

## **Welcome to Smythe's Online Services for Personal Taxes**

Here we have some Frequently Asked Questions and Answers that will help you use our online services. If you have a question that is not covered here or in the introductory video, please contact our [Support Team](#) for assistance.

### **How do I get a registration link for the portal?**

Every personal tax client of Smythe will receive a registration link to the portal by March 4, 2022. If you did not receive a link, check the Junk Items folder in your email and if it isn't there, email our [Support](#) team for a new link.

### **I received a registration link, but it says it expired. What do I do?**

To increase security, registration links expire after 7 days. To receive a new link, contact our [support team](#) for assistance.

### **I don't have Google Authenticator on my mobile device. How can I get it installed?**

Google Authenticator is required for two-factor authentication for our online services. If you need support on how to get started with Google Authenticator, Google has detailed instructions on their [support site](#).

### **I don't want to use Google Authenticator, is there another way to enable two-factor authentication?**

If you prefer, you can have a code emailed to the email address we have on file for you. Simply choose the option to have the code emailed and then enter the code once received.

### **I don't want to have to enter an authentication code every time I log in, how can I prevent this?**

When you log-in, select "Remember Me" if you are using your personal computer or personal mobile device so you can avoid going through authentication again for the next 90 days. To ensure the security of your information, you will be prompted after 90 days to authenticate again, even if using the same device.

If you log in using any unrecognized device, you will be prompted again to authenticate.

### **Where do I find documents and where should I save documents that I am uploading?**

We've tried to keep the folder structure simple for you to use. Each client has a set of folders related to documents that are being shared back and forth between yourself and your preparer, as well as a set of folders where documents that require signatures can be found.

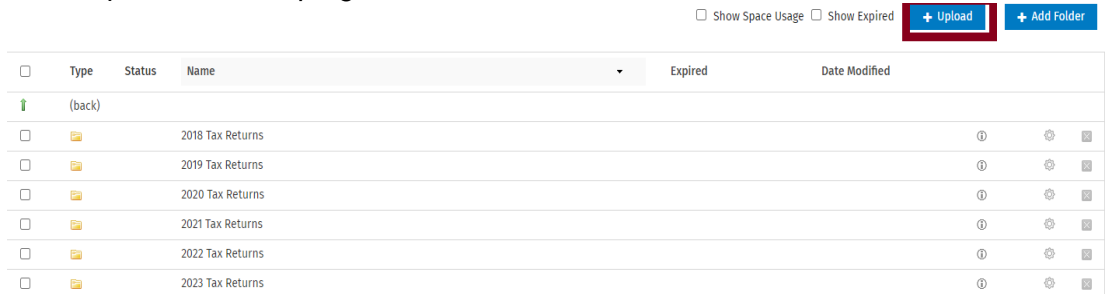
### **How will I know if Smythe has shared a document with me?**

If a file is added to the portal by Smythe, you will receive an email notification. A link in the email will direct you to the location of the new files. You can simply click on the link, enter your credentials and you will be directed to the location of the documents.

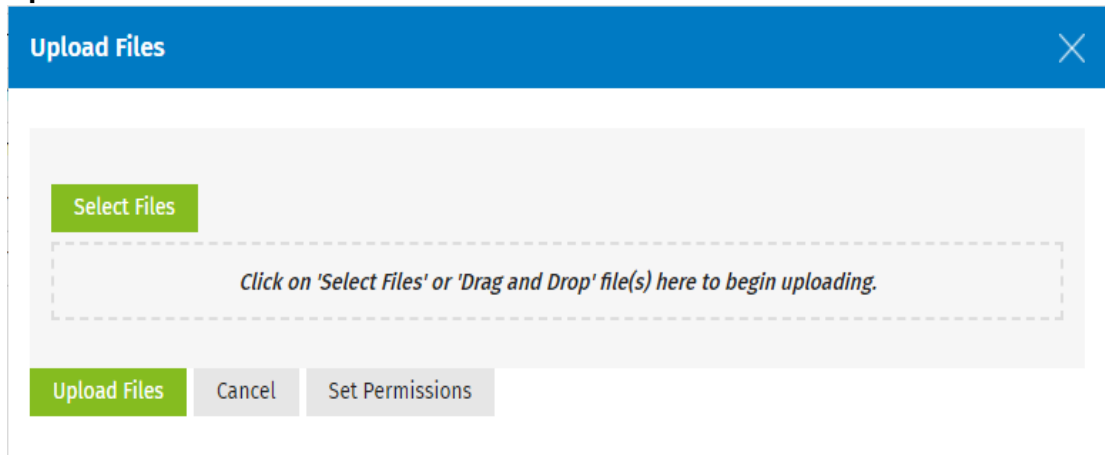
If you are suspicious of the email you receive, you can log into online services through our website and locate the folder **Completed Tax Returns** to find the information that has been shared. This folder is where any information back from Smythe will be shared.

### How do I upload documents?

1. To upload a file, first make sure it doesn't have any special characters in the file name (e.g.: @\$%~-).
2. Select the folder in online services named **Client Provided Documents**, and then select the appropriate tax year the document is for.
3. Click 'Upload' in the top right.



4. A window will open where you can choose to select files or drag and drop them into the window. Choose the file(s) you wish to share with Smythe and then click **Upload**.



5. Smythe will receive an email indicating that you have uploaded a file for review.