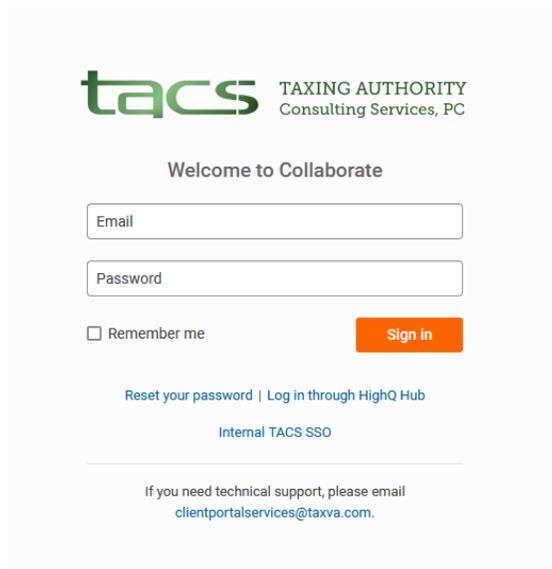


TACS Client Portal Instructions

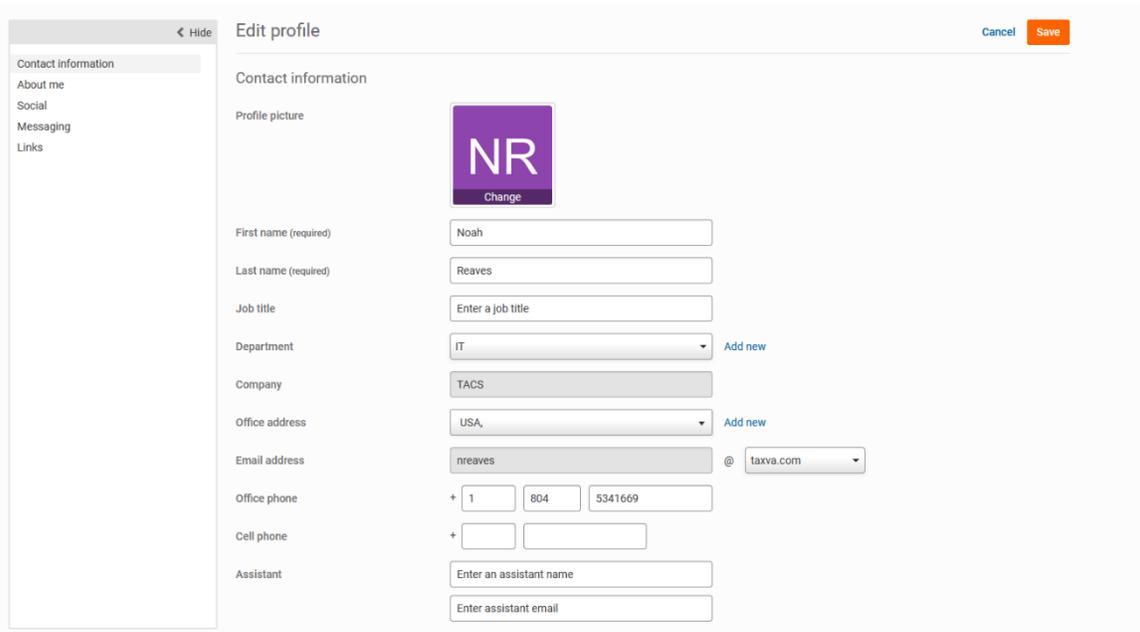
Logging into the TACS Client Portal site:

1. Enter the following address in a browser or click on the link: <https://clientportal.taxva.com/>
2. The following login screen will come up:



The screenshot shows the TACS login page. At the top left is the TACS logo, followed by the text "TAXING AUTHORITY Consulting Services, PC". Below this is the heading "Welcome to Collaborate". There are two input fields for "Email" and "Password". A checkbox labeled "Remember me" is next to the password field. An orange "Sign in" button is to the right. Below the fields are links for "Reset your password | Log in through HighQ Hub" and "Internal TACS SSO". At the bottom, there is a note: "If you need technical support, please email clientportalservices@taxva.com."

3. Enter the login information sent to you in a separate activation email. The email will most likely be from noreply-taxva@highq.com. If you do not see this email, you may need to look in your Spam or Junk email folders. If you do not have a login, cannot find the activation email, or have issues with your credentials, email files@taxva.com
4. After you log in, you are presented the edit profile page:



The screenshot shows the "Edit profile" page. On the left is a sidebar with a "Hide" button and a menu: "Contact information" (selected), "About me", "Social", "Messaging", and "Links". The main content area is titled "Edit profile" and has "Cancel" and "Save" buttons in the top right. The "Contact information" section includes: "Profile picture" (a purple square with "NR" and a "Change" button); "First name (required)" (text box with "Noah"); "Last name (required)" (text box with "Reaves"); "Job title" (text box with "Enter a job title"); "Department" (dropdown menu with "IT" selected and an "Add new" link); "Company" (text box with "TACS"); "Office address" (dropdown menu with "USA," selected and an "Add new" link); "Email address" (text box with "nreaves" and a dropdown menu with "taxva.com" selected); "Office phone" (text boxes with "1", "804", and "5341669"); "Cell phone" (text boxes with "+" and empty fields); and "Assistant" (text boxes for "Enter an assistant name" and "Enter assistant email").

