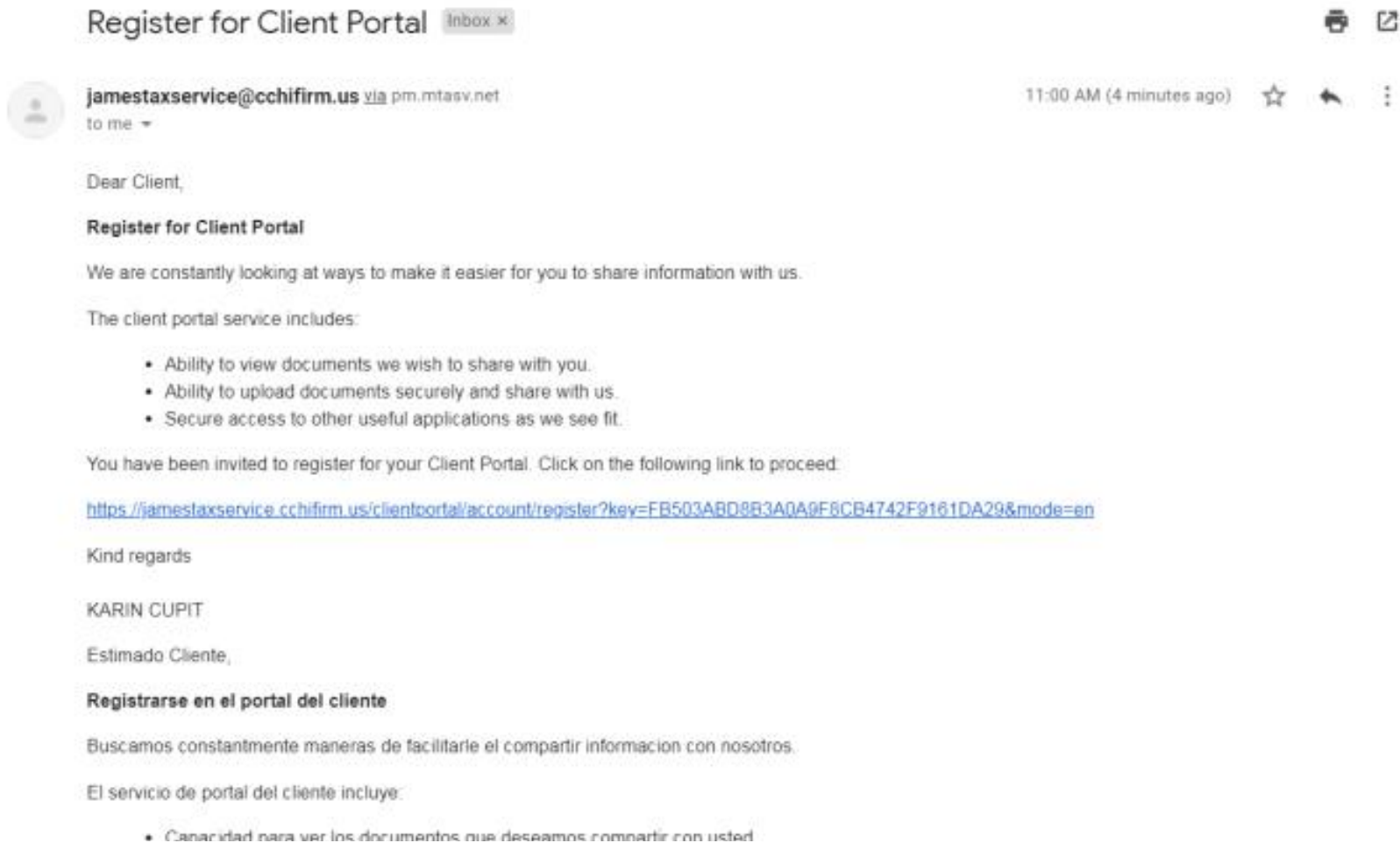


Below are some screen shots of the process for creating a secure portal for uploading and downloading your tax documents and return. You must request a portal user from James Tax Service. You will then receive an email from James Tax Service inviting you to use the portal. The first screen shot is what the email will look like.

To request an user call the office at 405-632-8229 or email to info@jamestax.com



Register

or

Login

To activate a new portal account:

First Name

Last Name

Mobile Phone

Email address

This field is required.

Create Password

This field is required.

