

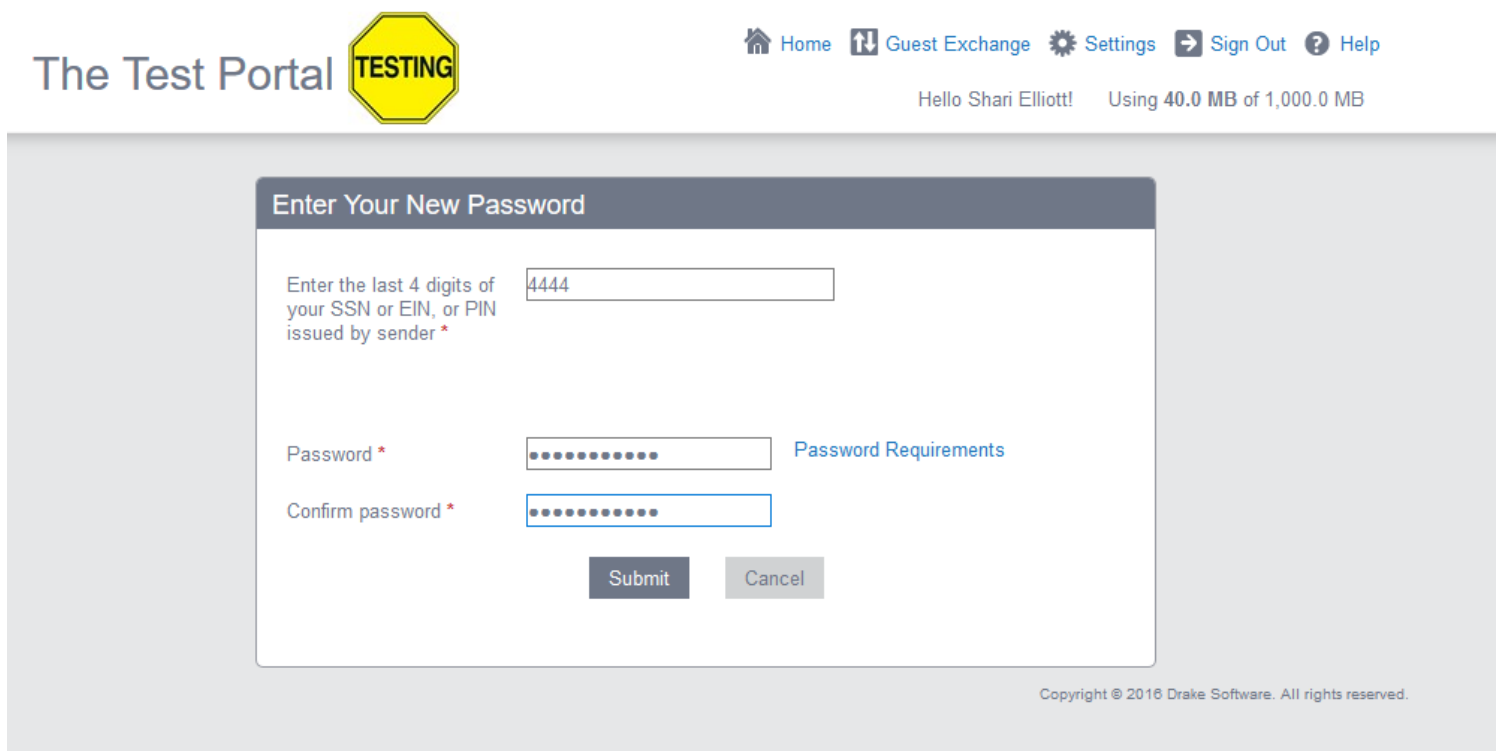
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Client Log in Instructions:

Once you receive an e-mail that your tax preparer has created a SecureFilePro™ account for you, click the link and follow the steps below to complete your account set up.

1. Enter the last four of your SSN, and establish a password. The password requirements are:
 - a. Minimum 8 characters.
 - b. Contain at least one uppercase letter.
 - c. Contain at least one number.
 - d. Contain at least one special character.
 - e. Cannot contain spaces.



