



## Client Portal Instructions

### Activating your SecureFilePro™ Portal Account

You will receive an email invitation to activate your personal portal account. Contact your tax professional if you don't receive it or are unable to access it. Don't forget to check your SPAM folder.

1. Open the "You Have a New Account" email.
2. Click on the Activation Link or copy and paste the link into your browser's address bar.
3. Enter the last four digits of your social security number and your password.
4. Click Submit.

*Your Portal Activation link will expire in 7 days.*

### Signing Into your SecureFilePro™ Portal Account

Once your password has been created and saved, you will be able to access your SecureFilePro™ Portal Account.

1. Enter your Username. This is your first and last name.  
Example: Clara Client's username is CLARACLIENT.
2. Enter your Password.
3. Click Sign In.

### Retrieving Lost Sign-In Information

The SecureFilePro™ sign-in screen includes a link to help with lost usernames.

1. Click Forgot Username / Password
2. Click Forgot Username?
3. Enter the email address that was used to create the account.
4. Click Submit

The SecureFilePro™ sign-in screen also includes a link to help with lost passwords.

1. Click Forgot Username / Password
2. Click Forgot Password?
3. Enter Username
4. Click Submit

*If you don't have the necessary information to use the sign in screen, contact our office by email and we will reset your password.*

### Uploading Documents to your Tax Preparer

Using the SecureFilePro™ Portal you can securely transfer electronic copies of your tax documents to your Tax Preparer.

Prior to uploading your tax documents to the portal, your documents should be scanned in PDF format and assigned a name that describes the file. Example: Wages could be labeled as W2-Giant Food.

Once your files are organized and named, you are ready to begin the process of uploading your tax documents to your tax preparer.

1. Go to the “To Preparer” area and click “2023 Tax Documents”.
2. Click Upload.
3. Browse the files saved to your device that you would like to upload.
4. Select the file and click Open. Additional files may be included by clicking Add.
5. Review the list of files and click Upload.

After you upload your documents your Tax Preparer will be notified by email that a file is ready for downloading from you.

### Downloading Documents from your Tax Preparer

An email notification will be sent to you every time your Tax Preparer uploads a document to your SecureFilePro™ Portal Account. Included in this email will be a link to your personal portal.

1. Click on the link in the email notification.
2. Enter your Username and Password on the SecureFilePro™ login screen.
3. Click Sign In.
4. Your documents can be found under “From Preparer”.
5. Click the document to download.
6. Save to your device.

**Note:** Your SecureFilePro™ Client Portal Account should not be used to store your tax returns. Files are removed from the platform after 14 days. Your best practice is to download your documents and save them to your device, in a location that is recognizable.

### Guest Exchange

The Guest Exchange is a convenient option for securely sending and receiving documents when you don't want to create a full Client Portal Account.

You will receive an Exchange Email Invite to upload your documents to the Guest Exchange. If you don't receive it or are unable to access it contact your tax professional. Don't forget to check your SPAM folder.

### Uploading Documents to your Tax Preparer

1. Open the “Exchange Invite Email”.
2. Click the Guest Exchange Link or copy and paste into your browser’s address bar.
3. Enter your name and email address.
4. Select your tax preparer.
5. Select the files you would like to upload.
6. Click Upload.

### Downloading Documents from your Tax Preparer

1. Open the “You Have Files” Email.
2. Click the Guest Exchange Link or copy and paste into your browser’s address bar.
3. Enter your Email Address and PIN. Your pin is the last 4 digits of your Social Security Number.
4. Click the download icon.
5. Save to your device.

**Note:** *The Guest Exchange should not be used to store your tax returns. Files are removed from the platform after 14 days. Your best practice is to download your documents and save them to your device, in a location that is recognizable.*