

Miller Financial Services

Online Portals



The Complete Step-by-Step Guide

Miller Financial Services

607-770-6330

admin@millerfinancialservices.com

Table of Contents

Accessing Your Secure Portal.....	
With Activation Link	
Without Activation Link	
Email, Username and Password.....	
I Forgot My Username/Password	
Updating Username/Password	
Uploading & Downloading Documents.....	
How to Upload Documents	
How to Download Documents	
Client Profiles.....	
Updating Your Profile	
Online Messenger.....	
Talk to Your Tax Preparer Online	
Signatures.....	
E-signing Documents	
Bill Payment.....	
Pay Your Bill Online	

How to access your portal-with activation link

1. Activation links are sent to the email on file. If your email has changed, please contact the office.
2. Copy the username provided in the email and click on the link. This will direct you to your portal login.
3. Paste the given username in its corresponding spot and follow the prompts to enter the last 4 of your SSN.
4. Create password. It is recommended that you save your username and password. They will remain the same each tax year.

How to access your portal-without activation link

1. Go to millerfinancialservices.com and click on the Client Portals tab then select “Click Here” under Access to Client Portal.

Forgot username/password

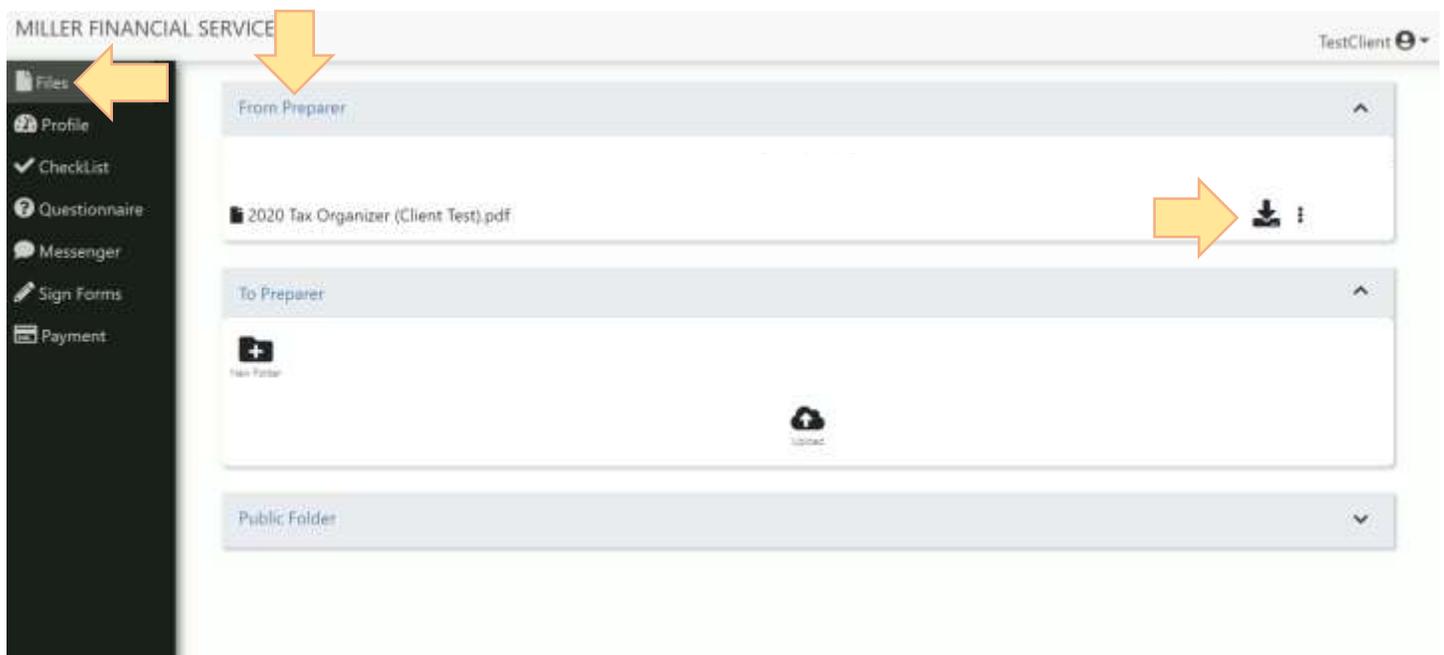
1. Go to millerfinancialservices.com and click on the Client Portals tab then select “Click Here” under Access to Client Portal.
2. On the login screen click on the “Forgot Username/Password” and follow the prompts to enter email information.

