Guide to Using TaxLady Secure Client Portal

Request that TaxLady staff add access to the portal for you by emailing [taxladyoffice@gmail.com](mailto:taxladyoffice@gmail.com) or calling 701-306-3483.

Your username will be your email address.

You will be asked to set up a password the first time you enter the portal. Your password must contain:

At least 1 upper case letter

At least 1 lower case letter

At least 1 number

At least 8 characters in length.

If you happen to forget your password later, click on “forgot your password?” and it will be reset.

Once you’ve entered the portal, click on the folder with your name.

You can now upload files to this folder by clicking on the plus sign and “upload” at the top right corner of the window.

Click on “browse files” to select the location of the file(s) you’d like to share with TaxLady.

Click on “Upload” in the bottom left corner to upload files.

TaxLady will automatically be notified when you upload a file. Likewise, you will be notified via email when TaxLady uploads a file to your folder for your review/information.

Click on “Log Out” when finished to leave the portal.