



Client Portal Guide

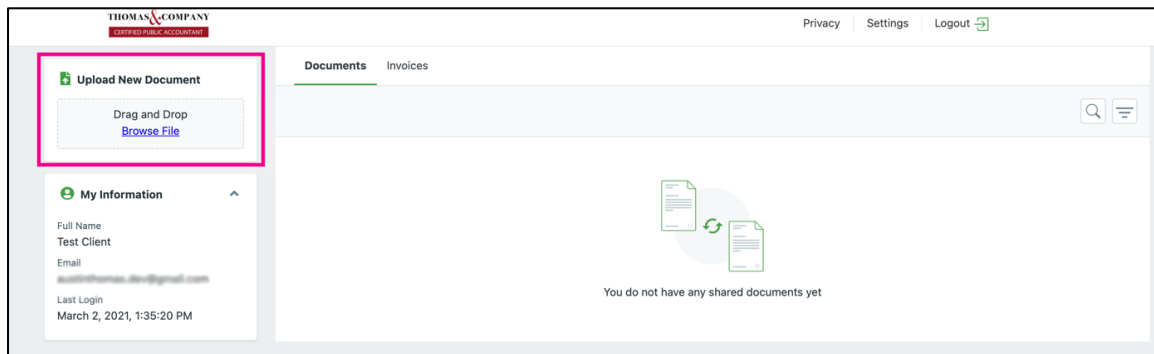
Uploading/Downloading Documents

Uploading Documents to the Portal

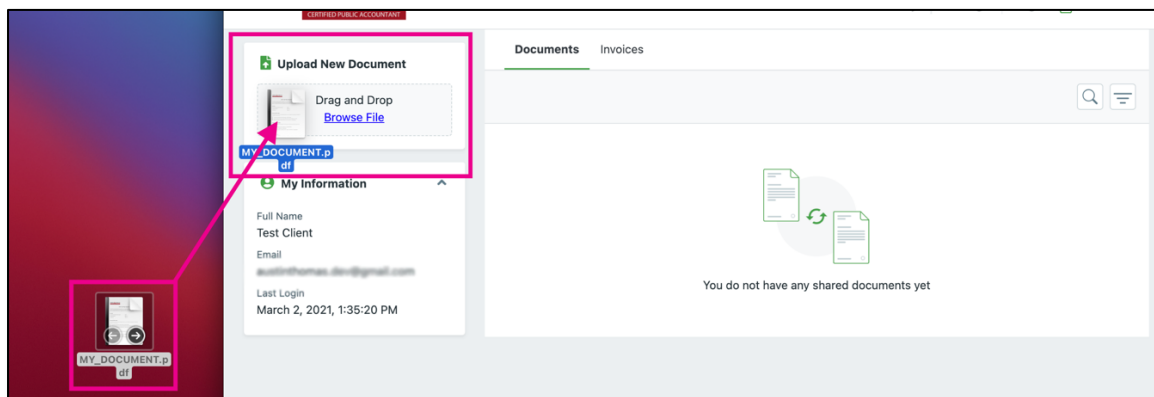
STEP ONE:

Bring your document into the portal

After logging into your portal, locate the **Upload New Document** box in the top left corner.



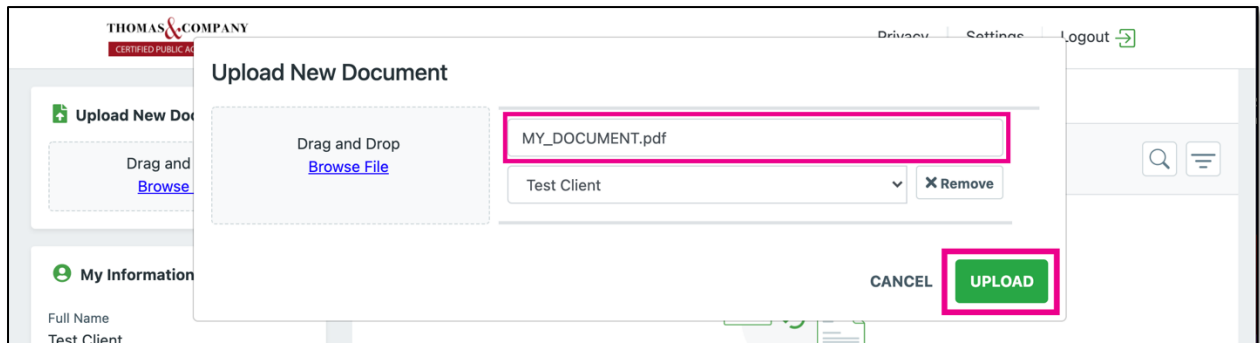
You have 2 options for bringing documents into the portal: you may **drag them into the Upload New Document box**, or you may click the **browse file** link in order to locate the document on your computer.



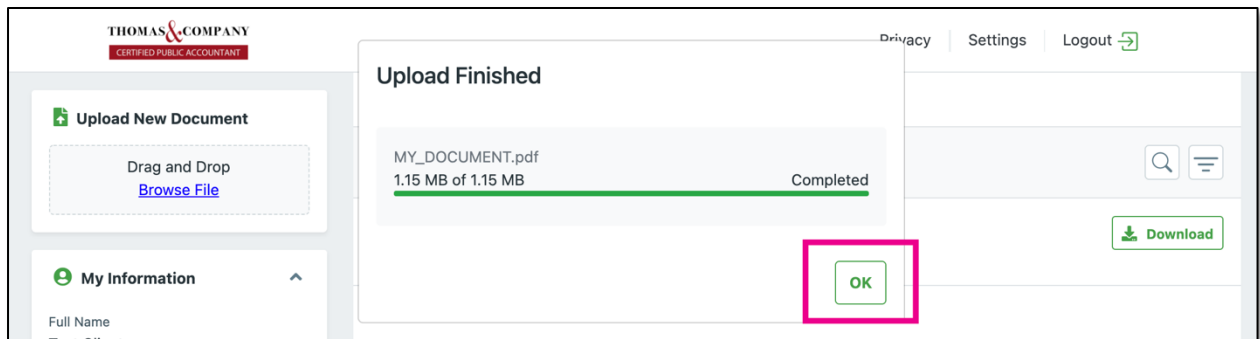
STEP TWO:

