Client Portal User Guide

About Your Client Portal

Client Portal is a Web based application used for secure file transfers and collaboration between Regier Carr & Monroe, LLP and our clients. Portal is a web-based interface that does not require downloading or installing additional applications in order to use (however, some adjustments to browser settings may be required).

Regier Carr & Monroe, LLP will utilize the Portal to send and receive files, ensuring that important documents are transferred in a secure manner, and clients can access their tax returns as well as other deliverables. Your Portal and login information will be provided via an email notification. All documents made available through the Portal site will be kept on the Portal site in accordance with Regier Carr & Monroe, LLP's document retention and Portal use policies.

Adjusting Internet Settings for Using Client Portal

Allowing the Client Portal to launch pop-ups

In order to download documents within Client Portal, Internet Explorer must be configured to allow pop-ups from the Portal website. The steps below allow Internet Explorer to launch pop-ups from the Portal website, however, if you use additional pop-up blockers (i.e. Google toolbar, Yahoo! Toolbar, etc.), you will need to consult their user guide for instructions on disabling the pop-up blocker for specific sites.
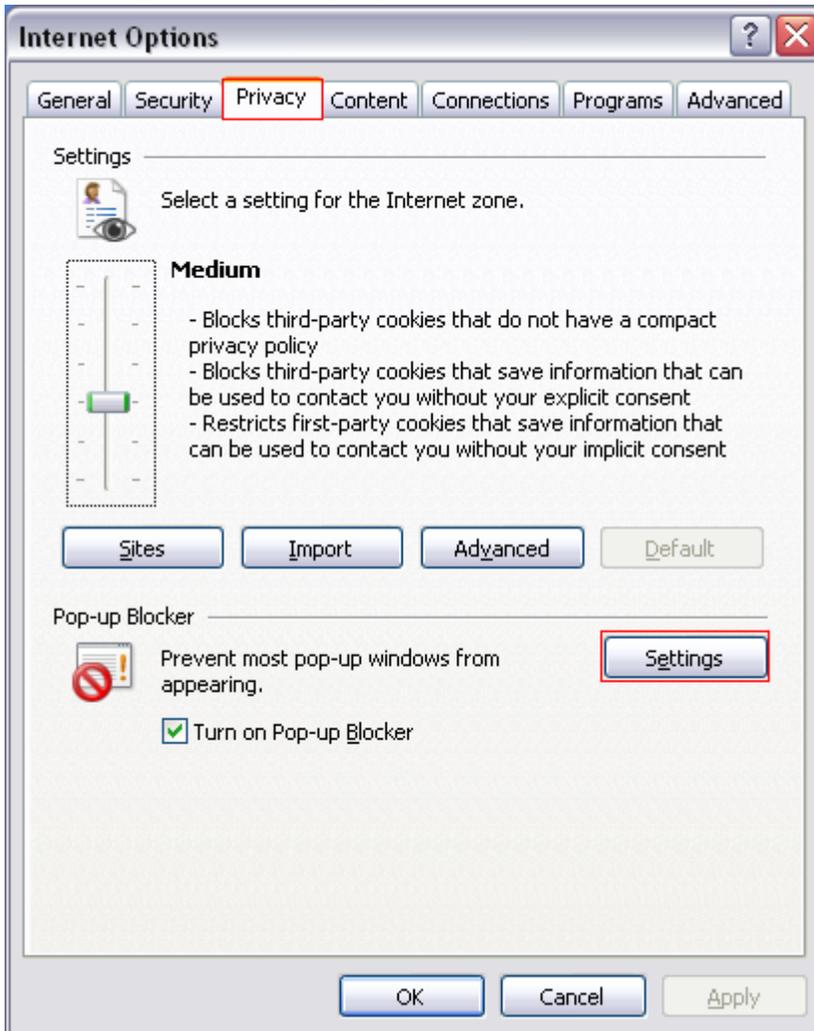
To add Client Portal to list of excepted sites, do the following:

1. Open **Internet Explorer**.
2. Click **Tools**, then **Internet Options**.
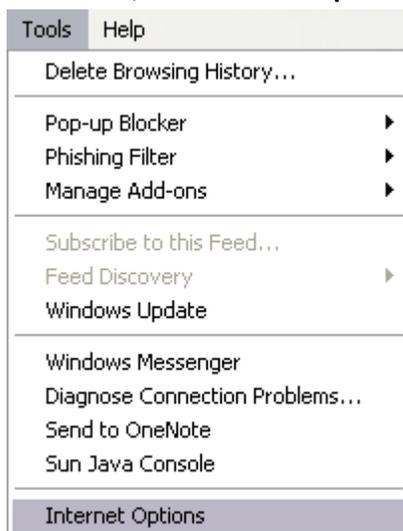
3. Click the **Privacy** tab.

