**CLIENT WEB PORTAL INSTRUCTIONS**

1. Website: www.toledocpa.com
2. Click on "**Client Tools**" on the Toolbar. Then Click on the "**Padlock"** under Securely Sign in to your Portal
3. **LOGIN**: 26361@ClientID **PASSWORD**: Primary Taxpayer SSN
   - The ClientID was sent to client via email; if we have an email address in Ultra Tax.
   - Clients can change username and password, so it could be different if changed last year.
   - We can look up login, email or reset password.
   - Paper organizers sent via USmail or email are not on the web.
4. In addition to yhe Web Tax Organizer, we have several other Documents that require your signature.

   WE call this packet of Documents your "**Action Items**"- Must be Printed, Signed and Returned to us BEFORE we can complete your returns!

   Included in this packet are the following:
   - **Tax Return Delivery Option** (You select from the following)
     - Web Portal PDF files (Using your secure login)
     - USB Memory Drive PDF files (Password protected files)
     - Paper copies picked up from our office (Old School)
     - FedEx Paper copies to your location (Additional charges apply)
   - **2016 Services Engagement Letter** (Written agreement for us to prepare your tax returns)
   - **FBAR Letter** (Foreign bank/investments) (Initial the applicable box in section One and the applicable box in section Two.)
   - **Acknowledgement Page** (Must provide USE Tax Purchases amount for State Filing AND Verify your Bank Account in the Portal)
   - **2016 Health Insurance Coverage Disclosure** (Must be completed unless you have 1095 forms to show all members of your tax household)

     The Packet MUST be signed on page 9.

     Digital signature is ok for Tech savvy clients

***** IF YOU DO NOT HAVE AN ACTION ITEMS PACKET, YOU CAN OBTAIN ONE AT OUR OFFICE AT THE TIME OF YOUR TAX MEETING *****

or YOU CAN CONTACT YOUR TAX PREPARER DIRECTLY TO HAVE THEM FAX OR EMAIL A PACKET TO YOU.

1. Click on "**Tax Organizer**"
   - Follow and complete items on the left side of the page
   - Put any extra stuff client cannot find a place for on the "Notes" page or look under the "Add Forms" at bottom left
2. Attach documents
   - Click on "**Uploaded Tax Statements**"
     - Upload
     - Add files
     - Browse computer for files
     - Start upload, wait to say Successful
3. When Finished
   - Click on "**Save & Close**"- This options saves and can work on later (not sent to us)
4. ONLY when you are ready to send to us...
   - Click Orange button **"Send to Preparer"** for us to receive information and documents.

     (TRY NOT TO SEND MULTIPLE TIMES IF POSSIBLE AS WE GET THE ENTIRE BLOCK OF INFO EVERY TIME)
     - You must also send us Forms W-2, 1099s, K-1s, and any other tax documents if you did not scan and attach a copy with organizer.
     - *We download this information once a day, immediate confirmation to client of receipt is not available.*