

Jones Hall Advisors

Client Portal Guide



Jones Hall Advisors
521 East Joppa Road,
Suite 104
Towson, MD 21286

Jones Hall Advisors has established Client Portals on its website. A Client Portal allows us to send documents to each Client Portal which allows the client to view, save or print the documents. The Client Portal also allows each client to send documents to Jones Hall Advisors via the portal.

At Jones Hall Advisors, we take the privacy and security of your information seriously. That's why we've introduced the Client Portal for sharing your important tax and financial information with us. This guide is designed to help you in your use of the Client Portal.

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What is a Client Portal?

A Client Portal is a Web based file storage vault for sharing data. You access it from your web browser using your customized User Login and the secured password provided to you. The Client Portal uses an encrypted connection for transmitting data to and from your private vault, so your information is safe. This portal will allow us to work together more efficiently while securely exchanging working documents, PDF files and even large files, such as QuickBooks, that may exceed the capacity of your email account.

Jones Hall Advisors (JHA) utilizes the Thomson Reuters Client Portal software and specific guidance in using the portal is provided in this document. Use of the Client Portal does not require downloading or installing additional applications – if you have a problem, then contact Jones Hall - 410-321-0206.

Where is the Client Portal?

You can access your Client Portal through the home page of our website. Simply go to our website www.jhacpa.com and click either the CBS, business, or individual, etc., Client Portal button on the left side of the screen.

Portal Administration

Jones Hall Advisors Administrator

If you have a problem with your Client Portal, please send an email to joneshall@jhacpa.com or call 410-321-0206 for portal help. When you email or call in, please indicate if your problem is related to your tax return, an accounting or consulting issue or an IT problem so we can route you to the right department. Please note the portal administrator is available from 8:30-4:30 on Monday thru Friday.

User ID and Password

You are solely responsible for (1) authorizing, monitoring, controlling access to and maintaining the strict confidentiality of your User ID and password, (2) not allowing another person to use your User ID or password, (3) any changes or damages that may be incurred as a result to your neglect to maintain the strict confidentiality of your User ID and password and (4) promptly informing JHA in writing of any need to deactivate a User ID due to security concerns or otherwise. You shall notify the Portal Administrator via email at joneshall@jhacpa.com of any unauthorized use of your User ID or password and breach of confidentiality. Until JHA receives this written notification, you will be held liable for any harm ensuing from the use of your User ID on the JHA Client Portal.

Termination of Login Account

You agree to notify the portal administrator at joneshall@jhacpa.com when an individual login account is to be terminated. JHA will make every effort to confirm and terminate access as soon as possible. However, you cannot be assured that access has been terminated until you receive an email confirmation of the termination.

Client Portal for Document Transfer

Terms of access to the Portal

Once your Client Portal has been created, you will receive your login information. The Portal is considered a secure area to provide your confidential information. It is recommended that all provided User IDs and passwords be treated as sensitive information and is the client's responsibility to do so. All deliverable documents will be published and available from the Client Portal according to Jones Hall Advisors' policies. Once deliverable documents are published, please download the documents for your records. If you cease to become a client of JHA, access to the Portal will be terminated after a period of 30 days. Once access is closed, it will no longer be possible to retrieve any documents housed on the Portal site.

Using Client Portal

How to Log In

To access your Client Portal, simply click the Client Portal buttons on the left side on our website (www.jhacpa.com) – select the one that is appropriate such as a Business or Individual (1040) Login - (or Client Bookkeeping Services if using CBS).



The screenshot shows the Jones Hall Advisors website header with a cityscape background and the phone number (410)321-0206. The navigation menu includes Home, Services, Our Firm, Tools & Resources, and Contact Us. Below the navigation is the "Secure Client Login" section with the following options:

- CLIENT BOOKKEEPING SERVICES
- BUSINESS LOGIN
- INDIVIDUAL LOGIN
- PAYROLL SERVICES
- CLIENT EMPLOYEE LOGIN

Below the radio buttons are fields for "Username:" and "Password:" and a "Log In" button. An arrow points from the "CLIENT BOOKKEEPING SERVICES" option to the "Business Login" option.

Enter your Login (User ID) and Password and click the Log In button. (You should have received these two items by email notification from JHA). This will take you to your private data vault where you can upload and download files.

