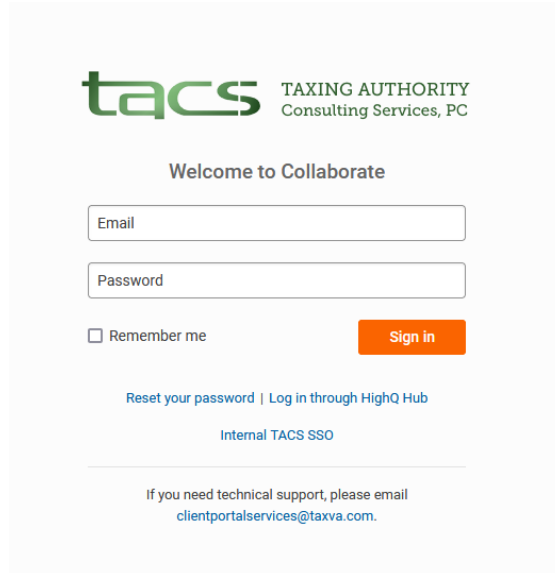


## TACS Client Portal Instructions

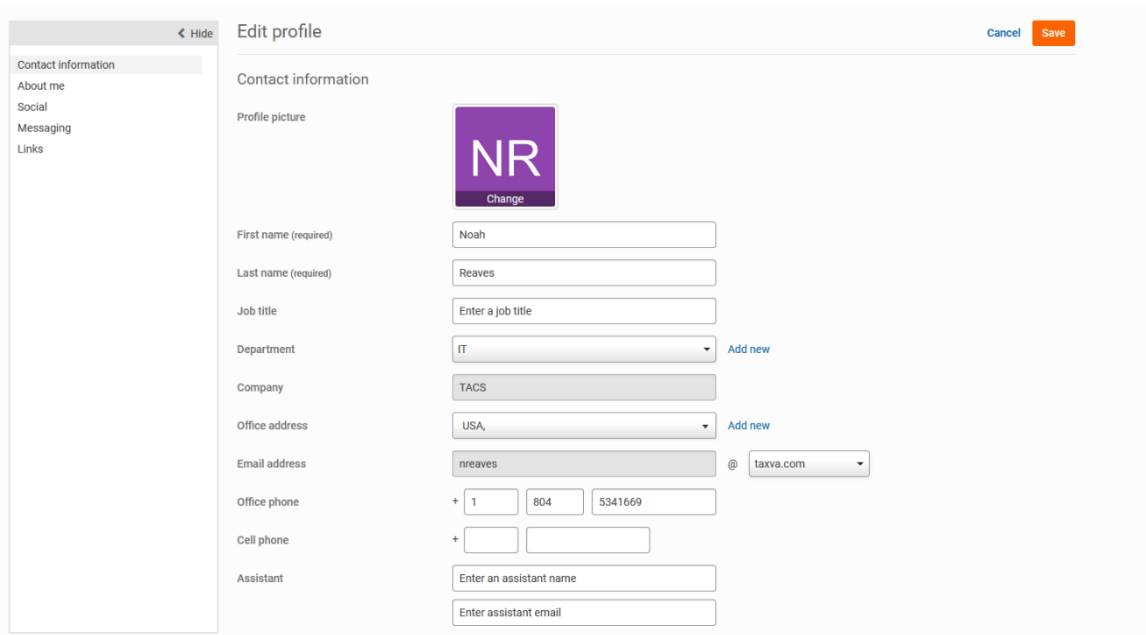
### Logging into the TACS Client Portal site:

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 Client Portal 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" and "Log in through HighQ Hub". A link for "Internal TACS SSO" is also present. At the bottom, there is a note: "If you need technical support, please email [clientportalservices@taxva.com](mailto: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](mailto: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](mailto:files@taxva.com)
4. After you log in, you are presented the edit profile page:



The screenshot shows the "Edit profile" page in the TACS Client Portal. On the left is a sidebar with a "Hide" button and a menu with options: "Contact information", "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 a "Profile picture" (a purple square with "NR" and a "Change" button), "First name (required)" (Noah), "Last name (required)" (Reaves), "Job title" (Enter a job title), "Department" (IT dropdown with "Add new" link), "Company" (TACS), "Office address" (USA dropdown with "Add new" link), "Email address" (nreaves @ taxva.com dropdown), "Office phone" (+ 1 804 5341669), "Cell phone" (+), and "Assistant" (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 highcontacts@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" (grey) and "Accept" (orange). 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:

