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The Definitive Guide to Using the SWC Client Center



Upload/download
documents



eSign
documents



View information
about your returns



Keep in touch
with our office

And much more.

The Definitive Guide to Using the SWC Client Center...

for uploading documents eSign important documents, viewing information about your returns, keeping in touch with our office, and much more.

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Accessing and Using the SWC Client Center

At Stees, Walker & Company, we pride ourselves in providing quality, personalized tax planning and financial strategy to individuals and businesses and simplifying the process as much as possible. One way we support this close collaboration is through use of the SWC Client Center, where registered clients can log on via their desktop computer, laptop computer, iPad/tablet, or mobile device like an iPhone to quickly and easily do the following:

- ▶ Securely access your tax and other financial documents 24/7/365 from anywhere
- ▶ Take photos of important documents with your mobile device and upload them to your account
- ▶ Drag and drop documents from your computer's hard drive, Google Drive, and even Dropbox directly into your account
- ▶ Easily and securely share documents with third parties right from your account
- ▶ Quickly review and complete tasks we assign, such as an e-signature to approve a tax filing
- ▶ Communicate with our office using a simple and intuitive messaging tool that archives our communication

This guide leads you through the process of registering, accessing, and navigating your Client Center account – your one-stop central location to store, retrieve, and sign key documents and forms.

Register for the Client Center

Once we give you access to Client Center, you'll receive an email with the subject line "Register Your Client Center Account," as shown in *Fig. 01*.

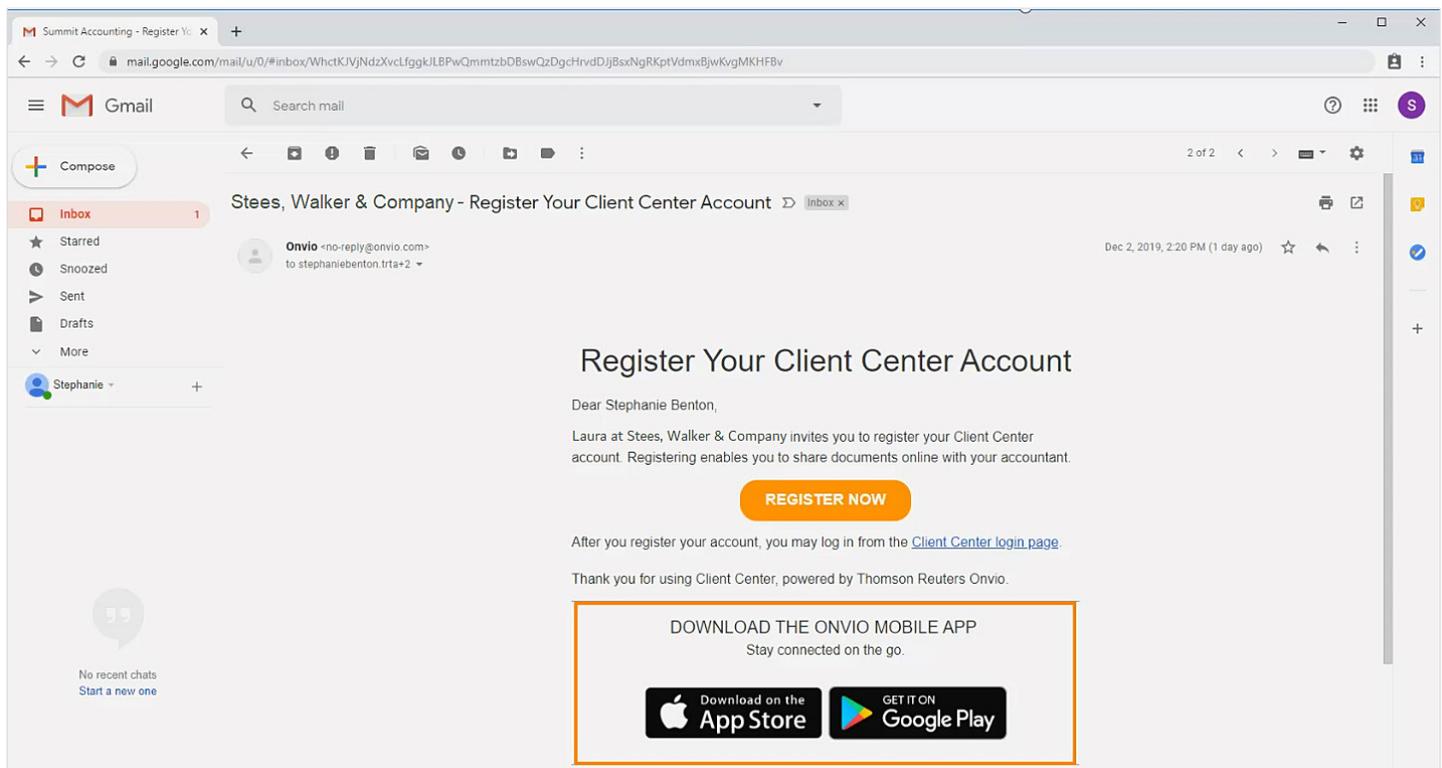


Fig. 01

Note: As shown in the figure above, you can also download the Onvio mobile app and use a mobile device to access your account, take pictures of and upload documents, manage your files, and communicate with our office.

Click the **Register Now** button. You'll be prompted to create a password for your account, as shown in *Fig. 02*.

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Register for the Client Center *(cont'd)*

Fig. 02

Type a password at least eight (8) characters long in the **New Password** field following the guidelines in the Password Requirements box.

Type the same password in the **Confirm Password** field.

Click the **Register Me** button. The Client Center displays a message indicating that you have successfully registered your account, as shown in *Fig. 03*.

Fig. 03

Click the **Done** button.

Log into Your Client Center Portal

To log into your SWC Client Center account, you can either open a web browser such as Firefox, Chrome, or Safari, and navigate to the SWC Client Center login page at <https://www.steeswalker.com/client-center>, or download and install the Onvio Client Center mobile app from the [Apple Store](#) or [Google Play Store](#) and use it to log in.

