Contents

Client Log in Instructions:

Once you receive an e-mail that your tax preparer has created a SecureFilePro™ your account, click the link and follow the steps below to complete your account set up.

1. Enter the last four of your SSN, and establish a password. The password requirements are:

    a. Minimum 8 characters.

    b. Contain at least one uppercase letter.

    c. Contain at least one number.

    d. Contain at least one special character.

    e. Cannot contain spaces.

Enter Your New Password

Enter the last 4 digits of your Social Security Number *	1235
Password *	••••••••
Confirm password *	••••••••

Submit   Cancel

2. Once this is done, you will be able to log in to the site using your assigned username and the password you created. Make sure you are on the Client Sign In before entering your information.
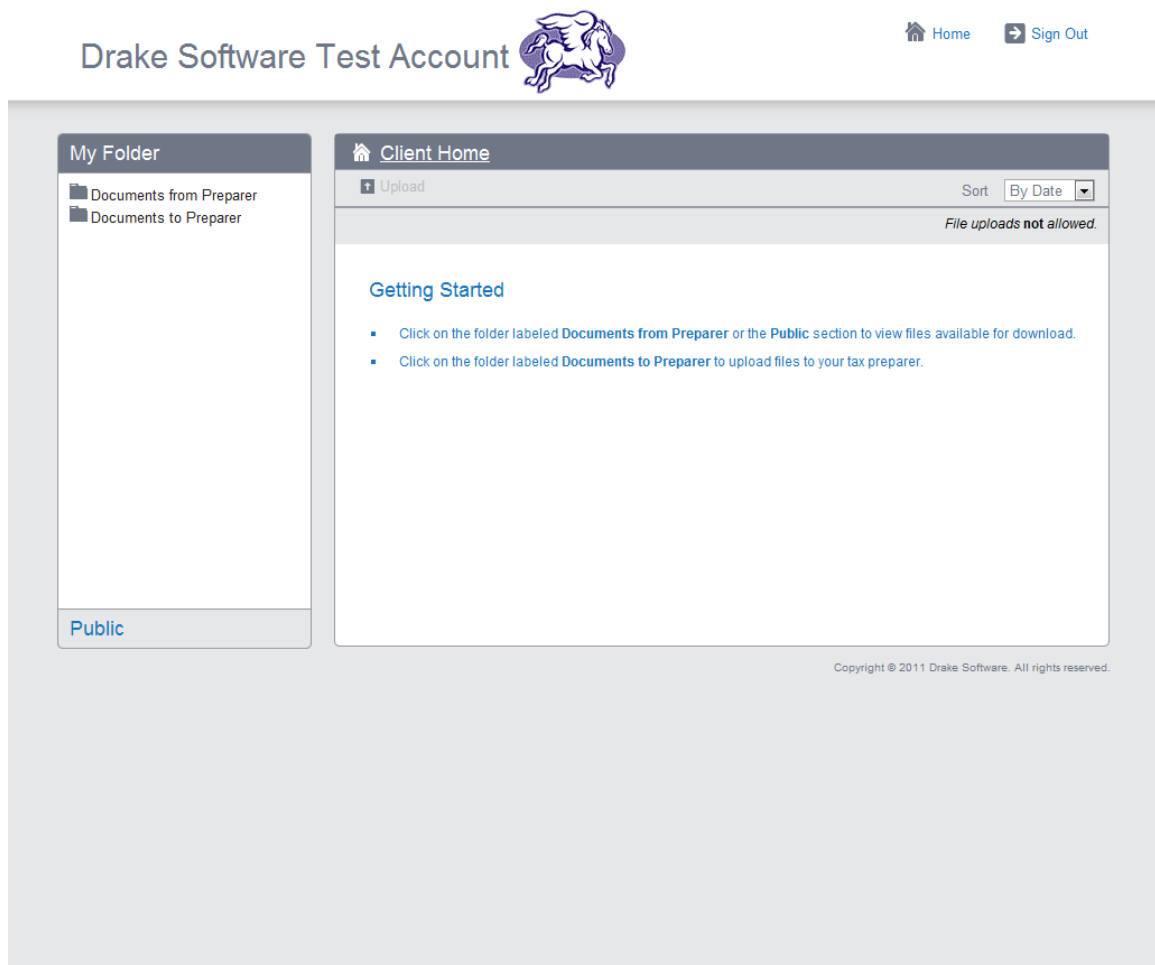
Sign In

