SMOKER SMITH
& ASSOCIATES P.C.
CERTIFIED PUBLIC ACCOUNTANTS

Client Portal User Guide

Access your portal from our website at:

www.smokersmith.com

Click the **Access My Portal** at the top of your screen

For the best experience, we recommend accessing the portal from a desktop or laptop computer, as mobile devices may not support all portal features. If using Apple devices, please use Google Chrome web browser.

Table of Contents

Table of Contents

Frequently Asked Questions....1
How to Register for the Client Portal....3
How to Upload Documents....11
How to Update Muli-factor Authentication (MFA)....14
How to Update my Email or Password....16

Frequently Asked Questions

What is the Client Portal?

The Client Portal is a secure, web-based application used for file transfers and ongoing document access between Smoker, Smith & Associates, P.C. and our clients.

Documents available for continued access, such as tax returns, will remain in your portal for a specified period in accordance with Smoker, Smith & Associates, P.C.'s record retention and portal usage policies.

Why can't I access my portal?

For the best experience, we recommend accessing the portal from a desktop or laptop computer, as mobile devices may not support all portal features.

Some users have also experienced difficulties opening portal documents on Apple devices. Because many portal documents are Microsoft-based, compatibility issues can occasionally occur between Apple operating systems and Microsoft file formats.

How do I create a login if I do not have one?

If you have not registered your account, you will not yet have a login or password. Please contact our office – info@smokersmith.com or 717-533-5154 and a staff member can assist you with getting registered.

What is my login?

Your portal login is the email address you used when registering for the portal.

If you are unsure which email address is associated with your account, please contact our office.

What is my password?

If you have forgotten your password, click the **"Access My Portal"** link on our website. On the portal sign-in page, select **"Forgot Password?"** and follow the prompts to reset your password using your registered email address.

Why can't I view a document on my portal?

To open a document, single-click the file name.

If the document does not open, clearing your browser's cookies and cache often resolves the issue. If you continue to experience difficulties, please contact our office for assistance.

What do I do if my Multi-Factor Authentication (MFA) is not working?

Please call our office - 717-533-5154. A staff member can provide a temporary alternative verification method to help you access your account.

Once you are signed in, we can also provide instructions for updating your MFA settings.

Where are the documents I uploaded to the portal?

The portal is used to securely transmit documents to Smoker, Smith & Associates, P.C. Once your uploaded documents have been retrieved and processed internally, they are removed from your portal view.

If you need confirmation that your documents have been received, please contact our office.

How to Register for the Client Portal

You should have received an email from Smoker Smith to register for the Client Portal. Click the create a Thomson Reuters Account.



Dear SSA Client,

Welcome to NetClient CS. Please Register your account.

After you register your account, you can log in from the NetClient CS Login page.

Thank you for using NetClient CS.