You can enter as much or as little information as you would like. You will have to click on "Save" to continue to your portal.

TACS Client Portal Instructions

5. At first login, you will be presented with the following message screen:

The screenshot shows the TACS Client Portal interface. At the top left is the TACS logo (TAXING AUTHORITY Consulting Services, PC). To the right are icons for search, notifications, email, favorites, and user profile. Below the header is a breadcrumb trail: Home > TACS Demo. The main content area is titled "Terms and Conditions" and includes the following text:

Last updated May 11, 2023
AGREEMENT TO OUR LEGAL TERMS

We are Taxing Authority Consulting Services, PC, doing business as TACS ("Company," "we," "us," "our"), a company registered in Virginia, United States at PO BOX 31800, Henrico, VA 23229.

We operate the website clientportal.taxva.com (the "Site"), as well as any other related products and services that refer or link to these legal terms (the "Legal Terms") (collectively, the "Services").

You can contact us by phone at 804-545-2500, email at highqcontacts@taxva.com, or by mail to PO BOX 31800, Henrico, VA 23229, United States.

These Legal Terms constitute a legally binding agreement made between you, whether personally or on behalf of an entity ("you"), and Taxing Authority Consulting Services, PC, concerning your access to and use of the Services. You agree that by accessing the Services, you have read, understood, and agreed to be bound by all of these Legal Terms. IF YOU DO NOT AGREE WITH ALL OF THESE LEGAL TERMS, THEN YOU ARE EXPRESSLY PROHIBITED FROM USING THE SERVICES AND YOU MUST DISCONTINUE USE IMMEDIATELY.

We will provide you with prior notice of any scheduled changes to the Services you are using. The modified Legal Terms will become effective upon posting or notifying you by email as stated in the email message. By continuing to use the Services after the effective date of any changes, you agree to be bound by the modified terms.

The Services are intended for users who are at least 18 years old. Persons under the age of 18 are not permitted to use or register for the Services.

At the bottom of the text are two buttons: "Decline" and "Accept". Below the buttons is the Thomson Reuters logo and copyright information: © 2023 Thomson Reuters | Thomson Reuters Privacy Statement | Terms of Use | Help | Contact us

Click on the "Accept" box. If you click on "Decline" instead, it will not let you into the site. You must exit out of the Client Portal and relog in to have the above message screen presented again. You should only have to click on "Accept" once. For your convenience, the agreement is always accessible by clicking the "Terms of Use" link at the bottom of the screen.

6. Once your login information is verified, you should a webpage similar to the following:

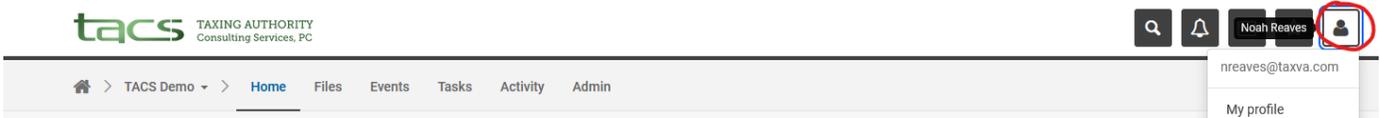
The screenshot shows the TACS Client Portal dashboard. At the top left is the TACS logo (TAXING AUTHORITY Consulting Services, PC). To the right are icons for search, notifications, email, favorites, and user profile. Below the header is a breadcrumb trail: Home > TACS Demo > Home. The main content area is divided into four sections:

- Upcoming Events:** In the future, GDC for Demo, On 29 Dec 2023, 13:00 - 14:00 GMT-05:00, 2 Comments.
- News:** TACS Operations, All TACS systems are operating normally.
- Newsletters:**
- Presentations:**

On the left side of the dashboard, there is a large circular graphic with the text "YOUR DESIGN HERE" repeated around the perimeter.

