

# etax local



- Help Resource

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**Client Portal**

How to use the Etax Local Client Portal

## Client Portal - Introduction



### What is The Etax Local Client Portal?

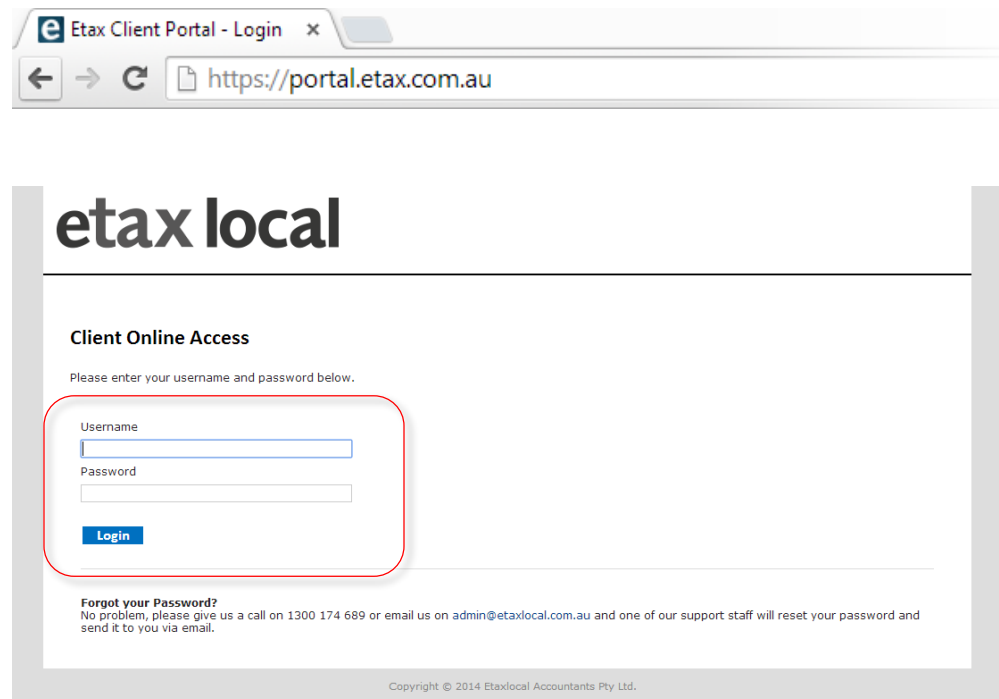
The client portal is a secure online system that enables clients to communicate information, provide documentation and pay fees securely, from wherever they are in Australia.

### Functions of the Client Portal:

1. Upload, store and download **documents**.
2. Send and receive **secure messages** with the accountant looking after your job.
3. Provide **personal details** such as Tax File Numbers and bank details in confidence.
4. Electronically **sign tax returns**.
5. Make **fee payments**, quickly and simply.

## Client Portal – Getting Started

When you choose Etax Local to look after your tax or accounting work, you are sent a unique **username** and **password** for our client portal, together with the login address: <https://portal.etax.com.au>



The screenshot shows a web browser window with the title 'Etax Client Portal - Login'. The address bar displays 'https://portal.etax.com.au'. The main content area features the 'etax local' logo at the top. Below the logo, the heading 'Client Online Access' is followed by the instruction 'Please enter your username and password below.' A red rounded rectangle highlights the login fields, which include a 'Username' input box, a 'Password' input box, and a blue 'Login' button. At the bottom of the form, there is a link for 'Forgot your Password?' with a brief explanation: 'No problem, please give us a call on 1300 174 689 or email us on admin@etaxlocal.com.au and one of our support staff will reset your password and send it to you via email.' The footer of the page contains the copyright notice: 'Copyright © 2014 Etaxlocal Accountants Pty Ltd.'

## Client Portal – Getting Started

### When you login:

1. If you have not previously supplied details such as your **tax file number** you will be required to enter these details into the fields provided in your profile.
2. Once these have been entered, click **Save** to update your profile.

