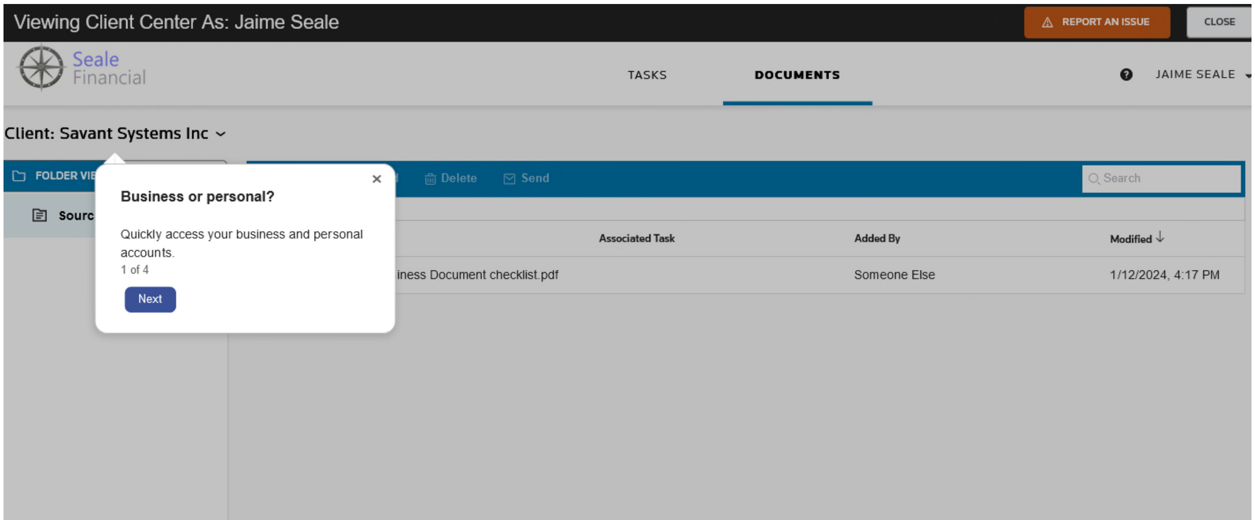
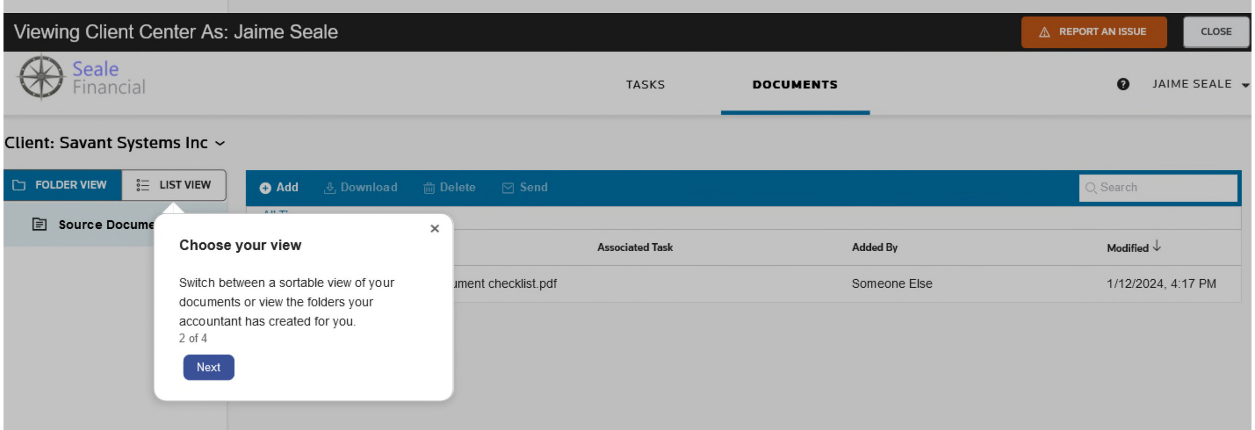
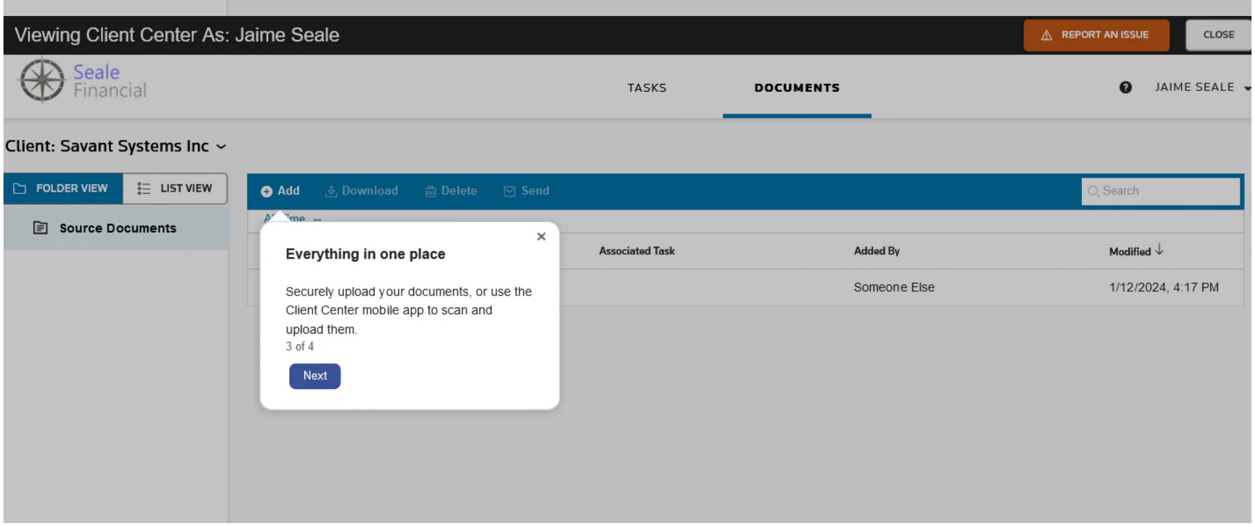
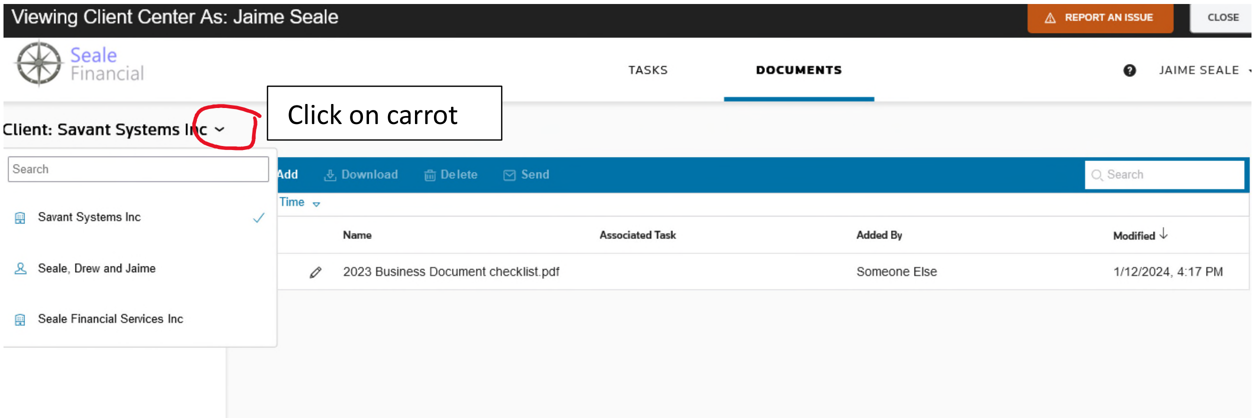
I wanted to just provide a refresher on the portal system. Some of you have access to multiple items. This is just a quick navigation overview. You can access everything (even signatures) from the documents section. These screen shots are from the Documents side (if you have tasks, you only need to click on that, and the underline will move, and you will be in the tasks section)