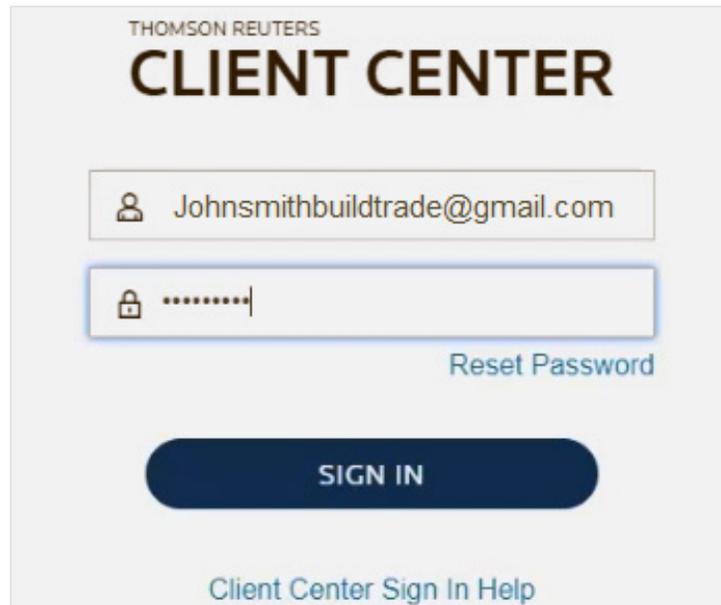
Please Note: You can download the Client Center mobile app to Apple devices that run iOS 11.0 or higher and to Android devices that run Android OS 5.0 or higher. Also, Internet Explorer is not a compatible browser for the SWC Client Center.

The Client Center login page appears, as shown in *Fig. 04*.

Stees, Walker & Co., LLP SWC_Client_Center_v01202021_B

Log into Your Client Center Portal *(cont'd)*

Fig. 04



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CLIENT CENTER

[Reset Password](#)

SIGN IN

[Client Center Sign In Help](#)

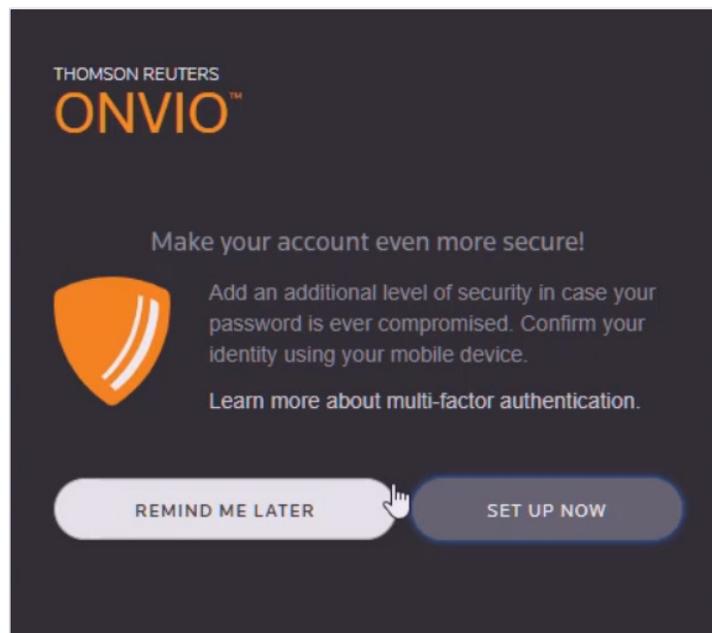
Type the email address you used to register for the Client Center in the top field and type your password in the field below it.

Click the **Sign In** button.

When you sign in for the first time, the Client Center prompts you to set up multi-factor authentication (MFA), as shown in *Fig. 05*, to make your account more secure. With MFA, we verify your identity via text to your cell phone or email to your email account whenever you sign on using a new device, as doing so protects your SWC Client Center account from unauthorized access. We strongly recommend that you use MFA to keep your confidential documents as secure as possible.

To learn more about multi-factor authentication (MFA), select the **Learn more about multi-factor authentication** link. To set up MFA, click **Set Up Now**, or to skip past this step, select **Remind Me Later**.

Fig. 05



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ONVIO™

Make your account even more secure!

 Add an additional level of security in case your password is ever compromised. Confirm your identity using your mobile device.

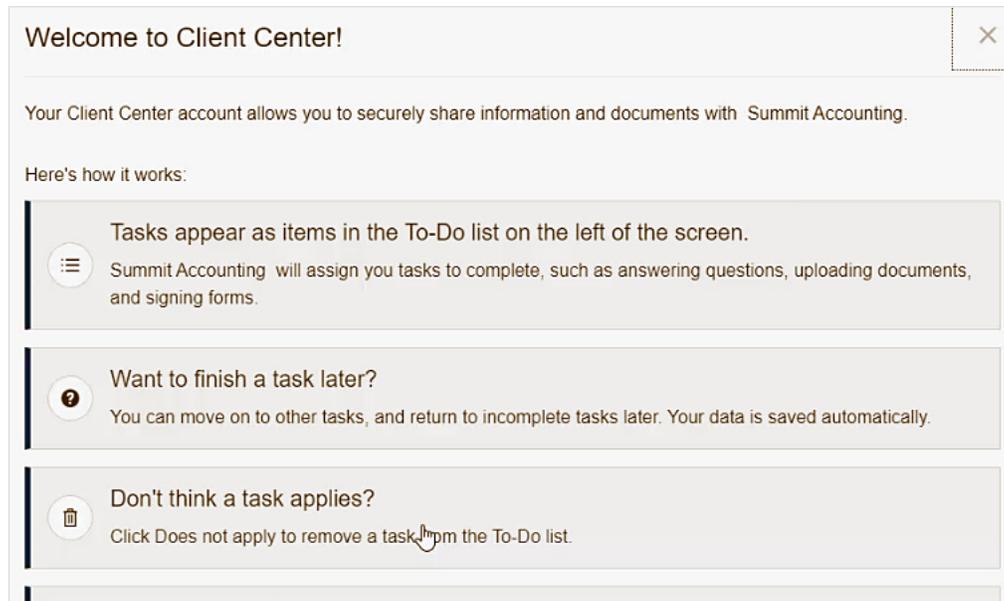
[Learn more about multi-factor authentication.](#)

REMIND ME LATER **SET UP NOW**

Welcome to your Client Center Portal

After setting up multi-factor authentication (or choosing to be reminded later), you'll be welcomed to SWC Client Center, as shown in *Fig. 06*.

Fig.06



Read the overview of how the SWC Client Center works, then click **Close & Get Started**. Your Client Center home page appears, as shown in *Fig. 07*.