TACS Client Portal Instructions

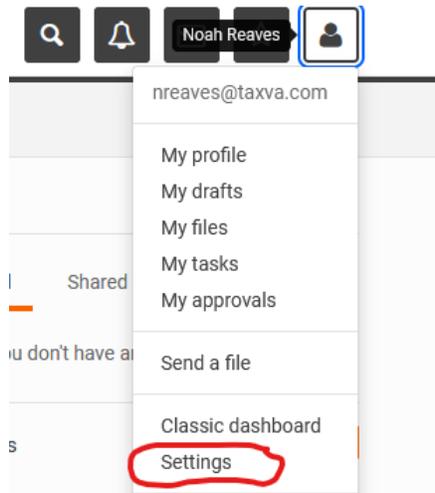
7. To see who is logged into the site, click the profile icon at the top right corner of your browser window (circled in red):



The login email for the signed in user will be the first item listed and the full name will show by hovering over the icon.

Changing your password on the TACS Client Portal site:

1. After logging into the TACS Client Portal site, click on the profile icon in the upper right corner of the screen, outlined in blue below, and select the Settings option from the menu, circled in red below.



2. On the Settings page under the General category, under "System password", click "Change".



TACS Client Portal Instructions

3. Type in the password you want in the boxes under New Password and Re-enter your new password. Then click on Save.

Change password

Enter the following details

Instance TACS

Old password

New password

Re-enter your new password

Please note that you will need to enter your new password the next time you log in, as resetting your password will invalidate your existing sessions

[Cancel](#) [Save](#)

Uploading to the TACS Client Portal site:

1. To upload a file, navigate to the "Account files for TACS" folder. You can get there easily from the option in the Quick Links section on Home page (circled in blue below) or via the Files button on the toolbar (circled in red):

Home > TACS Demo > **Files** Events Tasks Activity Admin

If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).

Quick Links

To access your folders, follow the links below or click "Files" in the header menu:

- **Account files for TACS**
- Remittance
- Collection Reports
- Invoices
- Legal Services Agreement
- Litigation Documents
- Legal Documents

Upcoming Events

No items to display

Newsletters

[TACS Briefs – December 2024](#)

TACS Facts

- [TACS FACTS Vol 19 Issue 2-Spring 2024](#)
(Resource For Government Finance Professionals on Developments)
- [TACS FACTS Vol 19 Issue 1-Winter 2024](#)
(Trends In Collection, Assessment, Bankruptcy, and Other Areas)
- [TACS FACTS Vol 18 Issue 4-Autumn 2023](#)
(Virginia Supreme Court Rules on Tax Sale Excess Proceeds)
- [TACS FACTS Vol 18 Issue 2-Spring 2023](#)
(Litigation and Legislative updates)
- [TACS FACTS Vol 18 Issue 1-Winter 2023](#)
(Statute of Limitations)

[See all TACS FACTS newsletters](#)

News

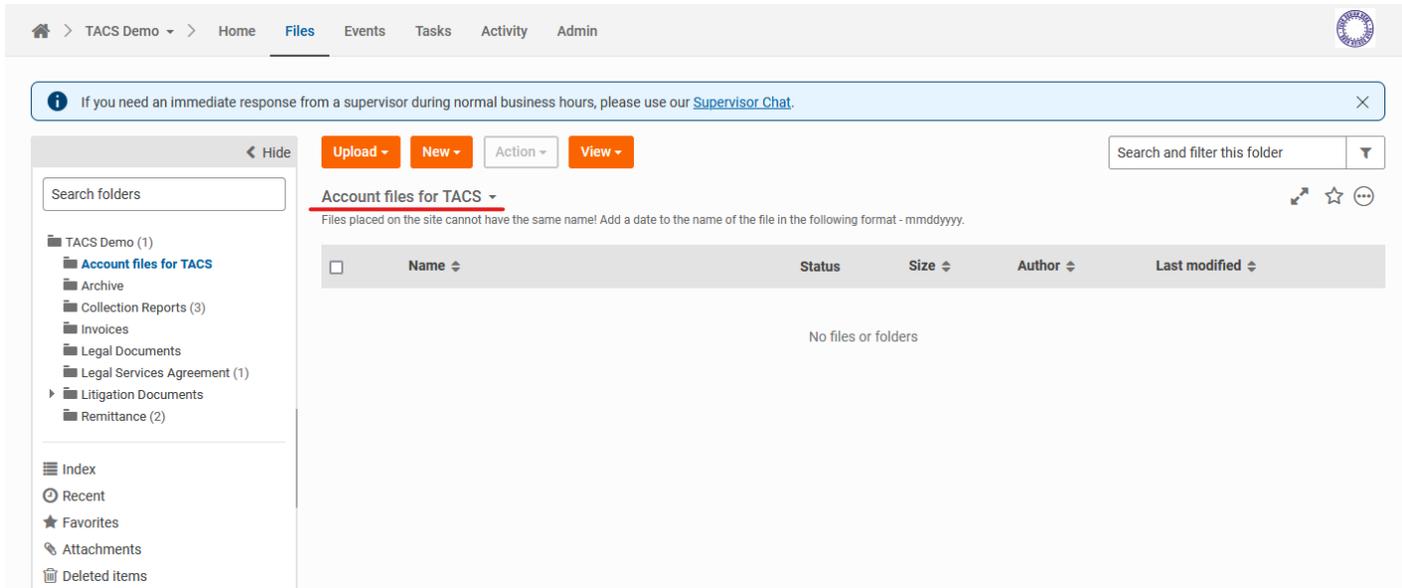
All TACS systems are operating normally.

