

SmartVault Orientation

The IRS is requiring that all CPA firms increase security levels. As a result, we have implemented the SmartVault secure document storage tool. We primarily use SmartVault in these two ways:

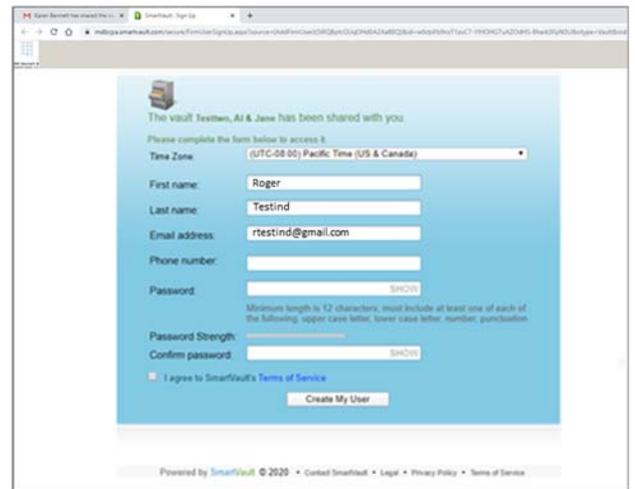
- As a place for you to upload your tax-related documents
- For us to place the soft copy of your completed tax return, for you to access as you need

This document gives a basic overview of these SmartVault features:

1. **Activating your account**
2. **Logging in**
3. **Navigating through your folders**
4. **Uploading tax documents**
5. **Reviewing your completed tax return (and, if needed, downloading it)**
6. **Two-Factor Authentication**

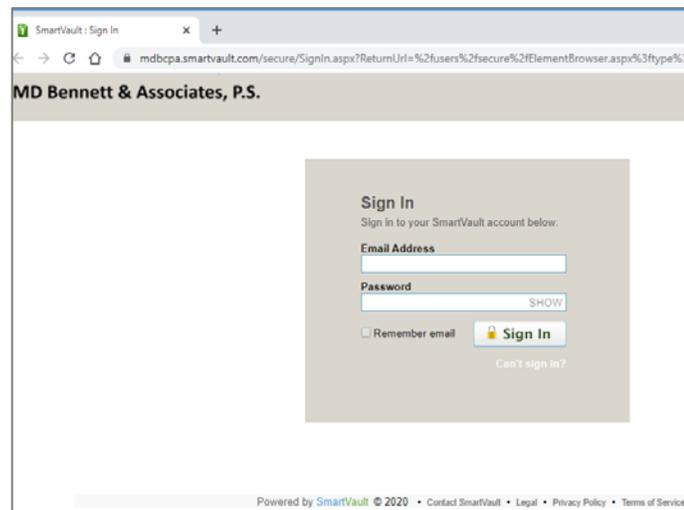
1. Activating Your Account:

You should have received an email from us announcing that we are “sharing a folder” with you. This is your invitation email that gives instructions for activating your SmartVault account. When you click on the big “Activate” button in your invitation email, you will see a screen similar to the one here. SmartVault requires a very strong 12-character password. Please read the instructions on the screen for password requirements. Yes, this is yet another set of credentials to track, but this security is stronger than using email.



2. Logging In

Once your account is activated, it is available for you to log in. To log in and start uploading/reviewing your folders and files, simply go to the Uploads/Tax Docs page of our website and click on the button for “Go to SmartVault”. The log in screen looks like the one here. Use the email address where you received your activation email, along with your new password to log in. We will not have access to your password. If you have problems logging in, or have forgotten your password, click on “Can’t sign in” for SmartVault help.

