



## Client Portal Guide



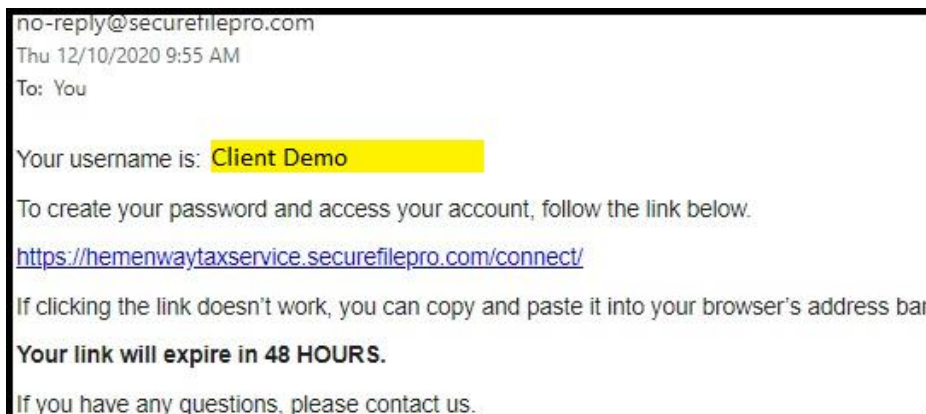
### [Video Guide: Using the Secure Client Portal](#)

#### About our Client Portal

- We use SecureFilePro to securely and electronically transfer files between our office and you. SecureFilePro is a service of Drake Software, a professional tax and accounting software provider that we've used for years to securely prepare and e-file your returns.
- The portal provides you with a secure way to exchange confidential tax documents safely and conveniently. You can send and receive documents anytime, anywhere.
- Your files are always protected by tough, industry-standard security measures. All transmissions are secured with 256-bit SSL encryption, and files are encrypted at rest on the server.

#### Accessing Your Client Portal for the First Time

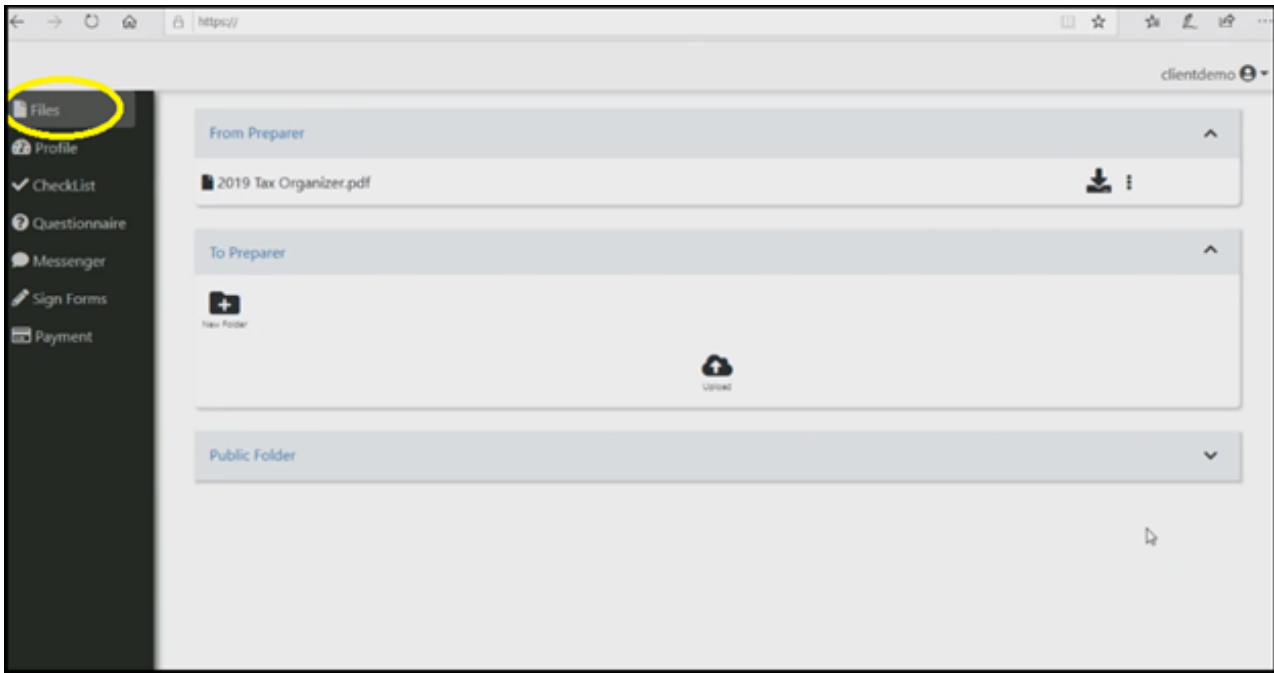
1. To get started, simply let us know that you want to use our Client Portal and we'll create your account. Please make sure we have your current email address.
2. You will receive an email message notifying you that a portal account has been created. Click the link shown in the email to create your password and access your account. This link expires in 48 hours. If you require another link, please contact our office.