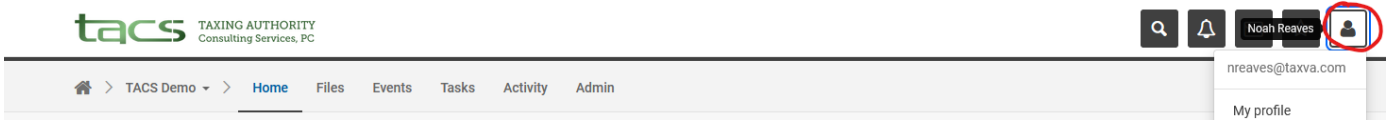
The screenshot shows the TACS Client Portal dashboard. At the top left is the TACS logo (TAXING AUTHORITY Consulting Services, PC). To the right are icons for search, notifications, email, favorites, and user profile. Below the header is a breadcrumb trail: Home > TACS Demo > > Home. The main content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

- Upcoming Events:** "In the future" section with a link for "GDC for Demo" (On 29 Dec 2023, 13:00 - 14:00 GMT-05:00, 2 Comments).
- News:** "TACS Operations" section with the text "All TACS systems are operating normally."
- Newsletters:** A section with a link for "Newsletters".
- Presentations:** A section with a link for "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

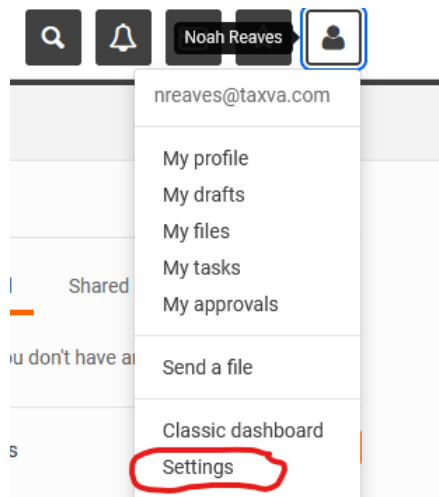
7. To see who is logged into the site, click the profile icon at the top right corner of your browser window (circled in red):



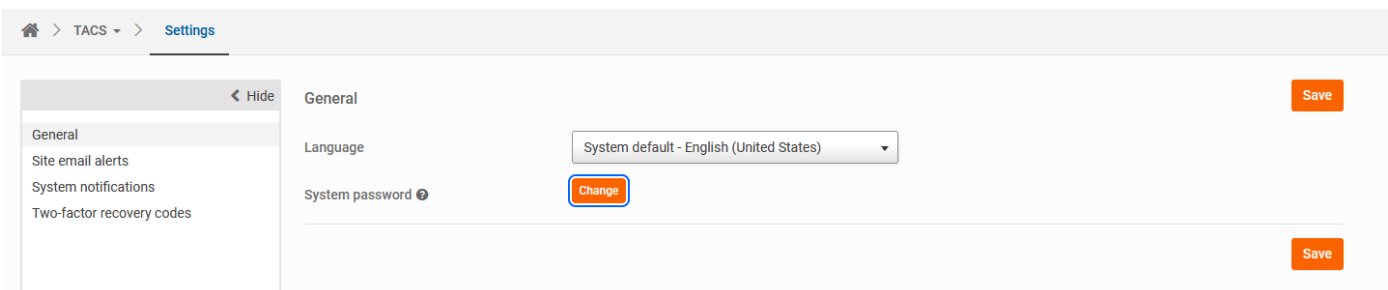
The login email for the signed in user will be the first item listed and the full name will show by hovering over the icon.

### 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.

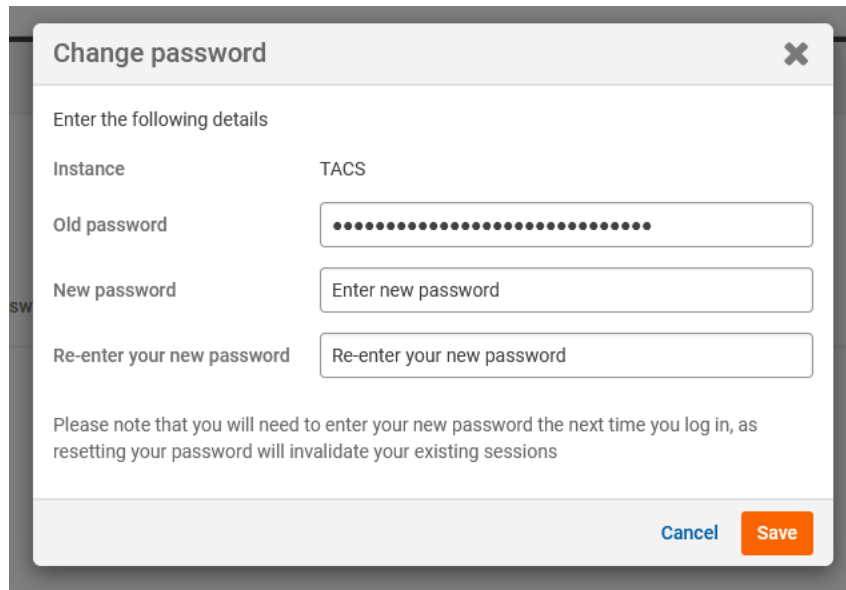


2. On the Settings page under the General category, under "System password", click "Change".



## 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.



A dialog box titled "Change password" with a close button (X) in the top right corner. The dialog contains the following fields and text:

Enter the following details

Instance: TACS

Old password: [password field with dots]

New password: [text field with placeholder "Enter new password"]

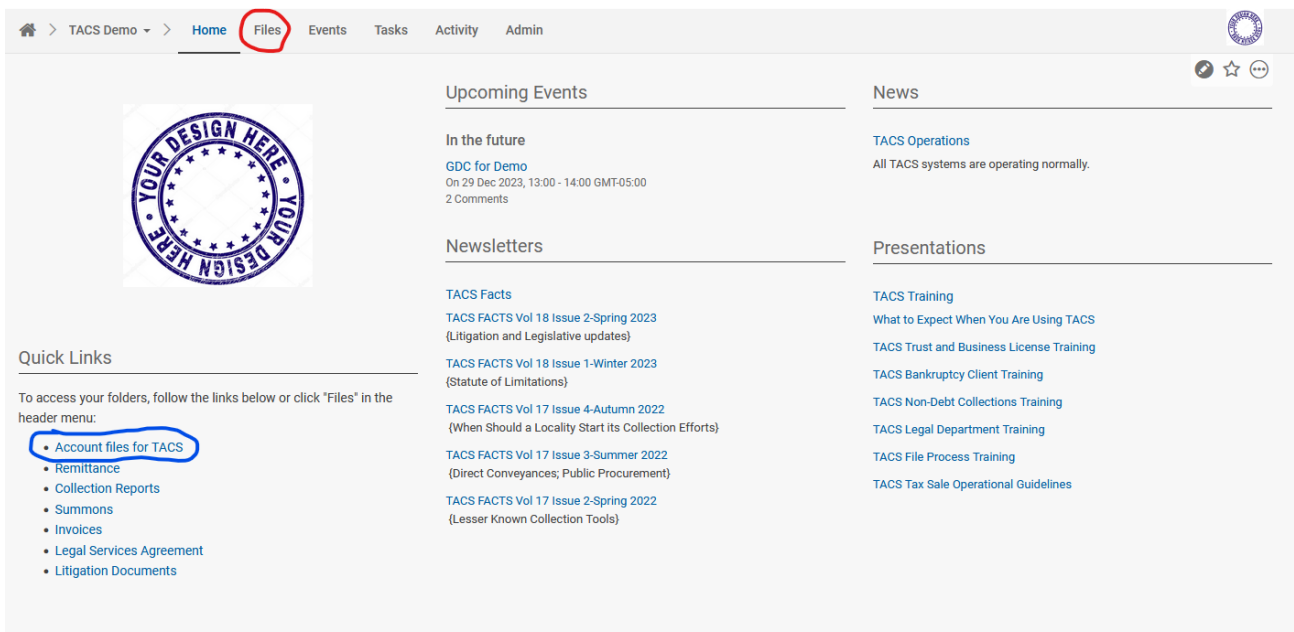
Re-enter your new password: [text field with placeholder "Re-enter your new password"]

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

Buttons: Cancel, Save

### Uploading to the TACS Client Portal site:

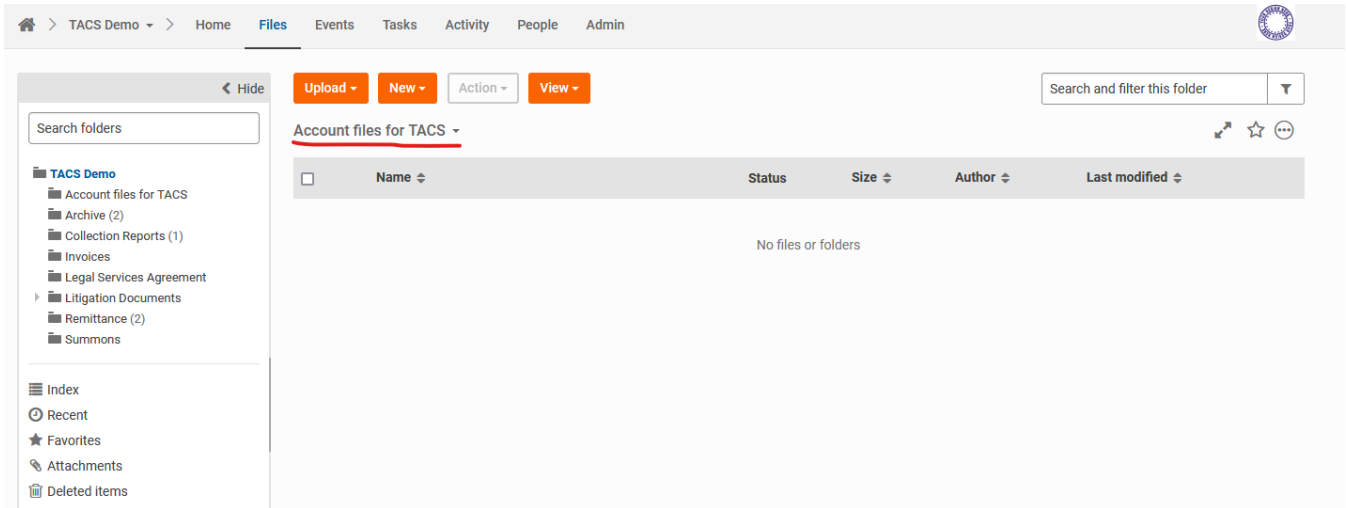
1. To upload a file, navigate to the "Account files for TACS" folder. You can get there easily from the option in the Quick Links section on Home page (circled in blue below) or via the Files button on the toolbar (circled in red):