First Time Users

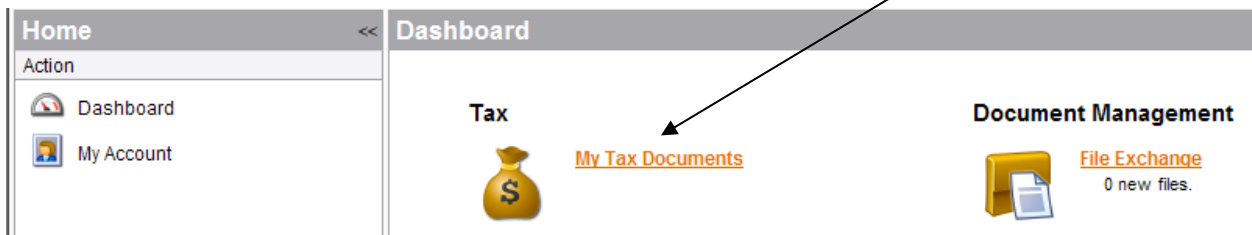
If this is your first time using the Client Portal, you may need to adjust your Internet settings before you try to login. See Adjusting Internet Settings for Using Client Portal. You need to be using Internet Explorer 8 or 9.

Navigating the Client Portal

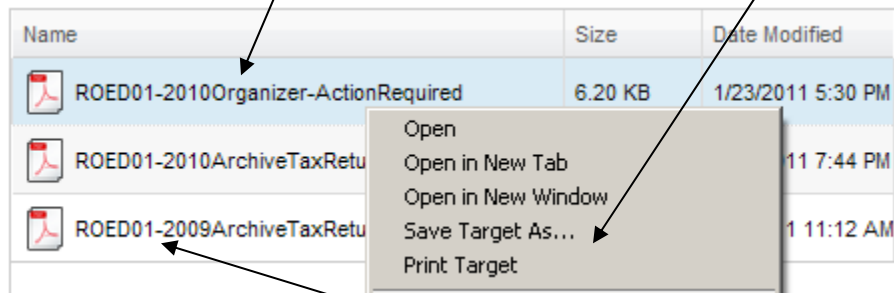
To Receive Documents from Jones Hall

The Accounting Professionals at JHA, generally, will publish deliverable documents such as a Tax Return in a read-only format. It is recommended that you download these files and keep for your records.

1. Jones Hall will send you an email notifying you that it has put a document in your Client Portal.
2. Once logged into your Client Portal, you can click on **My Tax Documents** to access your documents that Jones Hall has placed there.



3. Select the **My Tax Document** icon, go to the documents that you want to save or print and right click on each file and select "Save target as" or "Print target."



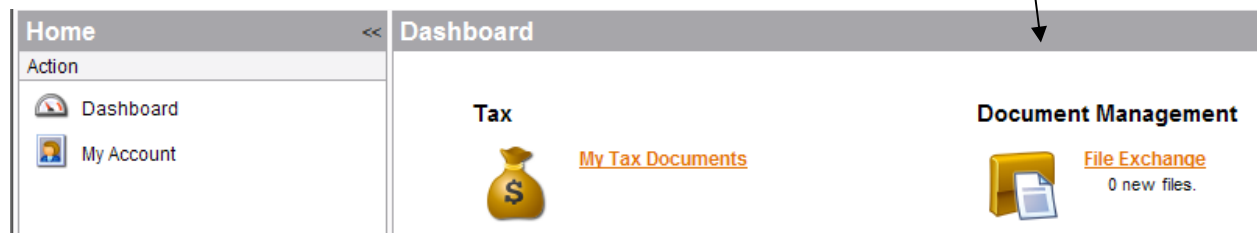
4. To Open the file, just double click on the file itself.

To Transfer Documents to Jones Hall

To send documents to JHA, the document must be saved on your computer or a USB flash drive (memory stick). Certain documents must be scanned into your computer such as a PDF type document to transmit.