Updating email/password

1. While in your portal, click on your name in the upper right corner of the page, and select **Account**.
2. Under My Account click on the  symbol to update your email and password.

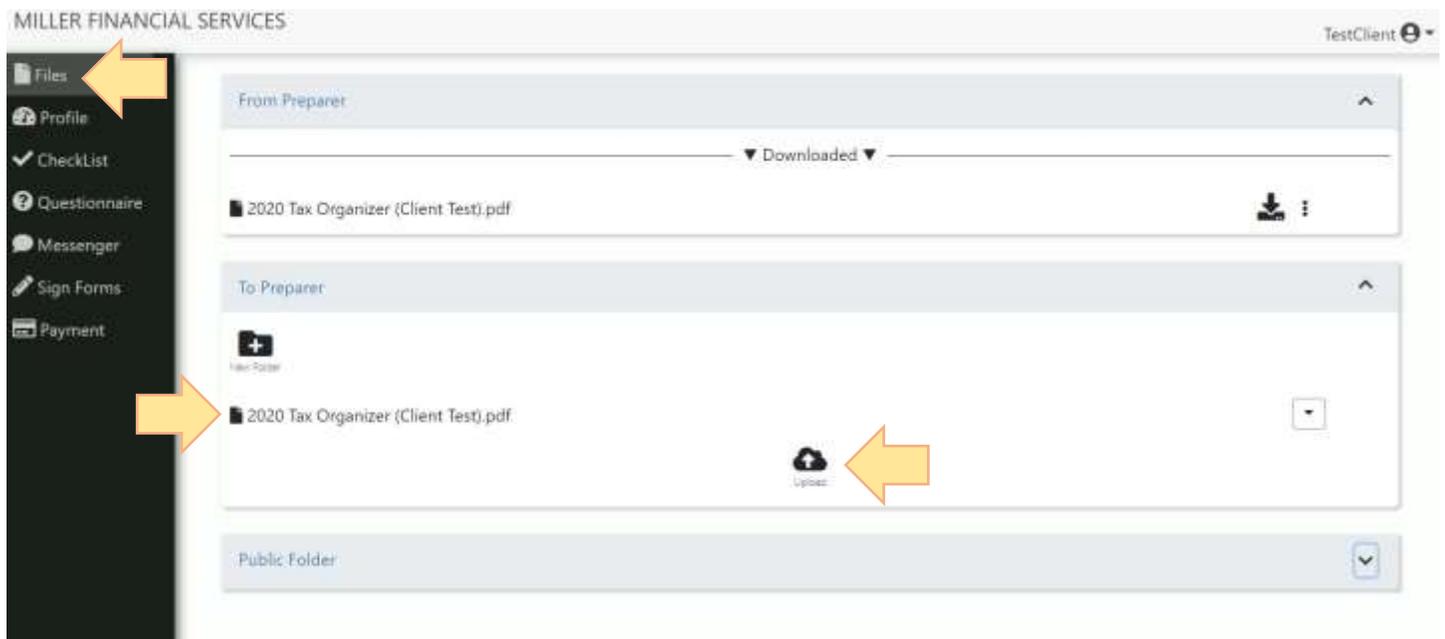
How to download your documents

1. Login with your username and password.
2. On the left side of the screen click on the **Files** tab.
3. Under the **From Preparer** section, locate the file to be downloaded and click the download icon .
4. You can access your downloads in your computer file system in the folder named “downloads”.



