CLH CPAs & CONSULTANTS EST. 1992

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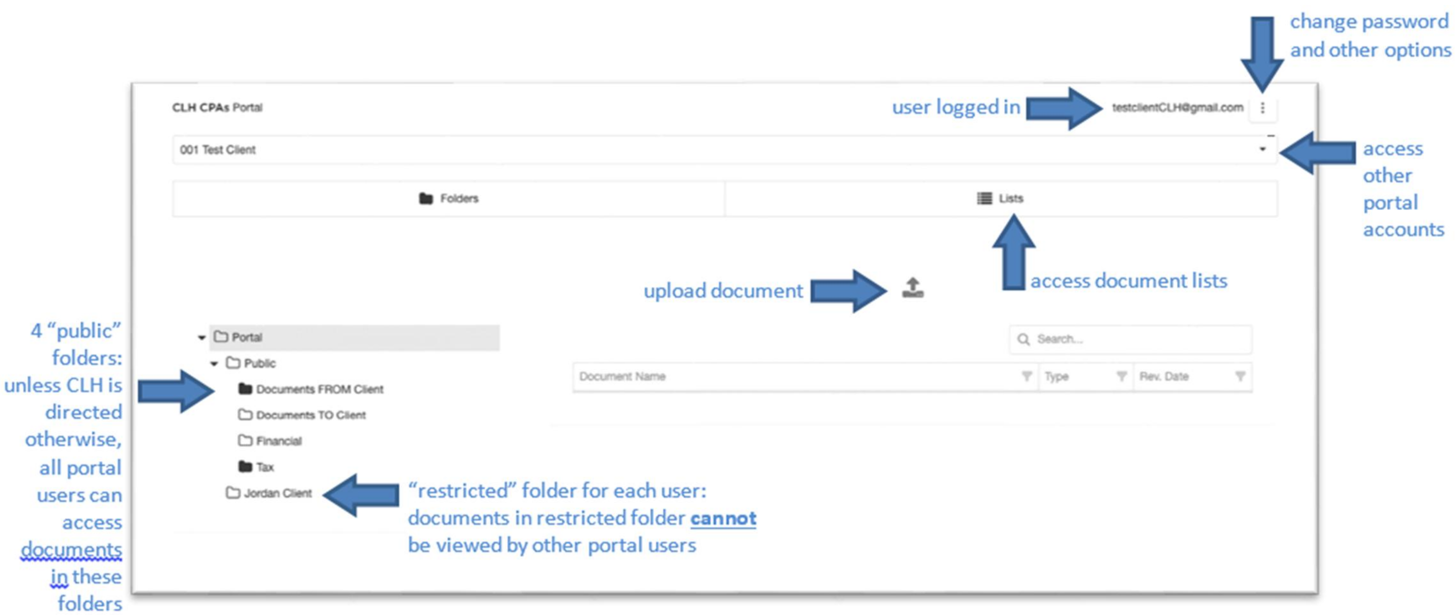
WEB PORTAL REFERENCE SHEET

GAINING ACCESS TO PORTAL FOR THE FIRST TIME

- Upon the creation of the portal account, users will receive a "Welcome" email with instructions on how to access the portal account. The instructions also include a random password that will be used in setting up the account.
- Click on the link to access the web portal. Enter your username and password from the welcome email. After your initial login, you will be prompted to change your password to something meaningful to you. Your username will remain your email address.
- You will access all portal accounts to which you have access using this same username and password.

GETTING TO KNOW PORTAL



RETENTION PERIODS

Documents are available on your portal account for specific periods of time:

GENERAL CLIENTS	
Documents FROM CLIENT	60 days
Documents TO CLIENT	60 days
Tax	3 years

CLIENTS WITH FINANCIAL STATEMENTS	
Documents FROM CLIENT	60 days
Documents TO CLIENT	60 days
Financial statements	6 months
Tax returns	6 months

WWW.CLH-CPA.COM CLH@CLH-CPA.COM CLH.CPA CLH-CPA

Upload Documents

- Log into the portal account using your name and password.
- On the left, click on the folder into which you want to upload the documents.
- Click on the "up" arrow to begin an upload. Select or drag and drop file(s). Click green "upload" button.
- CLH will receive a notification that a document has been uploaded.

Download Documents

- Log into the portal account using your name and password.
- On the left, click on the folder from which you want to download documents.
- Select the document to be downloaded. Click on the "down" arrow to begin an upload. You'll be prompted to save the document to your computer. Specifics will differ depending on your browser settings.

Using Document Lists

- You may be assigned a "document list," which is an organizational tool to assist you in uploading specified documents requested by our firm.
- Log into the portal account using your name and password. On the right, click on "Lists."
- Documents highlighted in pink are documents CLH still needs. Documents in green have already been uploaded to our firm.
- Click on the document name to be uploaded, which will then highlight the item in blue.
- Click on the "up" arrow to begin an upload. Select or drag and drop file(s). Click green "upload" button.
- CLH will receive a notification that a document has been uploaded.
- Once all document items are highlighted in green, you have completed the list.

Reset Password

- Visit the CLH website and click on "Web Portal."
- Click "Forgot Password."
- Enter your email address that is associated with the portal account(s) and click "Submit."
- You will receive an email with additional instructions. Click the link in the email to reset your password.
- Enter a new password and confirm the password. Click "Submit." Your password is reset and you should be able to log into the portal as usual.
- If you are still having trouble with your password after using the "Forgot Password" method, please contact our office so we can assist you personally.

Contact Us

Please email (clh@clh-cpa.com) or call (219-874-0210) our office if you have any questions regarding the portal.