

# USING YOUR 1040 PORTAL

Step 1: To access your portal, login at our Client Center on the left using your username and password - contact us at [rrivera@poydenceco.com](mailto:rrivera@poydenceco.com) or (630)717-5330 x321) if you require any assistance.

Step 2: Once you successfully logged in, click on your name on the left of your dashboard.

Step 3: Click on the Tax Returns folder, followed by the 12-31-19 folder and then double click on the Tax Return pdf to review your 2019 Tax Returns.

Step 4: Once you reviewed your return, print & sign the documents provided in the "Action Items" folder in the "Final Action Item" pdf (For example - Forms 8879 & IL-8453).

Step 5: Return the signed forms to our office via the portal by scanning and uploading through the File Exchange feature, fax to us at (630) 717-9378 or drop off at our offices.

Step 6: Click on "My Invoices" on the left of your dashboard to pay your invoice. For instructions, click this link: [Making an Online Payment](#). To make a payment by phone or an ACH payment (For ACH payments you must provide a voided check), call Rosie Rivera at (630) 717-5330 x321 or mail/drop off a check. **(PLEASE NOTE THAT PAYMENT MUST BE RECEIVED BEFORE RETURNS ARE ELECTRONICALLY FILED).**