The screenshot displays the 'etax local' client portal interface. At the top, the 'etax local' logo is on the left, and a welcome message 'Welcome, Joe Bloggs! [ Log Off ]' is on the right. Below this is a section titled 'My Tax and Accounting Records' with a sub-header 'My Profile' and a link 'Individual'. A message states: 'Welcome to your personalised Etax Local online account. Please complete any missing information from your profile below.' The profile form contains the following fields:

Title	Mr	Tax File Number	[REDACTED]
First Name	Joe	ABN	
Family Name	Bloggs	Mobile Phone	[REDACTED]
Other Given Name	B	Email	joe.bloggs@emailaddress.com
Date of Birth	22/01/2013		

A green 'Save' button is located at the bottom left of the form.

## Client Portal – Getting Started

Once your completed profile has been saved, the below personalised screen will appear:

If you want to change your password, click the **Change Password** button and follow prompts.

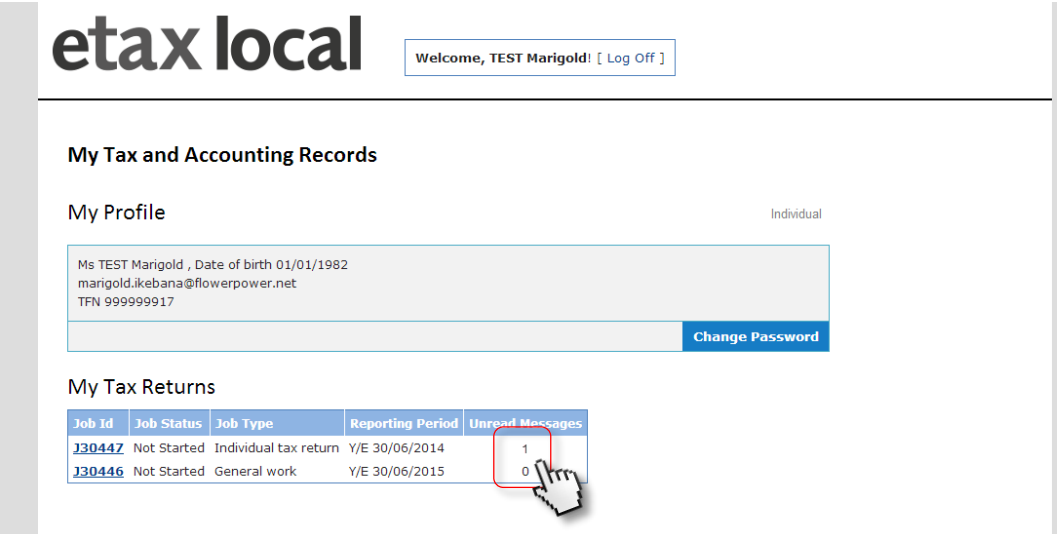
The screenshot displays the etax local Client Portal interface. At the top, the 'etax local' logo is on the left, and a welcome message 'Welcome, TEST Marigold! [ Log Off ]' is on the right. Below the header, the main content area is titled 'My Tax and Accounting Records'. Under this, there is a 'My Profile' section with the text 'Individual' to its right. The profile details include: 'Ms TEST Marigold , Date of birth 01/01/1982', 'marigold.ikebana@flowerpower.net', and 'TFN 999999917'. A red rectangular box highlights a 'Change Password' button, with a hand cursor icon pointing at it. Below the profile section is a 'My Tax Returns' section containing a table with the following data:

Job Id	Job Status	Job Type	Reporting Period	Unread Messages
<a href="#">J30447</a>	Not Started	Individual tax return	Y/E 30/06/2014	1
<a href="#">J30446</a>	Not Started	General work	Y/E 30/06/2015	0

At the bottom of the page, a copyright notice reads: 'Copyright © 2014 Etaxlocal Accountants Pty Ltd.'

## Client Portal – Getting Started

If you have a message from one of our accountants in regard to a job, it will show up beneath **Unread Messages** in the **My Tax Returns** section.



