

## Secure Client Portal Instructions

**Initial setup:** We will email you a link with your username. Your link will expire within 48 hours, so be sure to activate the portal when you receive the email.

**(Your initial password will be set to the last 4 digits of your social security number or a provided PIN number if a social is not on file.)** You will need to change that password to one that will contain an uppercase, lowercase, a number, a special character and at least 8 characters in length.

Once you've set up your user name and password, you can log into the portal at:  
<https://compasstaxsolutions.securefilepro.com/portal/login.aspx>.

**Please bookmark this website to use from year to year.**

### **To upload documents:**

1. Sign into secure portal with username and password.
2. Click file “**Documents to Preparer**” then “Upload”.
3. Select the select the files from your computer to upload then click “Select”
4. You may type a brief message in the email box to explain/ describe uploaded documents. (Optional).
5. Click the “Upload” button.

**Please let us know when you have uploaded all the documents so that we may begin preparing your return.**

**Also let us know how you would like to receive your completed return:**

- **pick up a printed copy of your at our office**
- **digital copy only uploaded in the portal**
- **USPS Priority Mail option available for \$10.**

### **To download completed return:**

Click on the “**Documents from Preparer**” folder then the file name to view uploaded documents from Compass Tax Solutions.