How to upload your documents

1. On the left side of the screen click on the **Files** tab.
2. Under the **To Preparer** section, click the upload icon  , locate the file on your device then click Upload Files.



How to update your profile

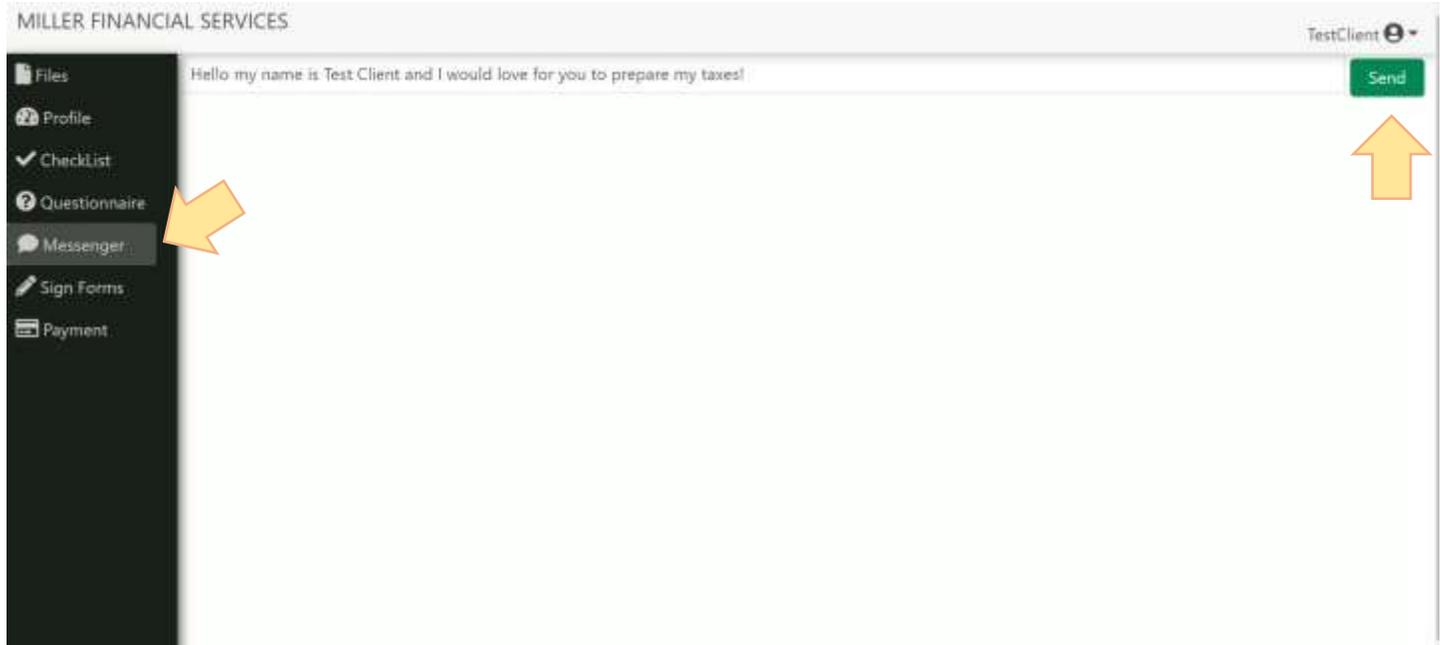
1. On the left side of the screen click on the Profile tab.
2. Fill in your information in the boxes provided and click on the **Information is complete** box.
3. To edit your information uncheck the Information is complete box by clicking on the check mark.



How to talk to your tax preparer online

1. While in your portal, click on the **Messenger** tab on the left side of your screen.
2. Type your response in the text field and click the Send button.

Please note that the messenger system does not produce automatic replies. We work very hard to respond as soon as possible.