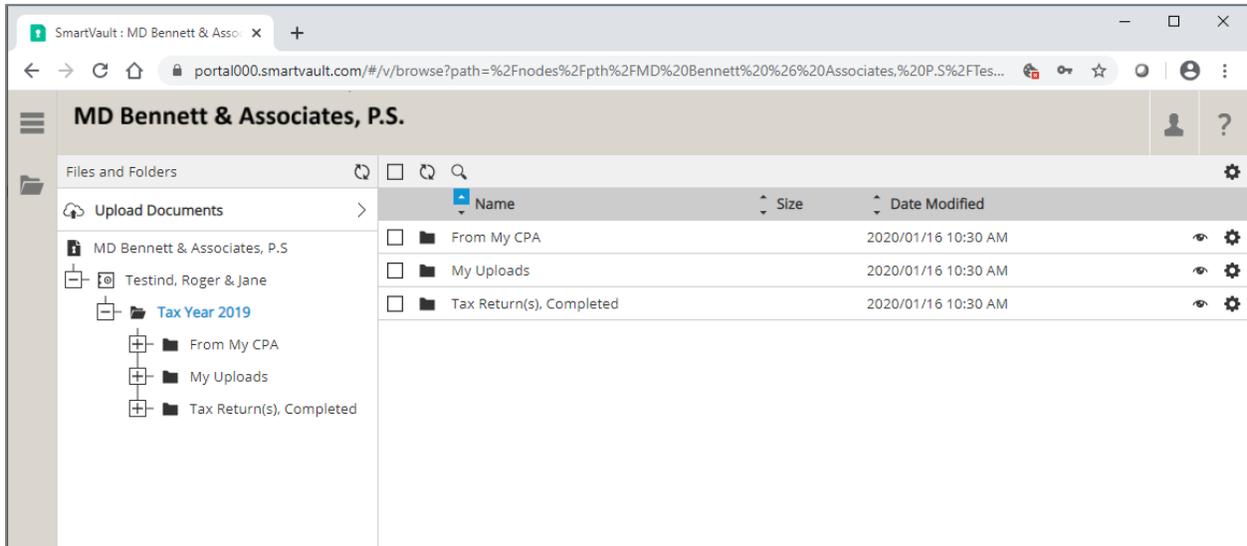


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3. Navigating Through Your Folders

Starting with 2019 and going forward, you will have a folder in your account for each tax year (i.e. “Tax Year 2019”, highlighted in blue below). Within each tax year, you will have three folders:

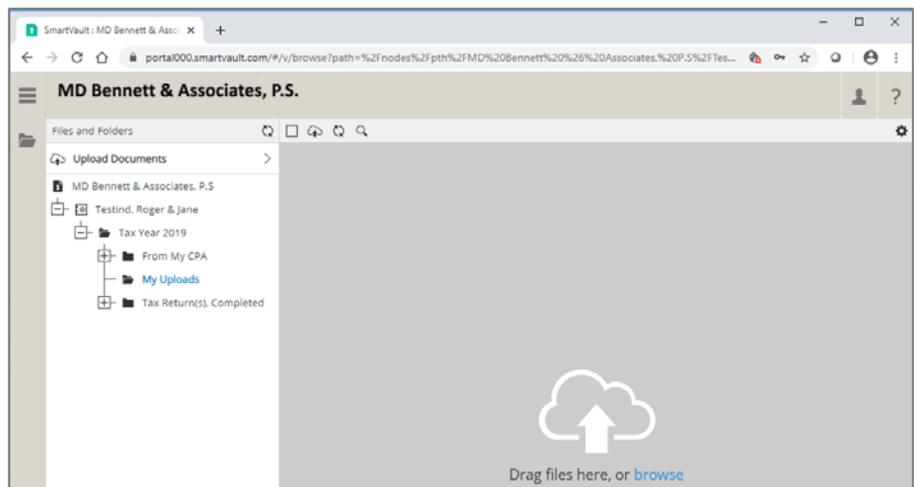
- From My CPA: For us to upload documents to you (except your completed tax return)
- My Uploads: For you to upload documents to us
- Tax Return(s), Completed: For us to upload your completed tax return for the year



4. Uploading Documents to Us

To upload documents to us, simply click on the “My Uploads” folder, then either drag/drop files into the folder, or browse (highlighted in blue) to browse your computer and select documents.