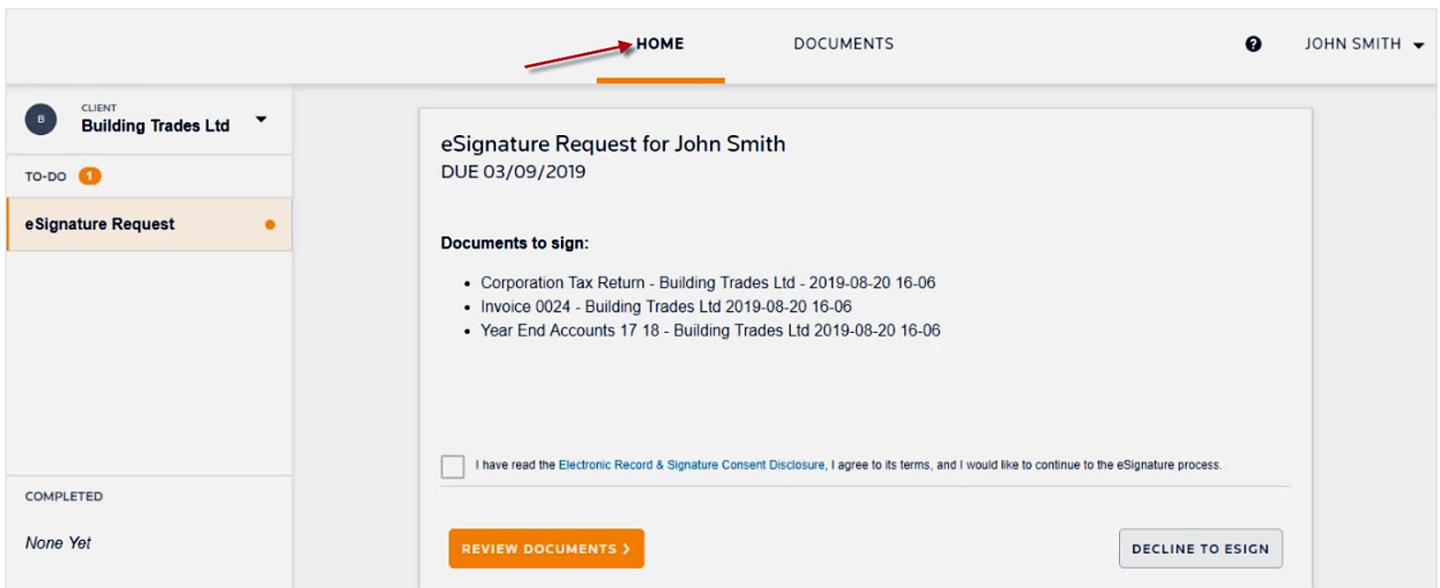


Fig. 07

Get Started

At the top of your Client Center account are two menu tabs:

- ▶ The Home tab, shown in *Fig. 07*, is where you will find tasks that require completion, such as electronically signing a document or completing a request from our office.
- ▶ The Documents tab, shown in *Fig. 08*, is where you will be able to view and download documents sent to you and add files that you would like to share with our office.

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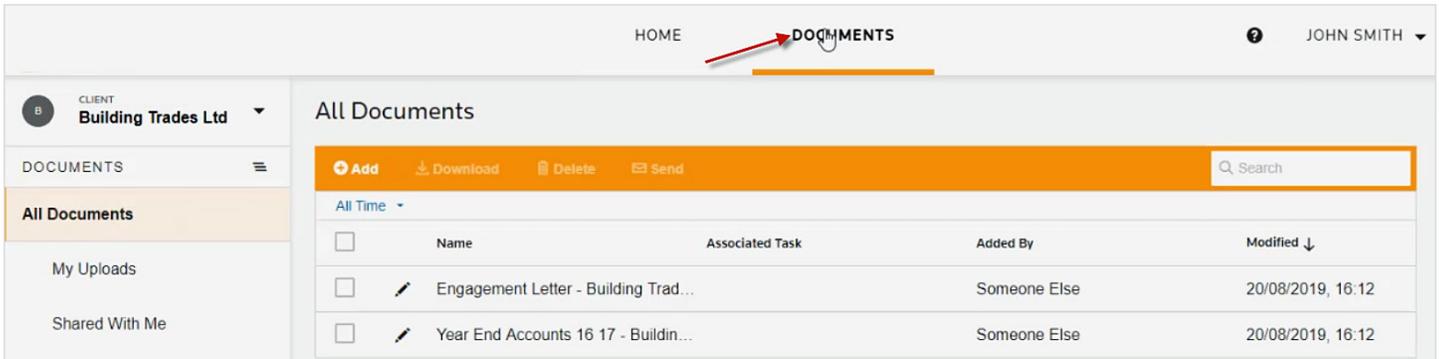


Fig. 08

Edit Your Profile

You can edit your name, email address, or password at any time, as well as enable or disable multi-factor authentication (MFA) by choosing to edit your profile.

To edit your profile, click your name, located in the upper-right corner of your Client Center Portal, and click **Edit Profile**, as shown in Fig. 09.

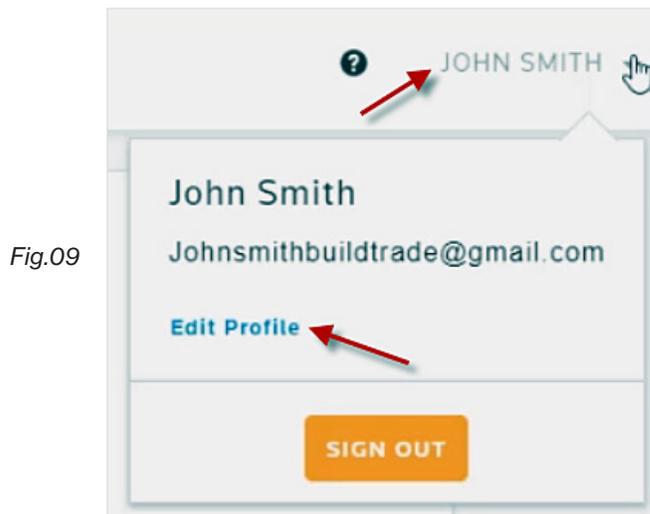


Fig.09

The *edit profile window* appears, as shown in Fig. 10. The tabs on the left (under Profile) enable you to switch to the Account Information, Password, or Multi-Factor Authentication page to make changes.



Fig. 10

continued on next page

Enter the desired changes and click **Save**.

Please Note: For security purposes, SWC Client Center passwords must be updated every 90 days, but you can edit your profile at any time to change your password.

If you change any account information, such as your last name, notify our office directly, so we can change the information in our system.

Get Help

Help is always just one click away. Simply click the question mark in the top right-hand corner of your Client Center to display the Help menu, as shown in *Fig. 11*. You can search for specific topics in the Search box or click the link for one of the suggested articles under Additional Assistance.

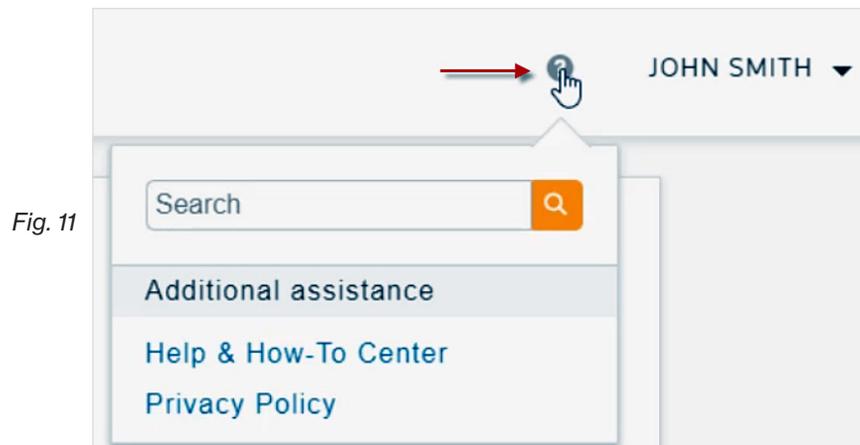


Fig. 11

Note: For more information help with common SWC Client Center help issues, please see the last section of this guide.

