HAMILTON JUFFER + ASSOCIATES LLP

Portal User Guide

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Introduction

Hamilton Juffer + Associates llp is pleased to offer a new paperless way to exchange documents in a secure environment: the HJA Client Portal. Think of the HJA Client Portal as an extension of our website through which we can securely and quickly exchange electronic documents with you and deliver electronic documents to you. The HJA Client Portal is made possible by Thomson Reuters, through a product called NetClient CS. Thomson Reuters also provides the software we use to prepare tax returns.

Sharing documents electronically is good for the environment because it doesn't require the use of resources to produce and transport printed documents. Also, unlike normal email messages and their attachments, the HJA Client Portal uses encryption technology to ensure that your information is secure.

If you need further assistance with the HJA Client Portal after reading this document, please email us at info@hamiltonjuffer.com or call us at (515) 245-3737.

You should store this user guide somewhere accessible to remind you of the user rules.

System Requirements for the HJA Client Portal

You must have a high-speed Internet connection to use the HJA Client Portal. The portal is compatible with the following Internet browsers:

- Google Chrome
- Internet Explorer version 7.0 or higher
- Mozilla Firefox version 3.0 or higher
- Safari version 5.0 or higher

For more information about system requirements, please contact us.

Getting started with the HJA Client Portal

In this chapter, you will learn how to register your portal account, how to log in to the portal, and how to access key features of the portal.

Note: The images in this guide are examples. Depending on the features our firm enabled for you, your portal may look different.

Activating your HJA Client Portal account

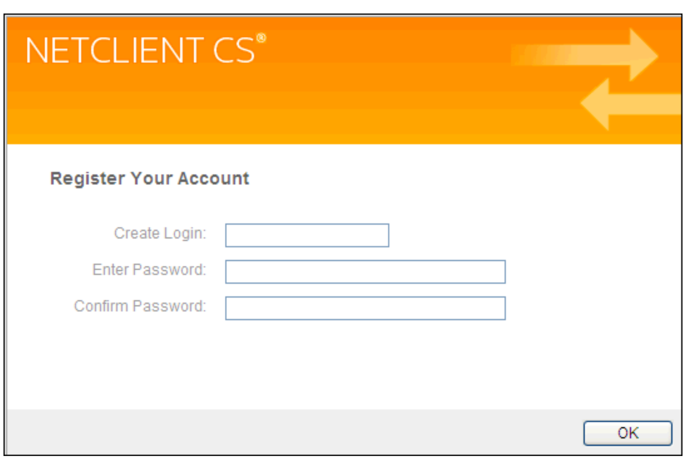
After our firm creates a portal account for you, you will receive an HJA Client Portal activation email message from info@hamiltonjuffer.com. The message will contain a link through which you can create a login and password for your portal.

Important! If you do not receive an activation email message in your inbox, check your spam folder. If you still cannot find the email, contact us.

Follow these steps to activate your HJA Client Portal account.

1. In the activation email message, click the registration link to create your login and register your account.
2. In the NetClient CS registration screen, enter a login in the **Create Login** field.

   Tip: Use your email address as your login to make it easier to remember.



3. Enter a password in the **Enter Password** field.

   Notes

   - Passwords must be at least seven characters long and must include letters and numbers (for example: “password1”).
   - Passwords can contain symbols, such as %, $, and #.
   - Passwords are case sensitive (for example, “PassWord1”).

4. Re-enter the password in the **Confirm Password** field.

Notes

- If you have questions or if you have difficulty accessing your HJA Client Portal account, contact us.
- After you register your account, you can log in to the portal from our website. You can also bookmark the HJA Client Portal login screen in your browser.

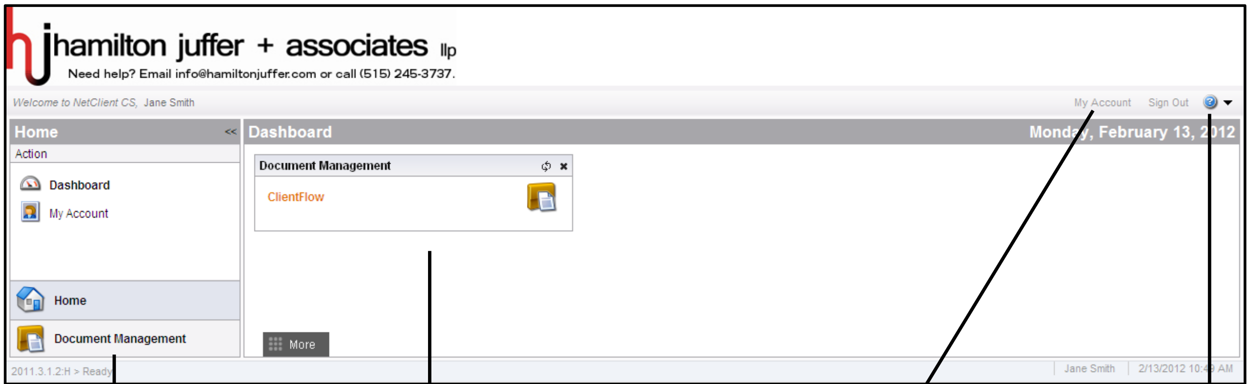
After you register your account, you can log in to the HJA Client Portal.