 Register

To login to existing portal account:

Email

Oops! You need to enter a username

Password

Oops! You need to enter a password

Login

[Forgot your password?](#)

Multi-Factor Authentication

Select how you want to receive the authentication code:

Google Authenticator

The Google Authenticator app needs to be installed on your mobile device so that you can generate an authentication code.

E-mail to

beaXXXXXXXXXXXX@gmXXXXXX

You will receive the authentication code by e-mail to this registered e-mail address.

Proceed

Multi-Factor Authentication

Select how you want to receive the authentication code:

Google Authenticator

The Google Authenticator app needs to be installed on your mobile device so that you can generate an authentication code.

E-mail to

beXXXXXXXXXXXXXXXXX@gmXXXXXXXX

You will receive the authentication code by e-mail to this registered e-mail address.

Resend

Enter the authentication code and click the Submit button.

Authentication code:

Remember me

Do not select the above box if this is a public device

Submit

[Home](#)[My Details](#)[My Documents](#)[Unread Files](#)[Invited](#)[Portal File Search](#)

James Tax Service Client Portal

Welcome to our secure portal.

We strive for all of your personal information to be safe and secure.

The following is a roadmap for this site:

'My Details': Your contact info-you can edit and update

'My Documents': This is where you will find anything we have uploaded for you

*You can also upload documents for us here.

'Unread Files': New files

At the top of each page you can **'Invite to Portal'** to invite someone to this portal.

*****If you are needing to sign and complete your return,*

please sign Form 8879 and OK 511EF (these should be the first 2 pages)

scan or take a picture

upload through this portal or fax back to 405.634.5093.

*Please do NOT email back, it is not secure. Upload or fax back. *****

- Home
- My Details
- My Documents
- Unread Files
- Invited

Portal File Search

My Details - TEST, JENNI

Edit Your Details

Invite to Portal

Client Details

Name
TEST, JENNI

Code	Type
4122490	Individual

Communication Details

Email adventuresofjennifer@gmail.com

- Home
- My Details
- My Documents
- Unread Files
- Invited

Portal File Search


My Details - TEST, JENNI

Invite to Portal

Addresses

Postal Address ▾

Address:


Address: 


City / Town:



State: Postcode:


Country:

Communications

Work Phone: Mobile: Skype: 

Home Phone: Fax: Twitter: 

E-mail:  LinkedIn: 

Website: 

[Home](#)[My Details](#)[My Documents](#)[Unread Files](#)[Invited](#)[Portal File Search](#)

My Documents - TEST, JENNI

[Invite to Portal](#)

TEST, JENNI

[Upload](#)[Add Folder](#)[Download](#) [Cut](#) [Copy](#) [Paste](#)

<input checked="" type="checkbox"/>	Type	Name	Date Modified	Size
<input checked="" type="checkbox"/>	 PDF	Test, Jenni () (1).pdf	Apr 03 2020	21.5 KB
<input checked="" type="checkbox"/>	 PDF	Test, Jenni ().pdf	Apr 03 2020	21.5 KB
<input checked="" type="checkbox"/>	 PDF	Test, Jenni (Taxpayer State Copy).pdf	Apr 03 2020	906.6 KB

- Home
- My Details
- My Documents
- Unread Files
- Invited

Portal File Search

Invited to TEST, JENNI

Invite to Portal

Address	Name
---------	------

No results to display

Your documents are ready to review: JENNI TEST.5151.04/03/20 3:49:32 PM Inbox x



JAMES TAX SERVICE Online Signatures <noreply@signixmail.com>

to me ▾

10:49 AM (1 minute ago)



Dear JENNI TEST,

Your tax documents are available online for viewing and signing.

To access your document, click here:

<https://www.signix.net/enter.jsp?m=102&i=RoUEMOe814LIPS3VbPNIA5>

If you have a question, please contact your tax professional.

Reply

Forward



To get started, you need to agree to receive electronic documents using the electronic signature service under the terms of the E-Sign Legal Consent by choosing **Accept** below. This will confirm that you are able to access all of the documents provided to you in electronic form and you agree to be bound by the terms and conditions of use.

To confirm your identity please enter the information below. Click **Next** to continue!

[Read Legal Consent](#)

Agree to Legal Consent? Accept Decline

Last 4 digits of Social Security Number

Date of Birth (mm/dd/yyyy)

Next