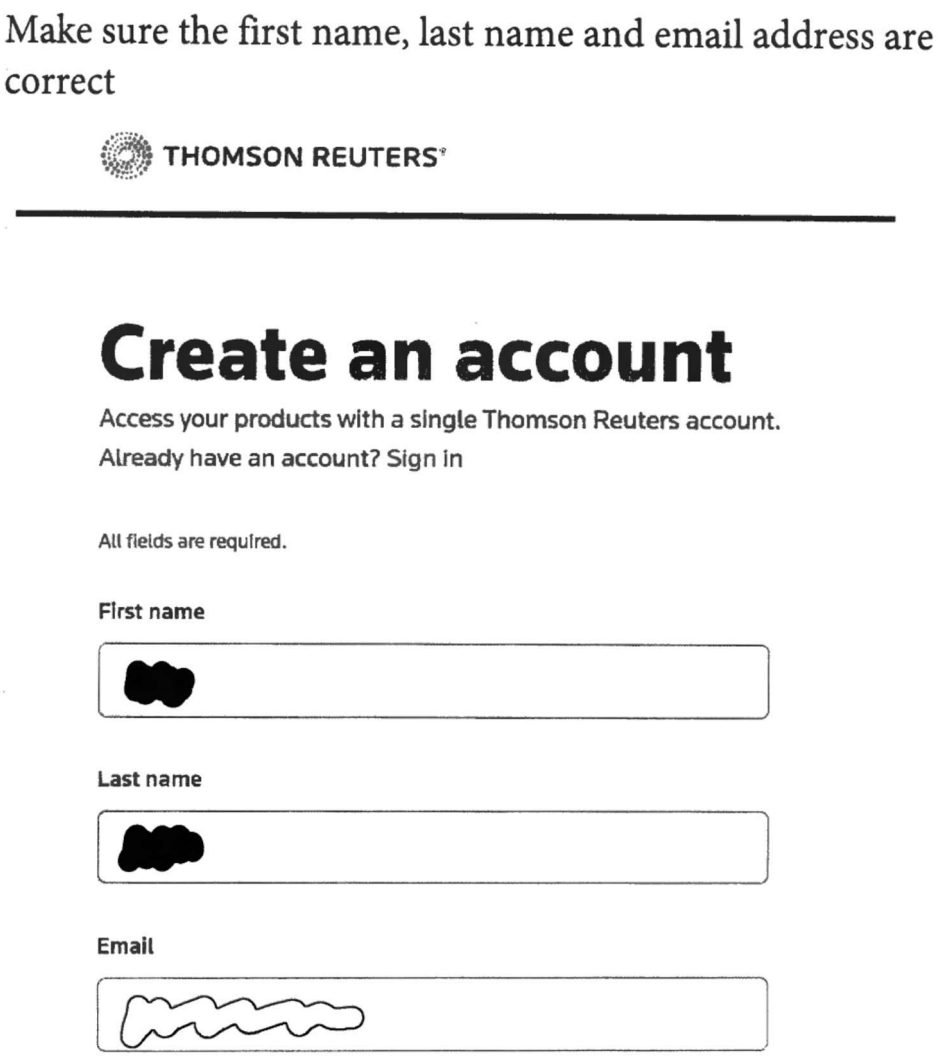
Smoker, Smith & Associates, P.C.
134 Sipe Ave
Hummelstown, PA, 17036

(717)533-5154

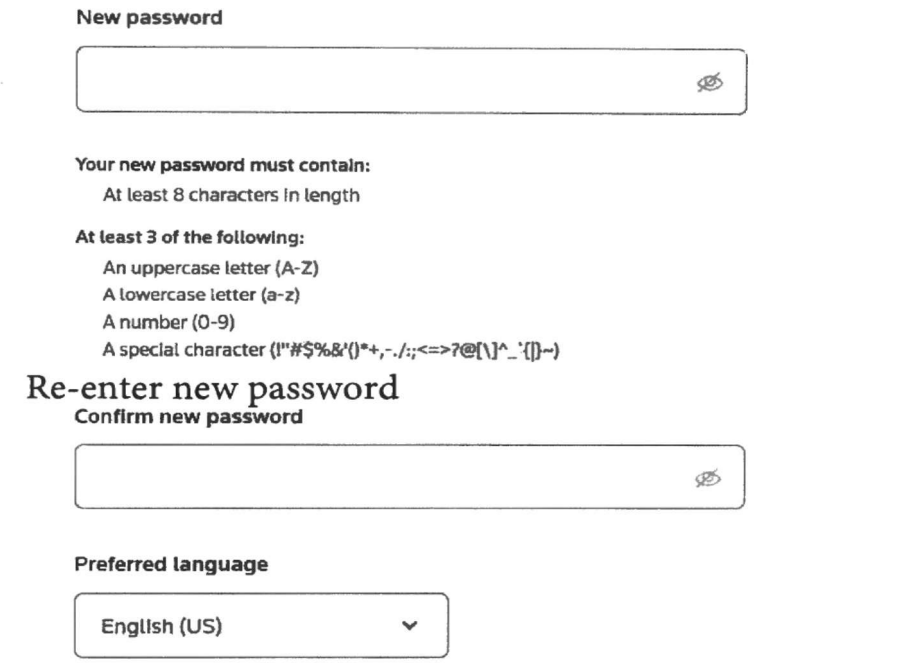
www.smokersmith.com

The information contained in this e-mail message and any attachments hereto is privileged and confidential, and is intended only for the use of the intended recipient and others who have been specifically authorized to receive it. If you are not the intended recipient, you are hereby notified that any dissemination, distribution, disclosure, use or copying of this communication, or the making or retention of a copy of this communication, is strictly prohibited. If you have received this communication in error, please contact the sender by return e-mail and delete this message. If this e-mail message has any files attached to it, they should be virus-checked before they are opened.
Any federal tax advice in this email and any attached documents is not intended or written to be used, and cannot be used, (1) for the purpose of avoiding federal tax penalties or (2) promoting, marketing or recommending any transaction discussed in this communication to another person unless we expressly indicate otherwise.

