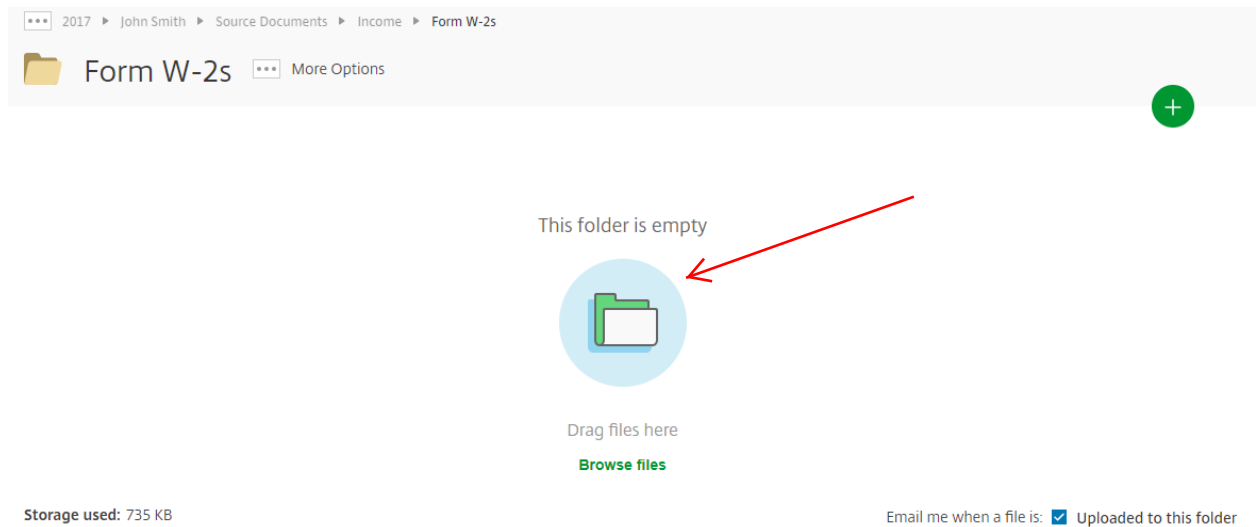


How to Upload & Download

Two Options for Uploading:

1. In the Client Portal, select the folder you wish to upload a document into and open it by clicking on it.

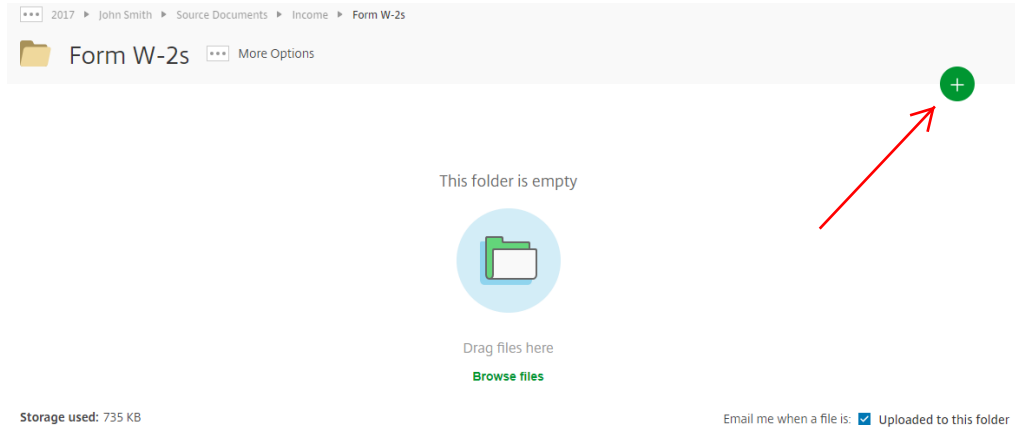
For Example, I want to upload a new W-2 that I received. I would select the correct tax year, Source Documents, Income, and then Form W-2s.