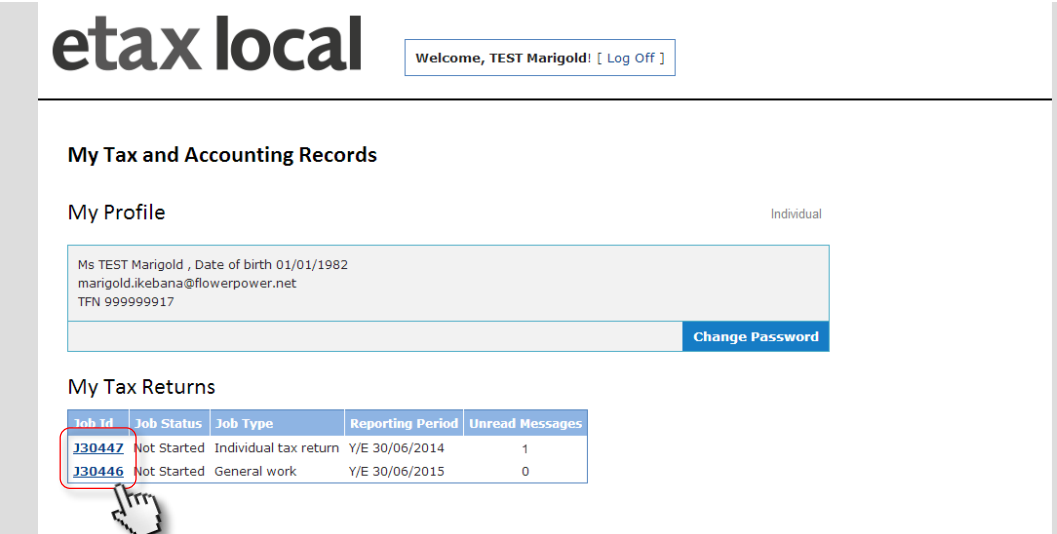
The screenshot shows the etax local Client Portal interface. At the top, the logo 'etax local' is displayed next to a welcome message: 'Welcome, TEST Marigold! [ Log Off ]'. Below this, the section 'My Tax and Accounting Records' is visible. Under 'My Profile', user details for 'Ms TEST Marigold' are shown, including date of birth, email, and TFN, along with a 'Change Password' button. The 'My Tax Returns' section contains a table with the following data:

Job Id	Job Status	Job Type	Reporting Period	Unread Messages
<a href="#">J30447</a>	Not Started	Individual tax return	Y/E 30/06/2014	1
<a href="#">J30446</a>	Not Started	General work	Y/E 30/06/2015	0

A red box highlights the 'Unread Messages' column, and a hand cursor points to the value '1' for job J30447. The footer of the page reads: 'Copyright © 2014 Etaxlocal Accountants Pty Ltd.'

## Client Portal – Getting Started

To view the progress of your job(s), write or read a message, upload documents or provide us with your bank account details, click on the relevant **Job ID** number.



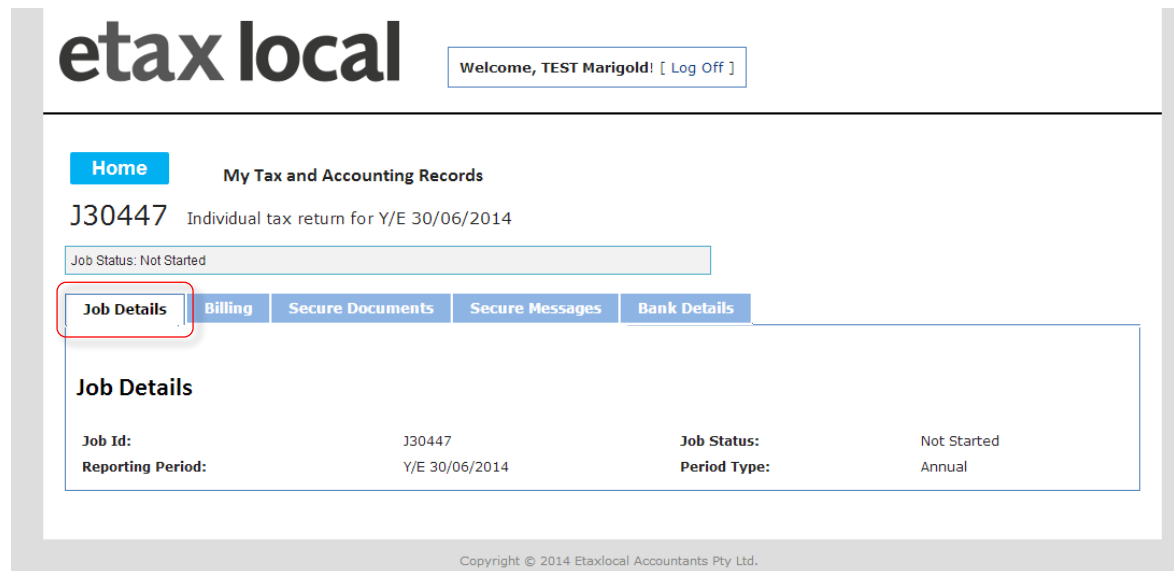
The screenshot shows the etax local Client Portal interface. At the top, the logo "etax local" is on the left, and a welcome message "Welcome, TEST Marigold! [ Log Off ]" is on the right. Below the header, the section "My Tax and Accounting Records" is displayed. Under this, there is a "My Profile" section for an "Individual" user. The profile details include: "Ms TEST Marigold , Date of birth 01/01/1982", "marigold.ikebana@flowerpower.net", and "TFN 999999917". A "Change Password" button is located to the right of the profile details. Below the profile section is the "My Tax Returns" section, which contains a table with the following data:

Job Id	Job Status	Job Type	Reporting Period	Unread Messages
J30447	Not Started	Individual tax return	Y/E 30/06/2014	1
J30446	Not Started	General work	Y/E 30/06/2015	0

A red box highlights the "Job Id" column, and a mouse cursor is pointing at the "J30446" entry. At the bottom of the page, the copyright notice "Copyright © 2014 Etaxlocal Accountants Pty Ltd." is visible.

## Client Portal – Getting Started

When you first open a job, you'll see the **Job Details** tab. This tells you basic details, including the status of your selected job.



The screenshot displays the etax local Client Portal interface. At the top, the 'etax local' logo is on the left, and a welcome message 'Welcome, TEST Marigold! [ Log Off ]' is on the right. Below the header, there are two tabs: 'Home' (selected) and 'My Tax and Accounting Records'. The main content area shows 'J30447 Individual tax return for Y/E 30/06/2014'. A status bar indicates 'Job Status: Not Started'. Below this, there are five tabs: 'Job Details' (highlighted with a red box), 'Billing', 'Secure Documents', 'Secure Messages', and 'Bank Details'. The 'Job Details' tab is active, showing a table with the following information:

Job Details			
Job Id:	J30447	Job Status:	Not Started
Reporting Period:	Y/E 30/06/2014	Period Type:	Annual

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## Client Portal – Getting Started

Start by making sure you provide the bank details relevant for the job by selecting the **Bank Details** tab. (The ATO will not accept your tax return without them.)

To save your entry, make sure you click on the **Update Bank Details** button when you have finished.

The screenshot shows the etax local Client Portal interface. At the top, the logo 'etax local' is on the left, and a welcome message 'Welcome, TEST Marigold! [ Log Off ]' is on the right. Below the logo, there's a navigation bar with 'Home' and 'My Tax and Accounting Records'. The main content area shows 'J30447 Individual tax return for Y/E 30/06/2014' and 'Job Status: Not Started'. A tabbed interface is present with 'Job Details', 'Secure Documents', 'Secure Messages', and 'Bank Details' (which is selected and highlighted with a red box). Below the tabs, the 'Bank Details' section contains three input fields: 'BSB number', 'Account number', and 'Account holder name'. At the bottom of this section, the 'Update Bank Details' button is highlighted with a red box and a hand cursor icon pointing to it. The footer of the page reads 'Copyright © 2014 Etaxlocal Accountants Pty Ltd.'

**Don't like providing bank details?**

Don't worry: The level of bank details we require only allow for money to be paid **INTO** your account.

## Client Portal – Billing

The **Billing** tab is where you will find your invoice for that job. You can choose to pay immediately or on completion of the tax return.

You must pay the fee prior to us lodging your return with the ATO.

- To pay by credit card fill in the Online payment form and click the **Make Payment** button
- To view your invoice and/or to pay by **EFT** or **cheque**, select the **invoice number**. Remittance advice is included at the base of the invoice.