Documentation

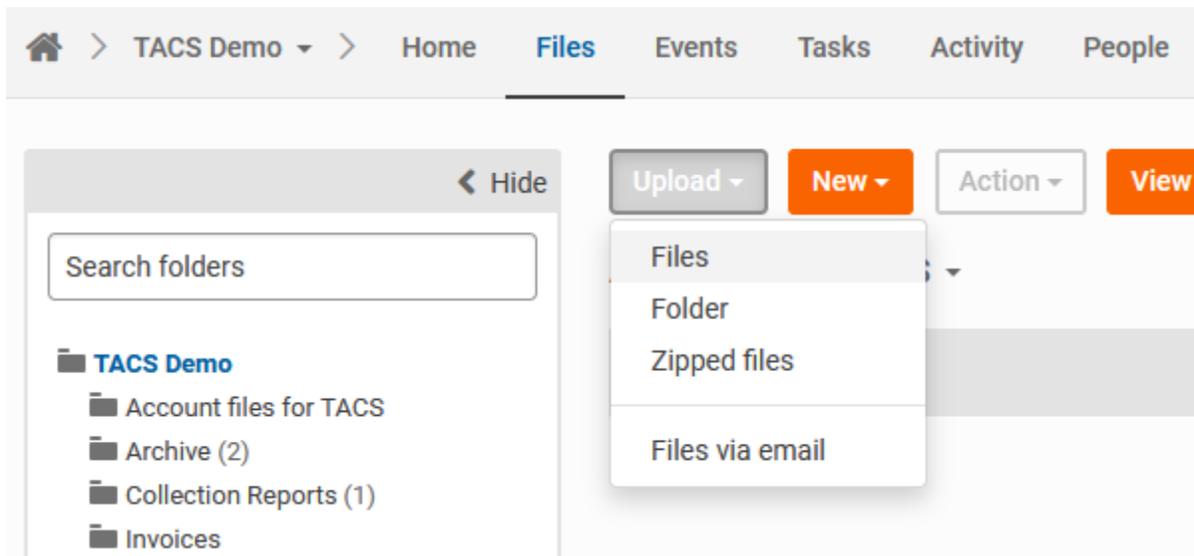
- [TACS Client Portal Guidance](#)
- [TACS Client Portal User Help Documentation](#)
- [TACS Client Portal Demo Video](#)
- [TACS Training](#)
- [What to Expect When You Are Using TACS](#)
- [TACS Collections Overview](#)
- [Bankruptcy Overview](#)
- [Non-Debt Collections Overview](#)
- [Legal Department Overview](#)
- [Revision File Transfer Process](#)
- [Tax Sale Operational Guidelines](#)
- [Annual Statute of Limitations Guidelines](#)
- [TACS Accounting](#)
- [ACH to post in RevQ \(trust account\)](#)
- [ACH to pay invoices \(op sweep account\)](#)

TACS Client Portal Instructions

- The Account Files for TACS folder is shown below. **This will be the folder where you place all New Record/Revision files.** The folder you are currently viewing is always shown at the top (underlined in red in the image below):

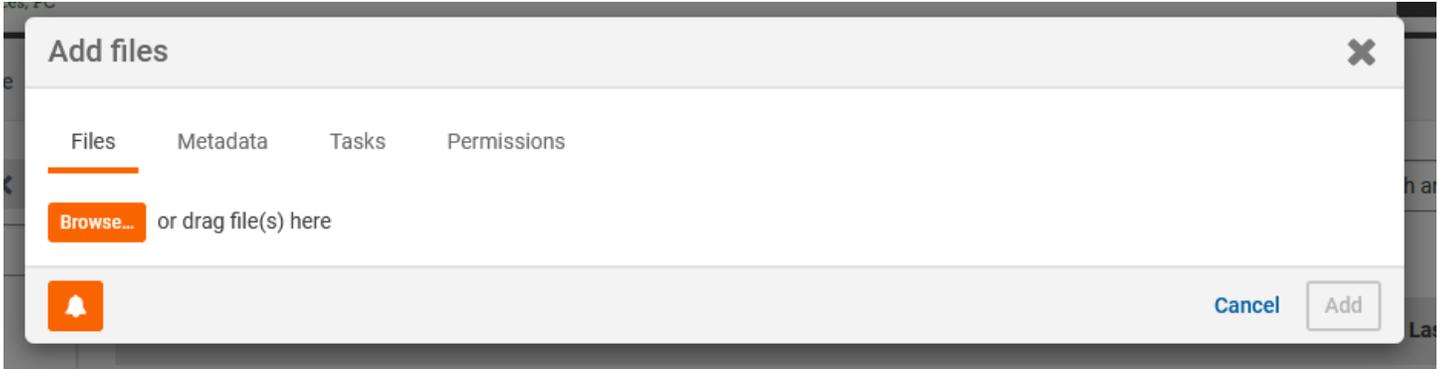


- Click the "Upload" button and select the drop-down option for the type of file you're uploading.