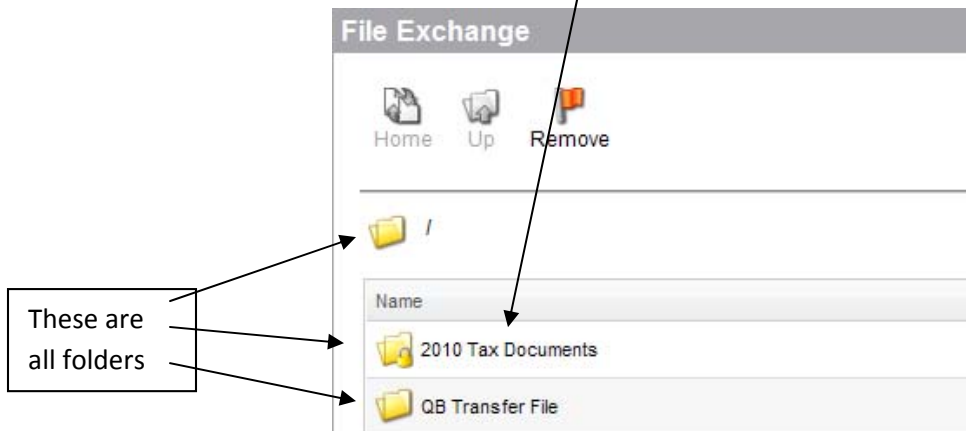
1. Once logged into your Client Portal, you can go to **Document Management** and click on **File Exchange** to transfer files such as Word or Excel files, PDF documents (scanned), or QuickBooks files.

Document Management



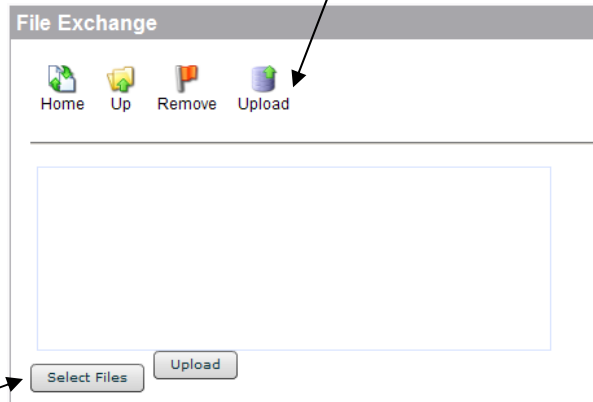
File Exchange

2. In **File Exchange**, select the folder that you want to put your documents and double click the folder.



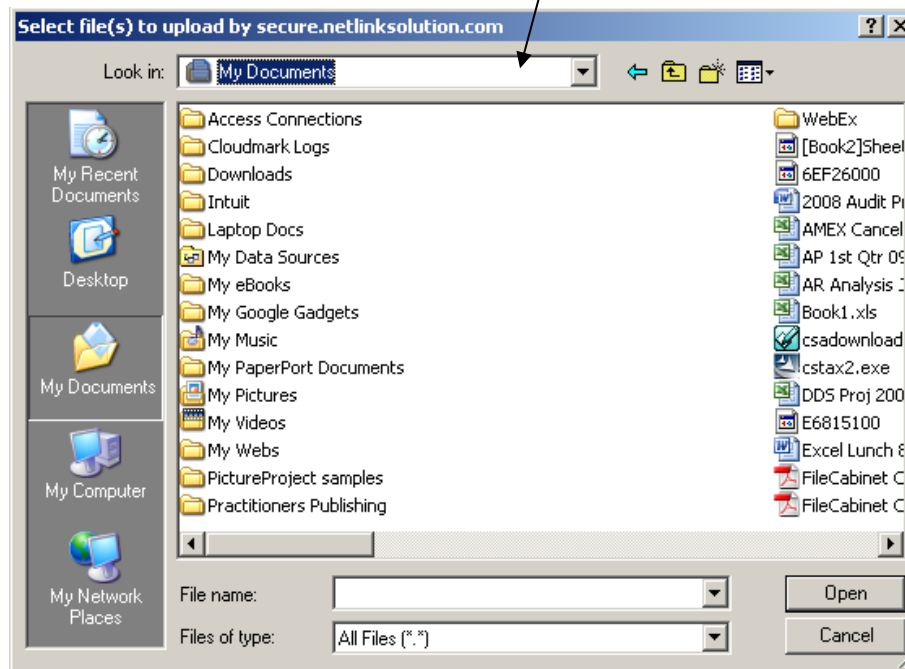
Note: In order to upload files, JHA has created a basic folder set. When uploading files to the portal, you will need to assign them to a folder within the Portal (select the folder that is closest to your subject and our staff will handle it).