4. Click **Settings**, under the Pop-Up Blocker section.

5. Enter the following URL in the field provided:
    https://portal.rcmllp.com/ClientPortal/
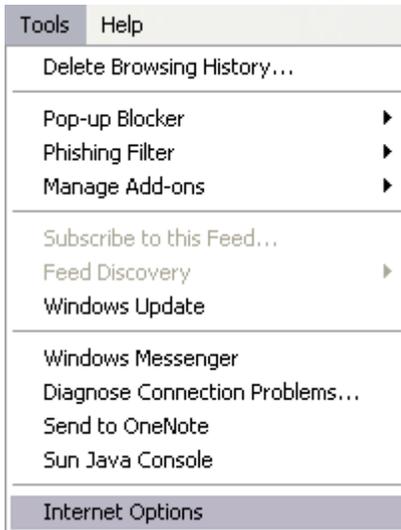
6. Click **Add**, then **Close**, then **OK.**

Adding Client Portal to your Trusted Sites

To enable some of the features of Client Portal, such as Advanced Upload and Direct Edit, Internet Explorer must allow access to ActiveX Controls. Adding the Document sites to the Trusted Sites zone in Internet Explorer safely accesses the necessary controls for Client Portal to be fully functional.

To add Document Client Portal to your trusted sites, do the following:
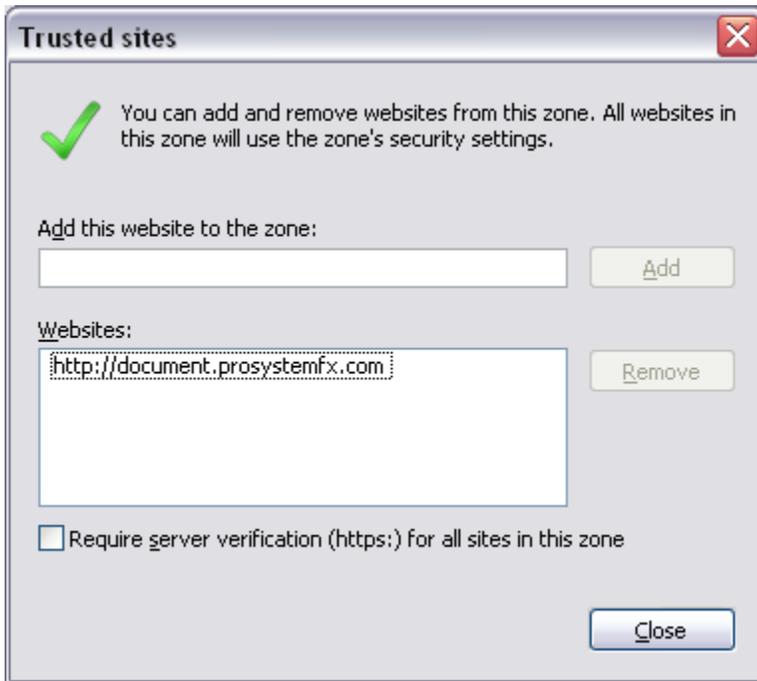
1. Open **Internet Explorer**.

2. Click **Tools** and then click **Internet Options**.

3. Click the **Security** tab.
4. Click **Trusted Sites** and then click **Sites** to display the *Trusted sites* dialog.
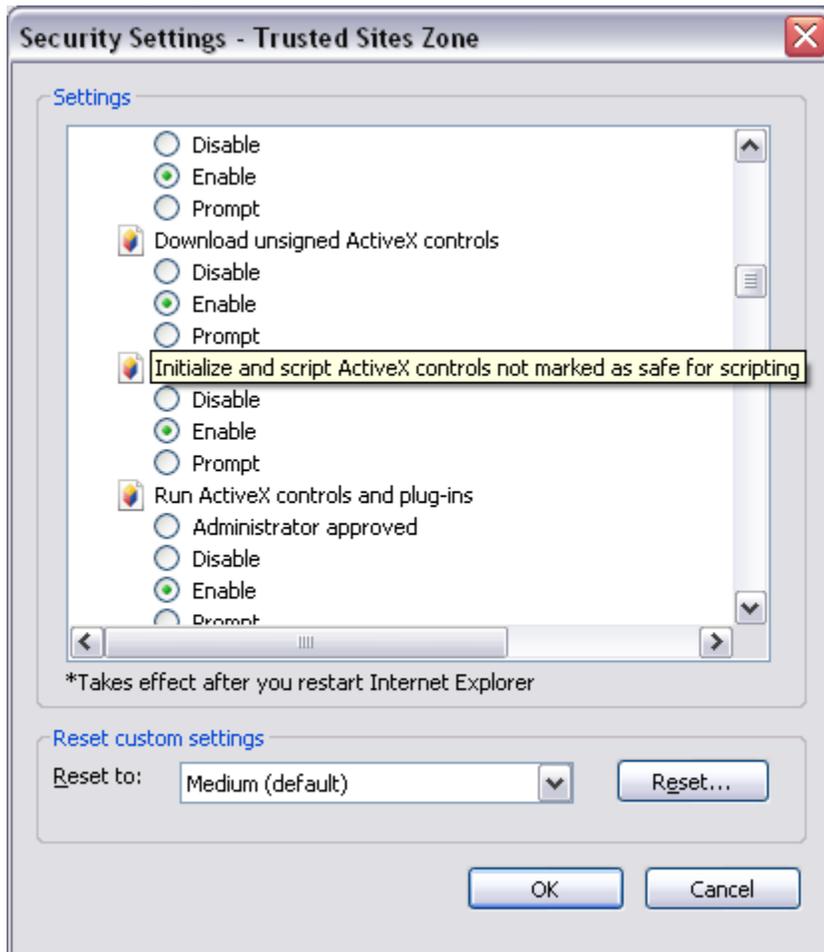
5. Enter the following URL in the field provided and click **Add**:
    https://portal.rcmllp.com/ClientPortal/
6. Click **Close**.