TACS Client Portal Instructions

4. You can either drag and drop the files or browse for them.



5. Once you have selected your files, click on the “Upload” button to start the upload. When the upload is complete, you will see the file listed on the site.

Downloading from the TACS Client Portal site:

1. To download a file from your Client Portal, click the three dots on the file you wish to download, which will open a menu with the “Download” option (pictured below).



Alternatively, you can download multiple files at once by ticking the boxes of the files you wish to pull from the site. Once you have selected files, you can click on the “Action” dropdown box and click on “Download”:



While a file can be previewed on the Client Portal site, it is always better to download the file to your computer prior to working with the file.

TACS Client Portal Instructions

Additional Folder Guidance: Other folders found on your portal are generally for file retrieval. The files placed here only exist on your portal for a certain number of days before they are removed to consolidate space. If you ever need an older file, contact TACS and we will provide it for you. Listed below are folders that generally have the most activity.

- **Collection Reports** – Files removed after one year.

If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).

Search folders

TACS Demo (1)
Account files for TACS
Archive
Collection Reports (3)
Invoices
Legal Documents
Legal Services Agreement (1)
Litigation Documents
Remittance (2)

Upload New Action View

Search and filter this folder

Collection Reports
Files are removed after one year. Contact TACS through the portal if you need an older file.

Name	Status	Size	Author	Last modified
TACS Sample redacted Client_Report.pdf v1		1.31MB	Cathy Keith	26 May 2023 11:18 AM
TestFile.txt v1		19bytes	Noah Reaves	10 Apr 2024 3:46 PM

- **Remittance** – Files removed after 60 days.

If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).

Search folders

TACS Demo (1)
Account files for TACS
Archive
Collection Reports (3)
Invoices
Legal Documents
Legal Services Agreement (1)
Litigation Documents
Remittance (2)

Upload New Action View

Search and filter this folder

Remittance
Files are removed after 60 days. Contact TACS through the portal if you need an older file.

Name	Status	Size	Author	Last modified
TACS Remittance_Report Sample Redacted.pdf v1		192.31KB	Cathy Keith	26 May 2023 11:18 AM
TACS Sample Remittance Report (redacted)_R.pdf v1		171.81KB	Cathy Keith	26 May 2023 11:17 AM

- **Invoices** - Files removed after 60 days.

If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).

Search folders

TACS Demo (1)
Account files for TACS
Archive
Collection Reports (3)
Invoices
Legal Documents
Legal Services Agreement (1)
Litigation Documents
Remittance (2)

Upload New Action View

Search and filter this folder

Invoices
Files are removed after 60 days. Contact TACS through the portal if you need an older file.

No files or folders

TACS Client Portal Instructions

Home Page and Contact:

- On the Home Screen, there are several sections that provide useful information from TACS.
- The News section shows our current TACS Operations. This feed will be updated on days when the office is closed or in any situation that transpires that may delay our operations.
- You can easily find our quarterly newsletters here on the homepage under the Newsletters section.
- The Documentation section provides training documents to guide you and provide a deeper understanding of the processes we take to ensure accounts are being handled correctly here at TACS.

<h3>Upcoming Events</h3> <hr/> <p>No items to display</p>	<h3>News</h3> <hr/> <p>All TACS systems are operating normally.</p>
<h3>Newsletters</h3> <hr/> <p>TACS Briefs – December 2024</p> <p>TACS Facts</p> <p>TACS FACTS Vol 19 Issue 2-Spring 2024 {Resource For Government Finance Professionals on Developments}</p> <p>TACS FACTS Vol 19 Issue 1-Winter 2024 {Trends In Collection, Assessment, Bankruptcy, and Other Areas}</p> <p>TACS FACTS Vol 18 Issue 4-Autumn 2023 {Virginia Supreme Court Rules on Tax Sale Excess Proceeds}</p> <p>TACS FACTS Vol 18 Issue 2-Spring 2023 {Litigation and Legislative updates}</p> <p>TACS FACTS Vol 18 Issue 1-Winter 2023 {Statute of Limitations}</p> <p>See all TACS FACTS newsletters</p>	<h3>Documentation</h3> <hr/> <p>TACS Client Portal Guidance TACS Client Portal User Help Documentation</p> <p>TACS Client Portal Demo Video</p> <p>TACS Training What to Expect When You Are Using TACS</p> <p>TACS Collections Overview</p> <p>Bankruptcy Overview</p> <p>Non-Debt Collections Overview</p> <p>Legal Department Overview</p> <p>Revision File Transfer Process</p> <p>Tax Sale Operational Guidelines</p> <p>Annual Statute of Limitations Guidelines</p> <p>TACS Accounting ACH to post in RevQ (trust account) ACH to pay invoices (op sweep account)</p>