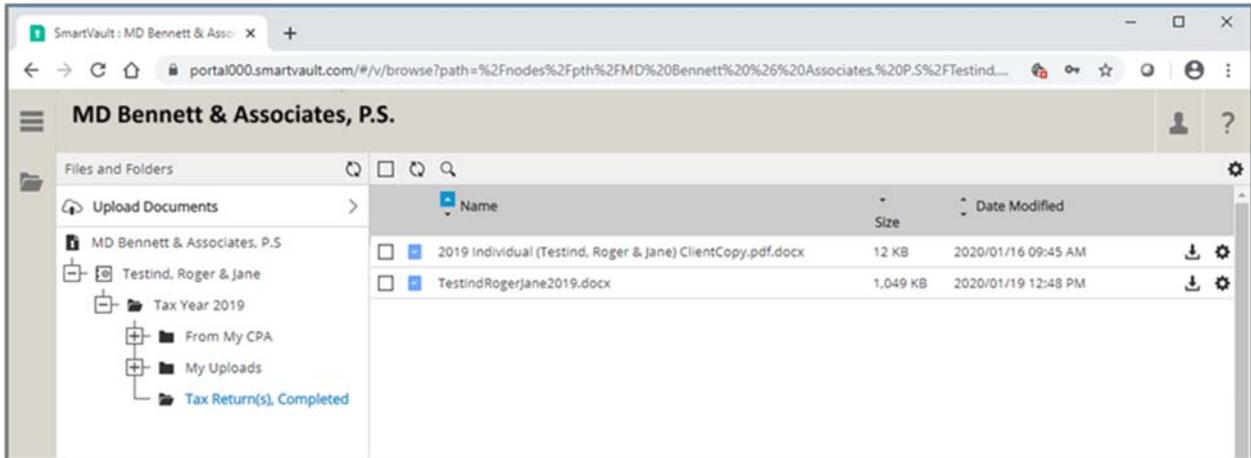
You will know your upload is successful when you see the file appear in your folder. We will be automatically notified each time you upload a document. If you have notes to send us regarding your uploads (i.e. changes in job, marital status, children, etc.) please upload them in a separate document or send to us via email.



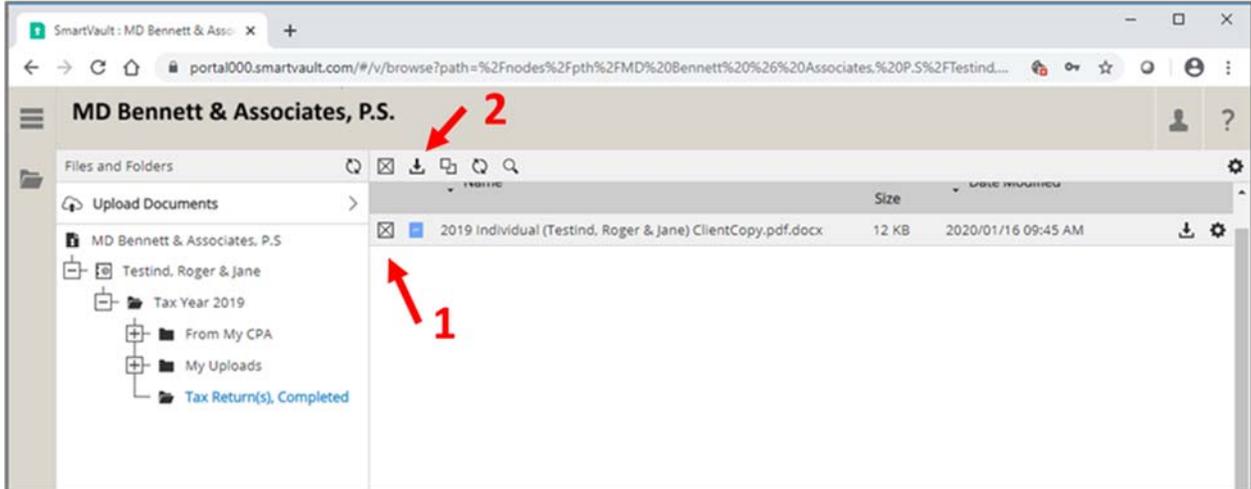
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5. Reviewing Your Completed Tax Return