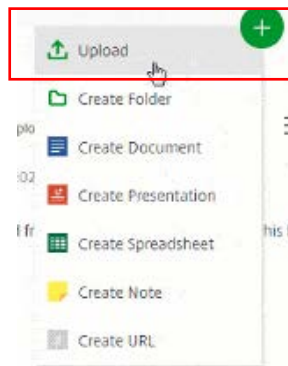
Simply drag the file that you wish to upload over the blue circle and drop it. It is recommended that you wait until the file is fully uploaded before navigating away from this page. You will know the file is fully uploaded when the green status bar reaches 100%. See below:



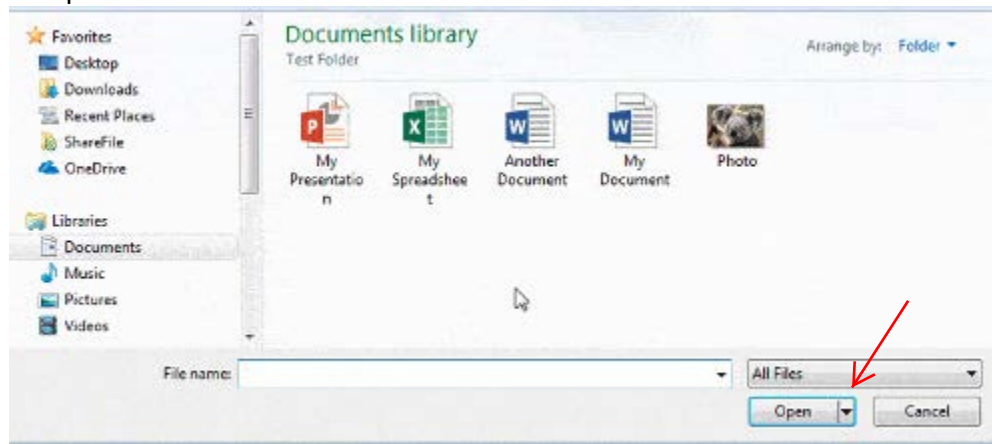
2. Select the folder you wish to upload a document into and open it by clicking on it. You can upload multiple files at once.
For Example, I want to upload a new W-2 that I received. Select the correct tax year, Source Documents, Income, and then Form W-2s.



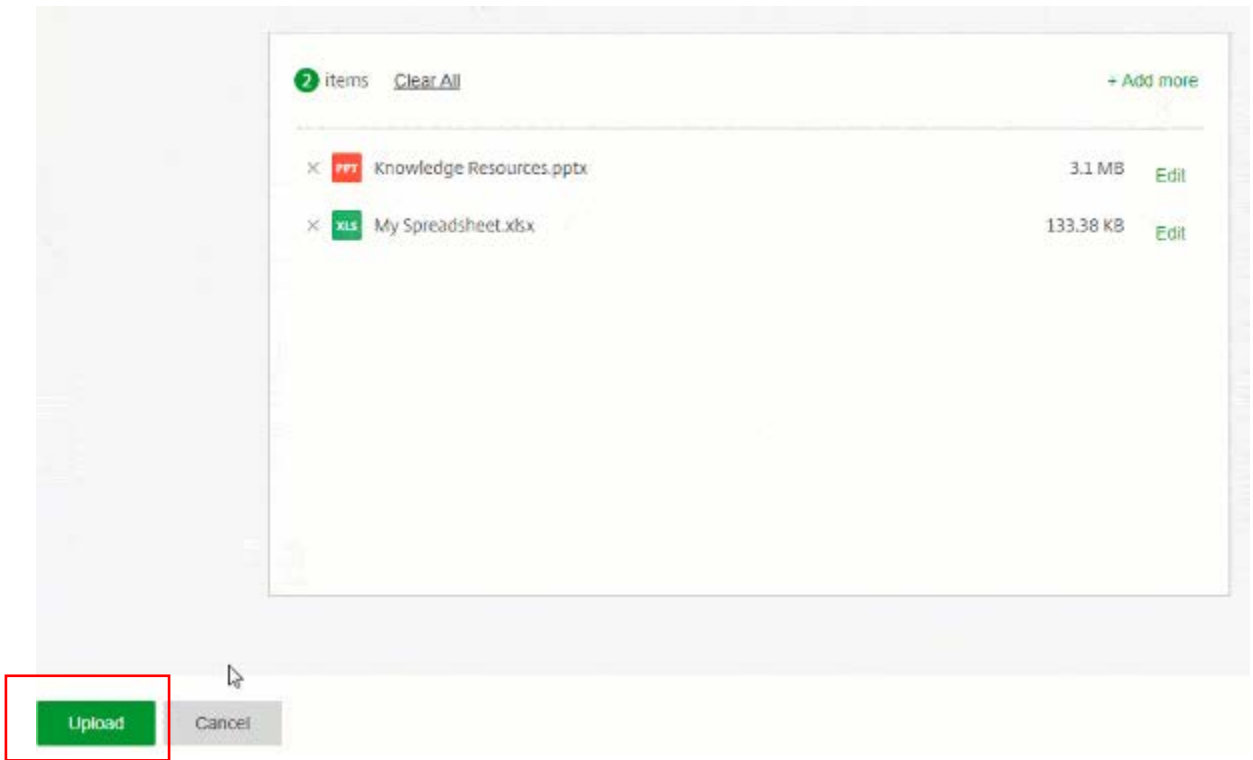
Click on the green + sign in the top right corner. Select the first option that says "Upload."