• At the bottom of the Home page is the Contact Us section. Each of the different links will open an email to the appropriate group to assist you as soon as possible

Contact Us

Create an email about topics listed below by clicking on the corresponding link:

Invoices	Files	Remittances	Payoff requests	Portal help	Reaching a supervisor
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TACS Client Portal Instructions

Other TACS Client Portal Features:

- Events
 - On the Events tab, you can add items to the calendar. TACS will also put relevant items on your calendar. When setting up your event, you can add various additional details, such as making the event recurring, adding other contacts, and setting one of the predefined categories.
 - There are four different views: Lists, Day, Week, and Month. These can help narrow down to a more focused view or help get a broad look at the month ahead.

The screenshot displays the TACS Client Portal interface. At the top, there's a navigation bar with 'Events' selected. Below it, there are tabs for 'Add', 'List', 'Day', 'Week', and 'Month'. A search bar is present on the right. On the left, there's a calendar for August 2023. The main content area shows a list of events, with 'GDC for Demo' selected. The event details include the date '29 Dec 2023, 13:00 - 14:00 GMT-05:00', the category 'Court', and '2 Comments'. There are also icons for 'Today' and 'Favorites'.

The 'Add event' modal form is shown. It has a title bar with 'Add event' and a close button. The form is divided into 'Details' and 'Attachments' tabs. The 'Details' tab is active. The form contains the following fields and controls:

- Title (required):** Text input field containing 'TACS Test'.
- Location:** Text input field containing 'Enter location'.
- Start date (required):** Date and time picker showing '17 Aug 2023' and '14:00'.
- End date (required):** Date and time picker showing '17 Aug 2023' and '15:00'.
- All day event:** A checkbox that is currently unchecked.
- Repeats:** A dropdown menu set to 'None'.
- Category (required):** A dropdown menu set to '0 selected'.
- Contacts:** A search input field.
- Description:** A text input field.
- Tags:** A text input field with the placeholder 'Type and hit enter to add'.
- Status:** A dropdown menu set to 'Published'.
- Comments:** A checkbox labeled 'Allow comments' which is checked.

At the bottom of the modal, there are three buttons: a bell icon, a 'Cancel' button, and an 'Add' button.

TACS Client Portal Instructions

- **Tasks**

- Tasks are a great way to organize items that need your attention. They can be created and assigned to specific users or groups to complete. Files can be attached to tasks if important documents need to be viewed or signed by the creator or assignee.

The screenshot shows the 'Tasks' page in the TACS Client Portal. The navigation bar includes 'Home', 'Files', 'Events', 'Tasks', 'Activity', 'People', and 'Admin'. Below the navigation bar, there are three buttons: 'Add', 'View: List', and 'Group: Due date'. A search bar labeled 'Search and filter tasks' is on the right. Below the search bar, there are four tabs: 'All tasks', 'Assigned to me', 'Created by me', and 'Favorites'. The main content area is a table with columns: 'Title', 'ID', 'Due date', 'List', 'Priority', 'Status', and 'Assignee'. A red header 'Overdue' is visible. One task is listed: 'Test 1' with ID 606, due date 24 Apr 2023, priority Normal, status Not started, and assigned to Cathy Keith.

Title	ID	Due date	List	Priority	Status	Assignee
Test 1	606	24 Apr 2023	None	Normal	Not started	Cathy Keith

- **Activity**

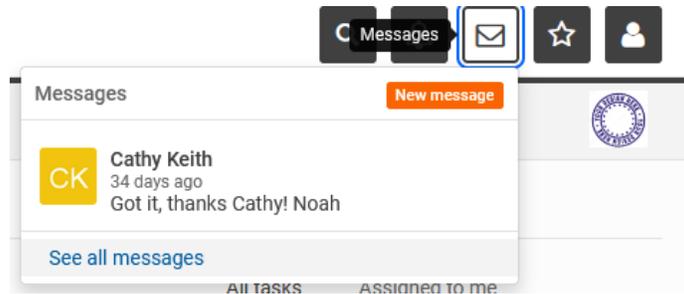
- The Activity tab showcases a feed where you can communicate with others on the portal, including TACS staff. You can tag users in posts and leave comments to keep the conversation going.