3. Once you select the folder, you select the Upload icon.

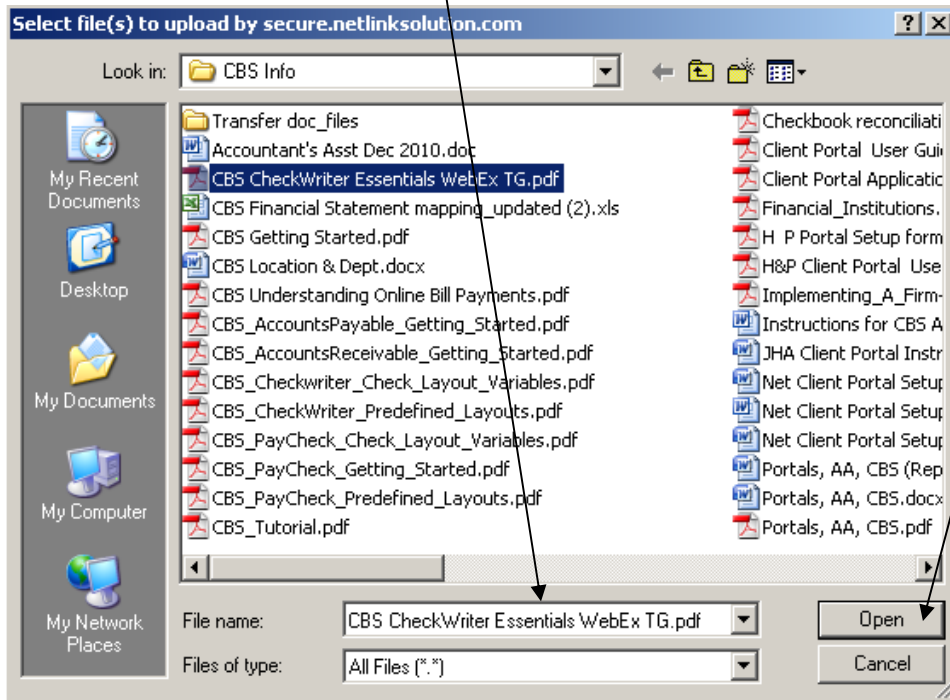


4. Go to Select Files.

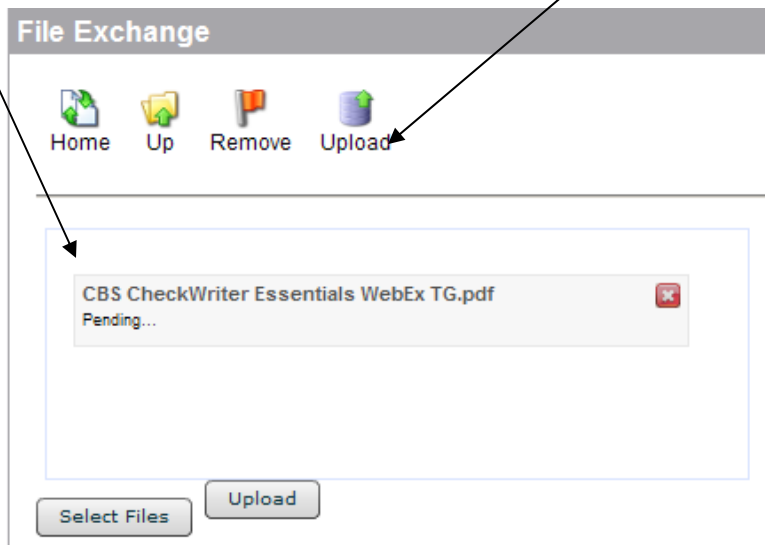
5. Once you are in your browser, select the drive (such as your "C" drive) where you have saved the documents that you want to transfer.



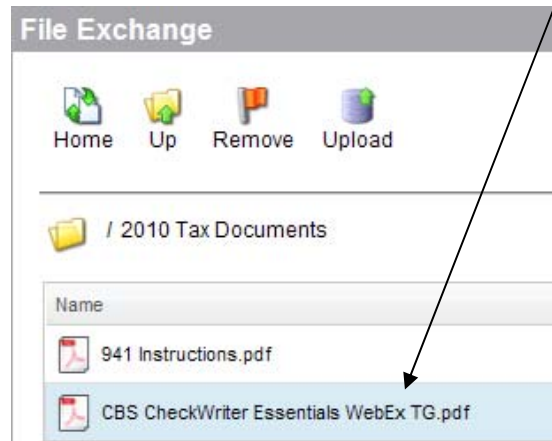
6. Once you have selected the file that you want to upload, you then select “Open.”