Follow the prompts to complete the registration.



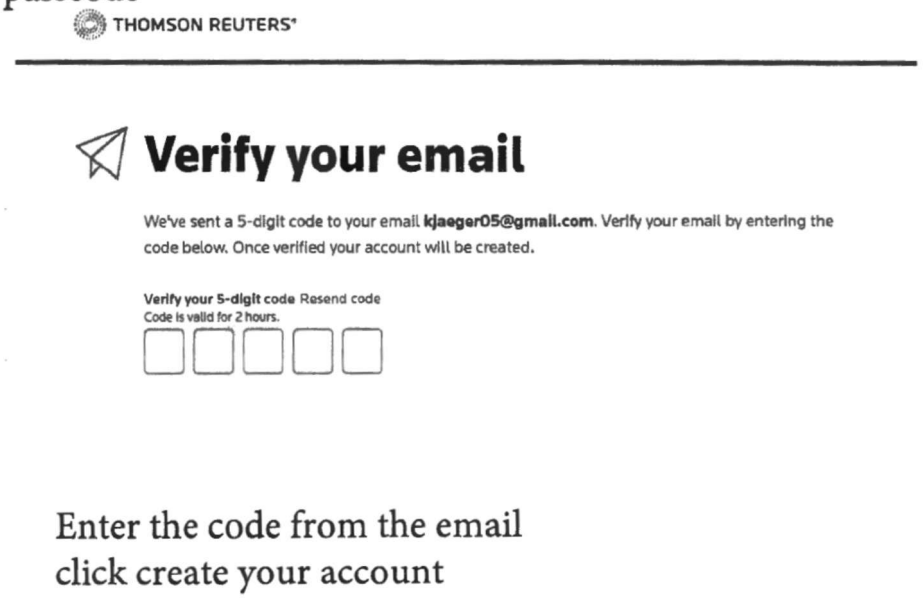
Create a new password for the portal



Re-enter new password

check the I agree box
click continue

An email will be sent to the email address entered with a passcode



Enter the code from the email
click create your account

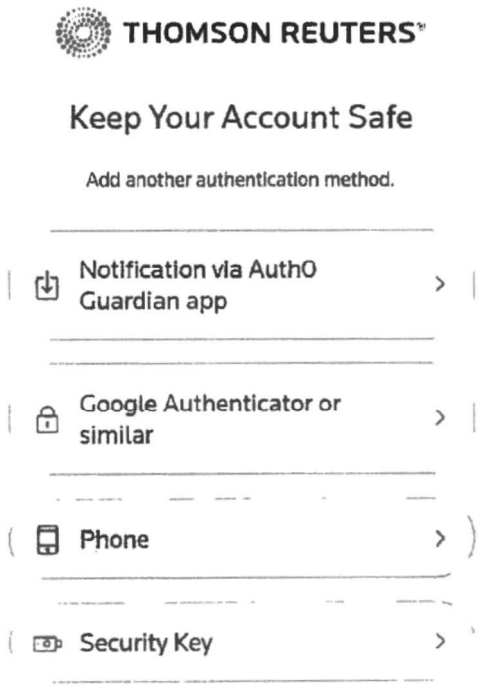
Enter your email address and click sign-in



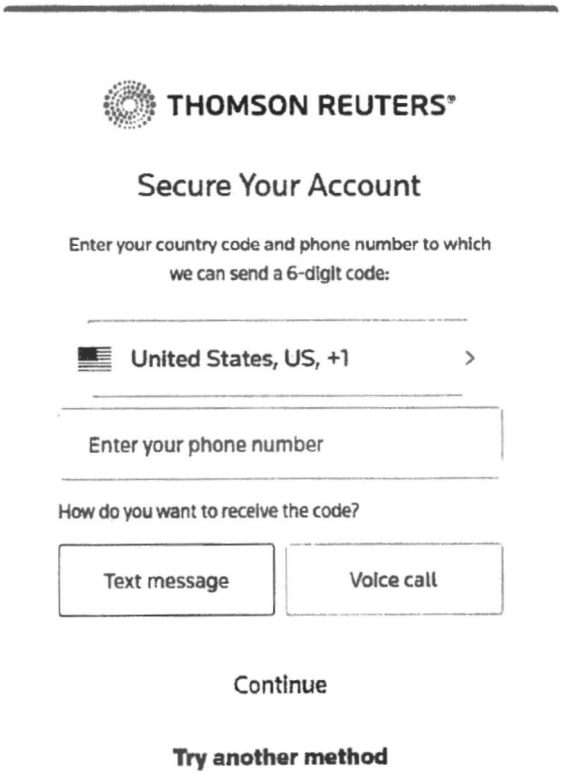
Enter the new password you created and click sign in