The screenshot shows the 'Activity' page in the TACS Client Portal. The navigation bar includes 'Home', 'Files', 'Events', 'Tasks', 'Activity', 'People', and 'Admin'. Below the navigation bar, there are two main sections: 'Recent activity' and 'Tasks'. The 'Recent activity' section has a 'Posts' tab and a 'Filter' dropdown. Below the filter is a text input field for posting. The feed shows four posts: 1. Cathy Keith: 'Todd Flax do you have a question about files?' (3 comments). 2. Todd Flax: 'How is the demo going today?' (1 reply). 3. Cathy Keith: 'Todd Flax another demo!' (1 reply). 4. Todd Flax: 'How is the 2nd demo going?' (1 reply). The 'Tasks' section has 'All tasks' and 'Assigned to me' tabs. It shows one overdue task: 'Test 1' due 24 Apr 2023, status 'Not started', assigned to Cathy Keith. Below the tasks section, there are sections for 'See all tasks', 'Events', and 'In the future' with a link to 'GDC for Demo' dated 29 Dec 2023.

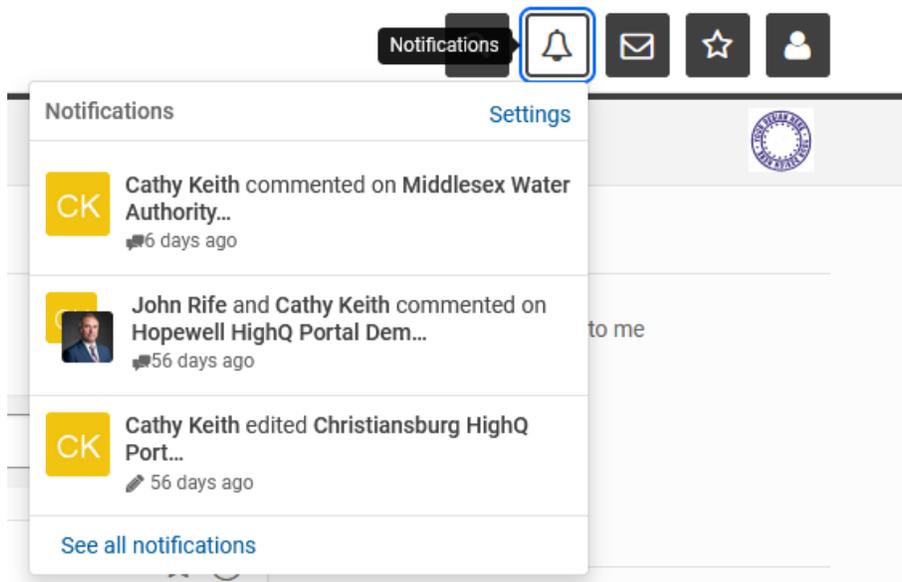
TACS Client Portal Instructions

- **Toolbar**

- **Messages** - The messaging tab is where direct messages can be viewed and replied to. You can attach files or embed links in these messages. "See all messages" will take you to all messages instead of just the most recent ones.



- **Notifications** – This option provides a focused view of new activity on items that you are directly involved in.

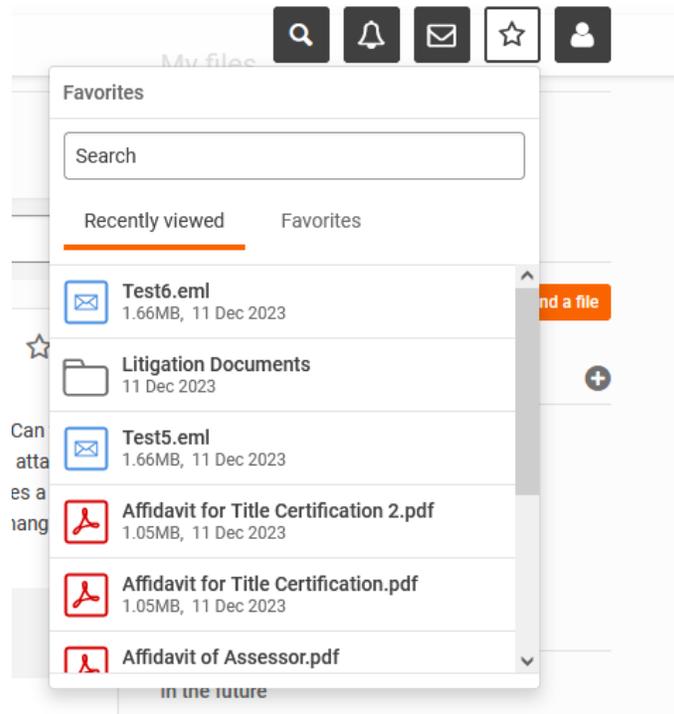


- **Favorites** – On files, folders, and posts, there is a star icon that you can select to mark it as a "favorite."

