

# Fast Track Clients in 4 Steps

Streamline the consent process for clients you have already verified

As an advisor, your firm has already completed an identity verification process for clients. All that is left for you to do is load a list of your clients following the four simple steps below.

**1** Login to TaxStatus and from the Advisor Dashboard and click: **+ Add client**

The screenshot shows the 'Firm workspace' dashboard. A red box highlights the '+ Add client' button in the 'Client consents' section.

**2** In the Add new client dialog, click Upload a list of known clients

The screenshot shows the 'Add new client' dialog. Under the 'Existing clients' section, the 'Upload a list of known clients' button is highlighted with a red box.

**3** Use your own Excel file or Download template to provide the required information.

The screenshot shows the 'Bulk import' dialog. A red box highlights the 'Download template' button. Another red box highlights the list of columns required for the Excel file: Social Security Number, First name, Last name, Date of birth, Mobile phone, Street, City, State, and Zip.

**4** Upload your data by clicking **Choose Excel file**  
Check the attestation box & type your name

The screenshot shows the 'Bulk import' dialog. A red box highlights the 'Choose Excel file' button. Another red box highlights the 'Attestation' checkbox and the text 'I, [ ] Type your full name declare to have personal knowledge of each person's identity in this file.'

Once uploaded, share your consent link with clients