Client Document Portal Instructions

If you have any issues logging in, please call us. Please be aware that the email address for your Portal account is locked; if you have changed your email within the last year, you will need to activate a new account to update the email address for the Portal. All password reset emails are sent to the email address associated with the Portal account.

1. **Portal Access – Logging On**

I. Lexington Financial will create a Portal account on your behalf.

- If you already have a username and password procced to step VI.

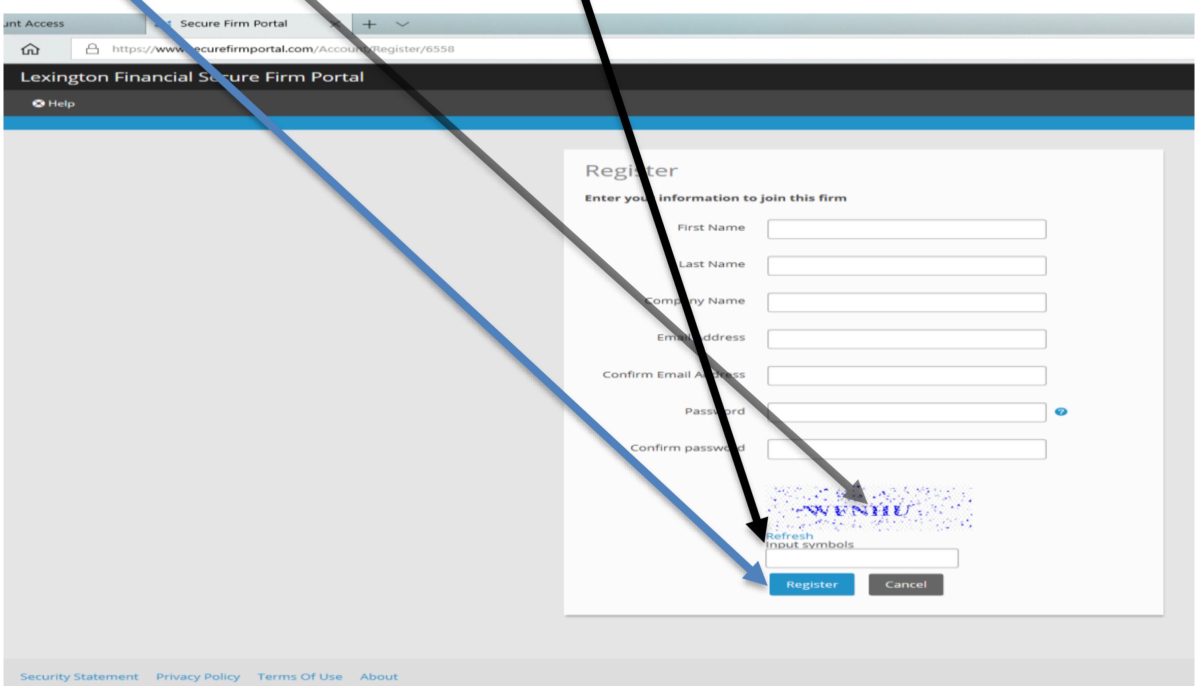
II. You will receive an email with a link to our Portal's Register page, Click on the link.

III. You will be brought to the **"Register"** screen shown below. Please fill-in all fields and create a Password.

- **Password Tips:** http://www.productivity501.com/10-tips-for-creating-secure-passwords/253/. This website will provide you 10 tips for creating a secure password.

IV. Enter the **Security Symbols** in the "**Input Symbols**" box.

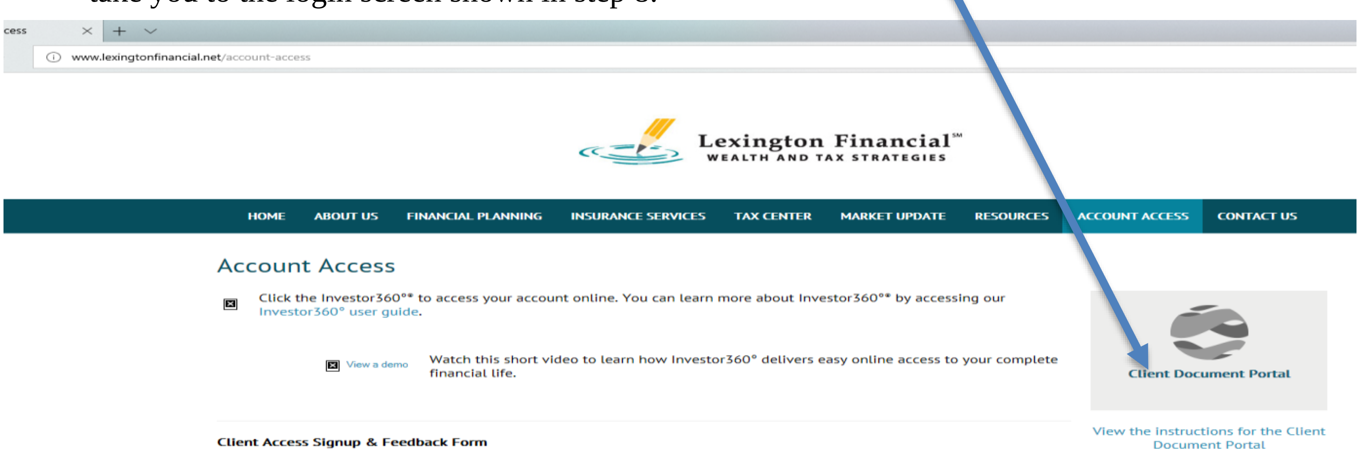
V. Click the **"Register"** box at the bottom of the page.