The screenshot shows a web portal titled "The Test Portal" with a yellow "TESTING" octagon icon. The navigation bar includes links for Home, Guest Exchange, Settings, Sign Out, and Help. The user is identified as "Hello Shari Elliott!" and is using 40.0 MB of 1,000.0 MB. The main content area displays a form titled "Enter Your New Password" with the following fields and controls:

- A text input field for "Enter the last 4 digits of your SSN or EIN, or PIN issued by sender *", containing the value "4444".
- A password input field for "Password *", masked with dots, with a "Password Requirements" link to its right.
- A confirm password input field for "Confirm password *", also masked with dots.
- Two buttons at the bottom: "Submit" and "Cancel".

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2. Once this is done, you will be able to log in to the site using your assigned username and the password you created. Make sure you are on the Client Sign In before entering your information.

Client Sign In

Are you a tax preparer? [Sign in here.](#)

Username:

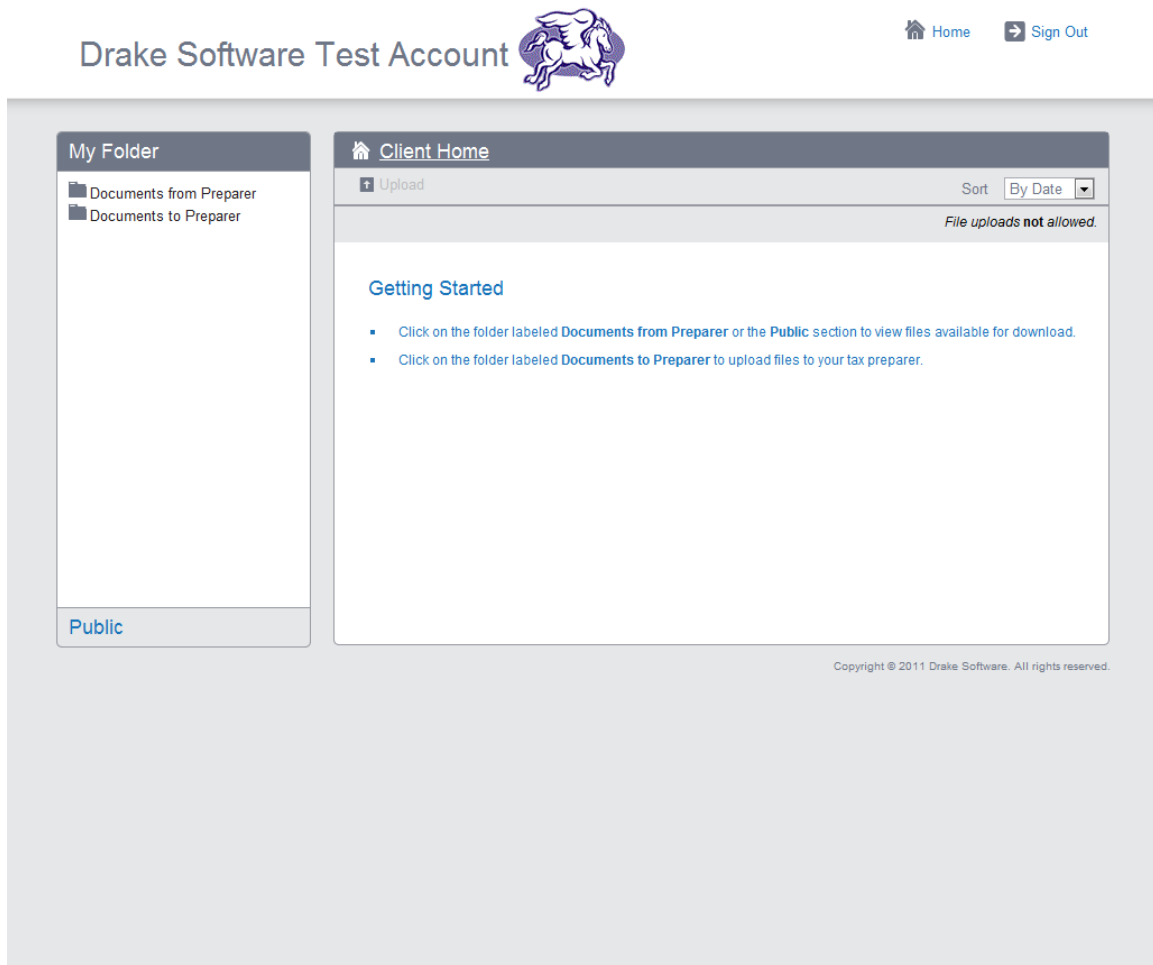
Password:

