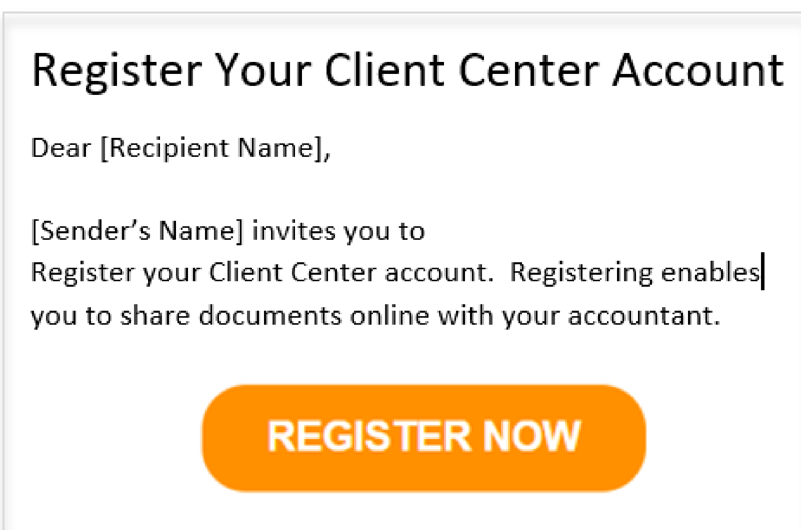
CLIENT CENTER PORTAL

Securely access your documents anytime from anywhere with your own private portal. You will securely receive documents from us and may also transmit documents to us.

Here is a short video tutorial for registering your portal or, follow the written instructions below. VIDEO TUTORIAL

Register your Account

You will receive an invite from Duncan, Messersmith and Associates to register your account. Click the **REGISTER NOW** button. Your login will be your email address and you can setup your own password.



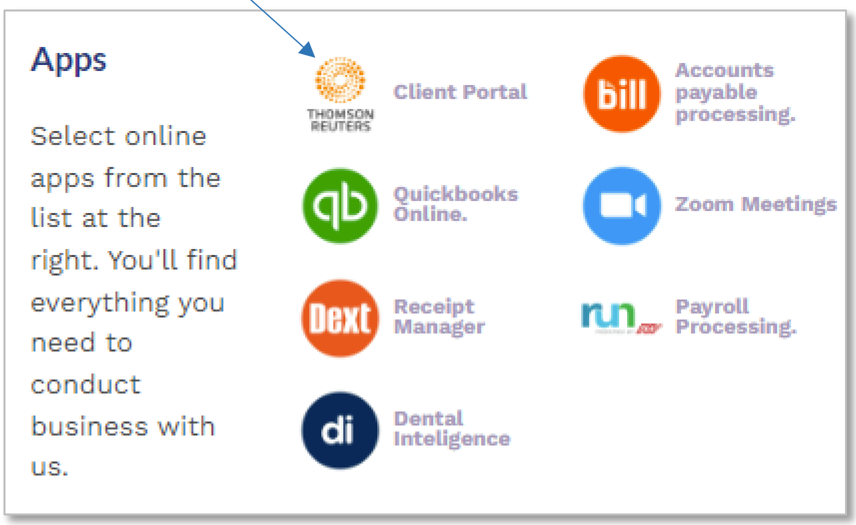
Register Your Client Center Account

Dear [Recipient Name],

[Sender's Name] invites you to
Register your Client Center account. Registering enables you to share documents online with your accountant.

REGISTER NOW

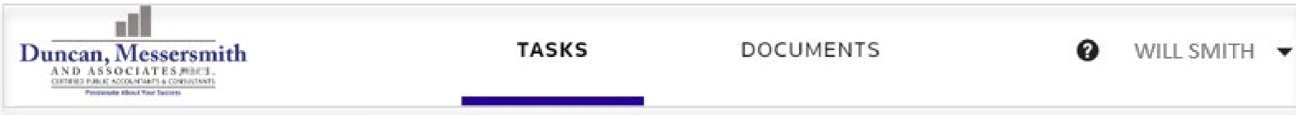
Once registered, you can login to your portal anytime by going to hscpas.com, clicking on the **Client Center** link and then **Client Portal**.



Navigating Your Online Client Center

Use the toggle arrow at the top left of the screen to navigate between your company and your individual accounts.

