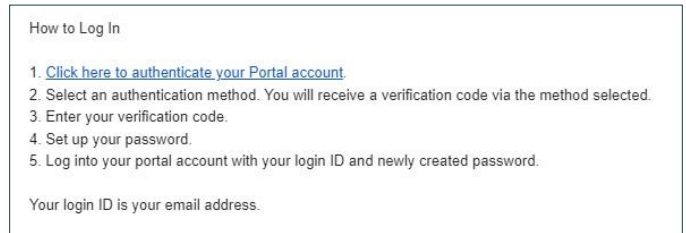


1. The email invitation to your new, secure ATLAS Client Access portal will come from a “DoNotReply” email address.



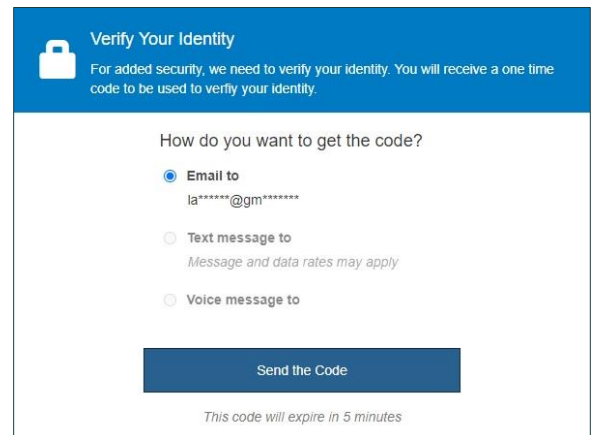
2. This portal registration email will contain a LINK, which asks you to **Click here to authenticate your Portal account.**

Pictured to the right. →



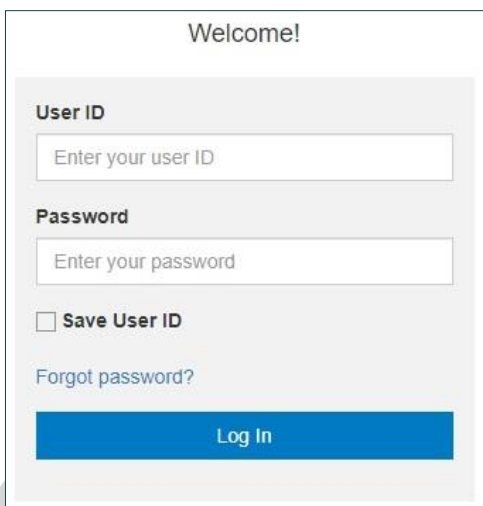
3. After following the link in the registration email, you will be asked to verify your identity. This keeps your account secure. We recommend adding your phone number to your account at this time, so that multi-factor authentication can be handled via text. This will simplify your login process in the future.

Pictured to the right. →



4. After completing your identity verification, you will be able to log into your new ATLAS Client Access portal account.

*Your User ID is your email address!*



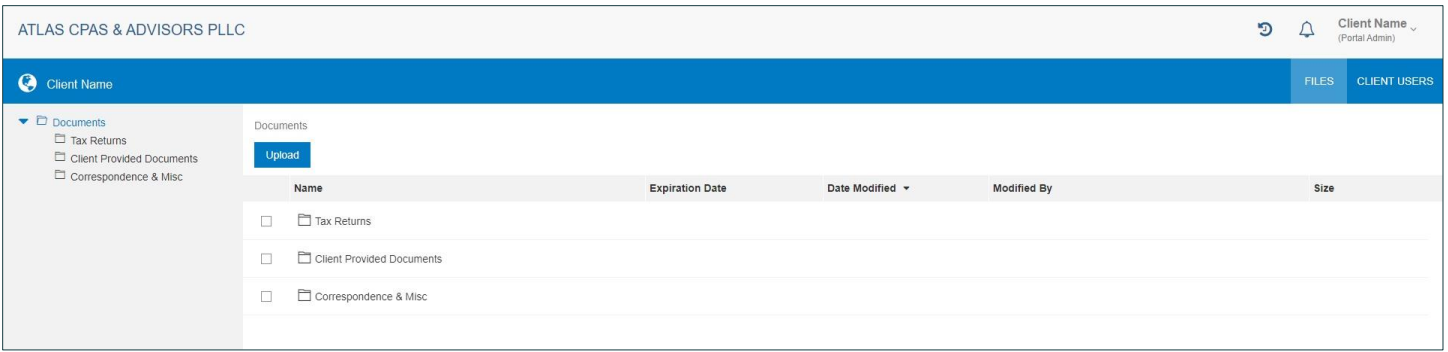
5. Unable to locate your portal registration email? No problem!