Username:

Password:

Sign In

Forgot username or password?
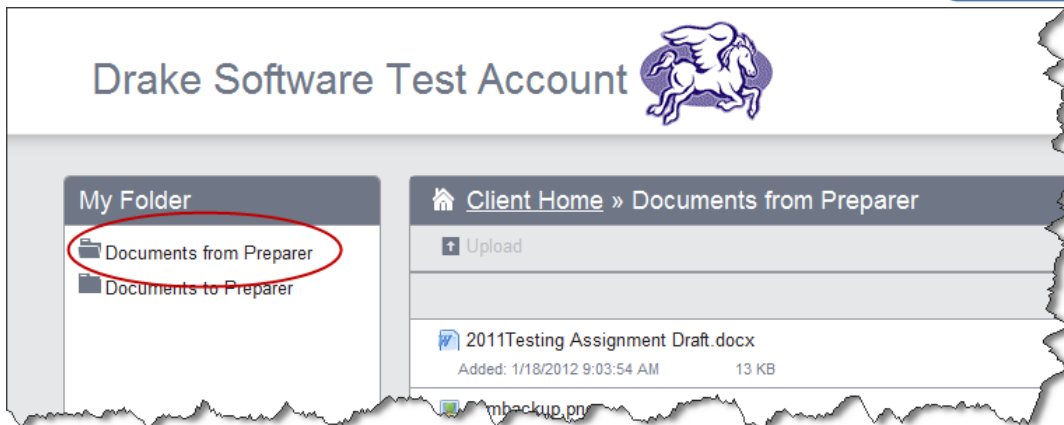
SecureFilePro™ - Client Information

Upload/Download Files:
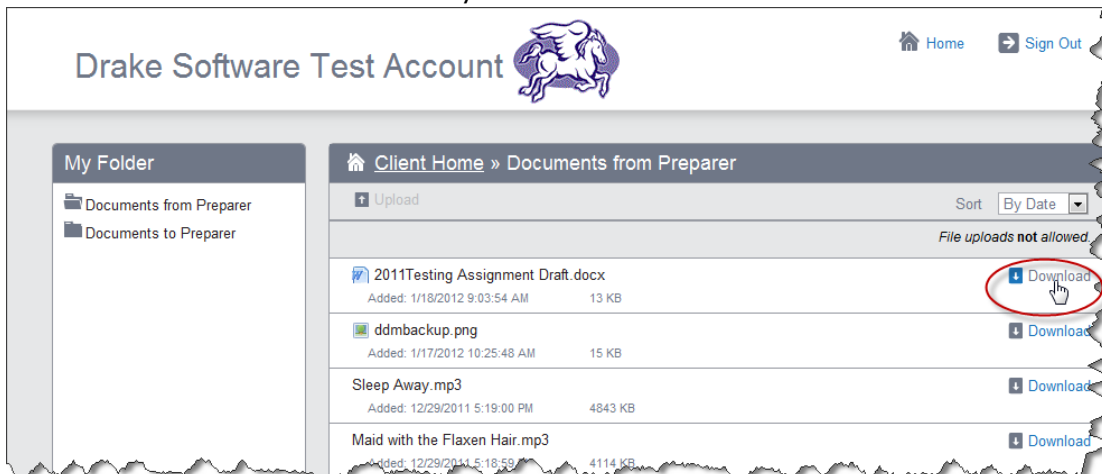
Files From Preparer:

After you log in you will be taken to the Client Home page of your tax preparer's site. Follow the instructions below to download your files.

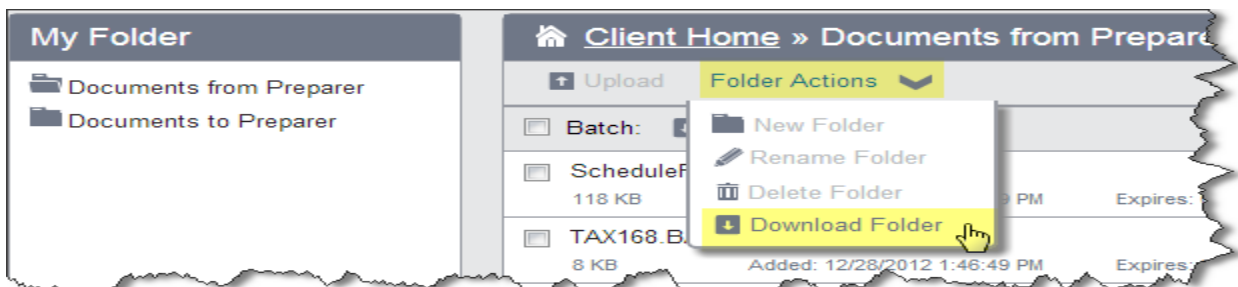
1. Click **Documents from Preparer**.