7. The file is now in the queue to upload – Select “Upload.”

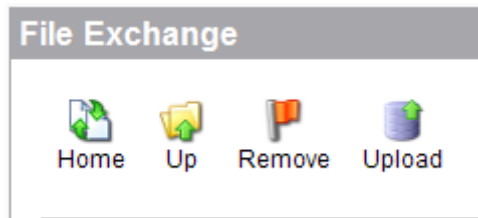


8. Once the file is uploaded, it will show in the folder that you selected.



Note: Use 2010 Tax Document folder if sending any documents related to your tax returns, tax planning or tax issues for 2010. If sending a QuickBooks backup file – use the QB Transfer file. If you are not sure which folder to use, select the one closest to your subject and our staff will handle it.

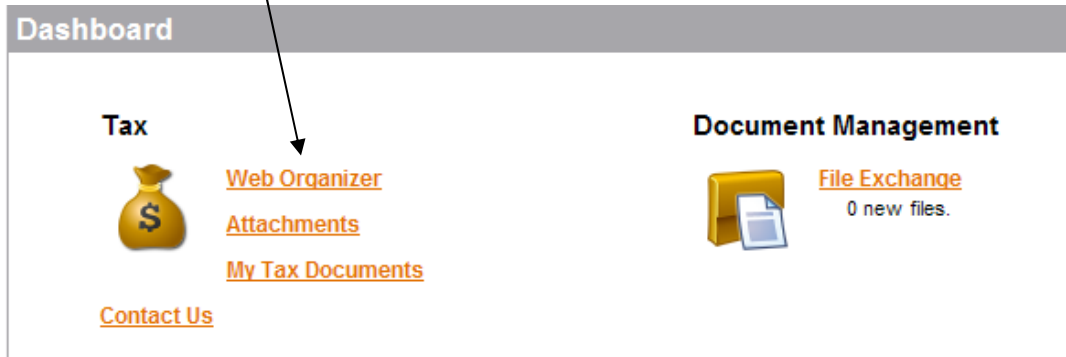
Note: The “Up” icon will take you back one level as you drill down to Folders, Upload, etc.



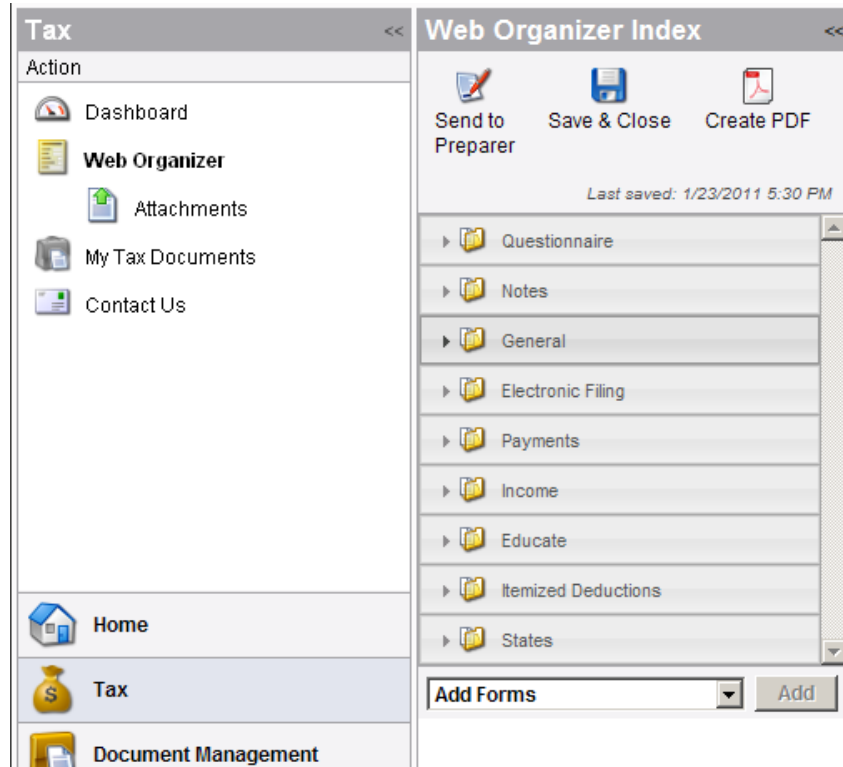
Web Organizers (Tax Organizer transmitted thru a Portal)