Job Details **Billing** Secure Documents Secure Messages Bank Details

### Account Summary

Fees for this Job \$181.00  
Amount Applied \$0.00  
**OUTSTANDING AMOUNT \$181.00**

Date	Invoice Number	Description	Amount	Balance
03-Dec-2014	2040179	Etax Local - Etax return (prior year)	\$181.00	\$181.00
<b>Total</b>			<b>\$181.00</b>	<b>\$181.00</b>

**Online Payment**

Card Type: Visa  
Card Number:   
Account Name:   
Expiry Month: Mar  
Expiry Year: 2015  
Amount Due: \$181.00

**Make Payment**

Please click the 'Make Payment' button once only. Approval may take 1 or 2 minutes.

**Bank Details**  
To change bank details, click here.

## Client Portal – Secure Messages

The **Secure Messages** tab is where you can read and respond to messages from the accountant looking after your job.

When you login to a new job, your first message will be our **Letter of Engagement (LOE)**.

We cannot commence with your job until this LOE has been read so please click on the message to view. (No response is required, the system notifies us when you have read the message.)

The screenshot shows the etax local Client Portal interface. At the top, the 'etax local' logo is on the left, and a welcome message 'Welcome, TEST Marigold! [ Log Off ]' is on the right. Below the logo, there are tabs for 'Home', 'My Tax and Accounting Records', 'J30447 Individual tax return for Y/E 30/06/2014', and 'Job Status: Not Started'. The 'Secure Messages' tab is highlighted with a red box. Below the tabs, there is a section titled 'My Messages' with a button 'Send a new message to your Etax Local Member'. A table lists messages with columns 'From', 'Date', and 'Category'. The first message is from 'ELA' on '29/08/2014 2:41:09 PM' with the category 'Client Engagement Letter'. A mouse cursor is pointing at this message. To the right of the table, the content of the selected message is displayed, starting with 'Dear Marigold,' and 'Re: Client Engagement Letter'. The message body contains text about professional standards and the purpose of the engagement.

**etax local** Welcome, TEST Marigold! [ Log Off ]

**Home** My Tax and Accounting Records  
J30447 Individual tax return for Y/E 30/06/2014  
Job Status: Not Started

**Job Details** **Secure Documents** **Secure Messages** **Bank Details**

**My Messages**

Click on the message list below to read a message, or [Send a new message to your Etax Local Member](#)

From	Date	Category
ELA	29/08/2014 2:41:09 PM	Client Engagement Letter

Dear Marigold,

**Re:**  
Client Engagement Letter

We are bound to comply with professional quality standards of CPA Australia and the Tax Practitioner Board (TPB). Accordingly, this is a formal document and confirms our understanding of the terms of our engagement and the nature and limitations of the services that we provide.

Purpose, Scope and Output of the Engagement

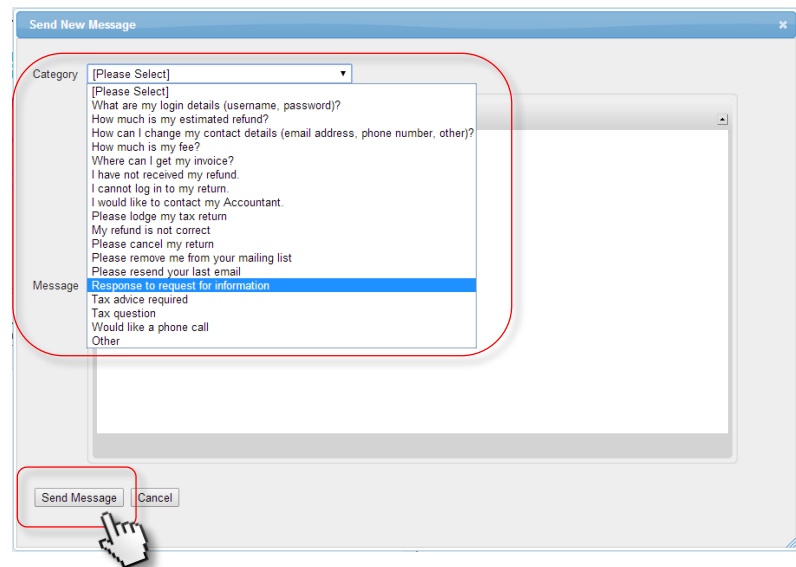
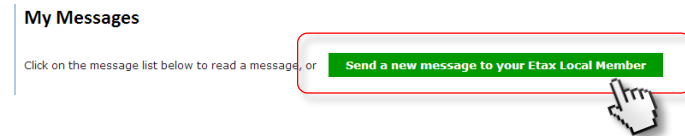
This firm will provide accounting and tax compliance services. No audit will be performed and, accordingly, no assurance will be expressed. Our engagement cannot be relied upon to disclose irregularities including fraud, other illegal acts and errors that may exist. However, we will inform you of any such matters that come to our attention.

