CLIENT PORTAL

Navigating your Client Portal!

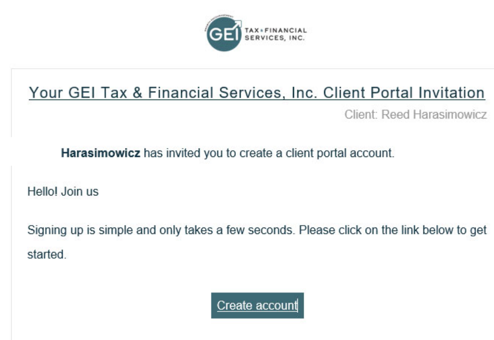
Your client portal offers you a safe and convenient place to organize, save, and share important documents with us, as well as manage client requests and gain transparency to your client profile. Rest assured that your sensitive documents are secure, as all materials uploaded are automatically encrypted.

You can access your client portal from our website at www.geitax.com and click "client portal" at the top of the screen, or navigate directly to www.geitax.clientportal.com.

Use this guide to help you…

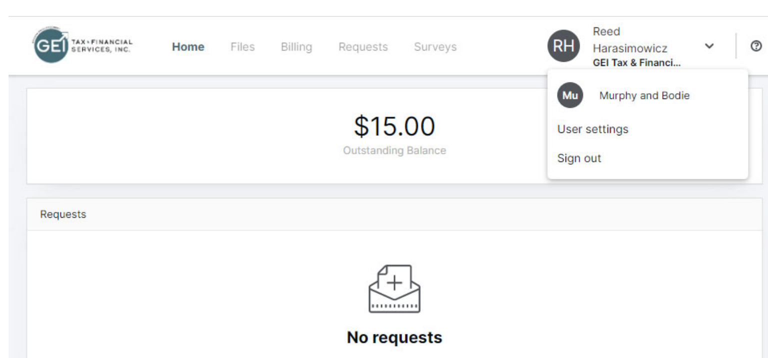
- Set up your profile
- Upload a File
- Download a File
- Manage and Fulfil Client Requests
- Use the Mobile App
- Scan/Add Photos through your Mobile Device

Set Up Your Profile



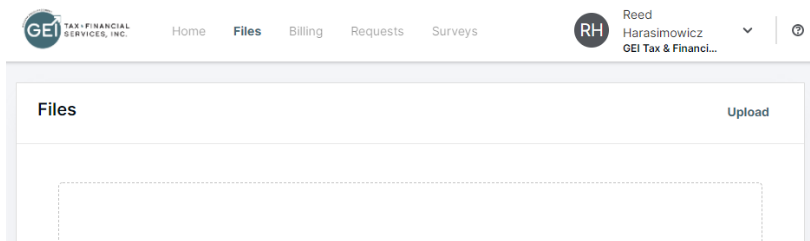
1. **Click "Create Account"** embedded in your Client Portal Invitation email. If you need your invitation resent, email Iliana at iharasimowicz@geitax.com.
2. **Enter your account information.** Some of your account information may already be pre-populated.
   ** Please note that if you are married, the portal will only be in the name of the listed primary taxpayer on your return.
3. Type your preferred password in the ***Create Password*** field.
4. **Click "Sign In"** and you will be redirected to the Client Portal in a new tab on your internet browser.
5. Enter your ***Email*** and ***Password***. Click **"Log In."**

Navigating Between Accounts



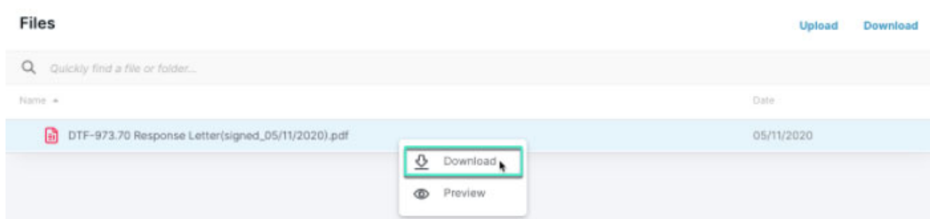
1. Once logged in, you will be taken to the home screen of the client portal.
2. If you have a business, you will be able to **navigate between home screens by clicking the carrot on the upper right-hand corner of your screen**.

Upload a File



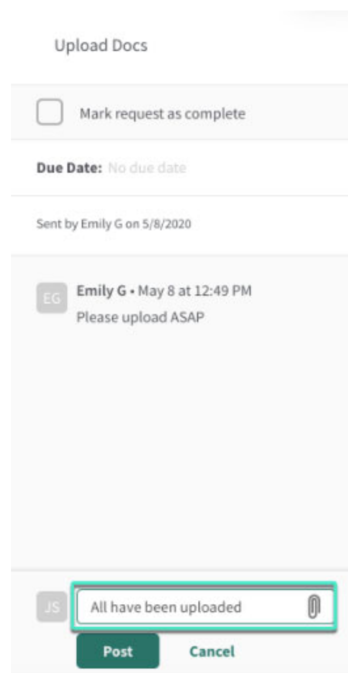
1. **Click the "Files" tab** at the top of your client portal home screen.
2. **Click "Upload"** in the upper right-hand corner.
3. **Select the file** on your computer you wish to upload.
4. The uploaded file will appear on the **"Files"** screen.
5. **Click "Got It"** in the pop-up window to indicate you understand we at GEI might reorganize or rename the file. Note: We will automatically receive an email notifying our team of your recent upload.

Download a File



1. **Click the "Files" tab** at the top of your client portal home screen.
2. **Right click** the file you wish to download.
3. **Click "Download".**

Manage and Fulfil Client Requests



We will use this portion of your Client Portal to send requests for additional documents needed to process your returns, to schedule a phone interview, and to retrieve your signature for our e-file forms.

1. **Navigate to the "Requests"** box on your Client Portal home screen.
2. Click on the appropriate client request.
3. Complete that request; whether it be uploading a specific document or e-signing a form.
4. Click the "**Mark request as complete"** checkbox to let us know the request has been completed. We will automatically receive a notification to review the completed request.
5. You can message us by entering text in the ***Add a comment*** text field.
6. **Click "Post"** to add the comment. We will automatically be alerted of your comment.

Use the Mobile App

1. Download the Canopy Tax Client Portal App from your mobile device's app store.
2. Open the app and tap **"Sign in."** Enter your ***Email*** and ***Password*** and click **"Sign In."**
3. Follow the prompts to set up your mobile app.

Scanning/Adding Photos through your Mobile App

Take photos of your documents and upload it securely to your client portal straight through the app!

1. Open your app and sign in. Navigate to **"Files"** at the bottom of your app and click **"Add a File."**
2. Select either **"Scan with camera"**, **"Add from photos"**, or **"Upload from Files"**. Follow the prompts to select or take your photo/file.
3. Select the type of document you are uploading. This will help name your file.