How to sign e-signature forms

1. On the left side of the screen click on the **Sign Forms** tab.
2. Click on the signature documents located under Documents Available to Sign.
3. Once the e-file forms open click on the yellow box in the signature space.
4. After clicking on the yellow box, identity authentication questions will be provided for security purposes. Follow the prompts to answer these questions.
5. After verifying your identity a box will pop up to capture your signature. Use your mouse or stylus to draw your signature, then click the Save button.
6. For multiple signatures, follow steps 1-5 in each box highlighted for signature. You can use the arrows located on the upper left of the screen to move between signature pages.
7. Once all signature boxes are filled click on the Submit Signatures box on the bottom right of the screen.



SmithCPA coffbeans

1

2

Documents Available to Sign

- 2019 Signature Documents (BEANS COFFEE and COCOA) (2)
0 of 2 Signatures
- 2019 Signature Documents (BEANS COFFEE and COCOA)
0 of 2 Signatures

SmithCPA coffbeans

202 14 14

Form **8879** IRS e-file Signature Authorization OMB No. 1545-0074

Department of the Treasury Internal Revenue Service **2019**

ERO must obtain and retain completed Form 8879. Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SIN)

Taxpayer's name: **COFFEE BEANS** Social security number: **300-00-1001**

Spouse's name: **COCOA BEANS** Spouse's social security number: **300-00-1000**

Part I Tax Return Information - Tax Year Ending December 31, 2019 (Whole dollars only)

1	Adjusted gross income (Form 1040 or 1040-SR, line 8b; Form 1040-NR, line 3b)	1	41,000
2	Total tax (Form 1040 or 1040-SR, line 16; Form 1040-NR, line 61)	2	
3	Federal income tax withheld from Forms W-2 and 1099 (Form 1040 or 1040-SR, line 17; Form 1040-NR, line 62a)	3	4,500
4	Refund (Form 1040 or 1040-SR, line 21a; Form 1040-NR, line 73a; Form 1040-SS, Part 1, line 13a)	4	4,937
5	Amount you owe (Form 1040 or 1040-SR, line 23; Form 1040-NR, line 75)	5	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2019, and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, preparer, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgment of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund, if applicable. I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on the return and/or a payment of estimated tax, and the financial institution to debit the entry to the account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize Joe Trap, CPA ERO firm name to enter or generate my PIN 83658 as my signature on my tax year 2019 electronically filed income tax return. (Enter five digits, but don't enter all zeros)

I will enter my PIN as my signature on my tax year 2019 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the PIN method. The ERO must complete Part III below.

Your signature: Joe Trap, CPA Date: _____

Spouse's PIN: check one box only

3

4

Confirm Identity

Which street have you lived on?

- WOODVIEW SQ
- RAINVILLE ST
- RATALEE CIR
- BRUSH CIR
- TOWNER
- Skip Question

Question 3 of 4

Next Cancel

Signature Submit Signatures

Taxpayer's PIN: check one box only

I authorize Lisa's Taxes ERO firm name to enter or generate my PIN 69183 Enter five digits, but don't enter all zeros as my signature on my tax year 2017 electronically filed income tax return.

I will enter my PIN as my signature on my tax year 2017 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► Coffee Beans

Spouse's PIN: check one box only

I authorize _____ ERO firm name to enter or generate my PIN _____ Enter five digits, but don't enter all zeros as my signature.

I will enter my PIN as my signature on my tax year 2017 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► _____ Date ► _____

Part III Certification

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 904417-33333 Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2017 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Pub.1345**, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ► _____ Date ► 02-23-2018

ERO Must Retain This Form - See Instructions
Don't Submit This Form to the IRS Unless Requested To Do So

For Paperwork Reduction Act Notice, see your tax return instructions. Form **8879** (2017)
 BEA

SmithCPA

8879 IRS e-file Signature Authorization (OMB No. 1545-0074) 2019

Department of the Treasury Internal Revenue Service

Submission Identification Number (SID) ►

Taxpayer's name COFFEE BEANS	Social security number 305-08-1901
Spouse's name COFFEE BEANS	Spouse's social security number 305-08-1908

as my signature on my tax year 2017 electronically filed income tax return. **don't enter all zeros**

I will enter my PIN as my signature on my tax year 2017 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► Coffee Beans Date ► _____

Spouse's PIN: check one box only

I authorize _____ ERO firm name to enter or generate my PIN _____ Enter five digits, but don't enter all zeros as my signature on my tax year 2017 electronically filed income tax return.