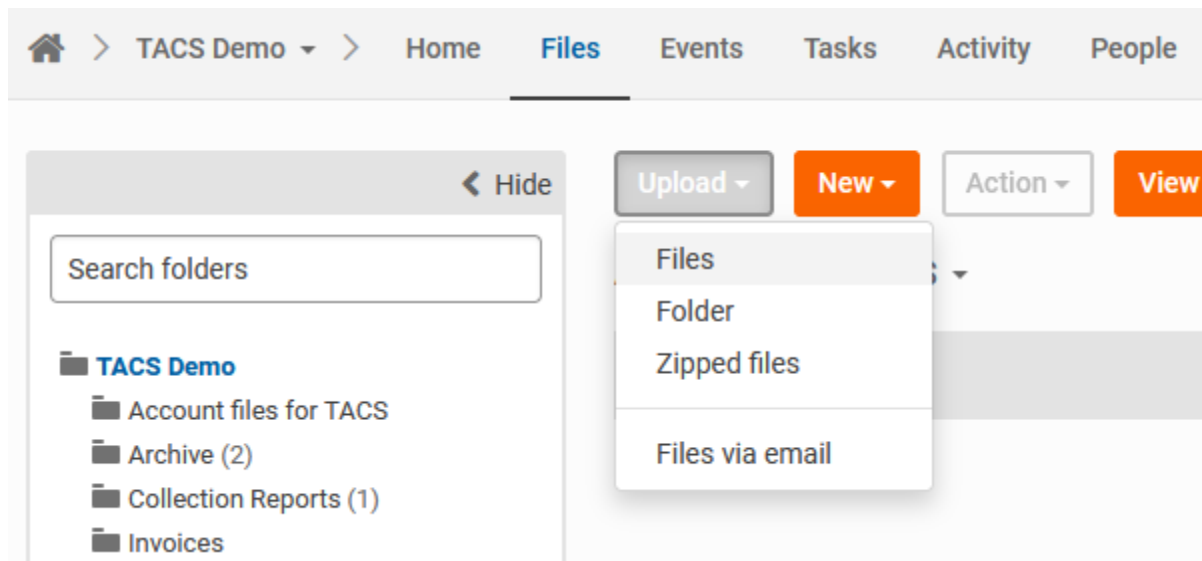
The screenshot shows the TACS Client Portal Home page. The navigation bar includes "Home" and "Files" (circled in red). The "Quick Links" section on the left has a list of links, with "Account files for TACS" circled in blue. The main content area is divided into sections: "Upcoming Events" (GDC for Demo), "Newsletters" (TACS FACTS Vol 18 Issue 2-Spring 2023, etc.), "News" (TACS Operations), and "Presentations" (TACS Training, etc.).

## TACS Client Portal Instructions

2. 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):

