<u>Instructions for Completing Your Organizer and Using Portals</u>

1. Go to www.cpastrong.com.
2. On the right side of the homepage, type in your Login (your email address).
3. The password should have been communicated to you separately. If not, please contact Gene Williams in our office.
4. Click on "Web Organizer".
5. If you would like to fill out the Web Organizer the traditional way, click on Create PDF and print out the document. Fill it out and then turn it in to our office. If you would like to fill it out electronically, proceed to step number 7.
6. Click on My Tax Documents. Click on the PDF file that it lists. This is your engagement letter. **Please print the engagement letter, read and sign it, then send it to us.**

   You may stop here unless you are going to return the organizer through your portal.

7. Under the Web Organizer Index, click on Questionnaire, and then click on Web Questionnaire. Please answer the questions in the Questionnaire by filling in the blanks and marking the Yes and No columns with an X. Move to step number 8 when you have completed the Questionnaire.
8. Click on General. Then click on Personal Information and fill out the form. Some of the information may already be entered. Please verify that this information is correct. When finished, move to step number 9.
9. Click on Electronic Filing and fill out the form. When finished, move to step number 10.
10. Click on Income. Then click on Income Summary. This contains a list of the forms as reported in last year's tax return. Please provide copies of all of the forms you have received. To indicate which forms are attached, enter a "1" for attached in the field provided next to the description. If a form is not applicable, enter a "2" for not applicable (N/A) in the field provided next to the description. Otherwise, leave this field blank.
11. To attach forms to the Web Organizer, click on Attachments underneath Web Organizer. Use this to upload any attachments electronically. If you do not wish to attach them electronically, you can turn copies in to our office along with your engagement letter (step 6).
12. Click on Web Organizer and then click on Income. Underneath Income Summary you will see Interest Income, Schedule D, and Social Security, Tier 1 RR Benefits. These will also list forms and relevant information that was used in last year's return. Please attach these forms and any new forms to your Web Organizer or send them to us.
13. Click on States. If you have received income from a state other than those listed please let us know.
14. Click on Notes and then Client Notes. Use this area to provide us with other information or to ask a question.
15. When you are completely finished with the Web Organizer, click on "Send to Preparer". Do NOT do this until you have completely finished the Web Organizer **as it can only be sent once.**