



CERTIFIED PUBLIC ACCOUNTANTS

## Portal FAQ's

Welcome to your Secure Client Portal, where you can upload and download sensitive files securely and efficiently.

Our [QUICK START GUIDE](#) will show you just how easy it is!

### PORTAL FAQ'S

#### How do I set up a portal?

If you haven't received an email notification to register your portal, contact [Deana](#) or [Vince](#) and they will send the notification with instructions.

#### What if I can't remember my password?

If you don't remember your password, enter your username and click "Log In." On the next page, click the "Forgot password?" button. Choose "Reset via email" and enter your username (Login) and associated Email address. A temporary password will be emailed to that address from [support@netlinksolution.com](mailto:support@netlinksolution.com). If you don't receive the email message, contact [Deana](#) or [Vince](#).

#### What are the password requirements?

IRS security regulations dictate that passwords will *expire at 90 days* and must contain at least 8 characters (not including your login or first/last name): to include at least 1 uppercase and 1 lowercase letter, at least 1 number, and at least 1 special character (such as @, #, \$, ?). To make your account even more secure, use passwords longer than 8 characters, and do not use common words or repeating characters.

#### What if I can't remember my login?

Contact [Deana](#) or [Vince](#). If they are unavailable, another support staff member can assist you.

#### How do I change my login or associated email address?

Once you have logged into NetClient CS, click your name on the top right side of your screen. Click "Edit Account" and make any necessary changes. Click "Enter" to save your changes. (We prefer that your portal email address matches our client contact email address.)



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### **How do I send you documents?**

To upload your extra documents, click “File Exchange” on the upper left from the home screen of your portal. Click the "Information to CPA" folder, then click "Upload." Either drag and drop files into the box or click “Add files” and choose from your computer. Once you have all the files you want uploaded into that folder, click “Start upload”. We will get an email letting us know there are documents on your File Exchange once the upload is complete.

### **How do I access my return?**

There will be folders for an individual and any entities associated on the left side of the screen (as long as we have already uploaded returns to the portal). Click the folder, choose “Tax Returns,” click the folder with the year of the needed return. The returns are in this folder. Continue clicking on a folder to open others, such as K-1’s and e-file forms.

### **What browser should I use?**

NetClient CS supports **Google Chrome**, Microsoft **Internet Explorer** version 9.0 and higher, Microsoft **Edge**, and Mozilla **Firefox** (the latest version).

### **Why can't I edit the organizer anymore?**

**You are only able to send the organizer in once** – after that, you are unable to make changes. You can click “Create a .pdf”, which makes a static copy of the organizer as it was filled out, and then print it and fill it out by hand, you can mail it to us, bring it into the office or scan and upload to the portal the updated version.

### **Can I sign my documents electronically?**

Yes, you may use the e-signature option to sign engagement letters and consent forms sent to your portal. If filing a joint return, both taxpayer and spouse must sign, so we must have 2 distinct emails, and both will receive a notification with a link to access the identity verification process. (This option is not available for businesses due to current IRS regulations). Here is a [video](#) showing how the process works.

*All communications between our firm and the user are encrypted using the Secure Socket Layer (SSL). This is the same functionality used by banks and popular e-commerce services for secure communication. We also store your files encrypted when they are at rest on our servers, adding an additional layer of security. To protect against data loss, our servers are equipped with technology that automatically mirrors all data in real-time to two separate locations. Regular incremental and full backups of all system data are performed, including off-site data backups stored in two separate secure physical locations, to protect against almost all disaster scenarios.*

*The underlined blue items are a hyperlink.*