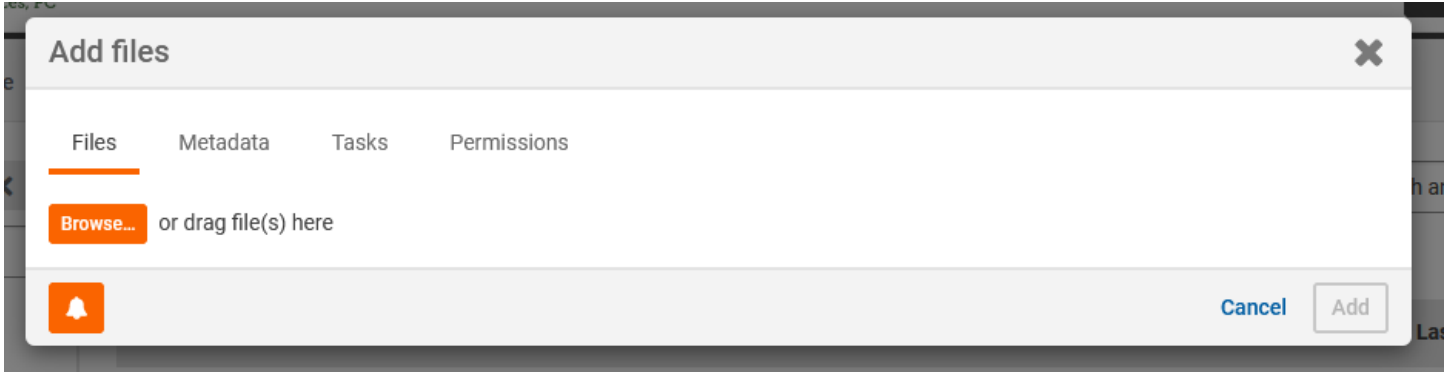


3. Click the “Upload” button and select the drop-down option for the type of file you’re uploading.



## TACS Client Portal Instructions

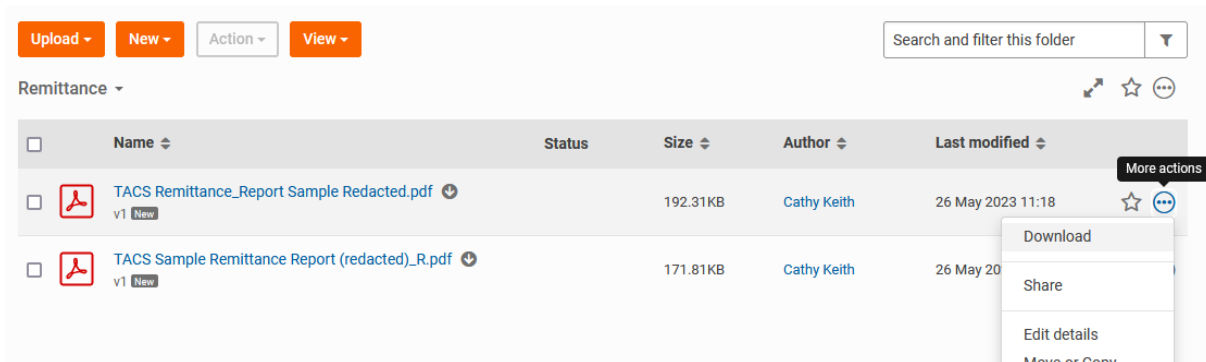
4. You can either drag and drop the files or browse for them.



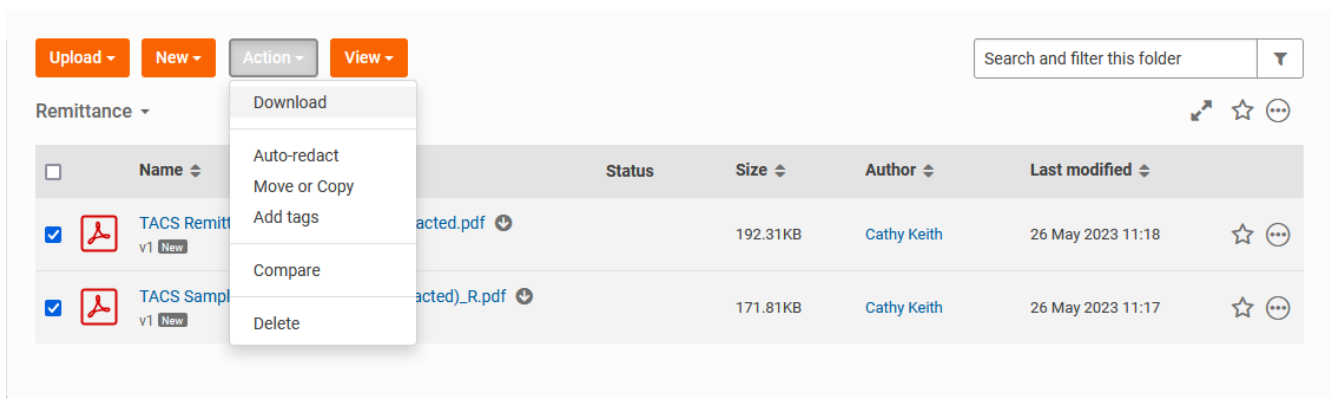
5. Once you have selected your files, click on the “Upload” button to start the upload. When the upload is complete, you will see the file listed on the site.

### 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.

The screenshot shows the 'Collection Reports' folder in the TACS Client Portal. The breadcrumb navigation is 'Home > Files > Collection Reports'. A notification bar at the top states: 'If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).' Below the notification, there are buttons for 'Upload', 'New', 'Action', and 'View'. A search bar is present with the text 'Search and filter this folder'. The folder name 'Collection Reports' is displayed, followed by a note: 'Files are removed after one year. Contact TACS through the portal if you need an older file.' A table lists the files in the folder:

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

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

The screenshot shows the 'Remittance' folder in the TACS Client Portal. The breadcrumb navigation is 'Home > Files > Remittance'. A notification bar at the top states: 'If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).' Below the notification, there are buttons for 'Upload', 'New', 'Action', and 'View'. A search bar is present with the text 'Search and filter this folder'. The folder name 'Remittance' is displayed, followed by a note: 'Files are removed after 60 days. Contact TACS through the portal if you need an older file.' A table lists the files in the folder:

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.