Choose your preferred verification method - either the Guardian App or Phone as your security method

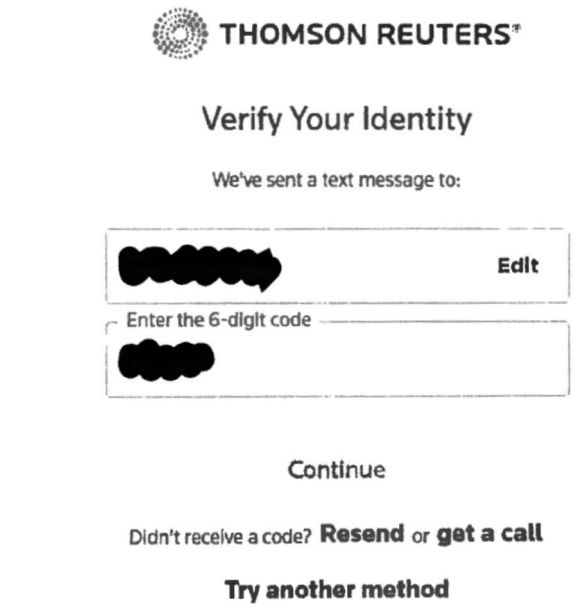


If you chose phone, you will be prompted to enter your phone number



select text message and click continue

Enter the code received via text



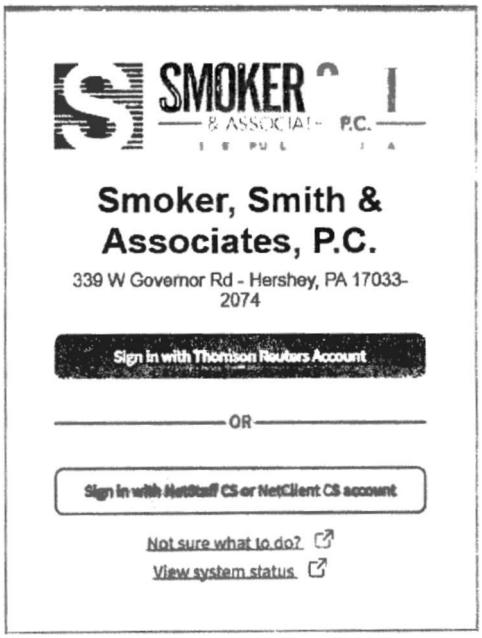
Copy or write down this code and keep it in a safe place