[Sign In](#)

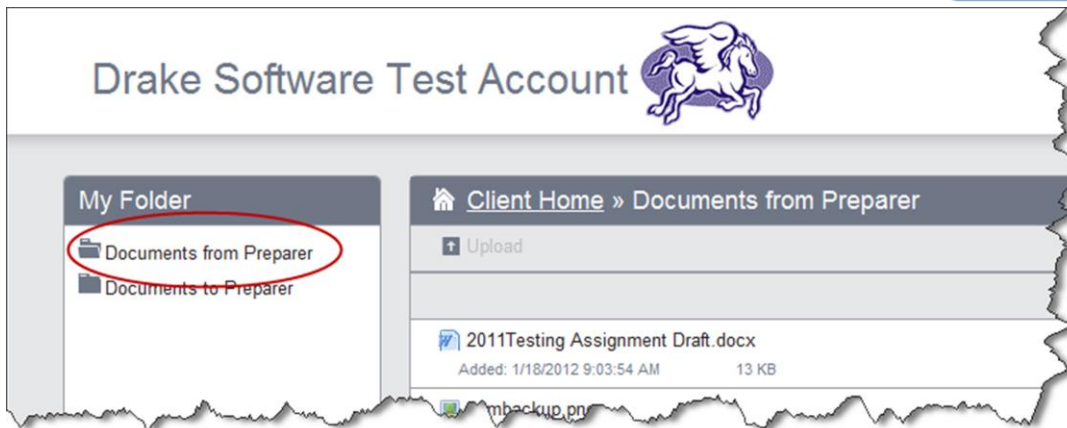
[Forgot username or password?](#)

Download Files from Preparer:

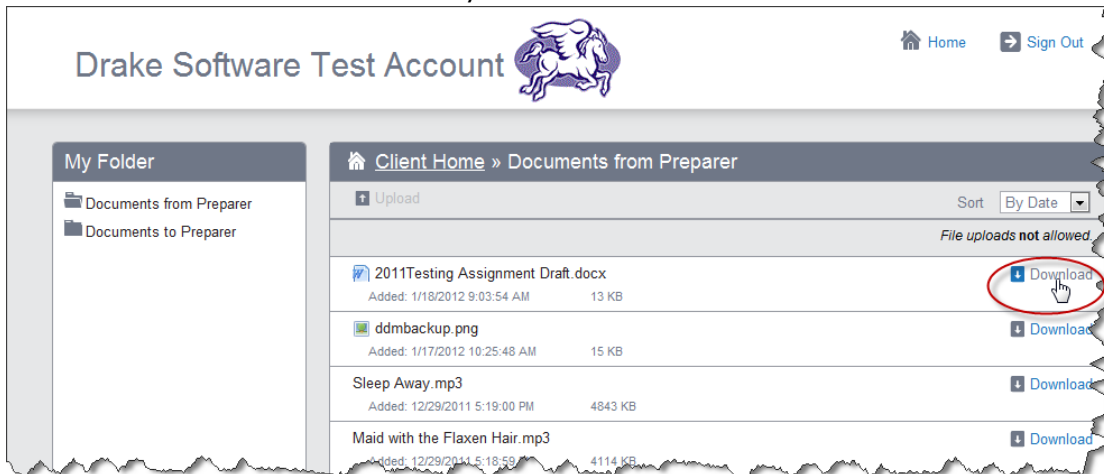
After you log in you will be taken to the Client Home page of your tax preparer's site. Follow the instructions below to download your files.