The screenshot shows the 'Invoices' folder in the TACS Client Portal. The breadcrumb navigation is 'Home > Files > Invoices'. A notification bar at the top states: 'If you need an immediate response from a supervisor during normal business hours, please use our [Supervisor Chat](#).' Below the notification, there are buttons for 'Upload', 'New', 'Action', and 'View'. A search bar is present with the text 'Search and filter this folder'. The folder name 'Invoices' is displayed, followed by a note: 'Files are removed after 60 days. Contact TACS through the portal if you need an older file.' The table below the note is empty, displaying the text '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 Presentations 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.

#### Upcoming Events

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##### In the future

###### [GDC for Demo](#)

On 29 Dec 2023, 13:00 - 14:00 GMT-05:00

2 Comments

#### Newsletters

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##### TACS Facts

###### [TACS FACTS Vol 18 Issue 2-Spring 2023](#)

{Litigation and Legislative updates}

###### [TACS FACTS Vol 18 Issue 1-Winter 2023](#)

{Statute of Limitations}

###### [TACS FACTS Vol 17 Issue 4-Autumn 2022](#)

{When Should a Locality Start its Collection Efforts}

###### [TACS FACTS Vol 17 Issue 3-Summer 2022](#)

{Direct Conveyances; Public Procurement}

###### [TACS FACTS Vol 17 Issue 2-Spring 2022](#)

{Lesser Known Collection Tools}

#### News

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##### [TACS Operations](#)

All TACS systems are operating normally.

#### Presentations

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##### [TACS Training](#)

[What to Expect When You Are Using TACS](#)

[TACS Trust and Business License Training](#)

[TACS Bankruptcy Client Training](#)

[TACS Non-Debt Collections Training](#)

[TACS Legal Department Training](#)

[TACS File Process Training](#)

[TACS Tax Sale Operational Guidelines](#)

- 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](#)

[TACS Information](#)

[Portal help](#)

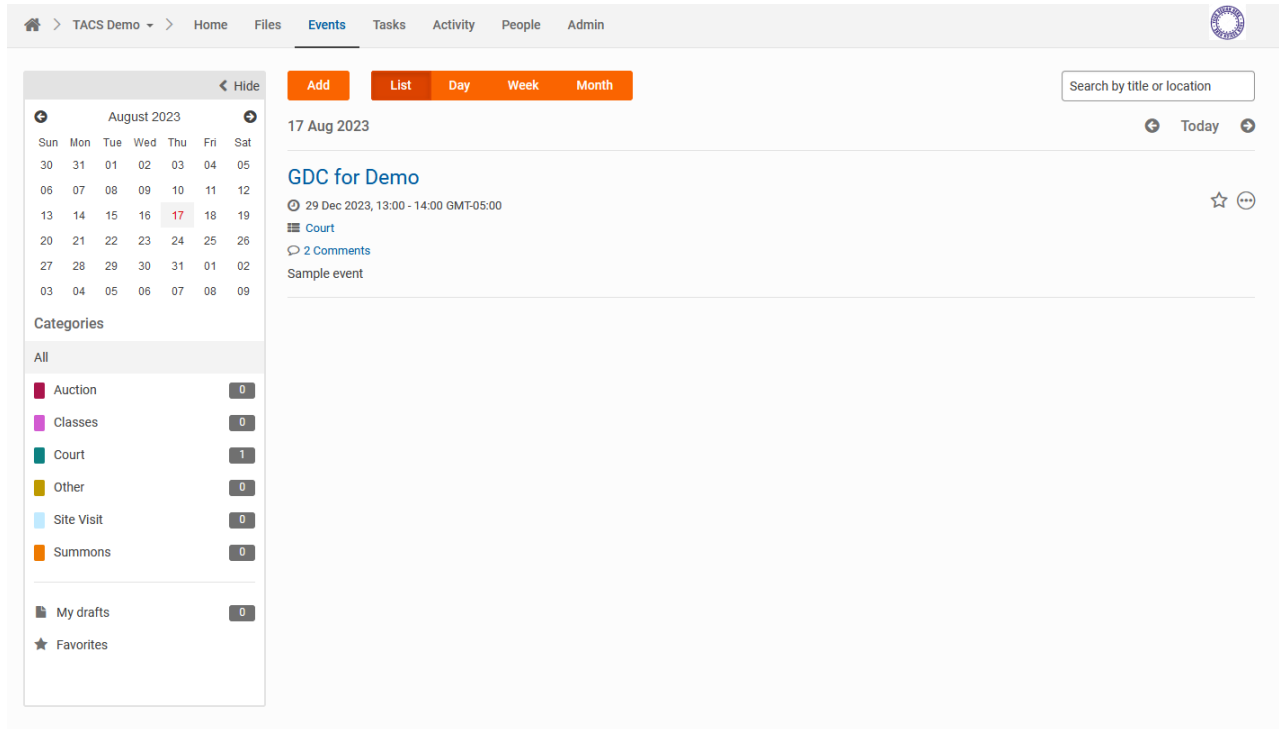
[Reaching a supervisor](#)