Choose a Client Account

In the top left-corner of your SWC Client Center account, your name appears. If you have authorized access to view or add information on behalf of other client associations, click the arrow next to your name and a list of these clients will appear, as shown in *Fig. 12*, in alphabetical order. Click the desired client name.

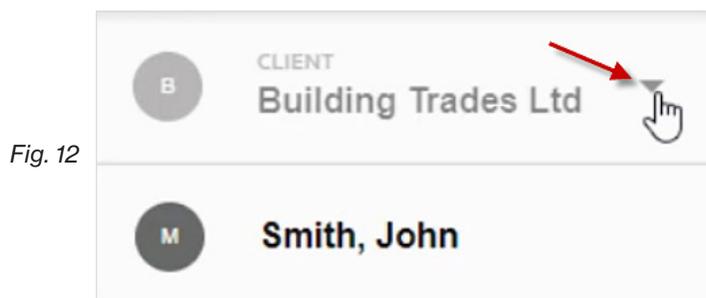


Fig. 12

Navigate Your To-Do List and Completed Items

Below the selected client name is the To-Do List for the selected client (see *Fig. 13*). If our office has assigned to you any tasks, such as reviewing and e-signing documents or responding to requests, they will appear here.

Note: Whenever a task is assigned to you, you will be notified via email.

When you click a task in the To-Do list, a detailed description of the task appears on the right, along with options for completing the task.

Below the To-Do list is the *Completed* section. After you have completed a task, it will appear here.

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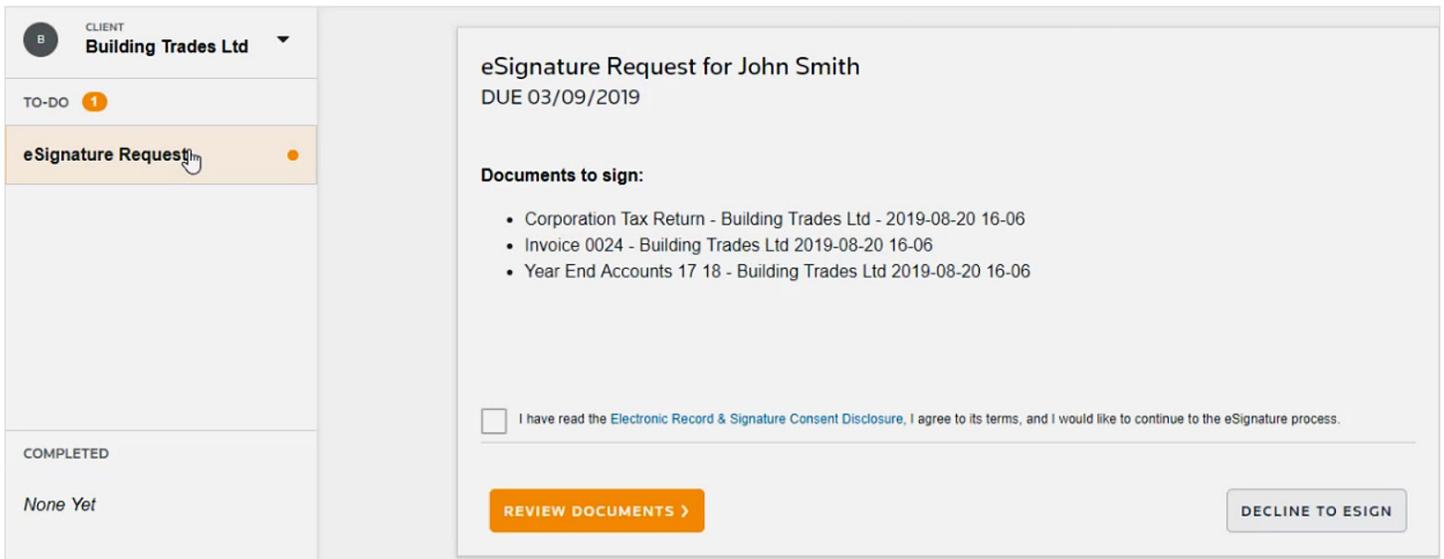


Fig. 13

Navigate the Documents Page

Click the **Documents** tab to view and download documents shared with you and to upload documents you want to share with your our office. Shared documents appear in the right pane, as shown below.

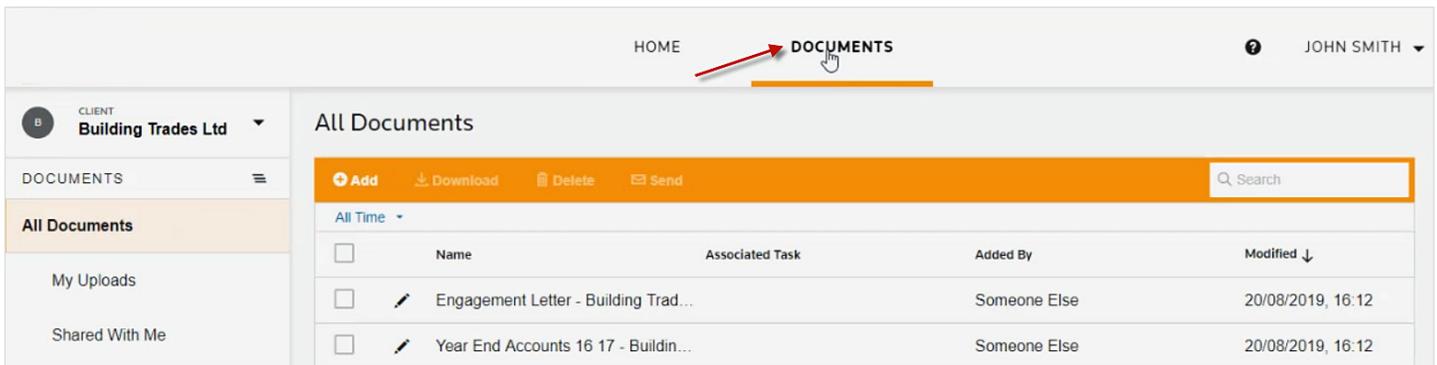


Fig. 14

As on the Home page, you can use the drop-down arrow next to the client name, as shown in *Fig. 15*, to switch between your documents and documents for other clients with whom you are associated.