3. On the next screen, you'll be asked to enter the last 4 digits of your Social Security Number (or, for business entities, your Employer Identification Number) and to create a password. Please take note of the password requirements explained in the notification. Click Submit.
4. You will be taken to a Login Page. Enter your username and password and press the Login Button. Your username can be found in the email that you received (see text in yellow above).



5. Your client dashboard will appear. You will be taken directly to the 'Files' page where you can download/upload files.

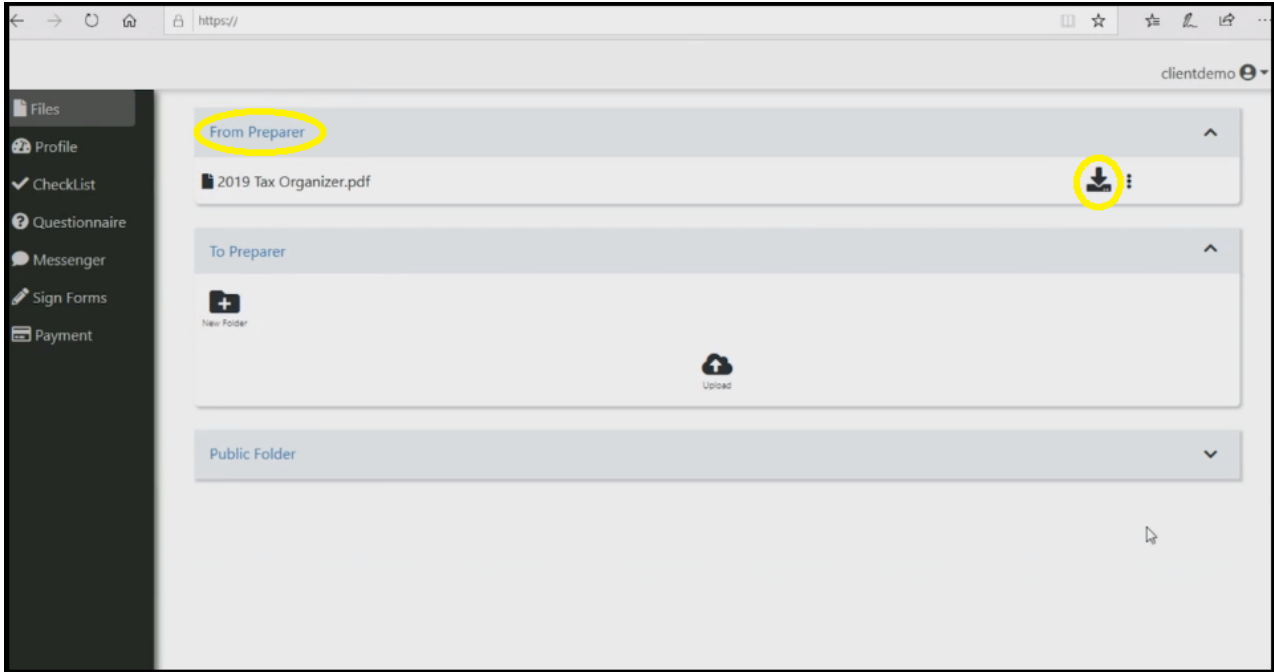


6. Congratulations! The set-up of your Client Portal account has been successfully completed. You may now use the portal at any time.
7. Please be sure to Sign Out when you are finished.