I will enter my PIN as my signature on my tax year 2017 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► _____ Date ► _____

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 904417-33333 Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2017 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Pub.1345**, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

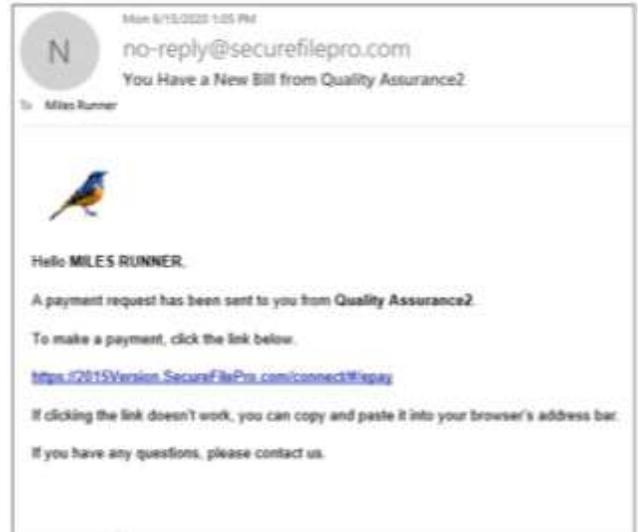
ERO's signature ► _____ Date ► 02-23-2018