To complete your Tax Organizer and transmit it to JHA

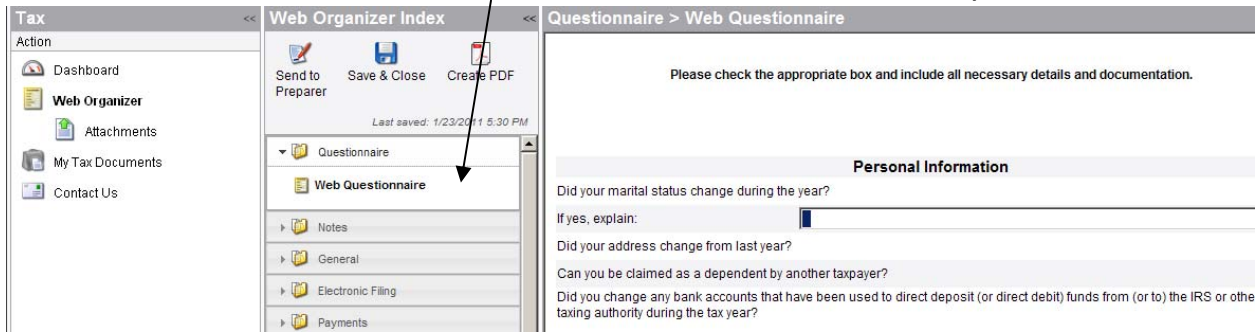
You will select the **Web Organizer** from within your Client Portal



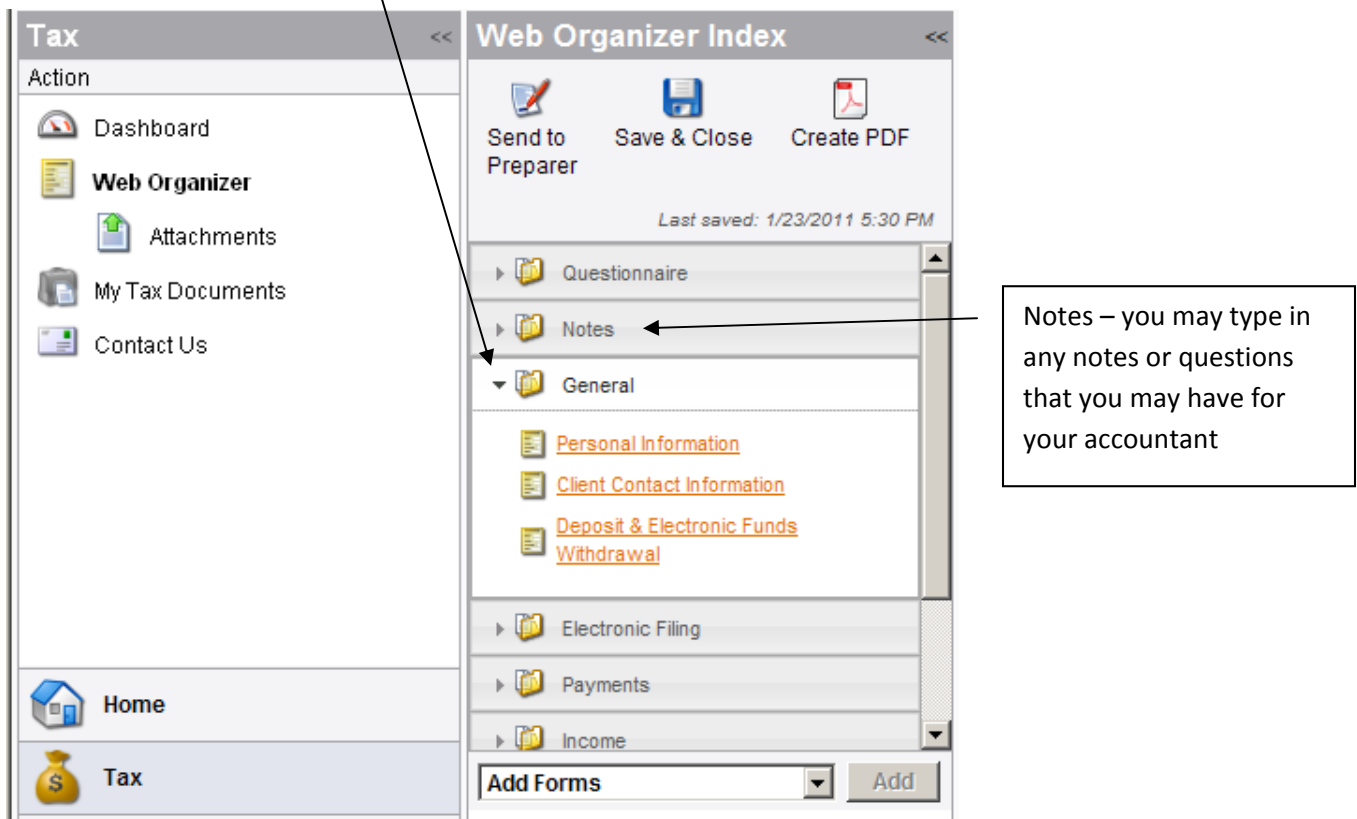
This is what the **Web Organizer** will look like



