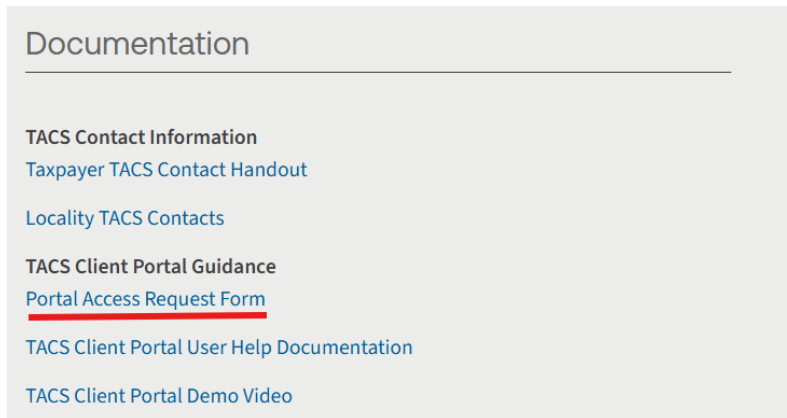


GUIDE: MANAGING PORTAL USERS

Use the steps below to add, remove, or update user access in the TACS Client Portal:

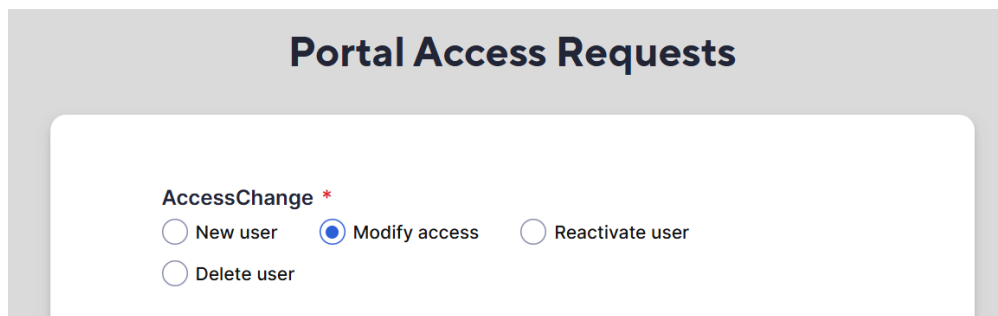
STEP 1: Access the Portal Request Form

1. Log in to the [TACS Client Portal](#)
2. Under the “TACS Client Portal Guidance,” select **Portal Access Request Form**



STEP 2: Complete the Form

1. Choose one of the following:
 - a. New User, Modify Access, Reactivate User, or Delete User

A screenshot of a form titled "Portal Access Requests". Below the title, there is a section labeled "AccessChange *" with four radio button options: "New user", "Modify access" (which is selected), "Reactivate user", and "Delete user".

2. Enter the required information
3. Use the **Groups** dropdown menu to:
 - a. Select the groups the user should have access to
 - b. Deselect any groups that should be removed

Groups *

Bankruptcy: access to bankruptcy documentation

Client Litigation: access to Litigation Recommendations

Client Reports: access to collections reports (included in report distribution)

Files: to place files for TACS to import into TACS systems

Remittance: access to remittance reports/invoices (included in remittance distribution)

Summons: place legal documents not for Client Litigation on the site

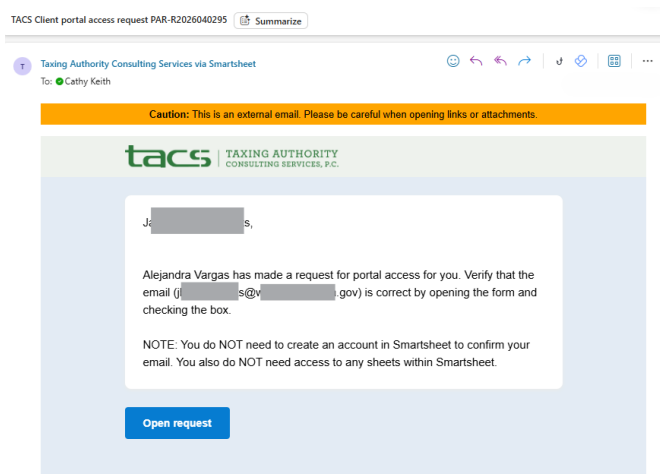
NOTE: Not all portals have all groups

- Bankruptcy
- Client Litigation
- Client Reports
- Files
- Remittance
- Summons

4. Click **Submit**

STEP 3: Email Notifications & Next Steps

5. If you selected **New User, Modify Access, or Reactivate User**, you will receive two emails:
 - a. **Email 1** (from automation@app.smartsheet.com): Requests verification of submitted information.



- b. **Email 2** (from noreply-taxva@highq.com): Prompts the user to create their portal login. Once completed, the user will have access to the client portal.

Note that you do not need to create a Smartsheet account during this process.

6. If you do not see the email, check Spam or Junk email folders. For login issues or missing activation emails, contact clientportalservices@taxva.com.

For more general help with your portal, see this guide: [Link to Guide](#)