
Instructions for the Client – New Client Experience

With the U.S. Individual Income Tax Return solution installed, the client will experience a new client portal. There are a few changes we'd like you to know before installing the solution and creating engagements for clients:

- There is a new user interface for the client with better visibility of his tasks.
- Settings, Folders, and Inbox has a bit different location on the homepage
- And the Projects that were previously created and shared with the client will be shown differently

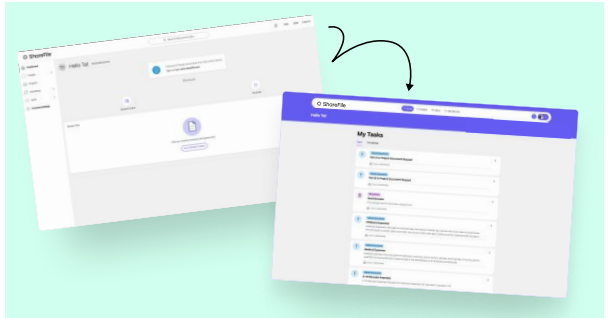
Settings

Before:

Settings were on the left navigation panel.

Now:

Clients can find settings on the right corner of their page.



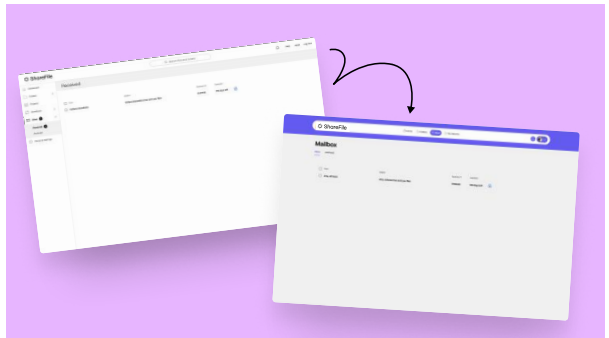
Inbox

Before:

The encrypted emails (Inbox) was on the left navigation panel.

Now:

Inbox is located on the top of the client home page.



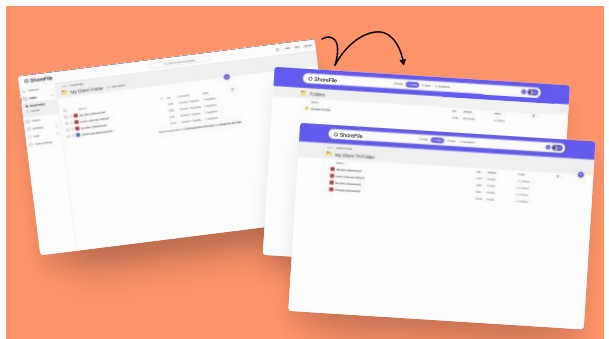
Folders

Before:

Clients can find settings on the right corner of their page.

Now:

Clients can find their folders located on the top of the client home page. They will only have access to Shared Folders.



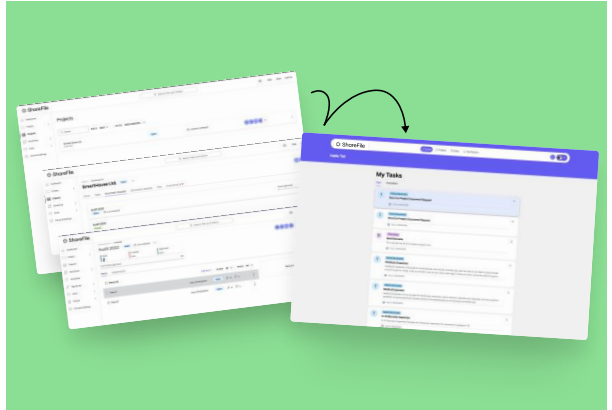
Projects

Before:

Client can see Projects, Document Request Lists, and Items.

Now:

Client sees a new view of outstanding requests as 'task items' on their homepage. This includes document request list items and information request items. Clients will complete outstanding tasks by clicking on them, viewing the description, add comments, and submit any documents or information.



Note, that all items in the Document request list should be assigned to the client directly.

First Time User

01

Complete your Open Tasks by clicking on each task. Upload files, answer the questions.

02

When is needed, comment navigating to a document request task and Comments on the top of the right panel of each task.

03

Find your service provider contact information navigating to a document request task and My Team on the top of the right panel of each task.

04

Find all completed tasks and uploaded files navigating to the Completed tab on the top of My Tasks on the homepage.

05

Find your Tax returns under the Tax Return tab on the top of your homepage.

06

Navigate to the Folders tab on the top of your homepage to see shared with you files and folders.