1. You will first select the “Web Questionnaire” and answer the questions



2. After completing the Questionnaire, you then select the next sections such as General, Electronic Filing, Payments, Income, Educate, Itemized Deductions, States



3. Once you complete the organizer, select "Send to Preparer" and then mark "Save and Close"

Web Organizer Index << **Org Lite > Lite-1 General Info**

Send to Preparer Save & Close Create PDF

Last saved: 1/16/2011 9:00 PM

Org Lite

- Lite-1 General Info
- Lite-2 Income P1
- Lite-3 Income P2
- Lite-4 Adjustments
- Lite-5 Itemized Ded

Electronic Filing

Payments

Educate

States

Add Forms Add

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er))

Mark if you were married but living apart all year

	Taxpayer	Spouse
Social security number	***-**-****	***-**-****
First name	<input type="text"/>	
Last name	<input type="text"/>	
Occupation	Program Manager	Accountant
Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)	<input type="text" value="2"/>	<input type="text" value="2"/>
Mark if legally blind	<input type="checkbox"/>	<input type="checkbox"/>
Mark if dependent of another taxpayer	<input type="checkbox"/>	<input type="checkbox"/>
Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N)	<input type="checkbox"/>	<input type="checkbox"/>

Attaching Documents in the Web Organizer

1. In the Window on the left, you select Attachments.

Tax << **Web Organizer > Attachments**

Action

- Dashboard
- Web Organizer
- Attachments**
- My Tax Documents
- Contact Us

To send file attachments to our office that contain information regarding the preparation of your tax return, click the Browse button, choose a file, and click the Upload button.

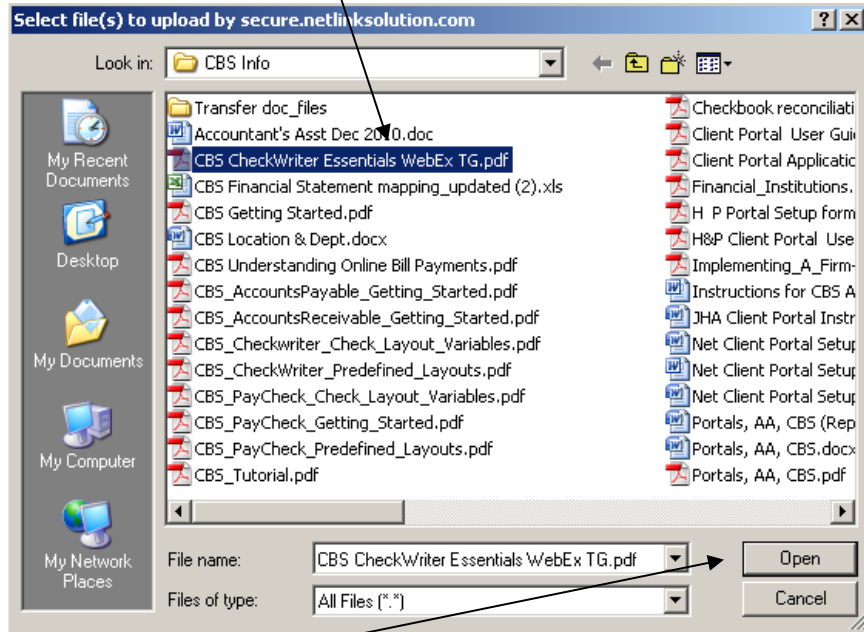
Browse...