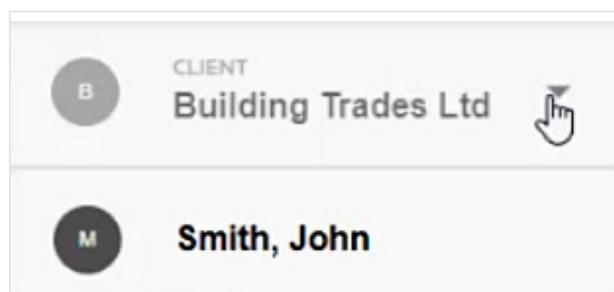


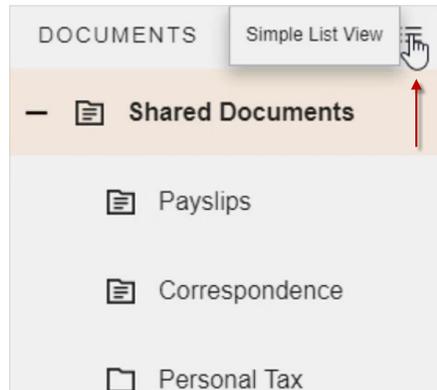
Fig. 15

Click the change view button, as shown below, to toggle the view between the firm folder view, which has been set up by our office, and simple list view.

continued on next page

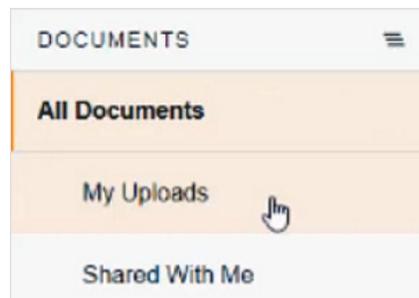
Navigate the Documents Page *(cont'd)*

Fig. 16



The simple list view displays documents you uploaded, along with any documents shared with you. Click **My Uploads** to view document files you uploaded to your Client Center account.

Fig. 17



To view document files that our office has shared with you, as well as documents that you have previously e-signed, click **Shared With Me**. Each document shared with you will list the document name, whether any tasks are associated with this document, the name of the person who added the file, and when the document was last modified.

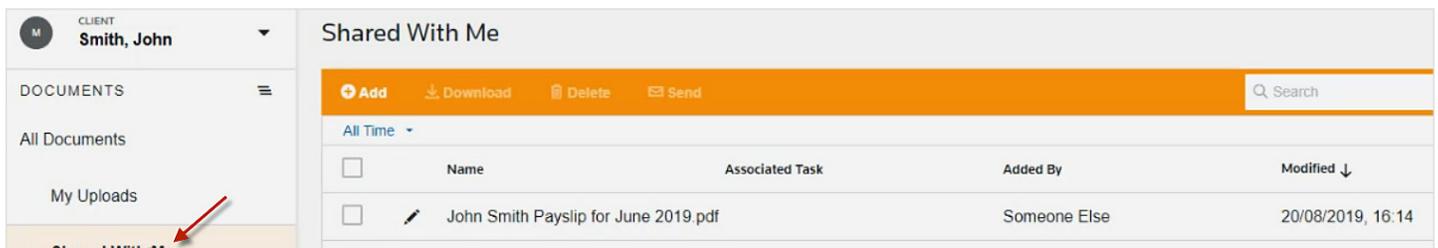


Fig. 18

To restrict how many documents are displayed, click **All Time**, just above and to the left of the list of documents, and reduce or increase your time scale, as shown in *Fig. 19*. To change the order in which documents are displayed, click the column heading – for example, to list documents by date, click **Modified**. Click it again to reverse the order.



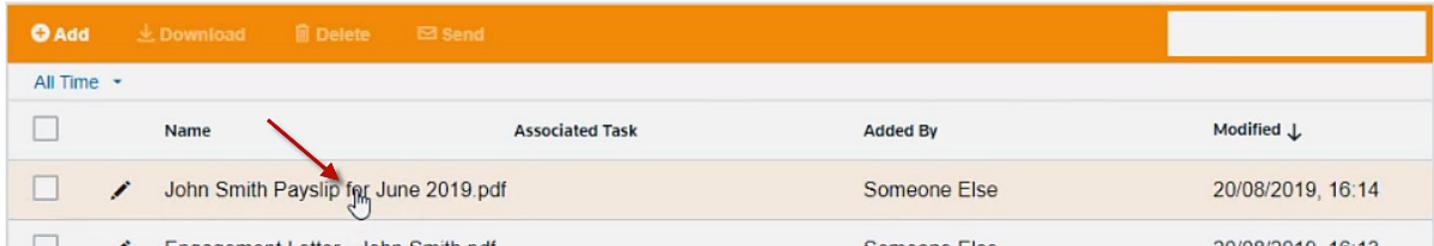
Fig. 19

Use the **Search** box in the top right of the screen to search for the title of a document.

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View a Document

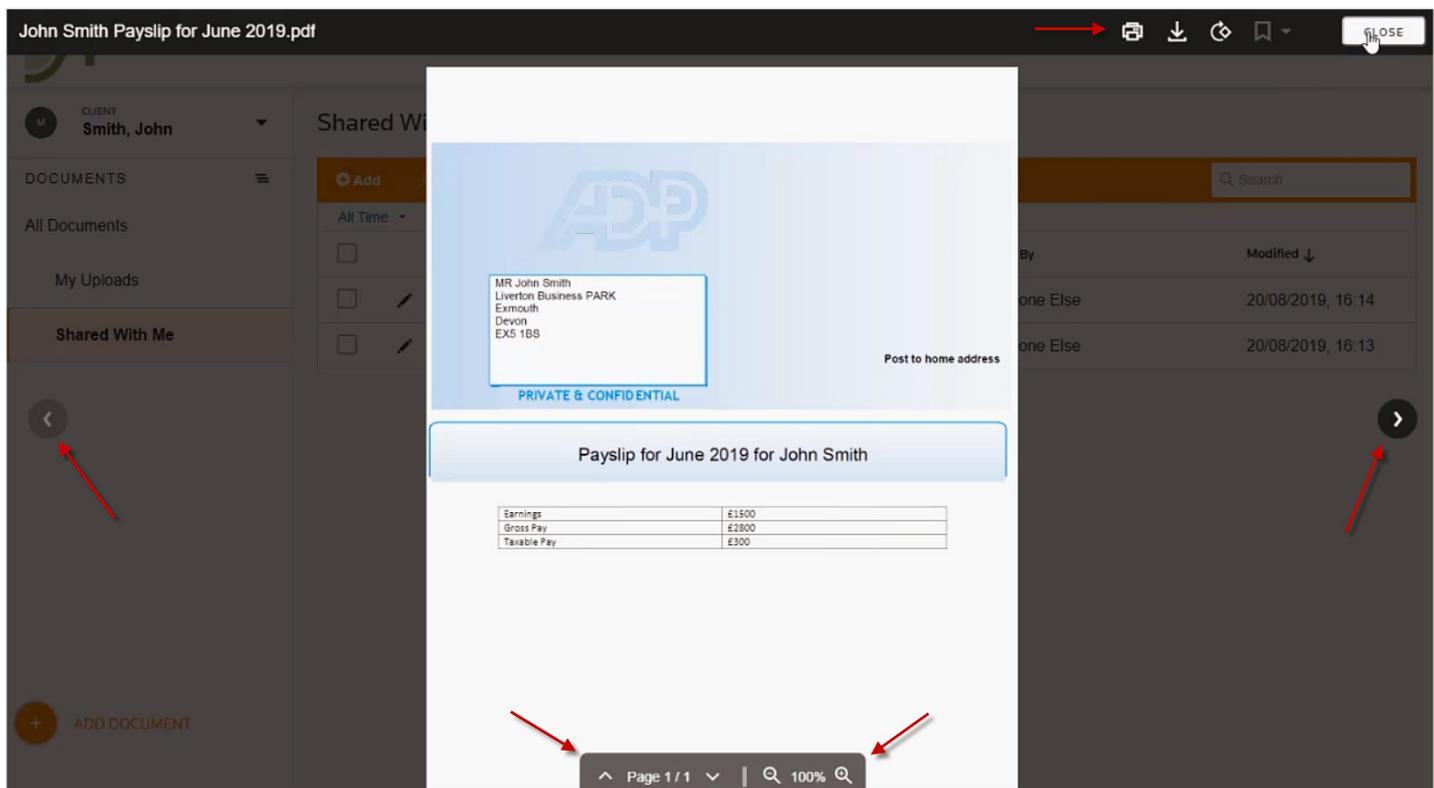
To view a document, select the document title as shown in *Fig. 20*.