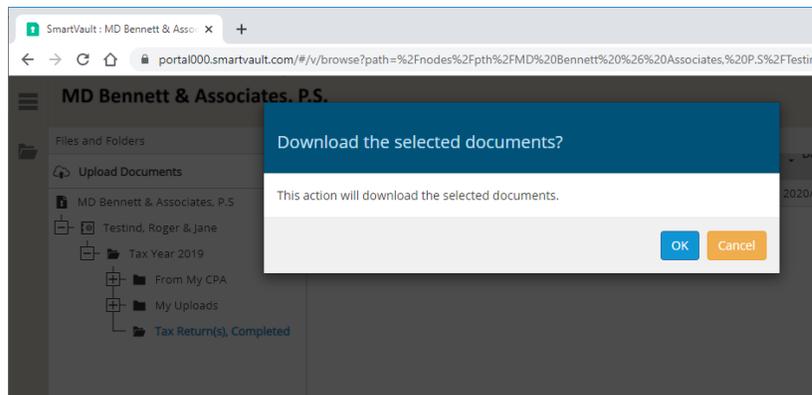
Once your tax return is complete, we will upload a soft copy of the return and related source docs into your “Tax Return(s), Complete” folder for the relevant tax year. We will notify you via email when that tax return has been uploaded and is ready for your review.



If you need to provide a third party with a copy of your tax return, you 1) click the box to the left of the tax return document (to select it). And then 2) click the download icon on the menu bar above your list of files.

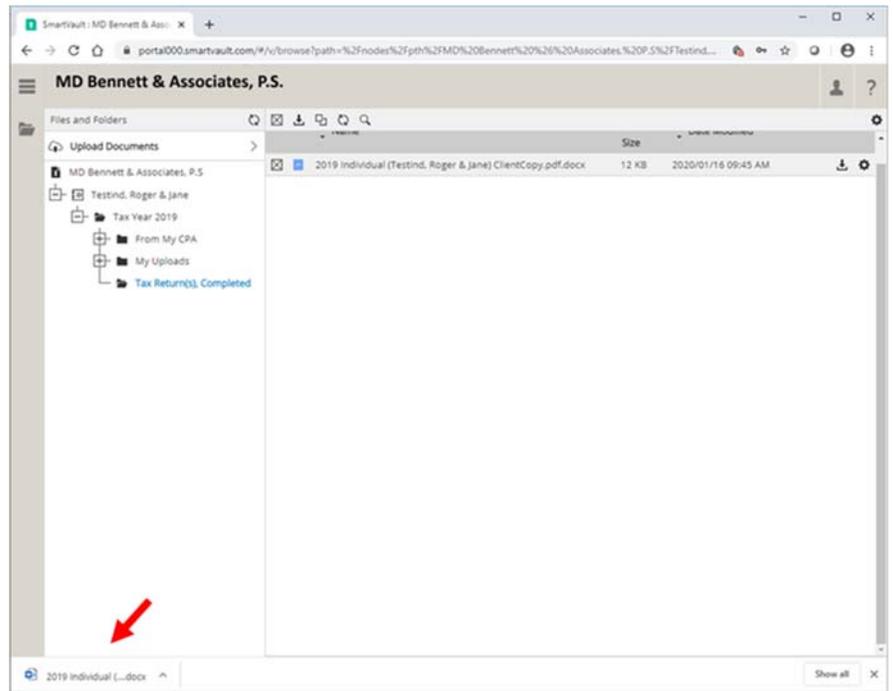


Click “OK” to initiate the download



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Your document is ready at the bottom of the screen for further action.



Please remember, we recommend you never send your Social Security number or other identity theft-type information via email unprotected, e.g., don't email an unprotected copy of your tax return. Before you download, have a plan for how you will keep your document secure on your computers and secure as you send it to others. Understand that we have no control over the unauthorized compromise of your SmartVault and downloaded documents.