You can complete your portal registration by visiting the portal login page here: [www.clientaccess.com](http://www.clientaccess.com)

Select the Forgot Password option, and follow the prompts. You will receive a password reset email. Do not be alarmed if this does not appear in your inbox immediately; this can sometimes take a few minutes.

Follow the link in the email to create your password, and add your phone number to your account.

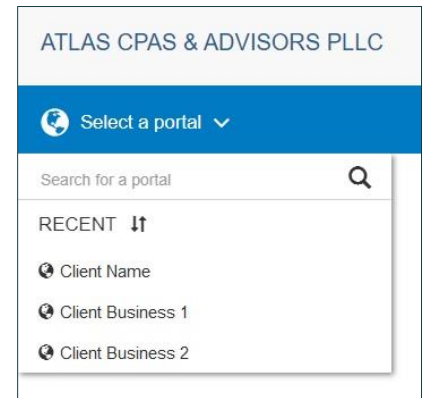
Once setup, revisit the original portal login page, and login using your email and newly created password.



6. *If you have more than one account with ATLAS:* When you are logged into your portal, you will be able to view all your accounts using the same login.

Your name will appear in the **top left** – next to the globe, under our firm name. If you have more than one account with ATLAS, you will see a drop-down arrow next to your name that allows you to toggle between your various accounts. With this feature, you can easily access all accounts using the same portal login, while keeping your information organized and separated by account.

Pictured to the right. →



7. Along the **left side** of the screen, you will see the folders that have been setup on your account.

You can access the folders by single-clicking the folder name listed along the left side of the screen; or by single-clicking the folder name where it is listed in the main area of the screen.

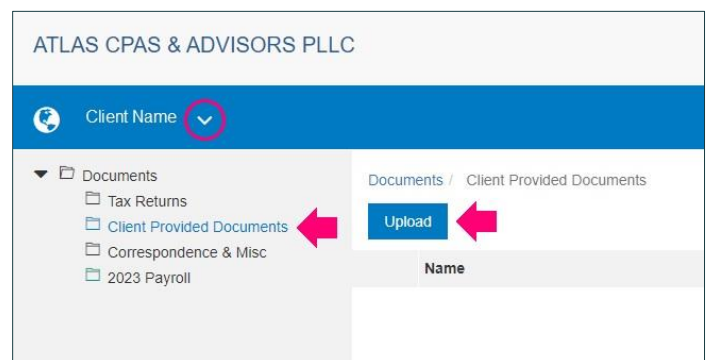
If you need additional folders, please contact your office administrator, so that we can setup the additional folders for you.

## SEND DOCUMENTS TO ATLAS

You may send files to ATLAS via any of the folders shown on your account. However, we kindly ask that you *please upload only to the “Client Provided Documents” folder*. This will help streamline the information received, to ensure we are working together efficiently.

1. Log into your portal account and, if needed, **toggle** to the account for which you are uploading documents.
2. Select the **Client Provided Documents** folder to the left.  
You can now do one of two things:

- a. Click the **Upload** button. Your local file explorer window will open. Locate the file(s) that you wish to upload to the portal, then click OK. This will open an “Upload Queue” window in the bottom right corner of your screen. Click “Upload All” to send the selected document(s) to ATLAS.