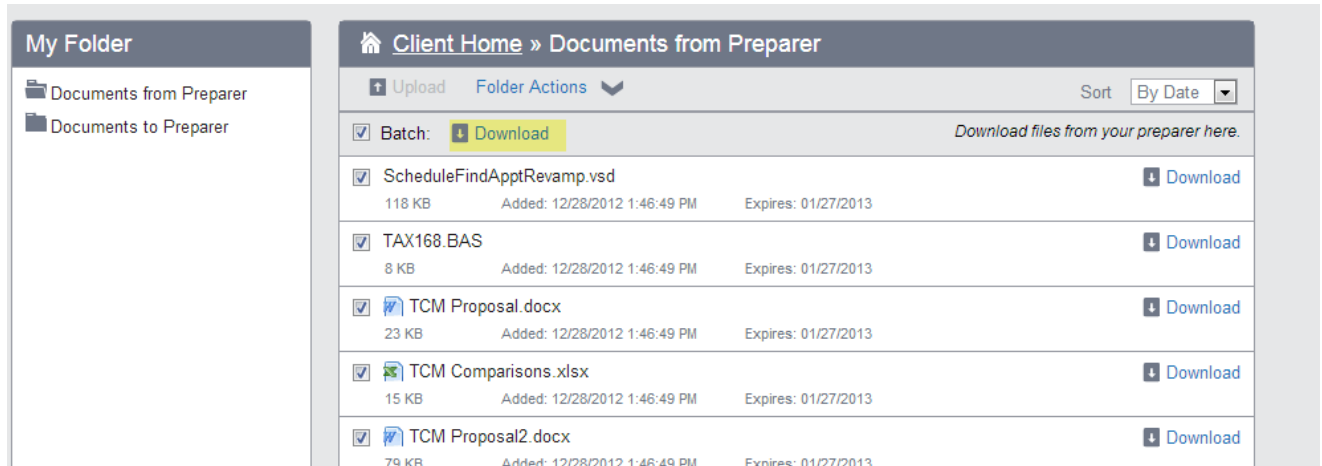2. Click **Download** beside to the file you want to retrieve.

> **NOTE:** You can download multiple files at a time.

    a. To download the folder:
- o Under Folder Actions, select Download Folder.
- o The program preparers a ZIP file.
- o Click **Download** and follow your browser's download processes.

b. For **All** files:
- o Click the checkbox for **Batch**.
- o Click **Download** link given as a **Batch** option.
- o The program preparers a ZIP file.
- o Click **Download** and follow your browser's download processes.

c. For multiple files:
- o Click the checkboxes of the files you wish to download.
- o Click **Download** link given as a **Batch** option.
- o The program preparers a ZIP file.
- o Click **Download** and follow your browser's download processes.

