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 and 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 for Client Portal Inbox ×		•	Ø
-	jamestaxservice@cchifirm.us via pm.mtasv.net to me -=	ŵ	*	:
	Dear Client,			
	Register for Client Portal			
	We are constantly looking at ways to make it easier for you to share information with us.			
	The client portal service includes:			
	 Ability to view documents we wish to share with you. Ability to upload documents securely and share with us. Secure access to other useful applications as we see fit. 			
	You have been invited to register for your Client Portal. Click on the following link to proceed.			
	https://jamestaxservice.cchifirm.us/clientoortal/account/register?kev=FB503ABD8B3A0A9F8CB4742F9161DA29&mode=en			
	Kind regards			
	KARIN CUPIT			
	Estimado Cliente,			
	Registrarse en el portal del cliente			
	Buscamos constantmente maneras de facilitarle el compartir informacion con nosotros.			
	El servicio de portal del cliente incluye			
	Canacidad para verios documentos que deseamos compartir con usted			

Register	or	Login	
To activate a new portal account:		To login to existing portal account:	
First Name		Email Cops! You need to enter a username	
Last Name		Password	
United States of Ame *		Oops! You need to enter a password	
Email address This field is required.			
Create Password This field is required.		Login Forgot your password?	
🖌 Register			

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 beaxxxxxxx@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.

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

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

Resend

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tome Ay Details Ay Documents Unread Files	James Tax Service Client Portal Welcome to our secure portal.	
Ay Documents Unread Files		
Inread Files		
	The state for all of some second before the barrents and second	
	We strive for all of your personal information to be safe and secure.	
	The following is a roadmap for this site:	
Portal File Search	'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.****	

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KARIN CUPIT				jen don Logout Help
Home	My Details - TEST, JENNI		Edit Your Details	Invite to Portal
My Details				
My Documents Unread Files	Client Details	Commun	nication Details	
Invited	TEST, JENNI	Email	adventuresofjennifer@gmail.com	
	Code Type			
Portal File Search	4122490 Individual			
		CCH #irm 2019.40.16702.0 - Copyright @	2020 Wolters Kluwer. All rights reserved.	Wolters Kluwer

KARIN CUPIT								jen do	n Logout Help
Home	My Details	- TEST, JENNI					Inv	ite to Portal	
My Details My Documents									
Unread Files	Addresses		Communications						
Invited		Postal Address	Work Phone:		Mobile:		Skype:		3
	Addressee:		Home Phone:		Fasc		Twitter:		
Portal File Search	Address		E-mail:			LinkedIn:		in	
			Website:						
	City / Town:								
	State:	Postcode:							
	Country:	Ŧ							
1								✓ Save	Cancel
			CDH Firm 2019.40.167	2.0 - Copyright @ 20	20 Wolters Kluwer, All rig	pts reserved.		🤹.w	olters Kluwer

				jen don Logo
My	Docum	ents - TEST, JENNI		Invite to Portal
	ST, JENNI			Upload 🖸 Add Folder
	0			
	Download	Cut Copy Paste		
h 2	Туре	Name	Date Modified	Size
	12	Test, Jenni () (1).pdf	Apr 03 2020	21.5 KB
2	12	Test, Jenni ().pdf	Apr 03 2020	21.6 KB
1	12	Test, Jenni (Taxpayer State Copy).pdf	Apr 03 2020	906.6 KB
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KARIN CUPIT		jen don Logout Help
Home	Invited to TEST, JENNI	Invite to Portal
My Details		
My Documents		
Unread Files	Address Name	
Invited	No results to display	
Portal File Search	í	
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Your documents are ready to review: JENNI TEST.5151.04/03/20 3:49:32 PM



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=RoUEMOe814LtPS3VbPNtA5

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



	? ENGLISH
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	c
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	H
Date of Birth (mm/dd/yyyy)	
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