

HOW TO SECURELY UPLOAD DOCUMENTS

To securely upload documents, please follow these steps:

1. Go to my website: www.rickjohnsoncpa.com
2. Click "click here to enter your SmartVault portal"
3. Sign in to your SmartVault account (If you have forgotten your password, it can be reset by clicking in the left bottom corner)
4. Click the file cabinet labeled with your name
5. Click the folder labeled "TY 18"
6. Click client source documents
7. In the upper left area, click "upload file"
8. Upload the file
9. Click email notification
10. Click send

Please let me know if you need assistance or if you have questions.