*Continues on next page.*



- b. Drag-and-Drop your chosen documents into the blank white area visible under the “Upload” button. As you drag-and-drop documents into this space, your “Upload Queue” will be created. When ready, review your “Upload Queue,” then click “Upload All” to send the selected document(s) to ATLAS.
3. ATLAS will receive an automatic email notification every time you upload a document to via the portal.

### RETRIEVE DOCUMENTS SENT TO YOU FROM ATLAS

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1. You will receive an automatic email notification every time ATLAS sends documents to you via the portal.
  - a. If you have more than one account with ATLAS, this email will identify which account contains your new document(s).
  - b. If the documents were shared to a specific folder in your portal, this email will identify which folder.
2. Log into your portal account and, if needed, **toggle** to the account for which you received a portal notification.
3. If the documents were shared in a folder, you can select the folder to see the documents listed.
4. When you locate the newly shared document, single-click on the file. **This will *automatically* download a copy of this document to your computer!**
5. Using your computer’s file explorer, locate the file that has been downloaded from the portal. Review the information provided by ATLAS, incase this requires any action on your part. When ready, save this file in a secure place within your own business and/or personal tax and/or accounting records, to ensure your records are complete.

### INVITE ADDITIONAL USERS TO YOUR PORTAL

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ATLAS is permitted to grant access to only one person per portal account. This security precaution is in place so that portal access is restricted to only those whom you have approved, and have personally granted access. These instructions are helpful in situations such as: You are married, and need to grant your spouse access to your joint portal account; you own a business, and need to grant your business partner access to the company portal account; and so on. If you are unsure as to whether these instructions apply to you, please do not hesitate to reach out – we are happy to provide additional guidance.

1. Log into your portal account and, if you have more than one account with ATLAS, **toggle** to the account for which you would like to grant access to an additional user.
2. In the top right of your portal, click **CLIENT USERS**
3. Select the **Add New User** option.
4. On the “User Profile” tab, fill in the information marked with a red asterisk to complete the new user’s profile.

*Continues on next page.*



5. Select the “Assigned Portals” tab, and check the “Grant Access” box to grant the new user access to your portal.
  - a. Here, you will also assign a “Firm Management Role” for the new user. This indicates the level of access the new user will have. “Standard User” is the default setting, which allows the new user to perform the most common portal operations. If necessary, you can change the “File Management Role” to limit the functions that can be performed by the new user. \* *As a security precaution, we do not recommend granting “Administrator” level access to any additional portal users.*
  - b. If you have more than one account with ATLAS, and you need- or would like- to grant the new user access to your other accounts, you may do so by selecting the “Assign more portals” button.
  - c. If you wish to only provide access to the portal temporarily, you can assign an “Access Expiration” date. This can be useful in situations such as a loan, in which you may want to provide your banker with temporary access to your portal, so they can pull documents for loan approval.
6. When everything has been setup for the new user, select the Save and Close button in the top right of your portal. This will send an automatic email to the new user, providing them with portal login information. Their login is their email address.

\* Reminder – Email is not a secure method by which to send information electronically. To ensure the security of our clients’ sensitive information, we provide all clients with their own secure portal account, so that clients can safely send sensitive documents to ATLAS electronically, and we can safely send sensitive documents to our clients electronically.

Your ATLAS Client Access portal account is designed for secure document *transfer*; it is not intended for secure document *storage*. All documents sent to ATLAS via the portal are considered “copies;” as the original version of said documents should be kept in your own records. Therefore, documents will be periodically removed from the portal as a security measure. Please be sure to *download* any documents sent to you by ATLAS, and save such documents to your own records in a secure place.

Per the IRS, all taxpayers should maintain their own business and personal tax and accounting records for at least 7 years. Since this is what the IRS requires, ATLAS recommends this as a best practice for all businesses and individuals.

If you have any questions about your secure ATLAS Client Access portal, or need assistance with your account, please do not hesitate to reach out. We are always happy to assist in any way we can to ensure a positive experience for you. Thank you!