Rename (optional) and upload your document

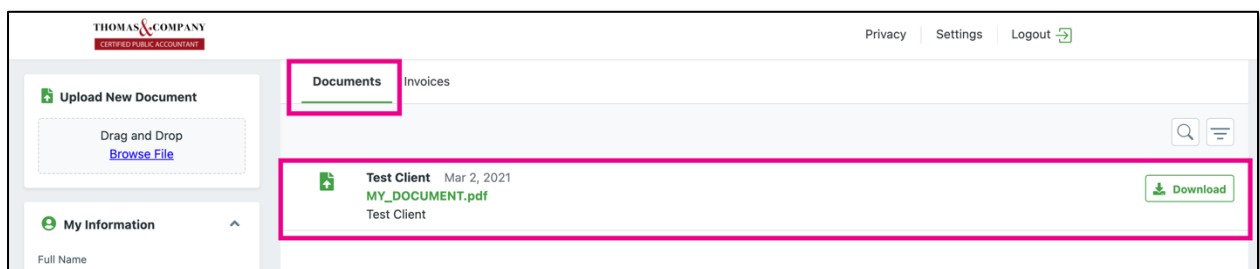
After bringing the file into the portal (either by dragging it or browsing for it), you'll receive a popup that looks like the one below. When you're ready, press the green **UPLOAD** button.



When your document is finished uploading, you'll see the popup change to look like it does below. Press the OK button.



Congratulations! You've just securely uploaded a document to the client portal. We'll receive an email notifying us that you've done so. In order to view all of the documents in your portal (including those we upload for you), simply click on the **Documents tab** as shown below.



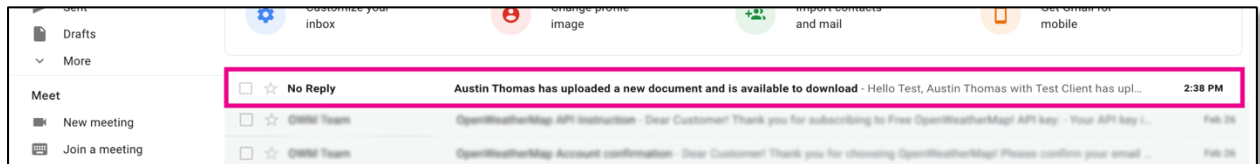
Downloading Documents from the Portal

STEP ONE:

Check your email

When we upload a new document to your portal, you'll receive a notification via email, similar to the one below.

NOTE: if you're expecting a document but don't see an email, try checking your junk/spam folders. If you see this email in one of those folders, be sure to mark it as "Not Spam" so that future messages reach your inbox!

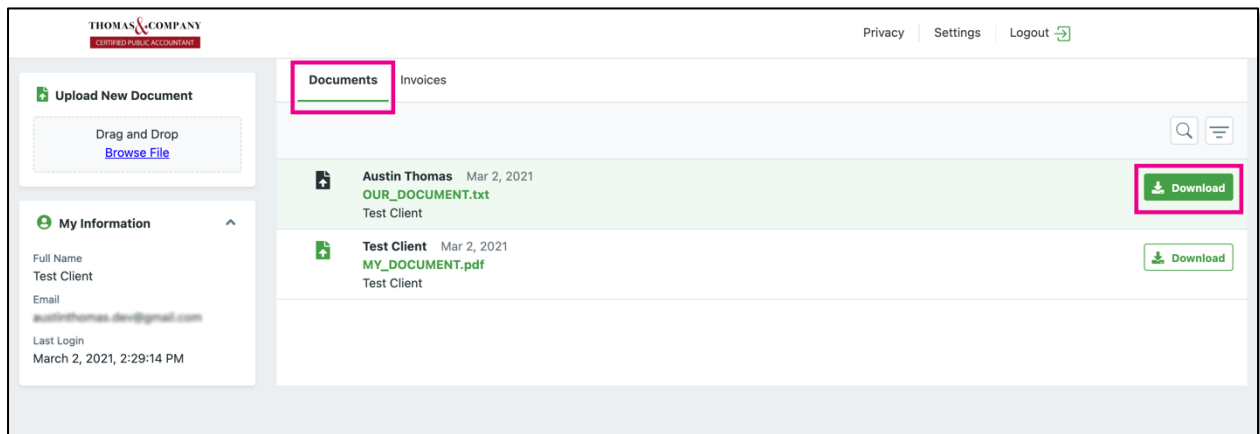


STEP TWO:

Log in and locate the document

Log into your portal and navigate to the the **Documents** tab. Here, you'll be able to view all of your documents, including the ones you upload for us.

KEEP IN MIND: documents will only remain on the portal for **30 DAYS** after they have been uploaded (for security reasons). After 30 days, documents will need to be uploaded again.



STEP THREE:

Download the document

Locate the document you'd like to download in the documents list (if it's new, it should appear at the top), and simply press the **Download button** on the right.

You'll find the downloaded document wherever you typically find documents you've downloaded from the web (you may see it at the bottom of your browser if you're using Chrome, and it will most likely be visible in the downloads folder of your computer).

Congratulations! You've successfully downloaded a document from your secure client portal.