7. Click **Custom level** to display the **Security Settings - Trusted Sites Zone** dialog.

8. Under Active X Controls and Plug-ins, enable Initialize and script ActiveX controls not marked as safe for scripting.

9. Click **OK**.

Client Portal for Document Transfer

Terms of access to the Portal

As an active client in good standing you will be provided the URL and login information to your Portal. The Portal is considered a secure area to provide your confidential information.   It is recommended that all provided IDs and passwords be treated as sensitive information and is the client` responsibility to do so. All deliverable documents will be published and available from the Client Portal according to Regier Carr & Monroe, LLP's document retention Portal policies. Once deliverable documents are published, please download the documents for your records. Access to the Portal will be terminated after a period no shorter than 30 days from when your client status changes. Once access is closed, it will no longer be possible to retrieve any documents housed on the Portal site.

Using Client Portal

1. Go to https://portal.rcmllp.com/ClientPortal/and enter the login information provided to you.
2. You will immediately be asked to change and confirm a new password. Click **Save**, then click close or **Cancel**.

Once logged into Client Portal, you can search for a document using the Quick Search box at the top-right corner of the page by entering a part of the document name, or simply click on the green arrow to search all documents on the Portal. In the Document List, you will find documents matching the search criteria entered, or all files if the field was left blank.

The Accounting Professionals at Regier Carr & Monroe, LLP will publish deliverable documents such a Tax Return in read-only format. It is recommended that you download these files and keep for your records. However the published files will be available for download until their defined expiration date. For information on how to download files from the Portal, see instructions below.

Some documents may need to be reviewed and updated between your firm and the consultants. For information on how to check files out and in from the Portal, see instructions below.

To download files, do the following:

1. Go to the Document List page (from the Client Portal home page, click on the green arrow at top-right).

2. Click on the hyperlinked file name.

3. Choose to Open or Save document.

To add new documents to the Client Portal:

In order to facilitate document retrieval and manage new files added to the Portal, Regier Carr & Monroe, LLP has created a basic cabinet and folder set. When uploading files to the portal, you will need to assign them to a cabinet and folder within the Portal.

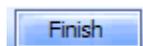1. From any screen within the Portal, click on **Add Document**.
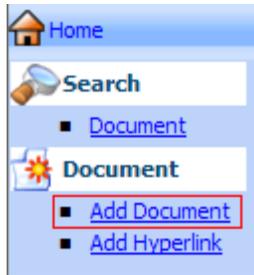
2. You can browse for multiple files and assign them to specific cabinets and folders, or assign all files to a default set.
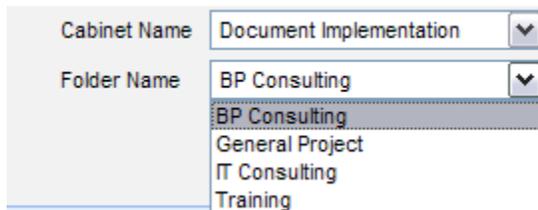
3. After you have browsed for the files you wish to upload and assigned them to appropriate folders, click **Finish** at the bottom-right corner of the window.


4. The Document Upload Status window simply confirms that the documents are now uploaded to the Portal. Regier Carr & Monroe, LLP will automatically be notified that the new documents have been uploaded and are available.

To check out an individual file, do the following:

1. Go to the Document List page (from the Client Portal home page, click on the green arrow at top-right).
2. Click on the file local menu drop-down button (▼).