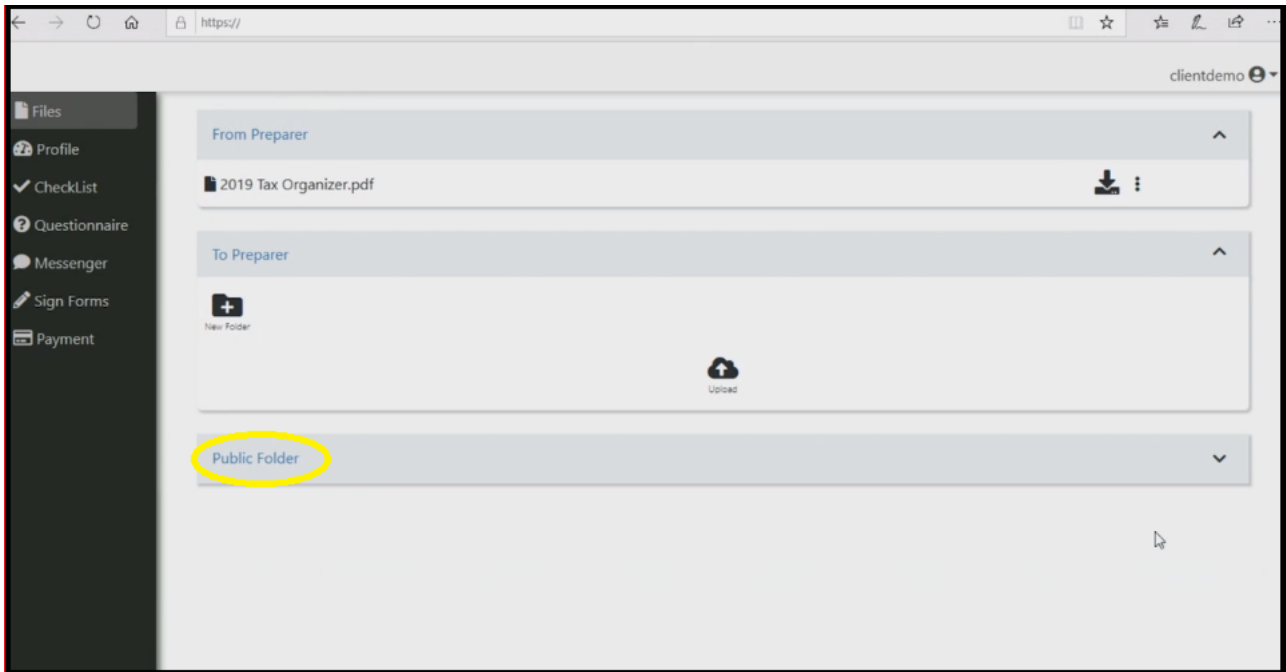


## Downloading Documents & Files

1. When we upload a file for you, you'll receive a notification via email.
2. Either click the link in the email or visit <https://hemenwaytaxservice.securefilepro.com> and Sign-In to your account.
3. Click the 'Files' link on the left-hand side menu. Under 'From Preparer' you will see documents provided to you from our firm.



4. Click the Download button for the desired file. The file will now be downloaded to your computer.
5. The downloaded file will be located in your Downloads folder (or other location you may have specified).
6. The 'Public Folder' holds generic forms and notices for all clients. They do not contain any personally-identifiable information