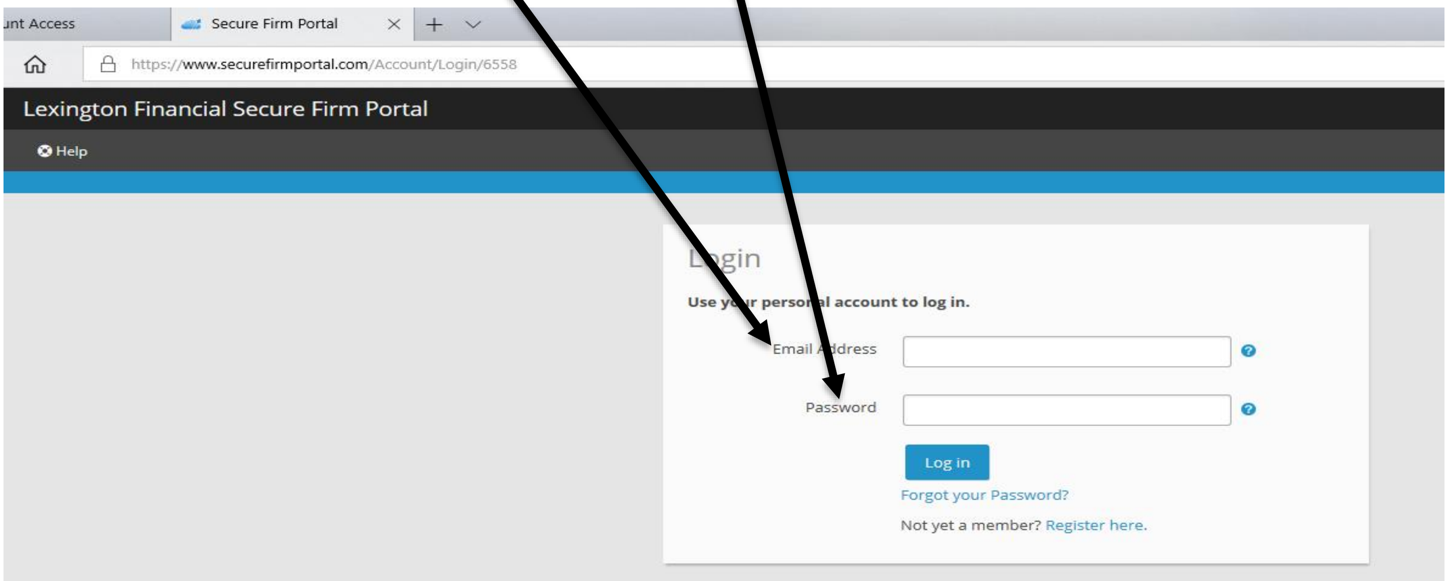
VI. Go to the Lexington Financial Webpage by clicking the link below.

- https://www.lexington-finance.com/account-access

VII. Once you are on the Lexington Financial webpage click on **"Client Document Portal"**. This will take you to the login screen shown in step 8.



VIII. Login by entering your **"Email Address"** and **"Password"** you created in step 3.



IX. After logging into the Portal, Proceed to one of the appropriate Step 2-6 below.

<u>USING the Client Document Portal</u>

2. **<u>Types of Documents Available on the Document Portal</u>**
   i. "*<u>My Documents</u>*" (your documents) – documents that you alone can see, access, and retrieve.
   ii. "*<u>Public documents</u>*" – documents that everyone can see, access, retrieve, update with their information and then upload to their <u>private folder</u> "My Documents".

3. **<u>How to Upload Tax Documents from your Computer to the Document Portal</u>**
   I. *Click* on the **<u>Home</u>** button**.**
   II. *Click* on the **<u>My Documents</u>** folder**.**
   III. *Click* on the **<u>2020 Tax Docs</u>** folder. (See Figure 1)
   IV. *Click* on the appropriate **<u>Client Tax Document</u>** folder. E.g. "**1. 2020 Personal/Joint Client Tax Docs**" (See Figure 1).
      - Note – you may only have the "Personal/Joint Client Tax Docs" folder since you are not filing a Trust or Business Tax Return.
   V. Once you are in the "Personal/Joint Client Tax Docs" folder, Click on the **<u>Upload</u>** button located on the left side of the tool bar at the top of the page.
   VI. Navigate to where the document is on your computer's hard drive.
   VII. *Click* and highlight the document you want to upload and click the **<u>Open</u>** button.
   VIII. *Click* the **<u>Upload</u>** button.