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## Client Portal – Secure Messages

To respond to a message or create a new message:

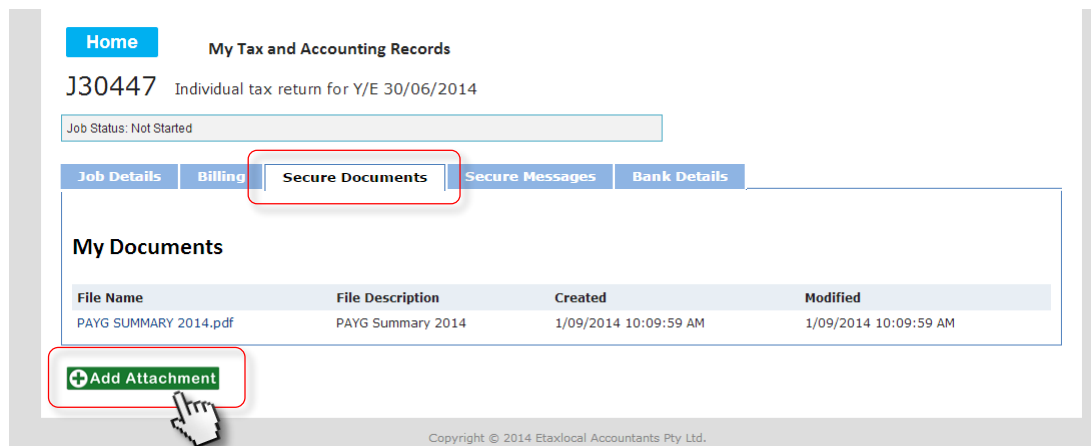
1. Click on the **Send a new message to your Etax Local Member** button.
2. A pop up window will appear on the screen. Select the **Category** your message fits into from the drop down menu.
3. Enter the content of your message in the **Message** field.
4. Click on the **Send Message** button.



## Client Portal – Documents

To process and lodge tax returns we need supporting documents and records for your claims. We make it easy for you to provide these by uploading them to our client portal.

1. Select the **Secure Documents** tab. Here is where all your documents for each job will be stored.
2. To upload a document, click on the **Add Attachment** button.



## Client Portal – Documents

3. Describe what the document is in the **File Description** field.
4. Select the **Choose File** button and select the relevant file from your computer.
5. Click the **Upload** button to upload the file. Your document will then be stored securely in our system.

Home My Tax and Accounting Records

J30447 Individual tax return for Y/E 30/06/2014

Job Status: Not Started

Job Details Billing **Secure Documents** Secure Messages Bank Details

**Upload Document**

File Description: PAYG Summary 2014

File Name: Choose File PAYG SUMM... 2014.pdf

Upload Cancel

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## Client Portal – Finalising Your Tax Return



Once your job is ready for lodgement, **you will be sent a notification email** to tell you to log in to the Client Portal and finalise your tax return.

When you log in and open your job, notice that **Tax Return** and **Sign My Return** tabs are now visible.

1. Select the **tax return** tab to check your tax return.
2. If you have any questions regarding the tax return please send a message via the **Secure Messages** tab.

## Client Portal – Finalising Your Tax Return

- Once you have checked your tax return, if you have not yet paid the fee, select the **Billing** tab and choose your method of payment:

**Fee From Refund** requires no up-front payment. Our fee, **plus a \$27.50 administration fee**, is taken from your refund prior to it being paid into your bank account.