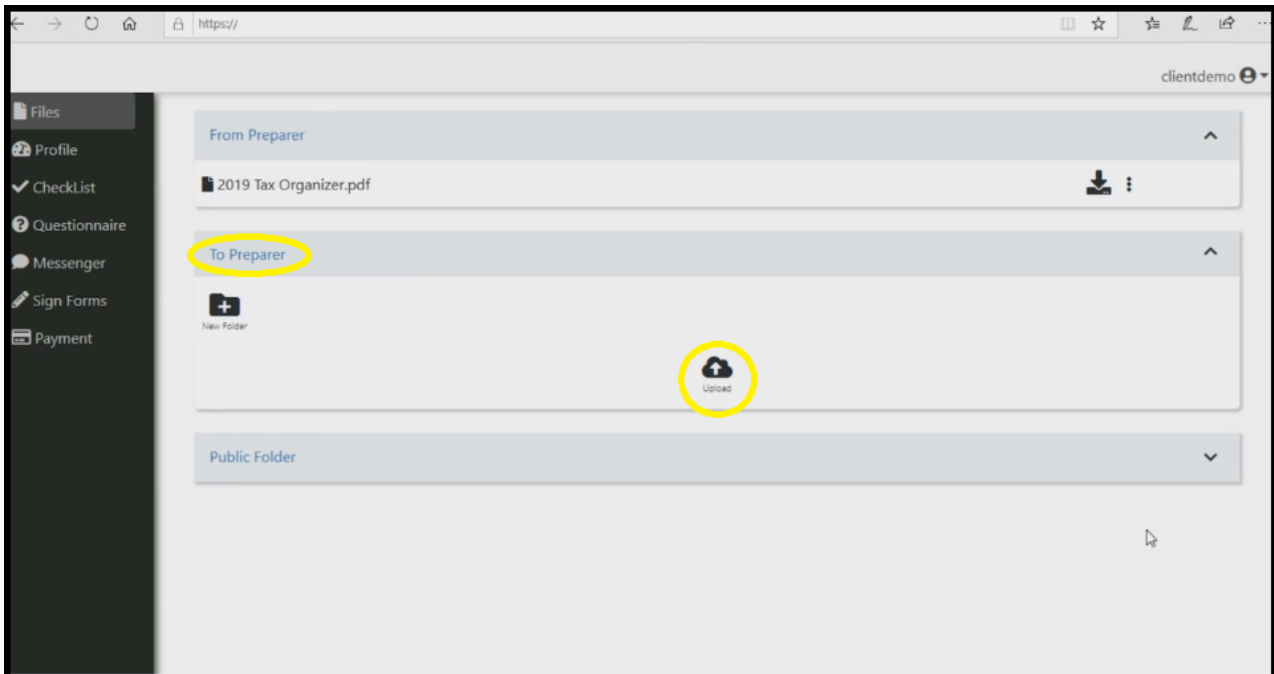


7. You're done! You may now Sign Out.



## Uploading Documents & Files

1. Login to <https://hemenwaytaxservice.securefilepro.com>.
2. Click the 'Files' link on the left-hand side menu. Under 'To Preparer' click the Upload button. A standard File Dialog box will be displayed, allowing you to select the file you wish to upload.



3. Select the desired file and click Upload.
4. The file will be uploaded and we will be automatically notified.
5. You're done! You may now Sign Out.



## Helpful Tips

1. Your Client Portal is located at <https://hemenwaytaxservice.securefilepro.com> and is accessible only via a secure connection (https). We encourage everyone to adopt the habit of checking the address in any url link before clicking. Know where you are going.
2. You can access your Client Portal using any of the following methods:
  - a. Clicking the link in any email notification from SecureFilePro™
  - b. By entering <https://hemenwaytaxservice.securefilepro.com> into your browser's address bar
  - c. By clicking Client Portal on our [website](#) menu



**HEMENWAY**

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3. All e-mail notifications will be sent from [no-reply@securefilepro.com](mailto:no-reply@securefilepro.com). You may wish to add this address to your Contacts to prevent these notifications from being sent to spam.
4. When uploading files to us, you may create folders to keep related documents together, if you wish. From the 'To Preparer' folder, click the Folder Options link. From there you can create additional folders.
5. ALWAYS Sign Out when you are finished.
6. We strongly discourage clients from accessing Client Portal from a public Wifi connection or other non-private computer system!
7. KEEP YOUR PASSWORD SECURE!