<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	John Smith Payslip for June 2019.pdf		Someone Else	20/08/2019, 16:14
<input type="checkbox"/>	Employment Letter - John Smith.pdf		Someone Else	20/08/2019, 16:13

Fig. 20

The document and its content appear, as shown in *Fig. 21*. In this view, you can print the document, download it, rotate it, and close it. These options appear to the upper right of the document.



John Smith Payslip for June 2019.pdf

CLIENT: Smith, John

DOCUMENTS: All Documents, My Uploads, Shared With Me

Shared With Me

MR John Smith
Liventon Business PARK
Ermouth
Devon
EX5 1BS

Post to home address

PRIVATE & CONFIDENTIAL

Payslip for June 2019 for John Smith

Earnings:	£1500
Gross Pay:	£2800
Taxable Pay:	£300

Page 1 / 1 | 100%

Fig. 21

At the bottom of the screen, click the page up or page down icons to change pages. You can also zoom in or out. Use the arrows at the far left and right of the screen to move to the previous or next document in the list.

Download or Send Documents

You also have options to download documents as well as send documents to external third-party contacts such as an attorney or family member by clicking the check box next to the document and clicking **Download** or **Send**, as shown in *Fig. 22*.



<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input checked="" type="checkbox"/>	John Smith Payslip for June 2019.pdf		Someone Else	20/08/2019, 16:14

Fig. 22

continued on next page

Download or Send Documents *(cont'd)*

If you choose to send one or more documents, the Send Documents box appears, as shown in *Fig. 23*, prompting you to enter the email address to which you want the document(s) sent. You can also customize the content and the expiration date of the link(s) to the document(s), as well as send a copy of the email message to yourself.

Fig. 23

Upload Documents

To upload documents to share with our office, choose either the + **Add Document** button on the bottom left, or the + **Add** button within your central display.

	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	John Smith Payslip for June 2019.pdf		Someone Else	20/08/2019, 16:14
<input type="checkbox"/>	Engagement Letter - John Smith.pdf		Someone Else	20/08/2019, 16:13

Fig. 24

The *Add Document* box appears, as shown in *Fig. 25*, providing several ways to upload document files:

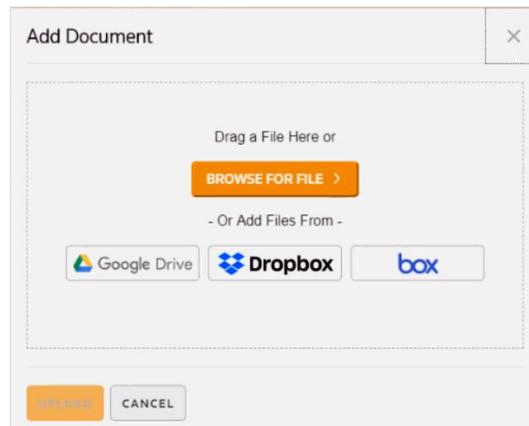
- ▶ Drag a file from your computer into the box.
- ▶ Click the **Browse for File** button and use the resulting dialog box to select the document files you want to upload.
- ▶ Click the button for **Google Drive**, **Dropbox**, or **Box**, and use the resulting dialog box to choose document files you have stored on the selected platform.

After adding the document files to the Add Document box, click the **Upload** button to upload the selected files to your Client Center account.

continued on next page

Upload Documents *(cont'd)*

Fig. 25



Sign Electronic Documents

When our office sends documents to your Client Center account to have you sign electronically, you will receive an email notification containing the title of the document that requires your attention.

To sign the document, click its link in the email message to open it or log into your Client Center account at <https://www.steeswalker.com/client-center> or by using the Client Center app on your smartphone or tablet, then click **eSignature Request** (in your To-Do list), as shown in Fig. 26.

