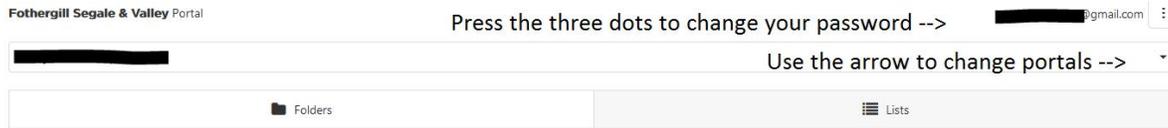
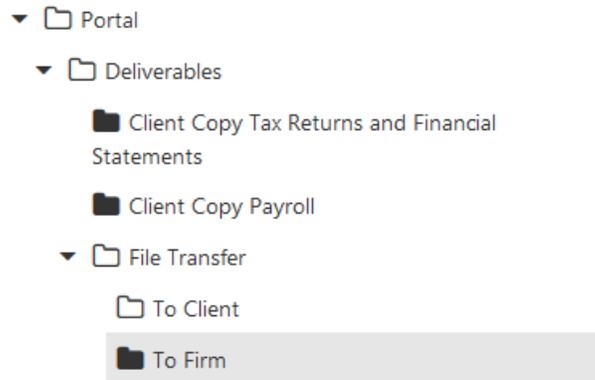


Once you log into the portal with your username and password, the top portion of your browser will look similar to the below. You can change your password as well as log off in this area. You can toggle between multiple portals here too.



Below are your portal folders. Any folder that is black means that it contains a document. A white folder means it is empty. In this portal there are files in the "Client Copy Tax Returns and Financial Statements", "Client Copy Payroll" and "To Firm" folders.



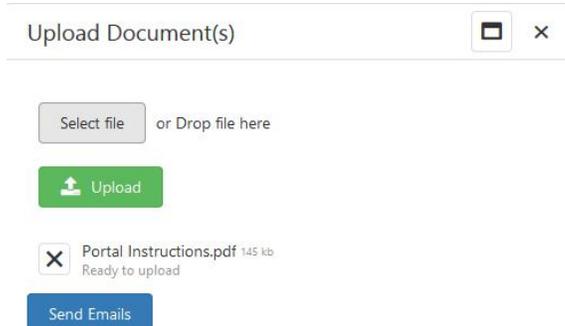
Depending on which folder is highlighted, you will see the below symbols appear. The arrow pointing down, means download (receive a document). The arrow pointing up, means upload (send a document). We have restricted the subfolders under "Deliverables" to be "View" only, meaning you can only download files. The subfolders under File Transfer are "read/write", meaning you can upload or download files from those subfolders.

To download a document please press the download icon and depending on your browser, the download will be placed in your download folder or you may be able to select where to download the file to on your computer.

You will receive a brief email notification from [portal@fsv-cpas.com](mailto:portal@fsv-cpas.com) alerting you to any new upload.



To upload a document please press the upload icon. A box will appear like below and you can either drag or drop your file(s) or you can use "select file" button to select your file(s). Before you press the **green** upload button please press the **blue** "send emails" button to select a contact to send the file to within our organization. If you do not select a contact, the front office will be notified by default and make sure your file gets to the proper person. The contact you selected will receive a brief email notification stating that you have uploaded file(s).



Items in the Deliverable subfolders are retained for the following length of time:

- Client Copy Tax Returns and Financial Statements = 3 years from upload date
- Client Copy Payroll = 1 year from upload date

Items in the File Transfer subfolders are retained for 120 days from upload.

If you have any questions, please call 802-223-6261 and ask for Mariann or email Mariann at [mariann@fsv-cpas.com](mailto:mariann@fsv-cpas.com). We strongly suggest that you do not email sensitive information. If you are having issues with the portal, please double check that your pop-up block is turned off.