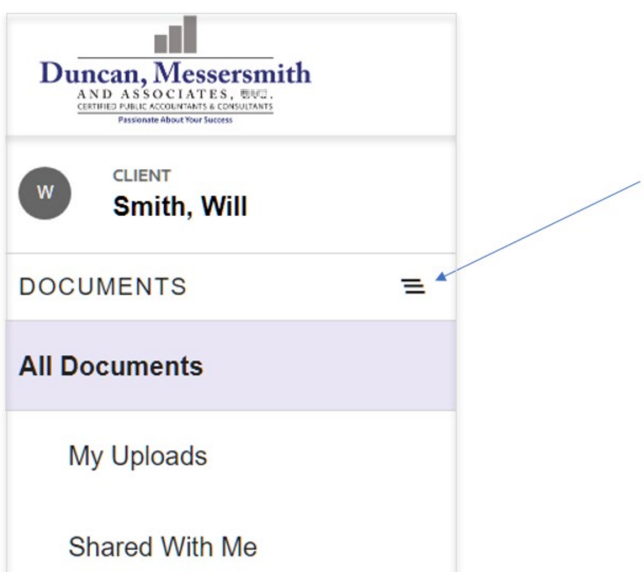
At the top of your screen are two tabs, **TASKS** and **DOCUMENTS**. When we request specific documents from you or require an action step, such as an electronic signature, it will be in your **TASKS** tab.



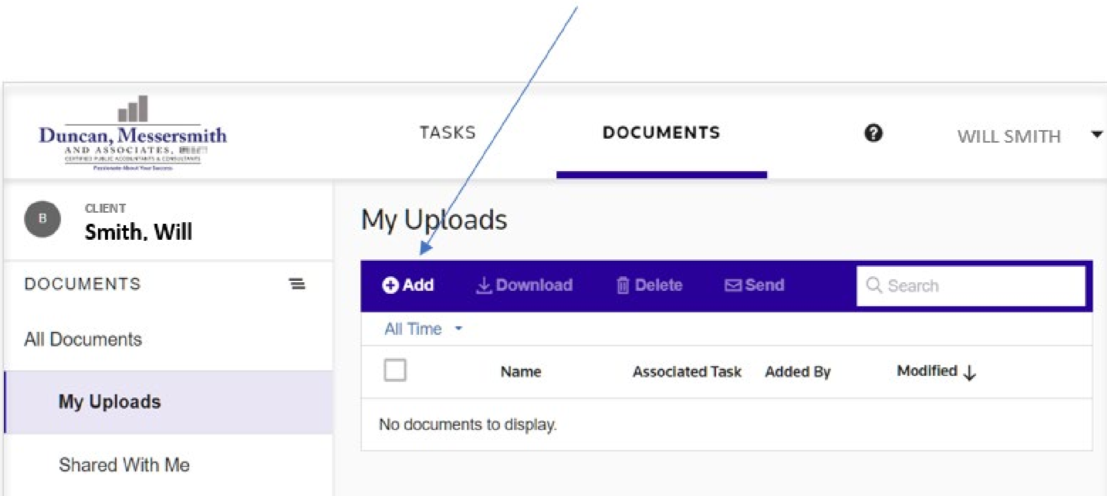
The **DOCUMENTS** tab is where you can go to review documents we have shared with you. Here, you can also upload documents back to our firm.

Uploading Documents

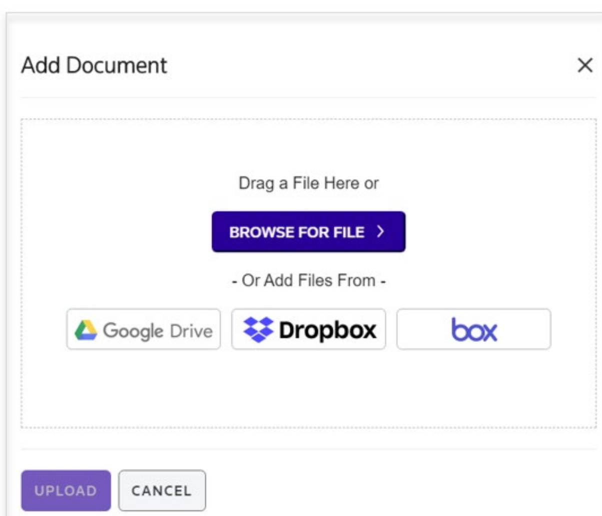
After you have selected your entity, click the **DOCUMENTS** tab and then the menu button to select either **Firm Folder View** or **Simple List View**. Choose the view that works best for you.



To upload files to us, click the Add button.