Additional information

- It is good practice to reset your password periodically.
- If you forget your password, you can reset it by answering a series of security questions that you can specify after you activate your account by clicking the **My Account** link in the Home Dashboard. If you enter an incorrect password, you can click the **Help! I’ve forgotten my password** link to request that the portal send you a temporary password via email.
- If you unsuccessfully attempt to log in to the HJA Client Portal too many times, the portal will lock your account. An automatic email will then be sent to your address, notifying you of the attempts and providing you a link to unlock the login immediately. The HJA Client Portal will unlock your account when you click the link in the email message or when the lock expires automatically.

Navigating in the HJA Client Portal

The HJA Client Portal provides quick access to all the features you need to manage your portal documents.



Click this button to open the Document Management dashboard, through which you can access all portal modules

The Home Dashboard provides access to all portal modules

Update your login, email address, and security questions through the My Account link

View help topics about working in the portal and using ClientFlow

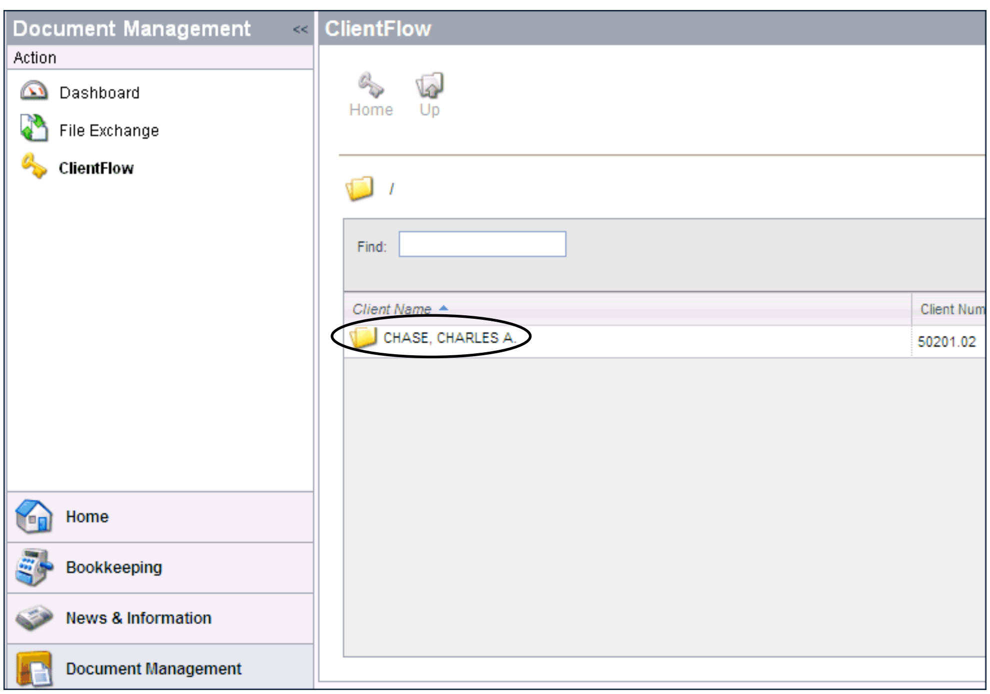
Managing portal documents with ClientFlow

This chapter describes how to manage portal documents in the HJA Client Portal using ClientFlow.

Viewing ClientFlow documents

After you register your portal account, you can view the documents that our firm has placed in ClientFlow for you.