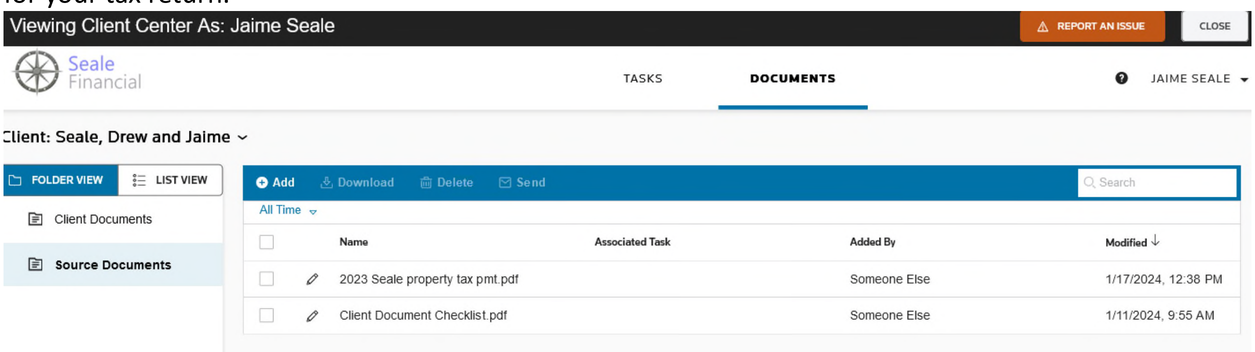




You can easily change between folders for your personal, business, or trusts documents:

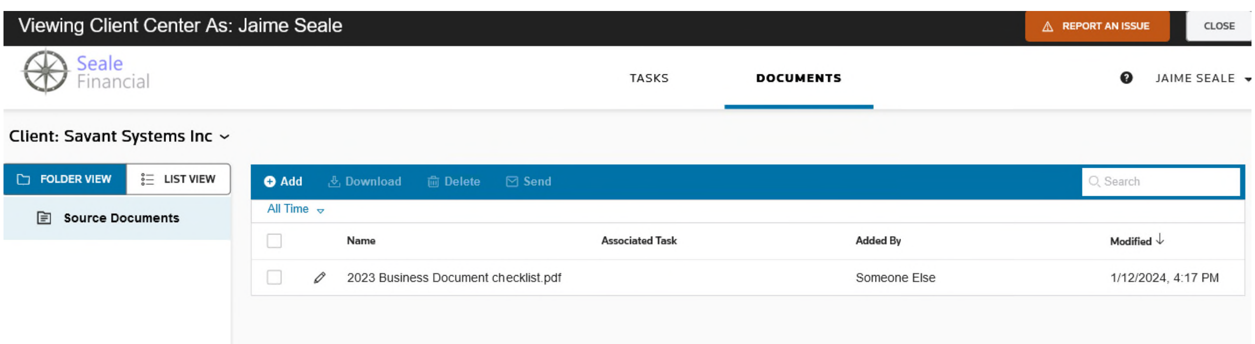



Choose the correct client folder.

Please navigate to the Source Documents folder. This is where you should save your required documents for your tax return.




Here I have changed to my business and navigated to source documents.




If you do not see this folder, please let us know. We can either add it if it is missing or correct the sharing on the folder.

All engagement letters are in your ‘Client Documents’ folder. If you do not have one there, please let us know so we can add it.