We suggest choosing not on this device

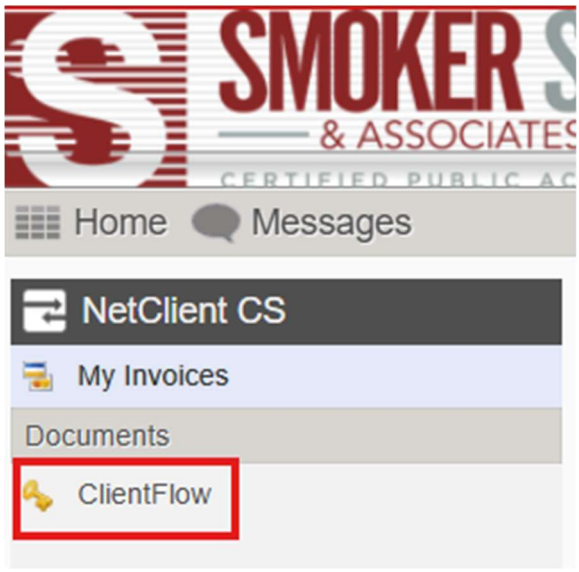


The sign in screen will look like this next time you log in

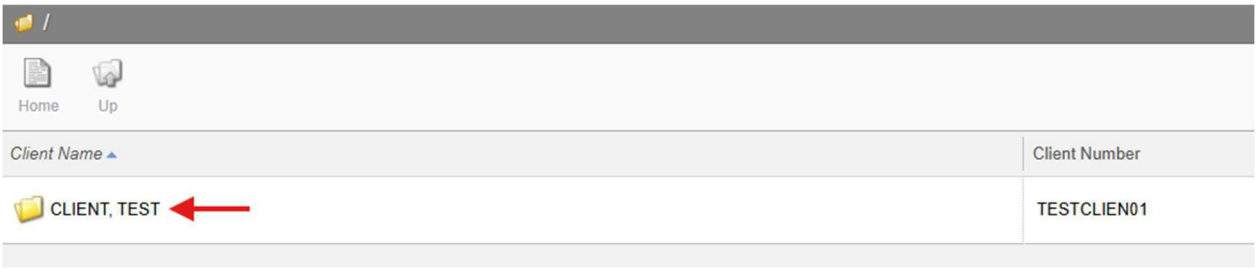


How to Upload Documents

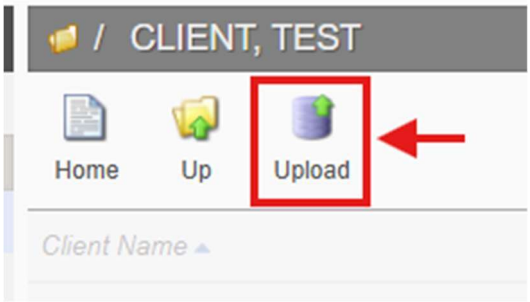
Once logged into the portal click the ClientFlow icon on the left side of the portal.



Then click the folder where you would like to upload the documents.



Select the Upload icon that is displayed under the folder name.



A box will pop up, you can either drag the files or click the Add Files button in the lower left corner.



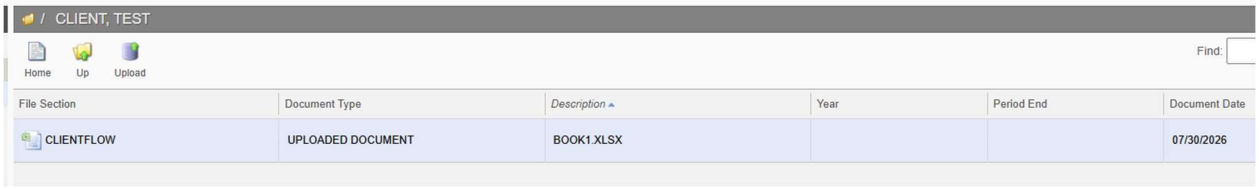
UPLOAD REQUIREMENT

TO ENSURE DOCUMENTS CAN BE VIEWED AND PROCESSED CORRECTLY, PLEASE UPLOAD DOCUMENTS IN PDF, WORD, OR EXCEL FORMAT ONLY.

Once you have all the files you wish to upload added click the Star Upload button. If you are uploading larger files, please complete one at a time.



You will know the upload has been successful when you can see it list under your folder.



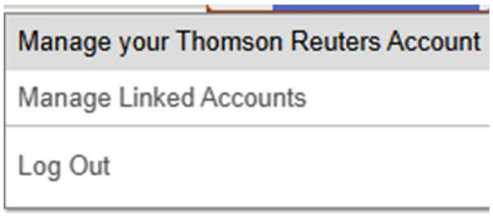
Once your uploaded documents have been retrieved and processed internally, they are removed from your portal view.

If you need confirmation that your documents were received, please contact our office.