You can choose this option **only** if your return has a refund.

Job Details
Tax Return
Sign My Return
Billing
Secure Documents
Secure Messages
Bank Details

### Account Summary

Fees for this Job	\$181.00
Amount Applied	\$0.00
<b>OUTSTANDING AMOUNT</b>	<b>\$181.00</b>

To see a list of invoices, [click here](#).

Date	Invoice Number	Description	Amount	Balance
23-Sep-2014	2035617	Etax Local - Etax return (prior year)	\$181.00	\$181.00
<b>Total</b>			<b>\$181.00</b>	<b>\$181.00</b>

### Bank Details

To change bank details, [click here](#).

### Fee From Refund

We currently estimate you will receive a refund – use our Fee From Refund service to have our fee deducted from your refund when we receive it from the ATO. Please check your bank account details below so we can deposit your refund when received (depends on ATO processing time).

Please take any fees out of my tax refund

By using our FFR service you agree to the [terms and conditions](#)

### Online Payment

To make an on-line payment, [click here](#).

The Fee from Refund option is only available for tax returns with a refund.



## Client Portal – Finalising Your Tax Return

4. Once the fee has been paid (or Fee From Refund selected) open the **Sign My Return** tab.
5. Read the **Etax Local Client Agreement**. If you are happy to proceed, tick the '**I agree**' box.
6. Click on the **Sign My Return** Button. This electronically signs your tax return

The screenshot displays the Etax Local Client Portal interface. At the top, a navigation bar contains several tabs: 'Job Details', 'Tax Return', 'Sign My Return' (highlighted with a red box), 'Billing', 'Secure Documents', 'Secure Messages', and 'Bank Details'. Below the navigation bar, the main heading is 'Sign your Return'. A paragraph of text instructs the user to read the Client Agreement and tick a box to agree to the Terms and Conditions. Below this is a scrollable area titled 'Etax Local Client Agreement' containing five numbered terms. At the bottom of the agreement area, there is a checkbox labeled 'I agree to the Terms & Conditions listed above' (the checkbox is checked and highlighted with a red box) and a 'Sign My Return' button (also highlighted with a red box and a mouse cursor pointing to it). The footer of the page reads 'Copyright © 2014 Etaxlocal Accountants Pty Ltd.'

Job Details Tax Return **Sign My Return** Billing Secure Documents Secure Messages Bank Details

**Sign your Return**

Please carefully read the Client Agreement and tick the box to agree to the Terms and Conditions listed. Then click on the 'Sign My Return' button.

**Etax Local Client Agreement**

1. If you choose to use the Etax Local service ('Service') you will be agreeing to abide by all of the terms and conditions of this Agreement between you and Etax Local.
2. Etax Local may change, add or remove portions of this Agreement at any time, but if it does so it will post such changes on the Service (or send them to you via email or prepaid post).
3. Your continued use of the Service now, or following the posting of notice of any changes in this Agreement, will indicate your acceptance of such changes or modifications.
4. Etax Local may change, suspend or discontinue any aspect of the Service at any time.
5. Etax Local is an on-line and face-to-face service consisting of access to tax return preparation software and services, information and other content owned or licensed by Etax Local and its suppliers and other third parties. The right to use Etax Local is personal to you and is not transferable to any other person. You may not use Etax Local to prepare and/or file tax returns as a professional business or as a paid preparer. The Tax Practitioners Board prohibits any use of this site by a person not being an employee or contractor of Etax Local to do tax preparation work for a fee and you agree to comply with this condition of use. You are responsible for all use of your account under any screen name or password by any person and for ensuring all use of your account complies fully with the provisions of this Agreement. You

☒ I agree to the Terms & Conditions listed above

**Sign My Return**

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## Client Portal – Lodging with the ATO



**Your tax return will then be lodged with the Australian Tax Office (ATO).**

Although refunds are usually processed within 14 days, sometimes faster, please allow 30 days before following up a tax return.

### Getting in touch

Call: 1300 174 689

Email: [admin@etaxlocal.com.au](mailto:admin@etaxlocal.com.au)

Or contact your local Member directly