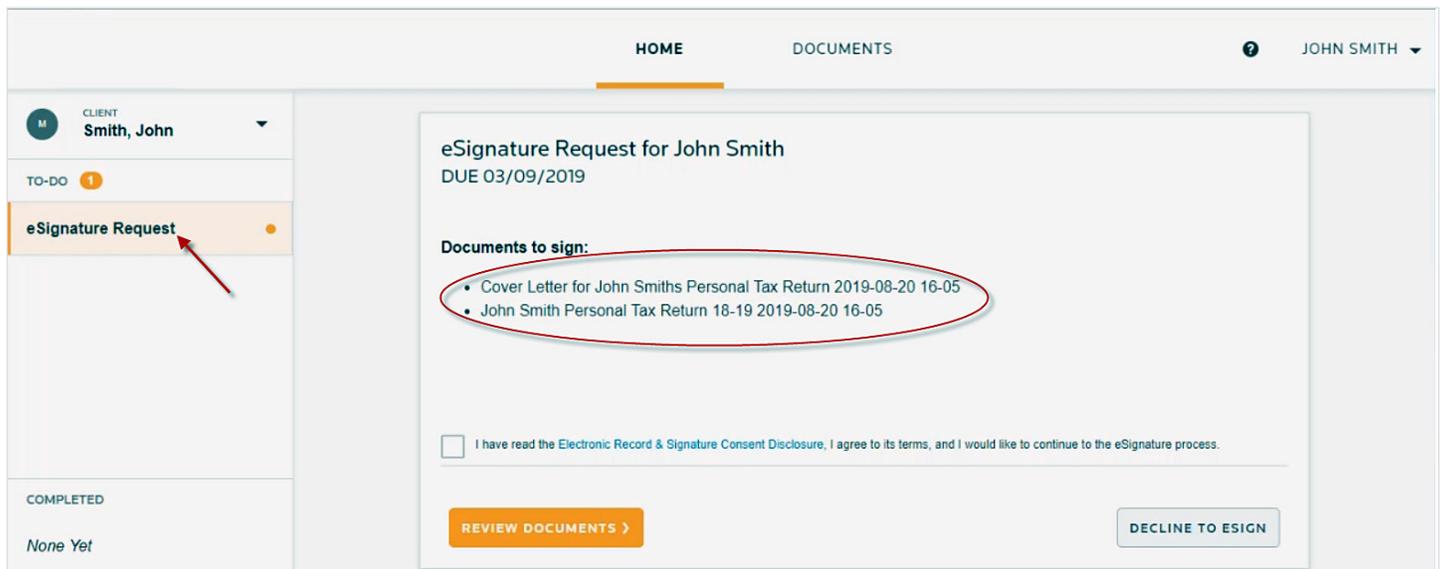


Fig. 26

The panel on the right displays the titles of the documents that require your attention as well as the due dates of the request.

Note: You may have more than one “client” associated with your Client Center account. For example, yourself and a company for which you are a director. If that is the case, you can open the Client drop-down list (above the To-Do list), and choose the desired client to view its To-Do list items.

Below the list of documents to sign, click the **Electronic Record & Signature Consent Disclosure** link read the disclosure, then return to the list of documents you need to sign and click the check box to indicate that you read the disclosure.

Click **Review Documents** or click **Decline to eSign** and leave a comment for us to explain why you are choosing not to sign. Assuming you click *Review Documents*, the Confirm Signature box appears, as shown in Fig. 27.

continued on next page

Sign Electronic Documents (cont'd)

Fig. 27

You can edit your name in the Full Name text box and then enter preferences for your signature. You can select a preset style, opt to draw your own signature, or upload a digital image of your signature. To review the document before confirming your signature, select **Next**.

The documents requiring your attention appear on the left beneath *To Sign*, as shown in *Fig. 28*.

A red exclamation icon appears next to each document that requires your signature. A preview of the selected document appears on the right.

Review the document by clicking the up and down arrows below the preview. If you need to zoom in or out, click the zoom plus or minus accordingly.

Fig. 28

The first page of the document will display what your preferred e-signature will look like, with a date and time stamp. Click **Start** for the selected document, then click **Confirm**, as shown below, to sign the document, indicating your acceptance of it. Repeat these steps for each document listed.

continued on next page

Sign Electronic Documents (cont'd)



Fig. 29

If you do not wish to eSign documents that you have been sent, click **Decline to Esign**, enter a comment as shown in *Fig. 30*, and click the **Decline to eSign** button. Our office will then be notified by email that you have declined the request.

Fig. 30

Once all the documents have been reviewed and you are happy to send the documents back to our office, click the **Sign & Submit** button in the bottom left corner, as shown in *Fig. 31*.

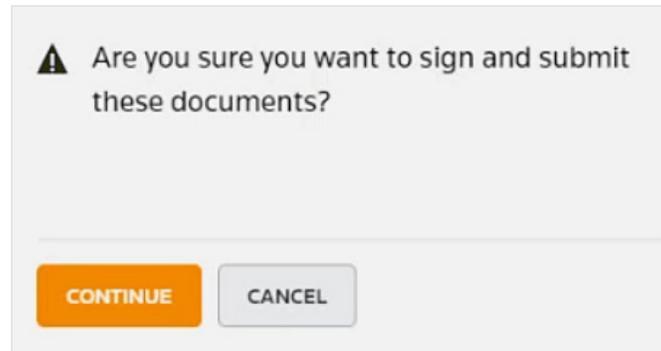
Fig. 31

You are then asked, “Are you sure you want to sign and submit these documents?” Click **Continue** to confirm or **Cancel** to review the documents again, as shown in *Fig. 32*.

continued on next page

Sign Electronic Documents (cont'd)

Fig. 32



Assuming you clicked Continue, the task is moved from the To-Do list to the Completed list, as shown in Fig. 33.

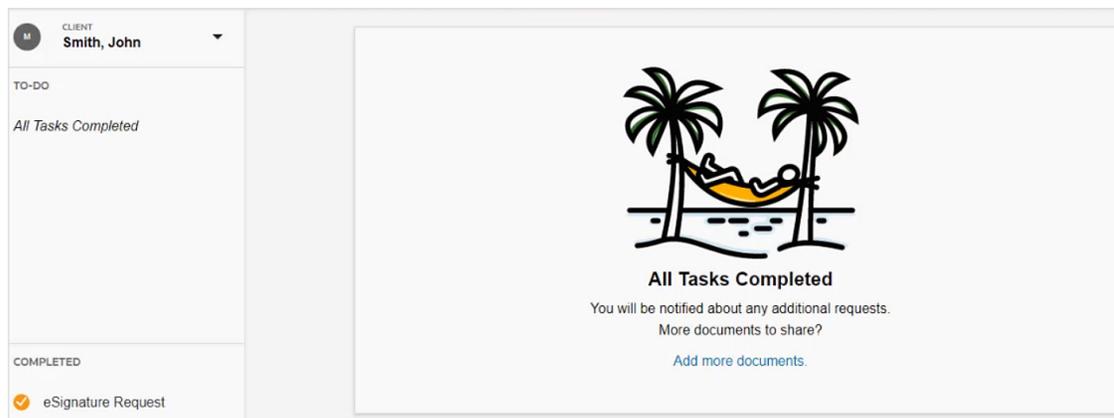


Fig. 33

Assuming you clicked Continue, the task is moved from the To-Do list to the Completed list, as shown in Fig. 33.

