm it. Please also confirm that your address, phone number and email are correct and click Save

Update My Address / Email / Phone / Password



The image shows a form titled 'Update My Address / Email / Phone / Password'. The form contains several input fields: 'Password', 'Confirm Password', 'Address' (a large text area), 'City' (with 'PORTLAND' entered), 'State/Province/Territory' (a dropdown menu with 'OR' selected), 'Zip Code/Postal Code' (with '97230' entered), 'Province', 'Country', 'Alternate Phone #', 'Cell Phone #', and 'Contact Email'. A red error message 'Email is required' is visible next to the 'Contact Email' field. A blue 'Save' button with a floppy disk icon is located at the bottom right of the form.

How to Use the Portal Features

The menu for the portal is on the left-hand side of the screen.

[Where's My Refund?](#)

[Get a Copy of My Tax Return \(E-Sign Required\)](#)

[Get a Copy of My Invoice and Receipt \(BALANCE: \\$0.00\)](#)

[Upload Documents](#)

[Send Questions / Notes / Attachments](#)

[Update My Address / Email / Phone / Password](#)

[Logout](#)

Where's My Refund?

This link will show the most current year filing data, including your refund/ balance due results. It also provides links to both the IRS and Oregon so that you may check the processing status of your refunds.

Where's My Refund? JOHN ATOMS (2222) ▾

We have no record of your Federal return being electronically filed to the IRS or your information and password is incorrect. If you need further assistance please call our office. Thank you.

RETURN YEAR: 2009 ▾

[Federal 1040 Refund Status Link](#) [Federal 1040X Refund Status Link](#) [State Refund Status Link](#)

Left-hand menu:

- 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 Questions / Notes / Attachments](#)
- [Update My Address / Email / Phone / Password](#)
- [Logout](#)

Get a Copy of My Tax Return

This is where you can view your tax return as well as sign for efilg.

[Where's My Refund?](#)
Get a Copy of My Tax Return (E-Sign Required)
[Get a Copy of My Invoice and Receipt \(BALANCE: \\$0.00\)](#)
[Upload Documents](#)
[Send Questions / Notes / Attachments](#)
[Update My Address / Email / Phone / Password](#)
[Logout](#)

Get a Copy of My Tax Return

MARISA DANLEY (7513) ▼

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: 2020 ▼

Upload Type: - ALL - ▼

☐ Show All Years

Year	File	Description	Upload Type	Electronic Signature	Account Balance	Modified Date
2020	Signatures.docx	Please complete the E-Signature process; instructions are noted above.	05. E-SIGN - FORM 8879	E-Sign Required		12/7/2020 10:01:08 AM

Get a Copy of My Invoice and Receipt

You can view and pay your invoice here.

[Where's My Refund?](#)
[Get a Copy of My Tax Return](#)
Get a Copy of My Invoice and Receipt (BALANCE: \$350.00)
[Upload Documents](#)
[Send Questions / Notes / Attachments](#)
[Update My Address / Email / Phone / Password](#)
[Logout](#)

Get a Copy of My Invoice and Receipt

JOHN ATOMS (2222) ▼

Client Balance: **\$350.00**

Year	Balance	Business Type	Statement / Invoice	Secure Payment
2018	\$0.00	Batch Message Test	Statement	
2019	\$350.00	Tax Preparation	Statement	Pay with Credit Card
2009	\$0.00	Tax Preparation	Statement	

Client Portal Instructions 12.5.2020

Upload Documents

You can upload your documents here. To view all upload files, including those sent by Inclusion, click [here](#).

The screenshot shows a user interface for uploading documents. On the left is a sidebar menu with links: 'Where's My Refund?', 'Get a Copy of My Tax Return', 'Get a Copy of My Invoice and Receipt (BALANCE: \$350.00)', 'Upload Documents' (highlighted with a red oval), 'Send Questions / Notes / Attachments', 'Update My Address / Email / Phone / Password', and 'Logout'. A red arrow points from the text 'You can upload your documents here' to the 'Upload Documents' link. The main content area is titled 'Upload Documents' and includes a dropdown menu for 'JOHN ATOMS (2222)'. Below the title, instructions state: '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**.' A red oval highlights the words 'selected the files and entered a description' in the instructions, with a red arrow pointing to the 'Drop Files Here' box. Below the instructions, there is a 'Browse' button, an 'Upload Document' label, a 'Drop Files Here' box, a 'Description' label, and an 'Upload' button. A red arrow points from the text 'To view all upload files, including those sent by Inclusion, click here.' to a link labeled 'HERE' in the text 'If you want to view a list of all your uploaded files please click HERE.'

Upload Documents JOHN ATOMS (2222) ▾

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



Send Questions/Notes/Attachments

You can send us a note about your files here.

[Where's My Refund?](#)
[Get a Copy of My Tax Return \(E-Sign Required\)](#)
[Get a Copy of My Invoice and Receipt \(BALANCE: \\$0.00\)](#)
[Upload Documents](#)
[Send Questions / Notes / Attachments](#)
[Update My Address / Email / Phone / Password](#)
[Logout](#)

Send Questions / Notes / Attachments

MARISA DANLEY (7513) ▾

[Compose Message](#)  [Archive](#) 

Instructions: To create a new message select the "Compose Message" button. To store a message select the "Archive" button.

Total Count: 3 Display: **Received** ▾ Account Year: **-- Unread Items --** ▾ ☐ Show All Years ☐ View Archives

	From	Subject	Received Date
--	------	---------	---------------

Update my Adress/Email/Phone/ Password

Please confirm that we have your most up-to-date information.

[Where's My Refund?](#)
[Get a Copy of My Tax Return](#)
[Get a Copy of My Invoice and Receipt \(BALANCE: \\$350.00\)](#)
[Upload Documents](#)
[Send Questions / Notes / Attachments](#)
[Update My Address / Email / Phone / Password](#)
[Logout](#)

Update My Address / Email / Phone / Password

JOHN ATOMS (2222) ▾

[Change Password](#)

Address

1600 PENNSYLVANIA AVENUE NW

City

WASHINGTON DC

State/Province/Territory

AA ▾

Zip Code/Postal Code

20502

Province

Country

Alternate Phone #

x

Cell Phone #

Contact Email

MARISA@INCLUSIONTAXSERVICES.COM

[Save](#) 