3. For all downloads follow the on-screen instructions for your specific browser.
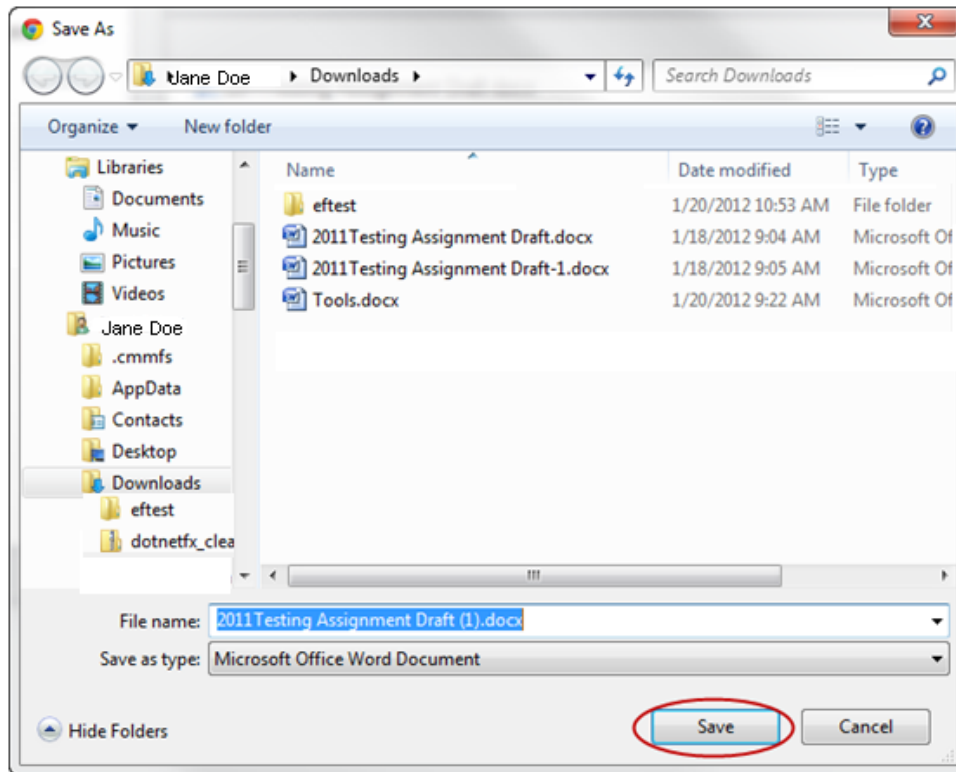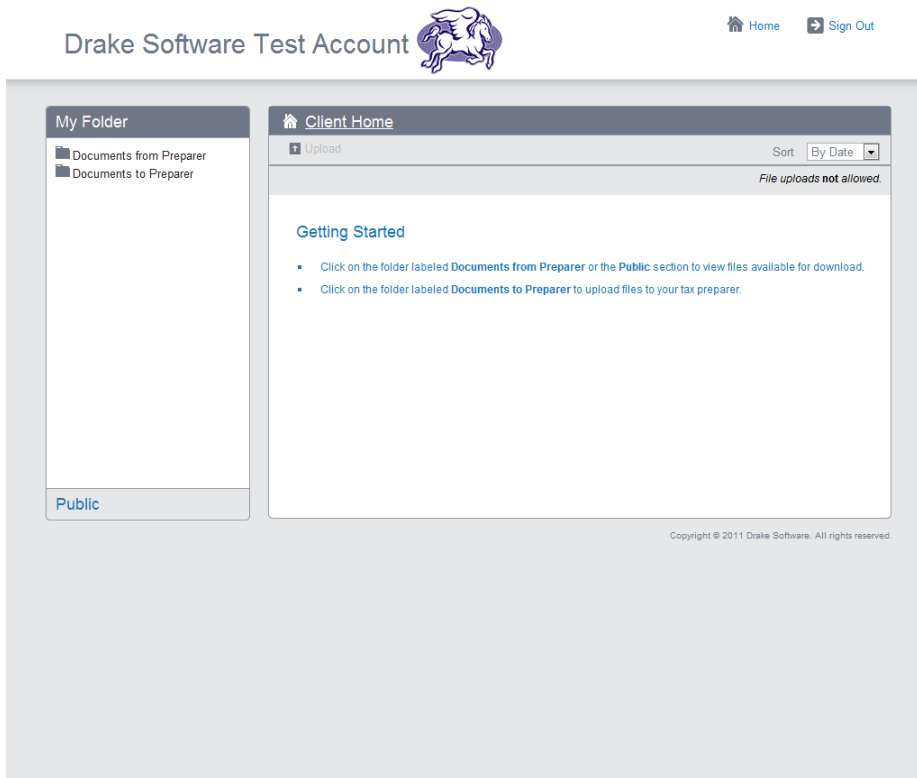
**NOTE:** If you cannot download the file, check your browser settings to ensure that downloads are allowed.