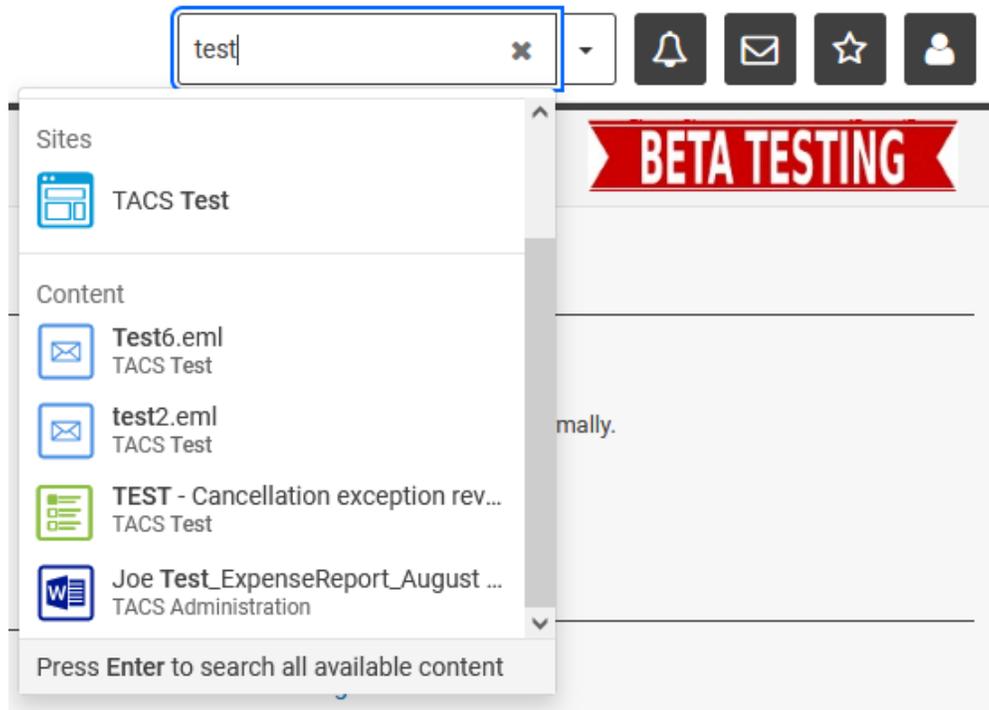
<input type="checkbox"/>	Name	Status	Size	Author	Last modified	
<input type="checkbox"/>	Account files for TACS			Cathy Keith	21 Jun 2023 12:17	<input type="checkbox"/> Add to favorites
<input type="checkbox"/>	Archive			Cathy Keith	24 May 2023 18:14	<input type="checkbox"/>

Favorited items can be accessed quickly from the toolbar, as shown below:

TACS Client Portal Instructions

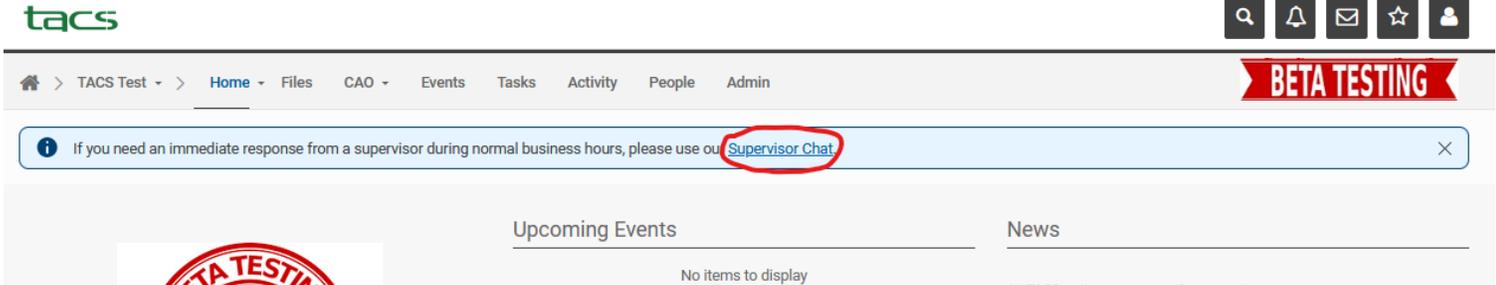


- Search – The search feature can be used to quickly locate items and content within your portal. Begin typing into the provided search bar after clicking the  icon to get results that best match the criteria.



TACS Client Portal Instructions

- Supervisor Chat
 - On the top of each page is a link to our supervisor chat, as show below. This will open a page in a new tab containing a chat window that provides quick access to a supervisor who can assist you.



Supervisor Chat

To start a chat with TACS supervisor, please use the "Supervisor Chat" below.