ERO Must Retain This Form - See Instructions

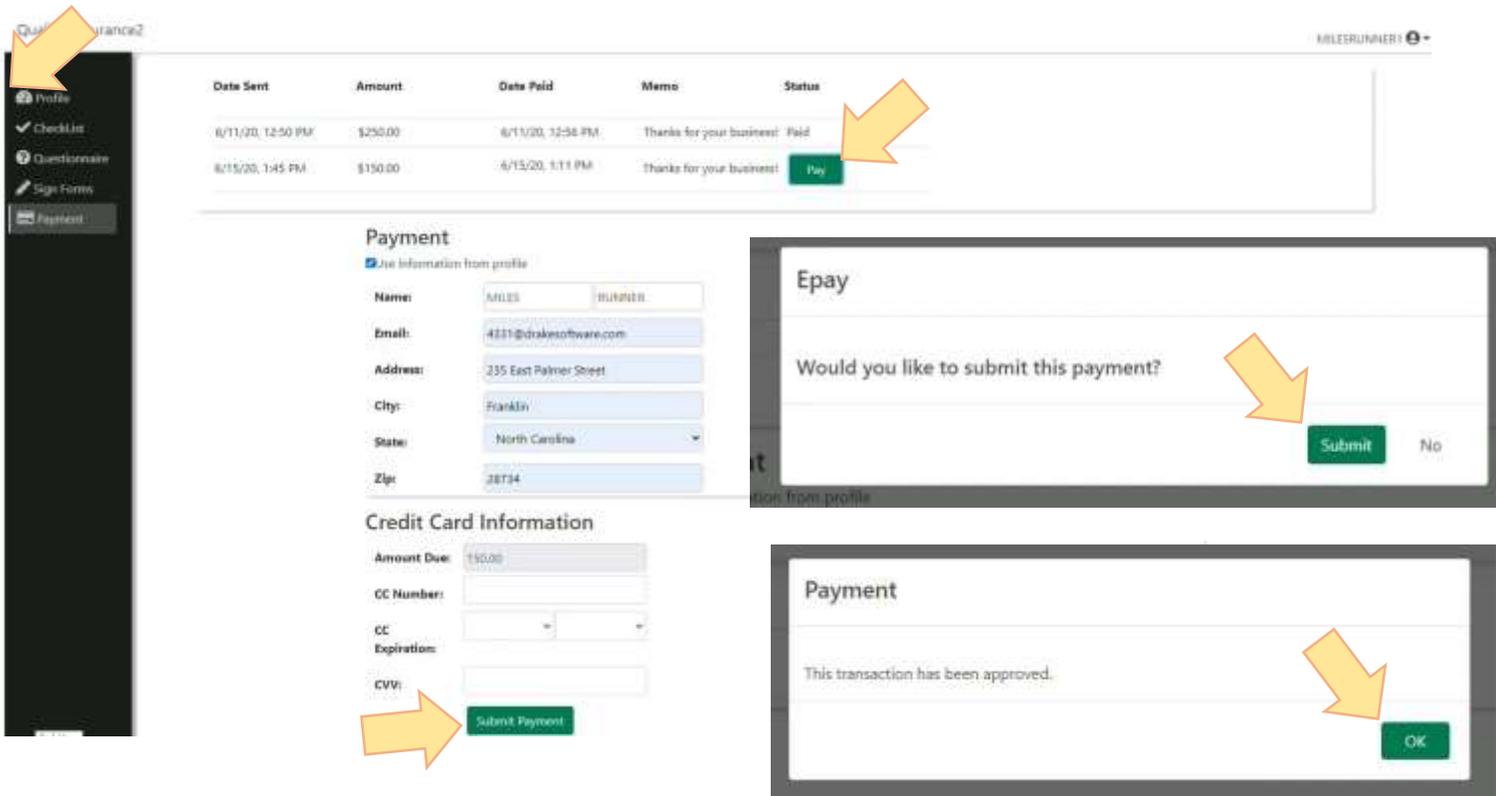
Submit Signature

How to pay online

1. On the left side of the screen click on the **Payment** tab.
2. Locate the bill to be paid and under the status column and click the  green button.
3. Enter in the payment information associated with the card you are using. Note: It is important to enter the information that matches what your card company has on file. If this information does not match it will result in a failed transaction.
4. Enter in your credit card information and click Submit Payment.
5. A box will pop up asking to verify that you would like to submit payment, click Submit.
6. The following box will inform you if your payment is processed, click Ok.
7. When the transaction is complete the status column will indicate "Paid".



Note: Please allow up to 1 business day for tax return and signature document forms to be uploaded upon payment submission.



The screenshot shows the online payment interface. On the left is a navigation menu with options: Profile, Check List, Questionnaire, Sign Forms, and Payment. The main area displays a table of bills:

Date Sent	Amount	Date Paid	Memo	Status
6/11/20, 12:50 PM	\$250.00	6/11/20, 3:56 PM	Thanks for your business!	Paid
6/15/20, 1:45 PM	\$150.00	6/15/20, 3:11 PM	Thanks for your business!	

Below the table are two forms:

- Payment** form: Includes fields for Name (MILES RUNNER), Email (4331@drakesoftware.com), Address (235 East Palmer Street), City (Franklin), State (North Carolina), and Zip (28734). A "Submit Payment" button is at the bottom.
- Credit Card Information** form: Includes fields for Amount Due (150.00), CC Number, CC Expiration, and CVV.

Two confirmation screens are shown on the right:

- Epay** screen: "Would you like to submit this payment?" with "Submit" and "No" buttons.
- Payment** screen: "This transaction has been approved." with an "OK" button.

Yellow arrows point to the "Payment" tab in the menu, the "Pay" button in the bill list, the "Submit Payment" button, the "Submit" button in the confirmation screen, and the "OK" button in the final confirmation screen.

- Files
- Profile
- ✓ Checklist
- Questionnaire
- Sign Forms
- Payment**

Date Sent	Amount	Date Paid	Memo	Status
6/11/20, 12:50 PM	\$250.00	6/11/20, 12:58 PM	Thanks for your business!	Paid
6/15/20, 1:05 PM	\$150.00	6/15/20, 1:11 PM	Thanks for your business!	Paid

