

Navigating Atom

What is Atom?

Atom is a secure site for tax preparers to communicate with their clients securely. It allows us to send and receive secure documents and messages without the need to encrypt or censor anything.

How to Login to Atom

- 1) Go to https://login.atomanager.com/ATOM_HAC/WebInfo.aspx
- 2) If you know your password, go to step 5, otherwise click “Need a Password or Forgot Password” at the bottom of the page.
- 3) It will ask for your primary’s Email or cell phone; this will be the email or cell phone we use to communicate with you. You will need to enter in the SSN of your primary taxpayer, or the taxpayer who comes first on the return.
- 4) Once you request a new password, go back to the login page.
- 5) The username is the SSN of your primary taxpayer, or the taxpayer who comes first on the return. Enter in your password, if you requested a new password, it will be sent to the email or cell phone you entered in.

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If you requested a new password, you will be brought to a page asking to update your contact information. Fill this out and submit it to get to the main page. When you first login you will be brought to a mostly blank screen with a bar on top. Click on the three lines on the top left to get to the menu.

Where’s My Refund?

In this section you can update your e-filed return. If we’ve paper filed your return, or if we have e-filed it but no information is showing up, go to the top right and click on “Refund Status Links.” Click on the return you want to know the status of, and it will redirect you to the page you need. If you want to look at a past year, click on the year next to “Return Year” and select which one you need information on.

Get a Copy of My Tax Return or Documents

This section is where you can access all of the documents we’ve uploaded for you. If the document you’re looking for isn’t showing up, check through the years under “Account Years.” If we need additional instructions for downloading your documents or to e-sign a document, click on the “Instructions” dropdown at the top of the screen.

Make a Payment or Get the Invoice

If you have an outstanding balance you can make a payment in this section.

Upload Documents

If we request documents, or you want to send us documents, you can do so here. Just drag and drop your files and give a short description. Don't forget to hit "Send" when you're done. If you want to look over the documents you've already uploaded, click on the "Instructions" drop-down and click on the highlighted "HERE."

Portal Messages

Portal messages are an onsite instant messenger. They allow for either side to communicate sensitive information in a more secure way than texting or emailing allows.

Client Feedback

The client feedback section allows you to submit a review to us. We may publish your review online unless specifically instructed not to, but they are not published online automatically.

Additional Links

This section has general links for all clients. It has our intake sheets, instruction sheets, and other useful links.

Update My Address/Email/Phone/Password

If you ever change your address, phone number, or email you can go to this section to update us to your current information, just remember to hit "Save" at the top as it doesn't save automatically. This page automatically opens when you request a new password, before redirecting to the main page.