# 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.



### Add event

Details Attachments

Title (required)

Location

Start date (required)

End date (required)

All day event

Repeats

Category (required)

Contacts

Description

Tags

Status

Comments  Allow comments

## 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

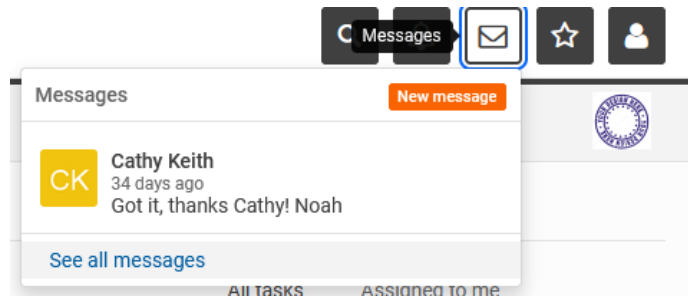
- **Activity**

- 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.

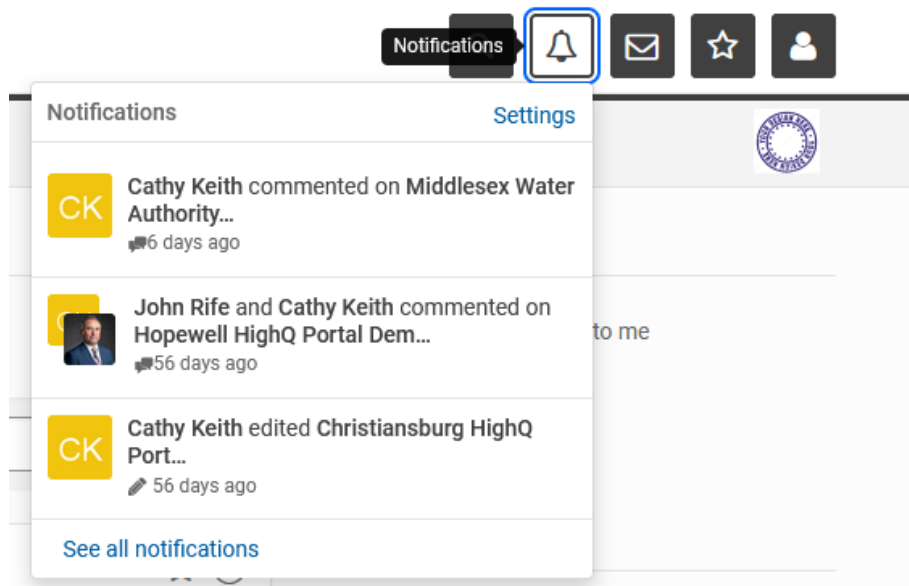
The screenshot shows the 'Activity' page in the TACS Client Portal. The navigation bar includes 'Home', 'Files', 'Events', 'Tasks', 'Activity', 'People', and 'Admin'. Below the navigation bar, there are two main sections: 'Recent activity' and 'Tasks'. The 'Recent activity' section has a 'Posts' tab and a 'Filter' dropdown. Below the filter, there is a text input field for posting. The activity 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. Below the tabs, there is a red header 'Overdue' and one task: 'Test 1' with due date 24 Apr 2023, status Not started, and assigned to Cathy Keith. Below the tasks, 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.

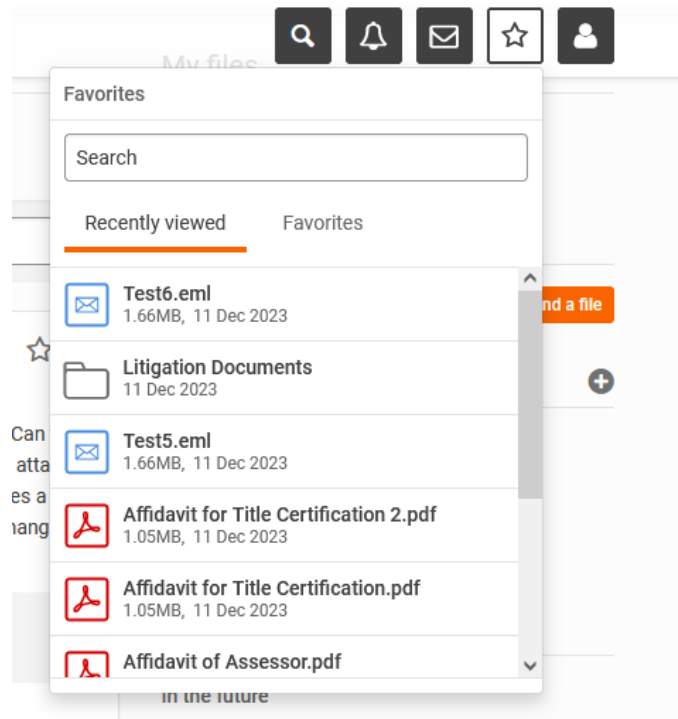



- **Favorites** – On files, folders, and posts, there is a star icon that you can select to mark it as a “favorite.”