1. Click **Documents from Preparer**.

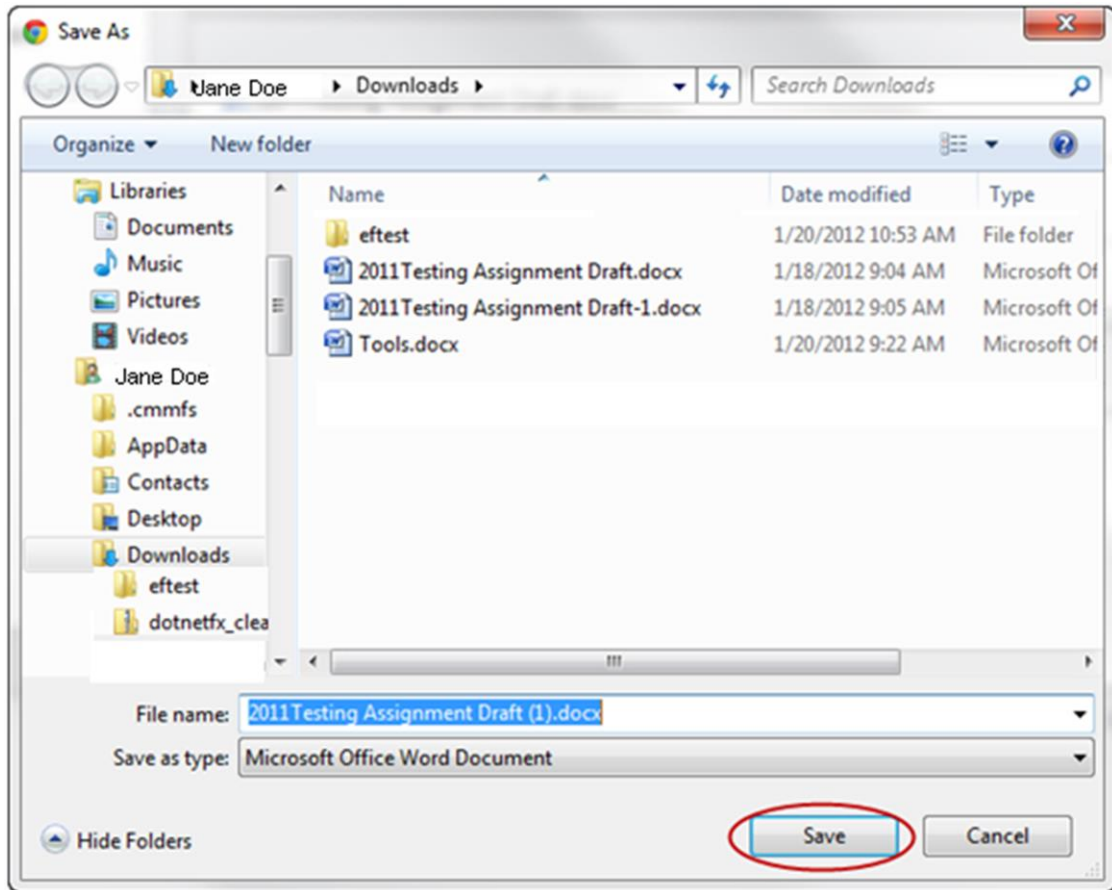


2. Click **Download** beside to the file you want to retrieve.



NOTE: You can only download one file at a time.

