Dear Tax Aid Client,

Tax season is fast approaching. As always, we are committed to providing you with professional tax preparation services and guidance.

**WHAT YOU NEED TO KNOW ABOUT THIS TAX SEASON**

**Please read this entire letter as many of our policies and processes have changed for 2023!**

The tax filing deadline this year is Tuesday, April 18th, 2023. We will continue to offer in-person meetings, if you would like to sit down with your preparer. Please contact the office at 215-957-5484 starting January 2, 2023, to schedule your appointment.

**CLIENT CENTER PORTAL SIGN IN PROCESS \*\*new for 2023\*\***

We updated the sign-in process to the Client Center Portal to make the process easier and more secure.

**What you need to know:**

·        You’ll continue using your current username and password to access your Client Center Portal account.

·        The sign-in page will look different but will function the same way. Check out this [video](https://video.tax.thomsonreuters.com/watch/M3uZABPJotA3zMJgnRxjnD) of the new experience.

·        **You will need to enable two-step verification (previously called multi-factor authentication)** after the update. Directions can be found on the [Client Center FAQs](https://www.taxaidassociates.com/onvio-faqs) page of our website

Please be sure to review the video and download the mobile app prior to tax season.

**CLIENT CENTER PORTAL \*\*new features 2023\*\***

We continue to utilize our Client Center Portal. The Client Center is used for e-signatures, document sharing and secure payment processing.

New this year, we will be adding any federal and/or state payment vouchers to the Client Center Portal for easy access. You will now have the ability to view and/or print your vouchers from home.

Please review this brief video on [How to Use Your Portal](https://video.tax.thomsonreuters.com/watch/U5G8wJYc7FM9j2esBn61mL) on our website.

**DOCUMENT STORAGE \*\*new for 2023\*\***

Documents will only be available in the Client Center Portal for three (3) years. After three (3) years, your documents will be archived and no longer available for access. We do recommend downloading a copy of your tax documents each year for record keeping.

**DOCUMENT UPLOAD \*\*new requirements for 2023\*\***

Save yourself a trip and/or postage and upload your tax documents to us quickly and securely using the Client Center portal. With the app, you will have the ability to take a picture of your tax documents and send them to us securely.

We do request that you compile **all your documents** and upload them all at once. This is the most efficient way to ensure all information is received. The Client Center portal is the most secure way to send your documents and keep your information protected.

**PAYMENT POLICY \*\*new policy reminder\*\***

Reminder, as this was a new policy last year, once your taxes are completed, both your e-signature and payment for service are required prior to us submitting your taxes to the government.

**TAX AID WEBSITE \*\*new links for 2023\*\***

[www.taxaidassociates.com](http://www.taxaidassociates.com). This year, we added a few more helpful links. On our new website, you can now:

* Access your tax documents in the Client Center Portal
* Pay your Tax Aid Associates invoice online
* Pay your federal, state and Philadelphia income taxes online
* Track your federal and state refund
* Access a How-To guide to your Client Center Portal

We are so excited to provide you with the professional service you are accustomed to at Tax Aid Associates. If you have any questions regarding this letter or any of our new policies and procedures, please do not hesitate to contact us. We’ll see you in 2023!

Happy New Year!

Tax Aid Associates

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