4. Once the file(s) are downloaded to your preferred location, you can view them as needed using your browser's view downloads or Windows Explorer.
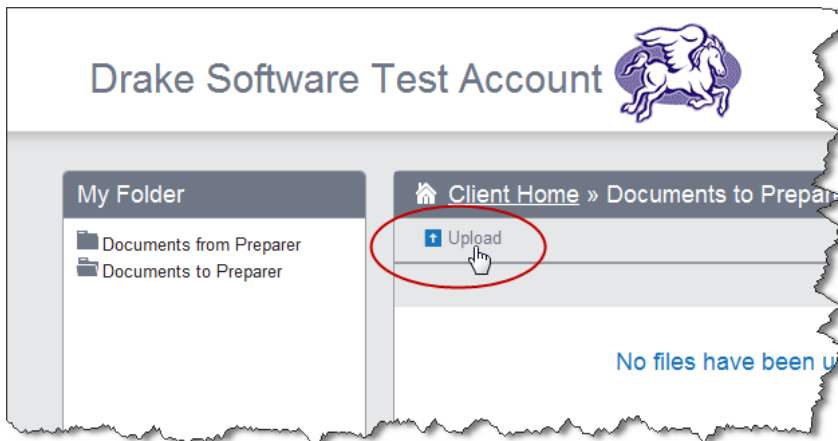
Files to Preparer:

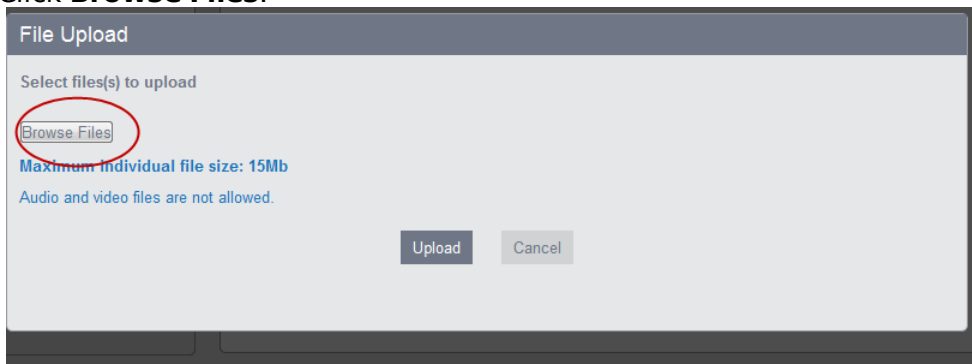You can Download Files to Preparer by following the instructions below:

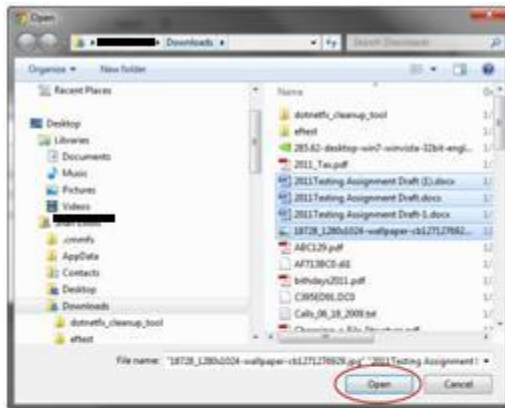1. Click **Documents to Preparer**.
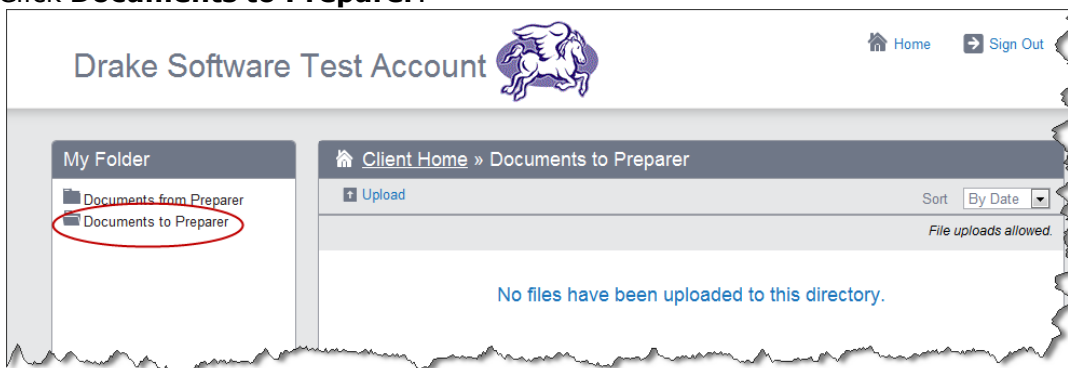
2. Click **Upload**.

3. Click **Browse Files**.

4. Use the browser to locate and select a file to upload and click **Open**.

> **NOTE:** You can select multiple files to upload at one time.

5. Click **Upload** to add the selected files to the Documents to Preparer folder.