3. Follow the on-screen instructions to download for your specific browser.

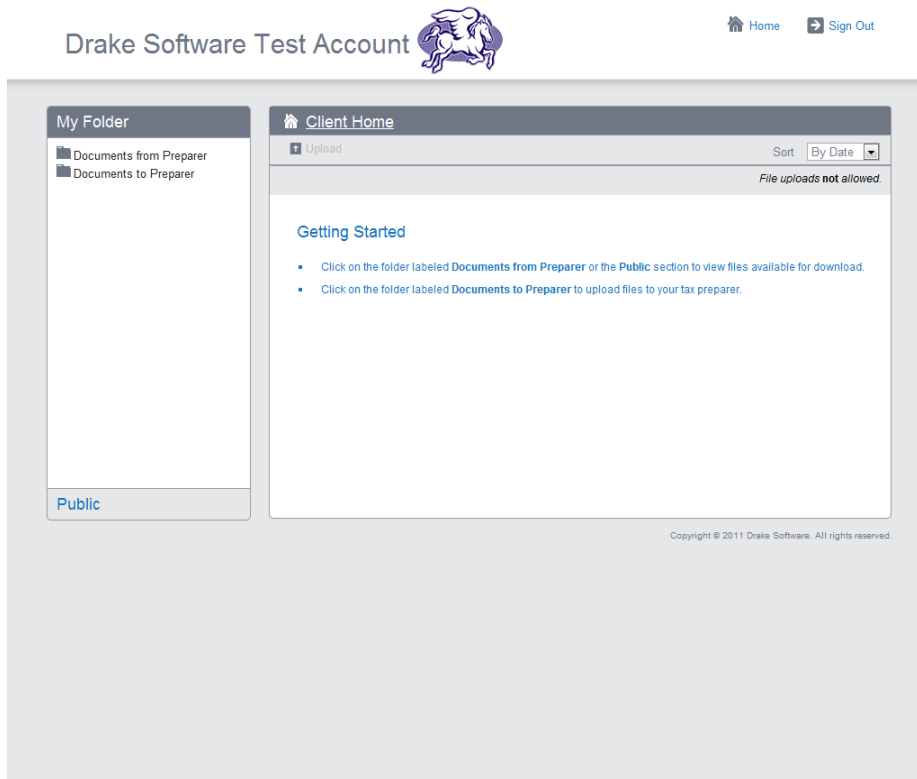


NOTE: If you cannot download the file, check your browser settings to ensure that downloads are allowed.

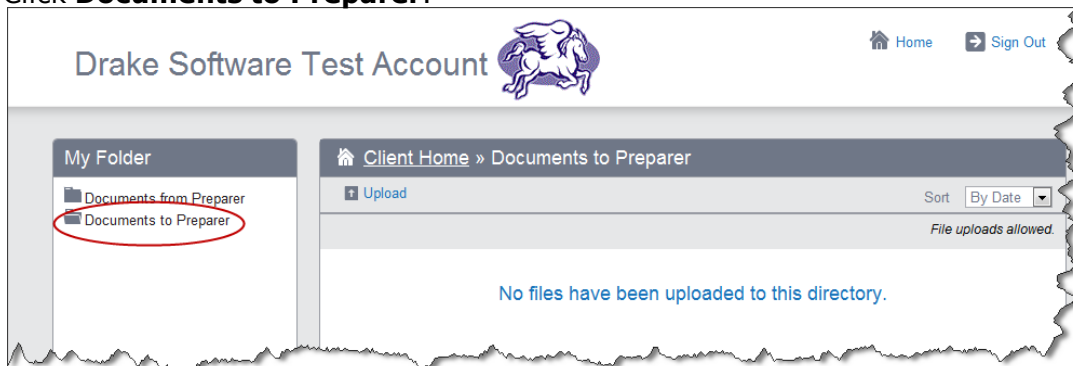
4. Once the file is downloaded to your preferred location, you can view it as needed using your browser's view downloads or Windows Explorer.

Download Files to Preparer:

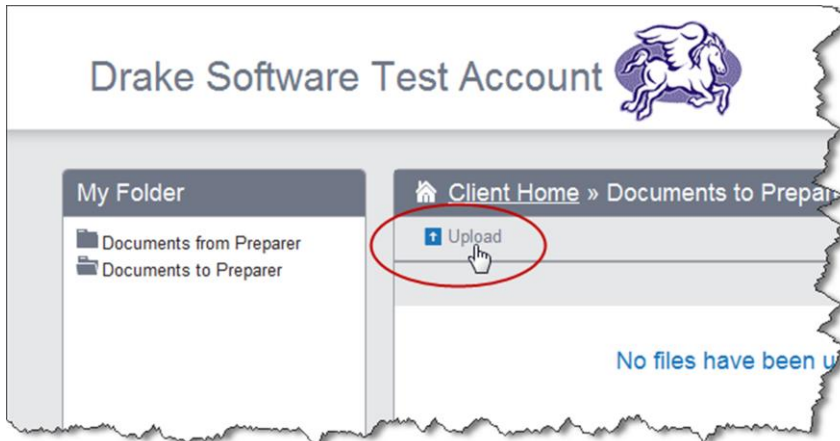
You can Download Files to Preparer by following the instructions below:



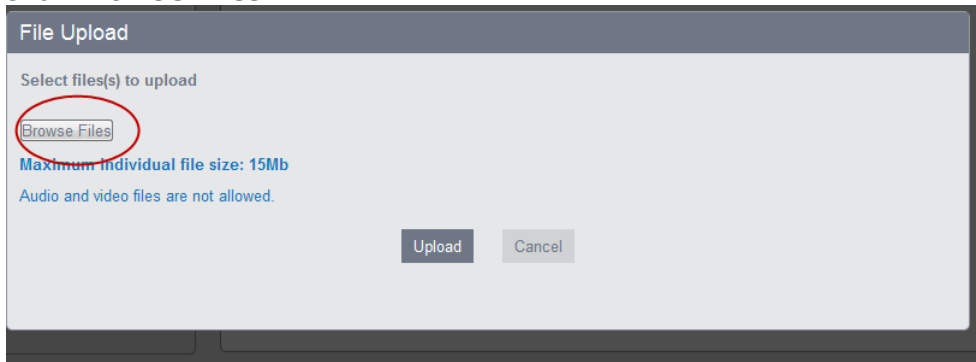
1. Click **Documents to Preparer**.



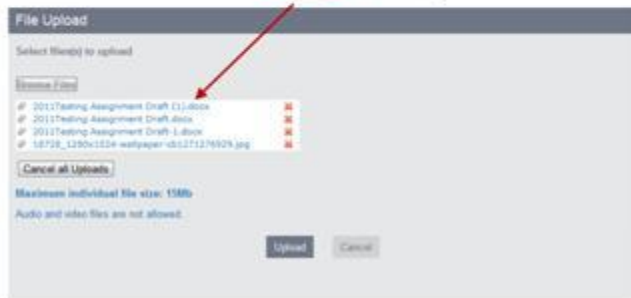
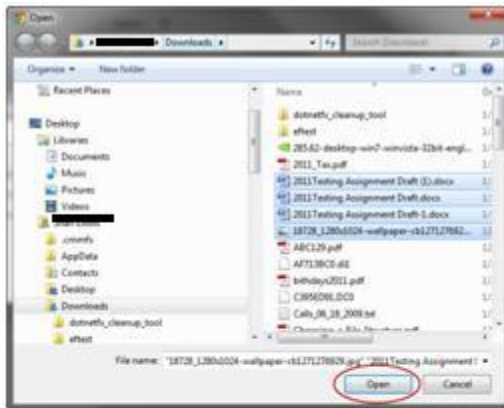
2. Click **Upload**.



3. Click **Browse Files**.




4. Use the browser to locate and select a file to upload and click **Open**.



NOTE: You can select multiple files to upload at one time.

5. Click **Upload** to add the selected files to the Documents to Preparer folder.

Drake Software Test Account  [Home](#) [Sign Out](#)

My Folder






- Documents from Preparer
- Documents to Preparer

Public

Client Home » Documents to Preparer

[Upload](#) Sort: By Date

Batch: [Delete](#) *File uploads allowed.*

<input type="checkbox"/>  18728_1280x1024-wallpaper-cb1271276929.jpg	Download Rename Delete
<small>Added: 1/25/2012 1:31:43 PM 1209 KB</small>	
<input type="checkbox"/>  2011Testing Assignment Draft-1.docx	Download Rename Delete
<small>Added: 1/25/2012 1:31:43 PM 13 KB</small>	
<input type="checkbox"/>  2011Testing Assignment Draft.docx	Download Rename Delete
<small>Added: 1/25/2012 1:31:43 PM 13 KB</small>	
<input type="checkbox"/>  2011Testing Assignment Draft (1).docx	Download Rename Delete
<small>Added: 1/25/2012 1:31:42 PM 13 KB</small>	
<input type="checkbox"/>  ABC129.pdf	Download Rename Delete
<small>Added: 1/25/2012 1:24:09 PM 32 KB</small>	

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