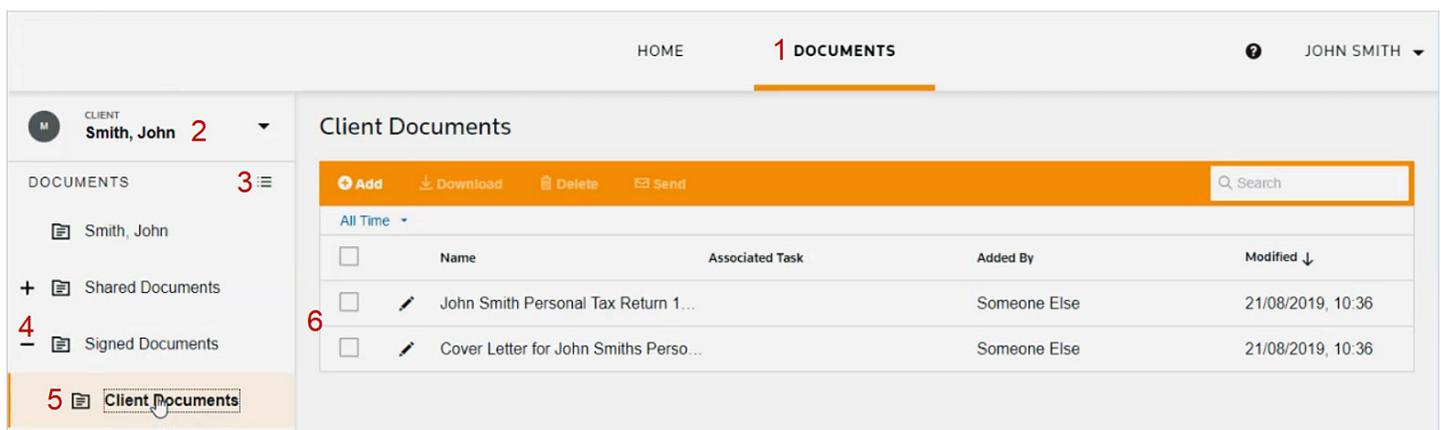


Fig. 34

To review the documents with your confirmed signature, click the **Documents** tab (1), as shown below, and select the client from the drop-down list (2). Click the **Firm Folder View** icon (3). Note that a Signed Document folder has been created for the current year (4). Click the + icon to the left of the Signed Document folder, click the **Client Documents** folder (5), and select the document titles to preview, download, or print (6).

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Help with common Client Center sign-in issues

If you can't sign in to your SWC Client Center account, please review these common issues and their solutions. If none of the suggestions help, please contact our office by calling (858) 487-8033.

ISSUE 1: Incorrect email address or password

SWC Client Center access requires a unique username and password. Your username is the email address where you received your registration email. If you see a notification that you entered the incorrect email address or password when attempting to sign in, follow these steps.

1. Confirm your username. If you have more than one email account, check the inbox for each one to locate your registration email. The email sender is "Onvio," and the subject line includes our firm's name and the phrase, "Register your Client Center Account." When you sign in, make sure you enter the full email address, including the part after the @ symbol.
2. Enter your password properly. Make sure Caps Lock is turned off and type your password slowly to ensure that there are no typos.
3. Reset your password. If you don't know your password, you can click the Reset Password link on the sign-in page. Enter the address where you received your registration email and click Reset My Password. You should get an email with instructions for resetting it.

Note: The password reset option does not check that the email address you enter is registered, so if you enter an email address that is not registered, password reset instructions will not be sent.

ISSUE 2: Issue Password reset email not received

If you don't receive the password reset email, follow these steps.

1. Check your spam or junk folder. The email sender is Onvio and the subject is *Reset Your Thomson Reuters ID Password*. If the message is in your spam or junk folder, we recommend adding Onvio to your safe sender list so you don't miss future emails.
2. Re-send the email. On the Client Center sign-in page, click the **Reset Password** link and re-enter your registered email address. The email address must match the one where you received the Client Center registration email. The email sender is Onvio and the subject is *Reset Your Thomson Reuters ID Password*. If you enter a different email address in the Reset Password panel, the instructions will not be sent.
3. Wait a few minutes and then check your email again. The email may take several minutes to be delivered.

Note: Contact us if you still do not receive the password reset email. We can reset your password manually.

ISSUE 3: Password is not valid

If you receive the notification "Please provide a valid password" when registering your account or resetting your password, check the password requirements. Enter a password on the registration or password reset page that meets the requirements.

ISSUE 4: Multi-factor authentication issues

Multi-factor authentication (MFA) provides an additional layer of security through the use of a mobile app, authenticator card, or printed access codes when you sign into your SWC Client Center account. Our office can require MFA or make it optional. To learn more about multi-factor authentication, see Multi-factor Authentication Overview below.

Multi-factor Authentication Overview

SWC strongly recommends that you use multi-factor authentication (MFA) to provide the highest level of security for your data.

What is multi-factor authentication?

Multi-factor authentication provides an additional layer of security that helps protect your confidential data. Many of your online accounts or software applications are protected by a login and password. That password is the single factor in the authentication process to confirm your identity.

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Help with common Client Center sign-in issues *(cont'd)*

Multi-factor authentication adds at least one more layer of identity verification so that your protection against hacking and fraud attempts is stronger and more secure than a simple password. That additional layer can take many forms, such as a physical ID card, a digital confirmation code, or even your fingerprint. You currently use multi-factor authentication every time you make a transaction using a debit card or withdraw cash from an ATM – your debit card is one factor and your PIN is another.

How does multi-factor authentication work?

- ▶ SWC recommends multi-factor authentication through the Thomson Reuters Authenticator app, the Thomson Reuters Authenticator card, and TOTP-compliant third-party multi-factor authentication apps. Choosing the appropriate multi-factor authentication (MFA) solution depends on your personal preferences. Each solution offers benefits, as detailed below.
- ▶ **Thomson Reuters Authenticator app** is a free mobile app that is supported on both Apple iOS and Android devices, and is the only multi-factor authentication solution that includes push notifications to your mobile device when you log in. Approving these verification requests requires a single touch. Choose this option if you want the quickest, easiest access. For more information, search for the Thomson Reuters Authenticator mobile app in your chosen app store.
- ▶ **Third-party authenticator apps** include those offered by Microsoft, Google, Symantec, Duo, LastPass, and others. The SWC Client Center is compatible with any multi-factor authentication app that uses a Time-based One-Time Password (TOTP) system, which is the industry standard for multi-factor security. Third-party apps provide numerical codes that you read off your mobile device and manually enter when prompted to verify your account during login. Choose this option if you already use one of these third-party authenticator apps and you want to continue with the same solution when enabling MFA for the SWC Client Center.
- ▶ **Thomson Reuters Authenticator card** is a multi-factor device that fits in your wallet. It enables you to increase security in environments where you can't easily use more feature-rich mobile apps. The Authenticator card generates numerical codes that you read off the device and then manually enter in a login screen when prompted to verify your account. Choose this option if you don't have access to mobile devices. To purchase a Thomson Reuters Authenticator Display Cards, please visit <https://www.formscs.com/mfa-card>.

After you activate the Authenticator card or install a mobile app on a device and pair that device with your Client Center login credentials, you'll use multi-factor authentication to confirm your identity every time you log in to the SWC Client Center.

Need Help?

If you need help navigating the SWC Client Center, please call the SWC office at (858) 487-8033 during normal hours of 9 a.m. – 5 p.m. Monday through Friday.