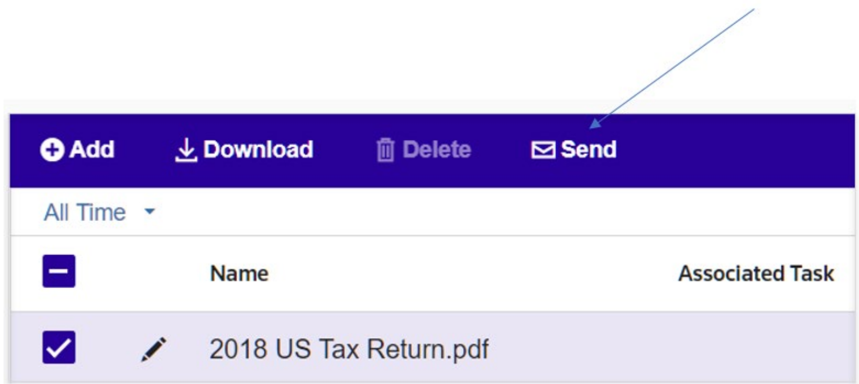


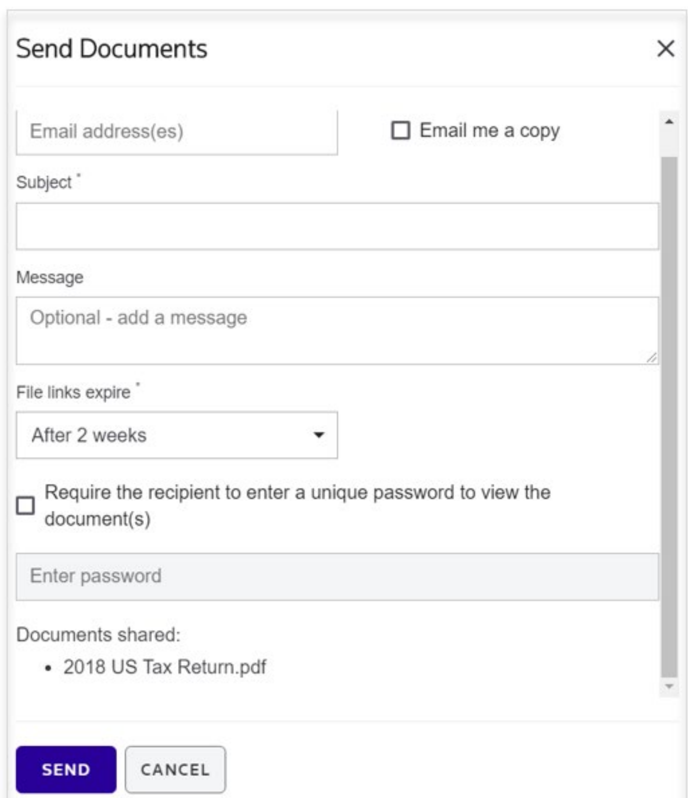
Add your files by Drag & Drop, by browsing for them on your computer, or by adding them from your Dropbox, Google Drive or Box account. Click Upload after your files have been added.



Send copies to a 3rd party

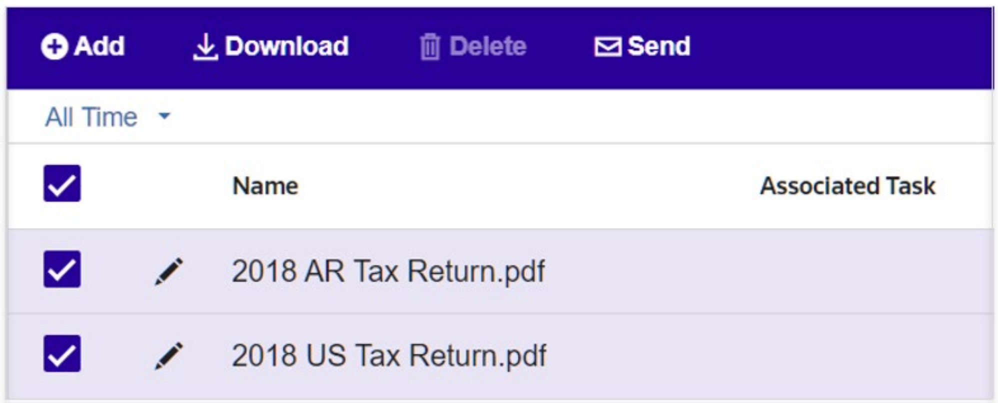
To send copies to your Banker or Financial Advisor, select your file, click **Send** and enter the recipients email address. This will send a link to the recipient allowing them to download the file. We recommend setting an expiration time for the link you send.





Download a file

Select the files you want to download, then click the download button.



Update your password

To update your password, click your name at the top right, then **Edit Profile**. Here you can update your name (if it changed) as well as your password.