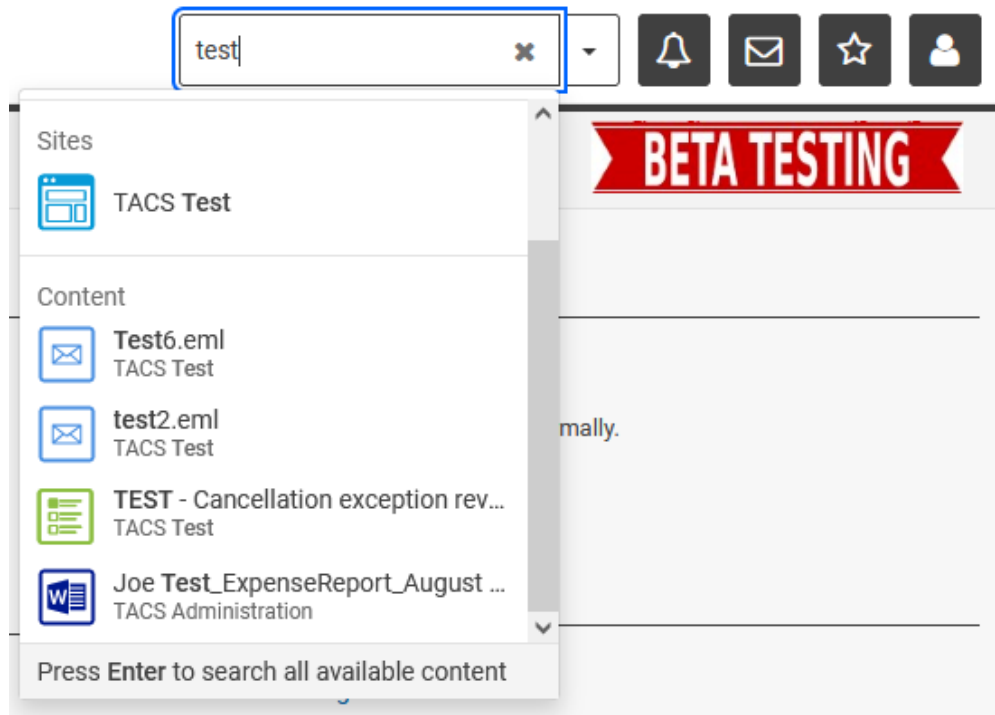
<input type="checkbox"/>	Name	Status	Size	Author	Last modified	
<input type="checkbox"/>	Account files for TACS			Cathy Keith	21 Jun 2023 12:17	<input type="checkbox"/> Add to favorites
<input type="checkbox"/>	Archive			Cathy Keith	24 May 2023 18:14	<input type="checkbox"/> <input type="checkbox"/>

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

## TACS Client Portal Instructions

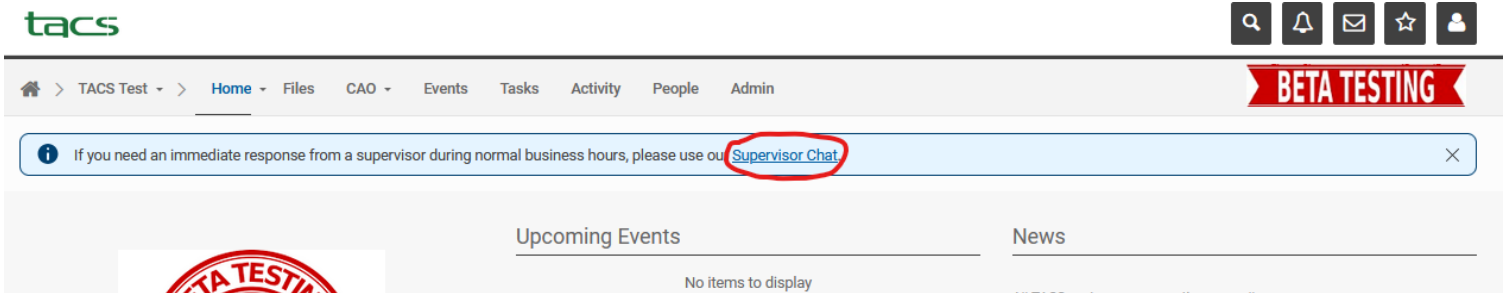


- Search – The search feature can be used to quickly locate items and content within your portal. Begin typing into the provided search bar after clicking the  icon to get results that best match the criteria.



## 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.