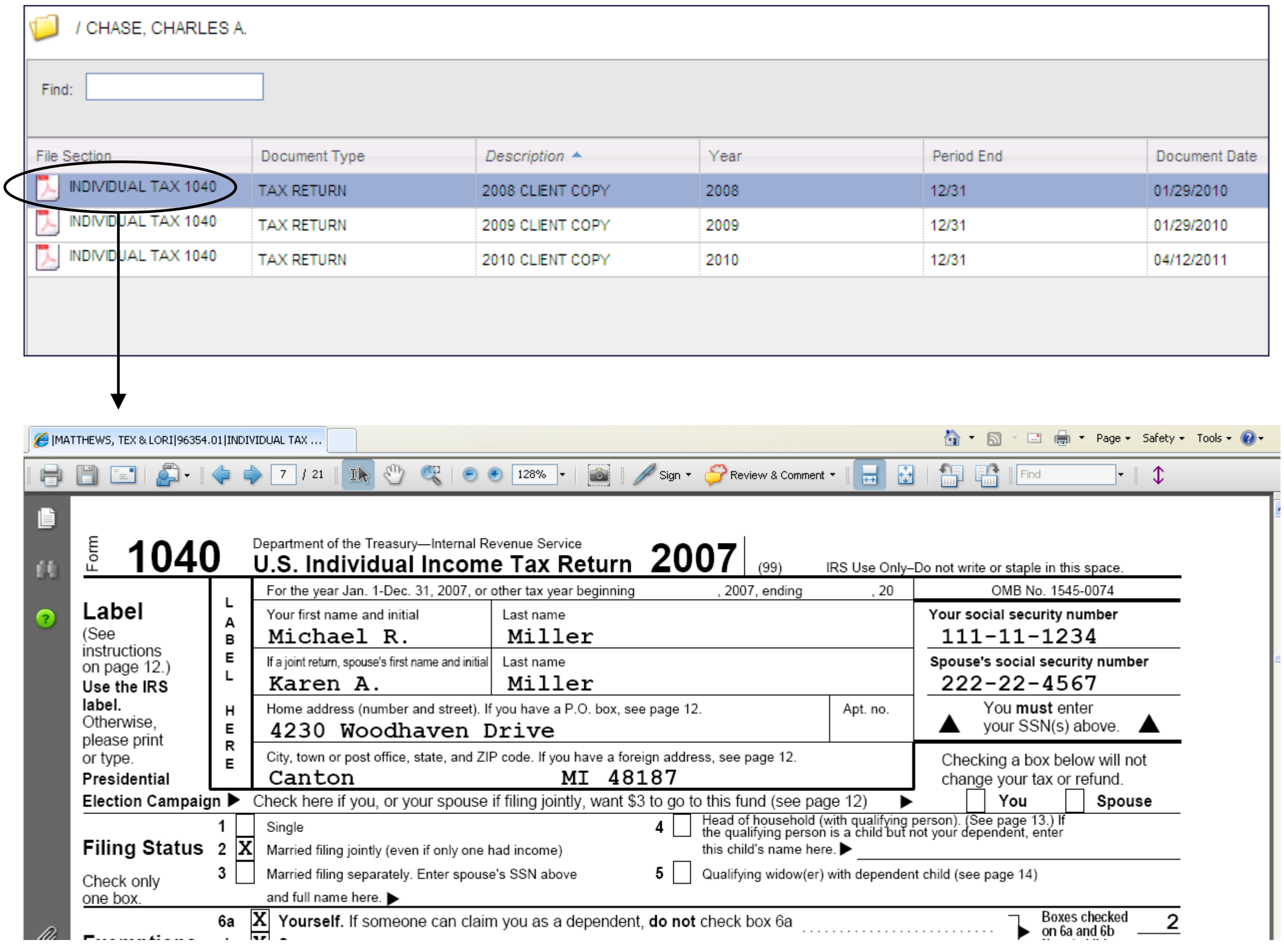
1. Log in to the HJA Client Portal through the link on our website.
2. In the Home Dashboard, click the **ClientFlow** link under the Document Management heading.
3. In the ClientFlow screen, click a folder to view its contents.



Notes

- Columns in the ClientFlow screen contain values that our firm assigns to each document for easy organization and quick access. To resize a column, click and drag its border. Click a column heading to sort the documents in the list by the information in that column.
- The ClientFlow screen will be empty if our firm has not published any documents to the portal for you to view and you have not uploaded any documents recently.

4. Click a document to open it for viewing.



Notes

- Because documents in ClientFlow are read only, you cannot edit them. If you need to edit a document, save a copy of it to your local drive by choosing File > Save As (or by clicking the Save button in the Acrobat toolbar), edit the document, and then upload it to the portal as described in "Uploading documents to ClientFlow."
- You can view documents only if the software applications in which the documents were created are installed on your computer. Our firm will generally make documents available in PDF, XLS/XLSX, or DOC/DOCX format, so Adobe Acrobat, Microsoft Excel, and Microsoft Word may be required.

5. Click the close button when you are done viewing the document.

6. Click the Up  icon to return to top-level ClientFlow screen.

Uploading documents to ClientFlow

Follow these steps to upload a document to ClientFlow.

1. Click the folder to which you will upload the document.
2. Click the Upload  icon and then click the Select Files button.

   Tip: Click the Upload icon again to cancel the upload.

3. Navigate to the documents you want to upload, select them, and click the Open button.
4. Click the **Upload** button below the selected files. Members of our firm can now view the document.

   Note: Our firm has enabled the Auto Publish feature, which allows the uploaded document to be available to you through ClientFlow.

5. Click the **Sign Out** link to sign out of the HJA Client Portal.

Additional information

- You can upload files of any type to ClientFlow. Note that TIFF files are converted to PDF files during upload.
- You can upload files of up to 1 gigabyte (GB).
- Your HJA Client Portal session may time out if your Internet connection is not fast enough to complete a single upload within three hours.
- You can upload multiple documents or files to ClientFlow simultaneously.
- Our firm determines which documents you can view through ClientFlow and can remove documents from your portal at any time.