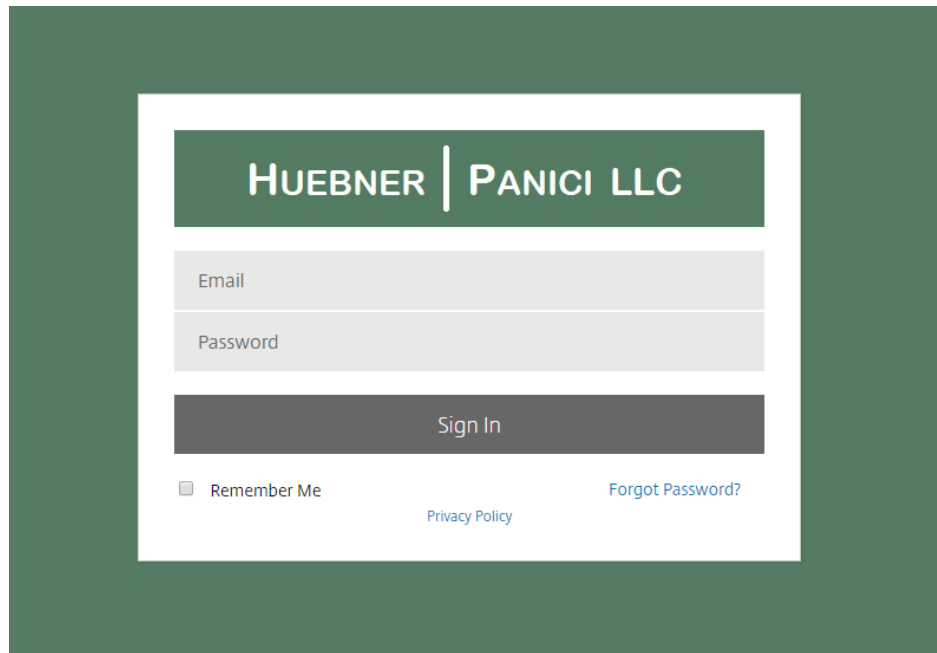
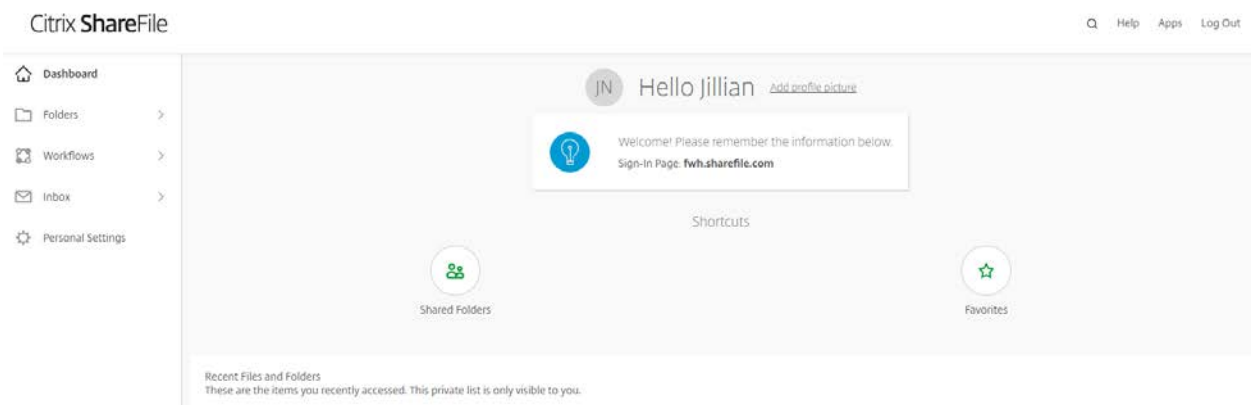


Your Portal Experience

1. Once you have successfully created a login and password, you will go to fwh.sharefile.com or use the link found on www.fhcotax.com.
2. Enter your email and password then click the grey “Sign In” bar as follows:



3. Once you have logged in, you will see a page similar to this:



From here you can click on the folders tab on the left-hand side of your screen to view the folders you have been given access to.

Citrix ShareFile

The screenshot shows the Citrix ShareFile interface. On the left is a sidebar with navigation options: Dashboard, Folders, Shared Folders, Favorites, ShareConnect, Workflows, Inbox, and Personal Settings. The main area is titled 'Folders' and displays a table of folders:

Name	Size	Uploaded	Creator
.../2017/John Smith	0 B	10:19 AM	J. Nowell
.../2018/John Smith	0 B	10:20 AM	J. Nowell

For a personal return, once you have selected the appropriate tax year you will see the following folder options:

The screenshot shows a breadcrumb path: Folders > Test > Smith, John > 2017 > John Smith. Below the path is a folder icon and the name 'John Smith', followed by a 'More Options' button.

The screenshot shows a list of folder options, each with a checkbox and a star icon:

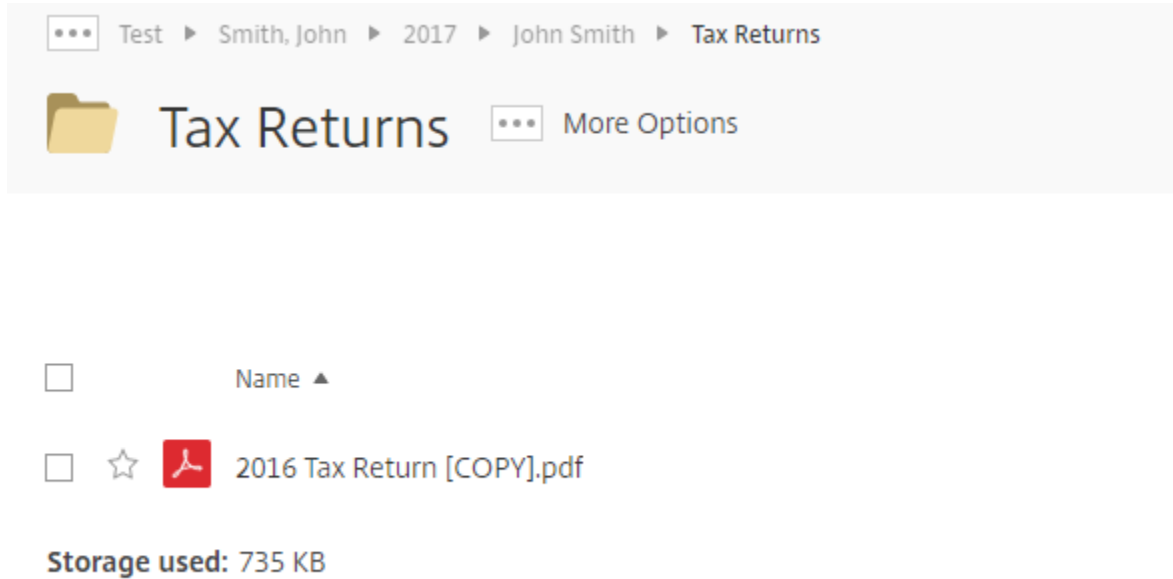
- Name
- Correspondence
- Engagement Letter
- Organizer
- Source Documents
- Tax Notices
- Tax Returns

Below the list, it states: **Storage used: 735 KB**

If it is a return type other than individual, you will see similar but slightly different folder options.

To view a document

1. Navigate to the folder containing the document and click on the name of the file that you wish to view.



2. This will allow you to view the document. On the right side of the screen, you will also have the options to download or print the document.