Navigate to the location on your computer where the file is stored then select the file and click open.

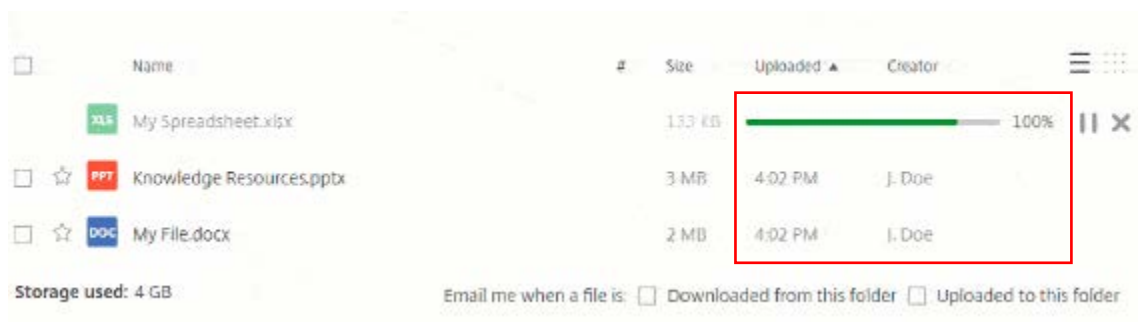


Once you have selected all the files you wish to upload, click “Upload” in the bottom left corner of the screen.



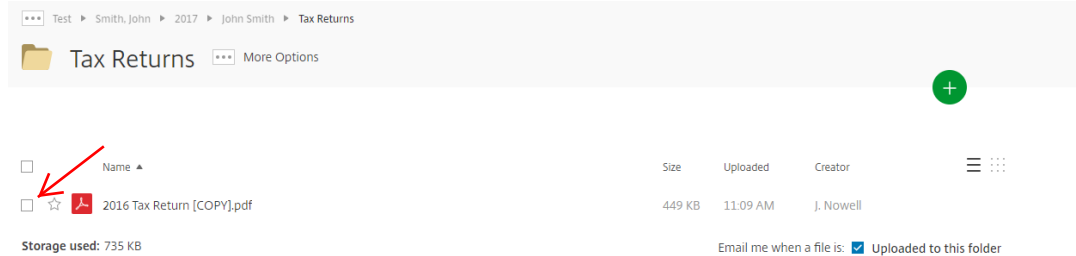
It is recommended to wait until the file is fully uploaded before navigating away from this page. You will know the file is fully uploaded when the green status bar reaches 100%. If uploading multiple files at once, wait until the last file has fully loaded before leaving the page.

See below:

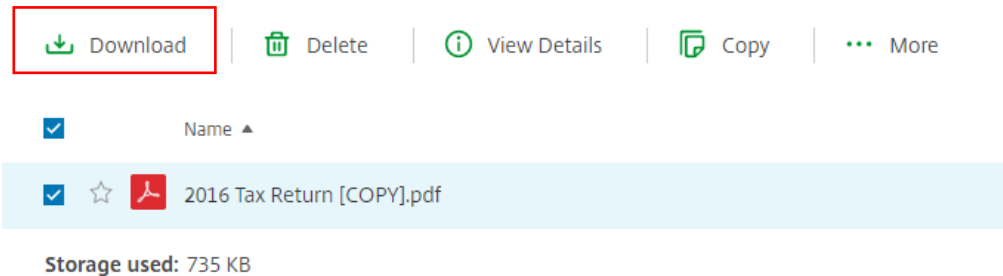


Downloading:

In the Client Portal, navigate to the folder containing the file that you wish to download. For example, I want to download my copy of my tax return to review. I would select the correct tax year and then Tax Returns.



Click to select the box next to the file that you wish to download and then click “Download” in green shown on the upper left of the screen.



Your file will appear on the bottom left of your screen. You can click on the file name or use the upward arrow to open it. Once you have the file open, you will have the option to print or save the file.

