

# ACCESSING YOUR 2018 CLIENT ORGANIZER

Your Client Organizer is the important first step in analyzing your tax position for the year. Our online version is designed to help you quickly and conveniently provide us with critical information to maximize your deductions and minimize the hassles.

## How to Access your Client Organizer/Upload Documents

Follow the steps below to access your 2018 tax organizer via our Client Center.

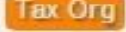
### Step 1: Login

- Select Client Login
- Enter your Username and password
- Click Login

Note: If you forgot your password, click the forgot password link. Otherwise you can call Rosie Rivera (630) 717-5330 x321, to reset your password.



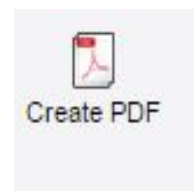
### Step 2: CLIENT ORGANIZER ENTERING INFORMATION ONLINE

- Select the **orange Tax Org rectangle** next to your name (as shown here) 
- Click on the Questionnaire folder
- Click on the [Web Questionnaire](#) to answer **ALL** questions
- Save & Close
- Note: Do not click on the **Send to Preparer** icon until you are completely done answering all questions and uploading all documents because you **will not** be able to go back once you click on the Send to Preparer. (see Step 3)

**OR**

### PRINTING YOUR CLIENT ORGANIZER TO COMPLETE BY HAND

- Click on the CREATE pdf icon (as shown here).
- Print the pdf or save to your computer
- Complete questionnaire by hand



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## Step 3: UPLOADING YOUR TAX DOCUMENTS

- Click on the Upload Tax Documents  
(As shown here in your **Tax Organizer Index**.)
- Click on Upload
- Click Add files
- Choose ALL the files you're sending with your Organizer
- Start Upload (You will see the documents in the Upload box)
- Once you have completed both the Questionnaire and tax documents,
- Click on Send to Preparer (as shown here)
- You will see a "Send to Preparer Confirmation" window on your screen (see below).



If you need to enter more information please click CANCEL, if not, click OK and you are finished!

