

PHILLIPS TAX & ACCOUNTING, INC.

Client Portal Instructions

Beginning October 2023, Phillips Tax & Accounting, Inc. will have a new website for our secure portal. If you already have an existing portal, you will receive an email from administrator@phillips-tax.com with a welcome e-mail. Your login will remain the e-mail address at which you receive the welcome e-mail but you will be required to set up a new password. In the e-mail you will have a temporary password which you will be able to change upon your initial login.

If you are requesting access to our portal for the first time, you will receive the same welcome e-mail, but it will come at your request. Below is what the welcome e-mail will look like:

Welcome to your Web Portal for Phillips Tax & Accounting, Inc. We have set up your access as follows:

Username: youremail@yourdomain.com
Password: <temporary password>

Please click on the link below to access the Portal.

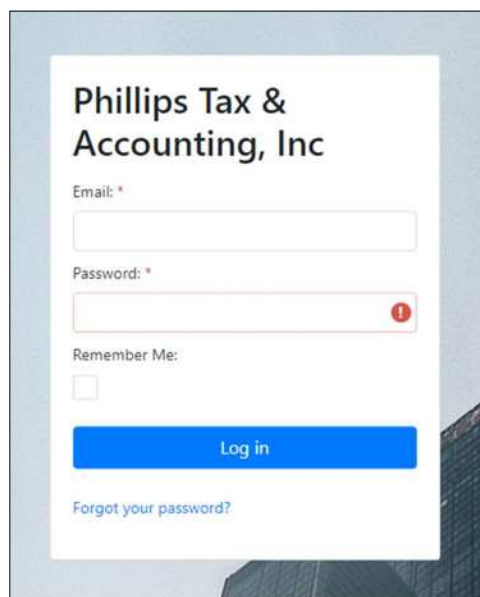
To access the portal, please go to <https://portal.phillips-tax.com>

Enter your Username and Password from above. After your initial login you will be prompted to change your Password to something meaningful to you. **Your Username will remain your email address.**

Should you have any difficulties please contact us at 920-231-1227

Phillips Tax & Accounting, Inc.
Accredited Tax Advisors, Certified QuickBooks ProAdvisors
1508 Oregon Street, Oshkosh, WI 54902
(920) 231-1227 Office (920) 231-1228 Fax

The login page for our portal appears as follows:



Phillips Tax & Accounting, Inc

Email: *

Password: *

Remember Me:

Log in

[Forgot your password?](#)

When you first log in, you will see a listing of folders along the left-hand side. The *contents* of each folder are shown on the right side as you click on each folder. The set up of the folder hierarchy is different from our previous portal, but once you are familiar with it, it should be more efficient.

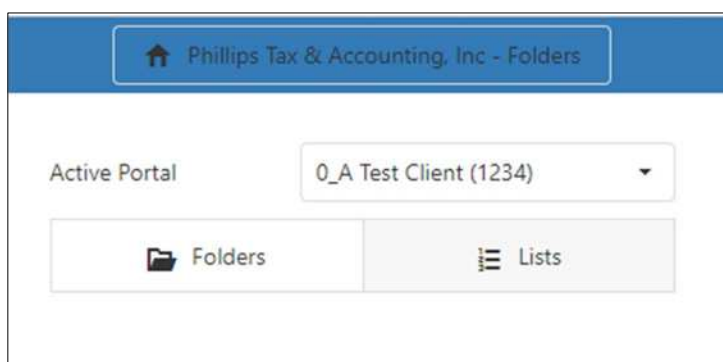
Anything that you need to upload will go under **Client Uploads** for the tax year in question. Anything your tax preparer needs to share with you will be placed in the Client Downloads folder.

The **TAX SEASON FOR CLIENT REVIEW** folder will be used for important, time sensitive notifications, including informing you when we are ready to start receiving tax documents and your client tax organizer.

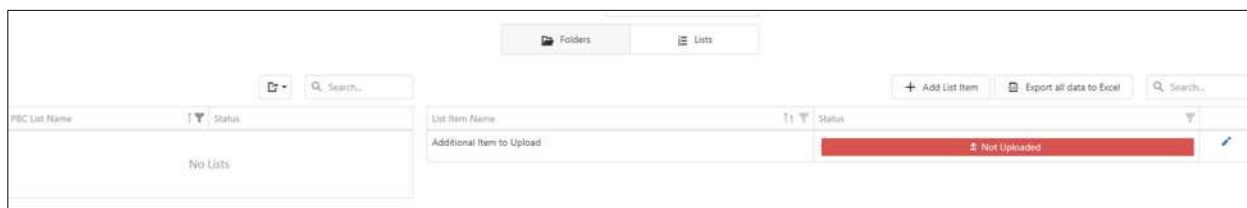
The only exception to this folder set up is if you are missing any tax documents. Once a staff member reviews your uploads, if it is determined we need more information, they will upload a request list to you. More information on that is explained later in this document.



At the top of the screen are two buttons, one for folders (which is where you land by default when you log in and has already been introduced above) and a second one for Lists. If you have more than one portal with us (if you have a business, for example) you can use the "Active Portal" drop down to switch between your portals.



Lists will generally only be used to prompt you for specific missing documents. As shown below, a staff member at Phillips Tax can upload a request list and you can upload the item directly to that list item.



If a staff member or your tax preparer uploads anything to your portal, you will receive a notification e-mail of that upload, just like our old portal.

Please let us know if you have any questions or issues, we will be happy to assist you.