Upload

Select	Name	Size	Date Modified
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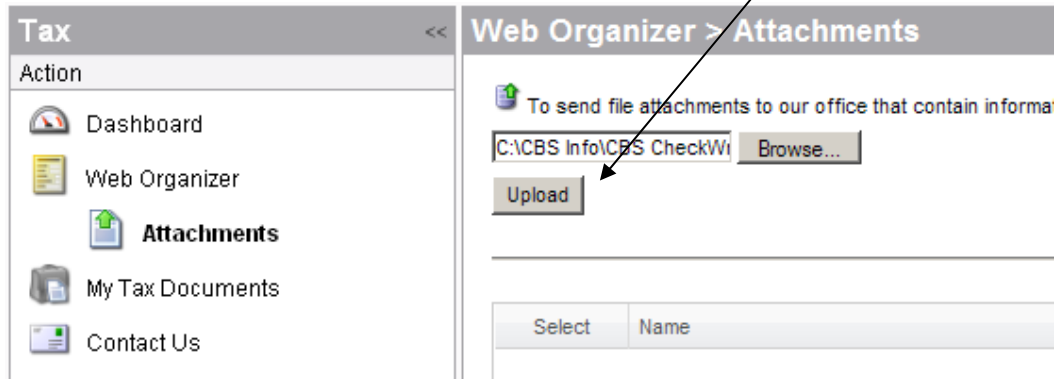
2. Click on the Browse button

3. Select the file that you want to attach.

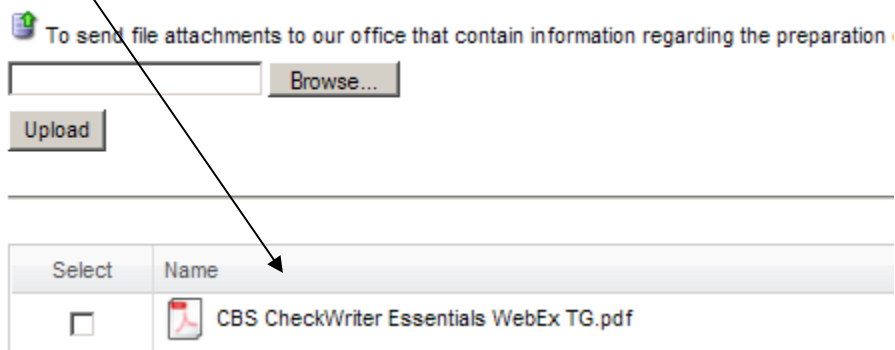


4. Select Open

5. Once the file has been selected, click on "Upload"

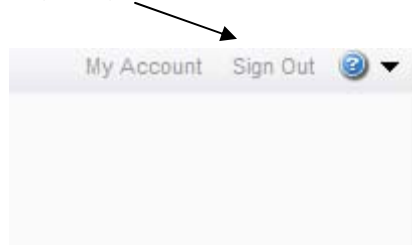


Once uploaded, the file will then show and Jones Hall will have access to the file



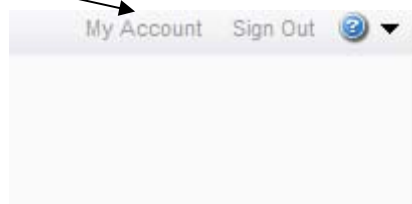
To Sign Out of your Client Portal

1. You sign out by selecting "Sign Out" in the upper right corner of your Portal.



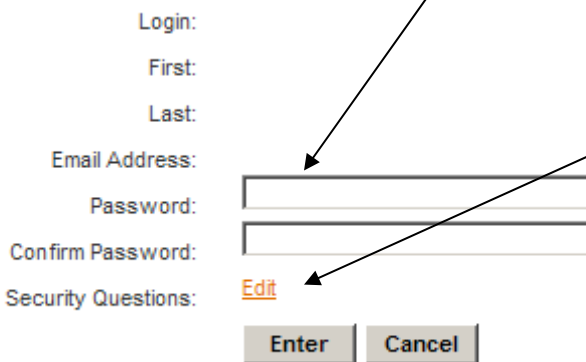
To Reset Your Password and Security Questions

1. Select "My Account" in the upper right corner of your Portal.



2. You can reset your Password here as well as answer the Security Questions if you forget your Password

Login:
First:
Last:
Email Address:
Password:
Confirm Password:
Security Questions: [Edit](#)

A screenshot of a form for managing account information. The form includes labels for "Login:", "First:", "Last:", "Email Address:", "Password:", "Confirm Password:", and "Security Questions:". Below the labels are five text input fields. The "Password:" and "Confirm Password:" fields are stacked vertically. Below the "Security Questions:" label is a red "Edit" link. At the bottom of the form are two buttons: "Enter" and "Cancel". Two arrows from the text above point to the "Password:" field and the "Edit" link.