4. **<u>How to View and Download Your Completed Tax Return upon Being Notified Your Tax Return is Complete</u>**
   I. *Click* on the **<u>Home</u>** button**.**
   II. *Click* on the **<u>My Documents</u>** folder**.**
   III. *Click* on the **<u>2020 Tax Docs</u>** folder. (See Figure 1)
   IV. *Click* on the **"<u>4. 2020 Completed Tax Return(s)</u>"** Folder
   V. Click on the "**<u>1. Personal/Joint Tax Return</u>**" Folder, there you will find the following documents:
      i. 8879 – for you to sign
      ii. Tax Return Invoice
      iii. Payment Option Instructions

VI. *Click* on the **document** you want and the "File Download Window" will display.

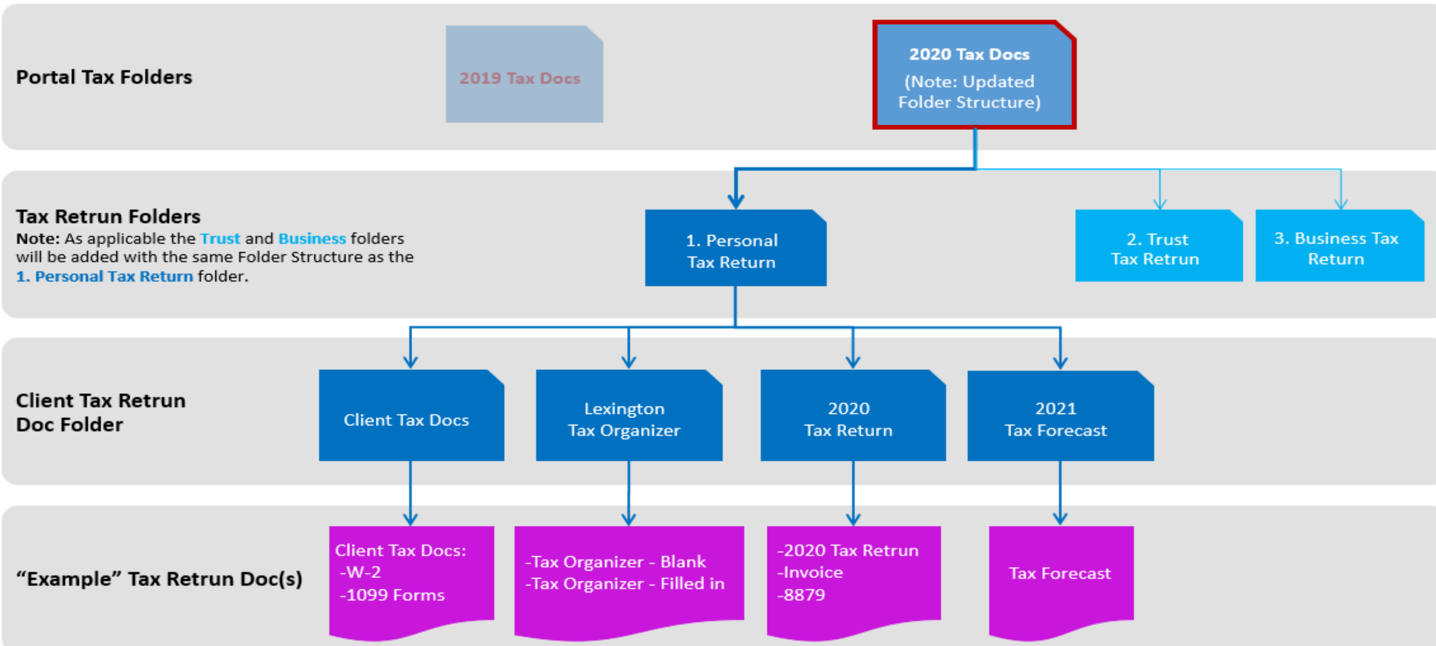
VII. To view the document, *click* "**Open**".

   i. To download and save the document to your computer, *click* "**Save**". Remember where you save the document on your hard drive

   ii. After signing the 8879 follow the "**To Upload Tax Documents from your Computer to the Document Portal**" Instructions shown in section 3.

VIII. *Click* on the appropriate **Client Tax Docs** folder. E.g. "1. 2020 Personal Client Tax Docs" (See Figure 1)

Figure 1: Updated Portal Tax Document Folder Structure



5. Retrieving and Using Public Documents

I. To retrieve documents that are accessible by everyone (*Public documents*), click on the **home** button at the top left of the page.

II. *Click* on the **Public Documents** folder.

III. To view and save a public document to your computer follow the instructions under "To View or Download a document" above.

IV. To upload a public document **to your client folder,** "My Documents Folder", you must first save it to your computer, and then follow the instructions for uploading to the Portal.

6. Document Availability Notifications

I. When documents are uploaded to the Portal, Lexington Financial will send you an email notifying you that a new document(s) are available for you to download.

II. Every time you upload a document to the Client Document Portal for delivery to Lexington Financial, an email will automatically be sent to Lexington Financial notifying us that a new document is available for us to download.