3. Click on **Check Out**.
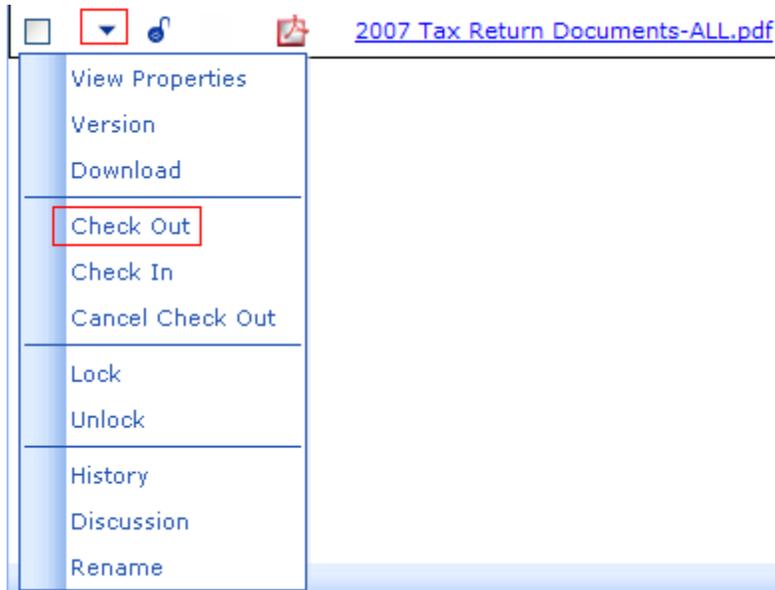
4. In the Document Check Out window, you can choose to notify project members via email that the file is checked out and include any comments in the body of the email.
5. Click on **Check Out** at the top-right corner of the window.

6. A pop-up File Download window will appear, at which point you can open the document, or save it to your hard drive. **This document is now locked for editing until you check it back in.**
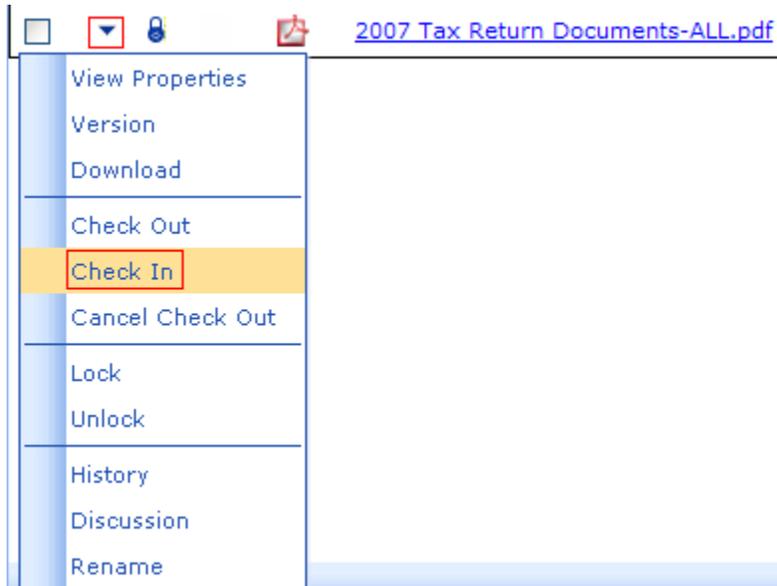
To check out multiple files, do the following:

1. Go to the Document List page (from the Client Portal home page, click on the green arrow at top-right).
2. For the files to check out, click the select box on the far left on the files' menu bar.
3. At the bottom-right corner of the window, select **Check Out selected files**, and click the green arrow button.
4. In the Document Check Out window, click on **Check out** in the top-right corner of the window. *Note: The only indication that the documents have been checked out will be that the Check Out button will become grey.*
5. Click on each hyperlinked file to download and open or save to your hard drive. **These documents are now locked for editing until you check them back in.**

To check in an individual file, do the following:

1. Go to the Document List page (from the Client Portal home page, click on the green arrow at top-right).
2. Click on the file local menu drop-down button (▼).

3. Click on **Check In**.

4. In the Document Check In window, you can choose to notify project members via email that the file is checked in and include any comments in the body of the email.
5. Click on the **Browse** button, select the file to check in and click **Open**.
6. Click on **Check In** at the top-right corner of the window.

To check in multiple files, do the following:

1. Go to the Document List page (from the Client Portal home page, click on the green arrow at top-right).
2. For the files to check out, click the select box on the far left on the files' menu bar.
3. At the bottom-right corner of the window, select **Check In selected files**, and click the green arrow button.
4. In the Document Check In window, click on **Check In** at the top-right corner of the window.