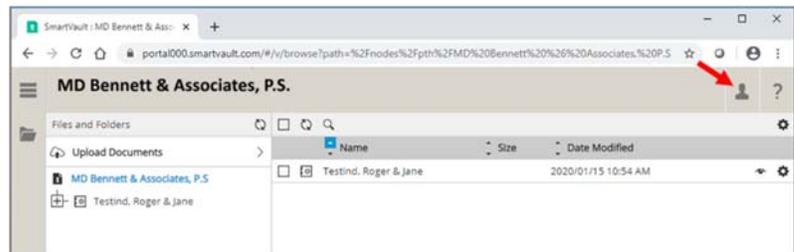
6. Two-Factor Authentication

Your SmartVault account is setup with an extra layer of security, ensuring that you're the only person who can gain access. Each time you log in, SmartVault will immediately send you an email with an authorization code that must be entered to successfully log in. Here are three options for modifying your two-factor authentication:

- Have your authorization codes in text to a mobile phone rather than email
- Receive a voice phone call with your authorization code
- Disable your two-factor authorization (although we do not recommend disabling)

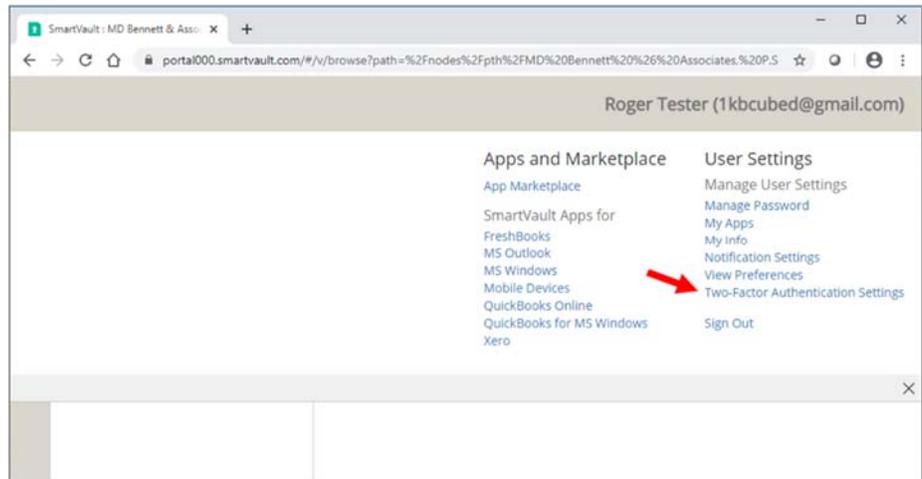
Here are the instructions for modifying your two-factor authorization settings:

Click on the person icon for your personal account settings:

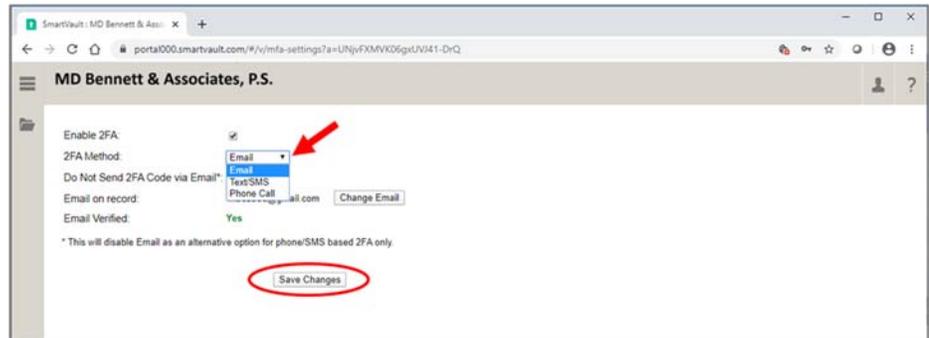


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Select "Two-Factor Authentication Settings"



To change the notification settings, click on the drop-down and complete the information. Press "Save" when done.



To cancel two-factor authentication, unclick "Enable 2FA". Press "Save" when done.