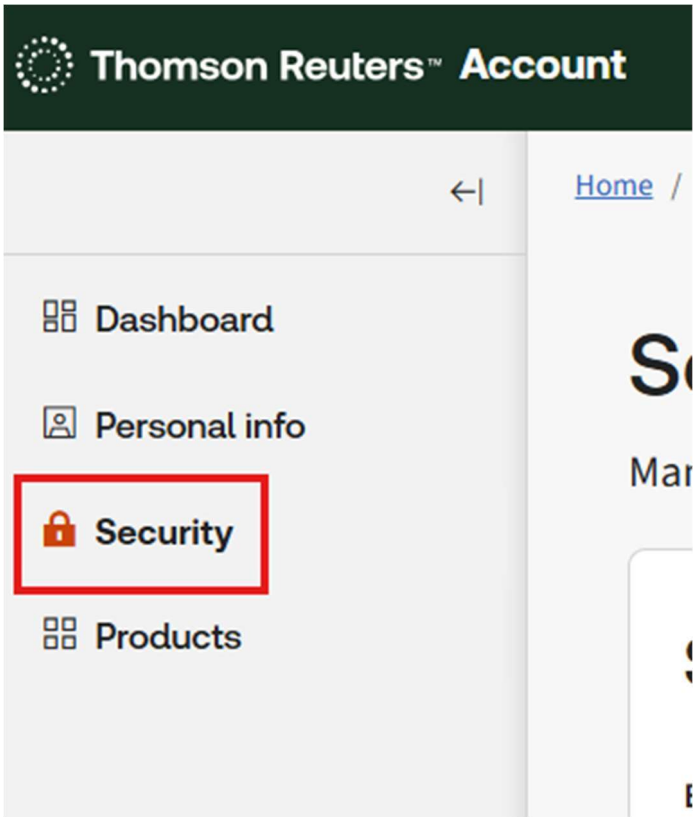
How to Update Muli-factor Authentication (MFA)

Once logged into the portal click on your name in the upper right corner

Then select Manage your Thomson Reuters Account

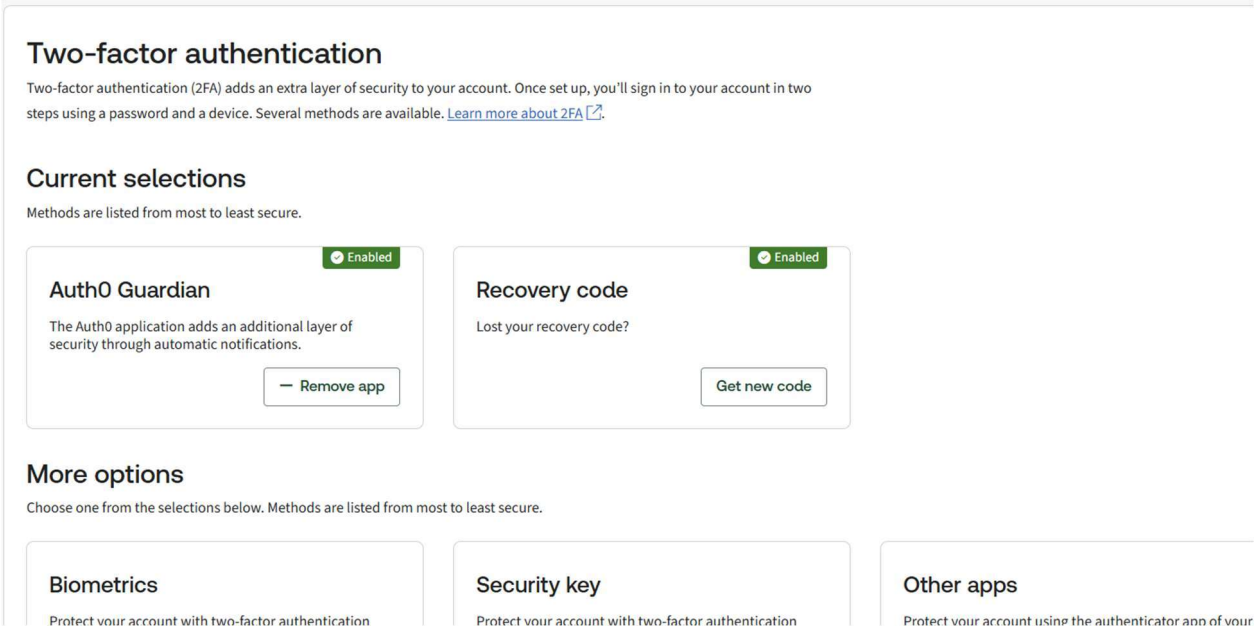


Click on Security on the left side



You will be prompted to approve the sign in again.

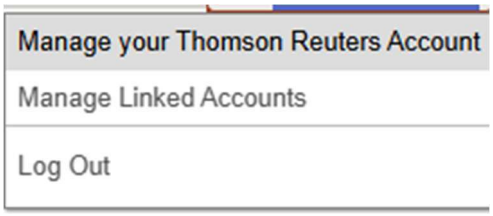
Then select which new MFA you would like to use.



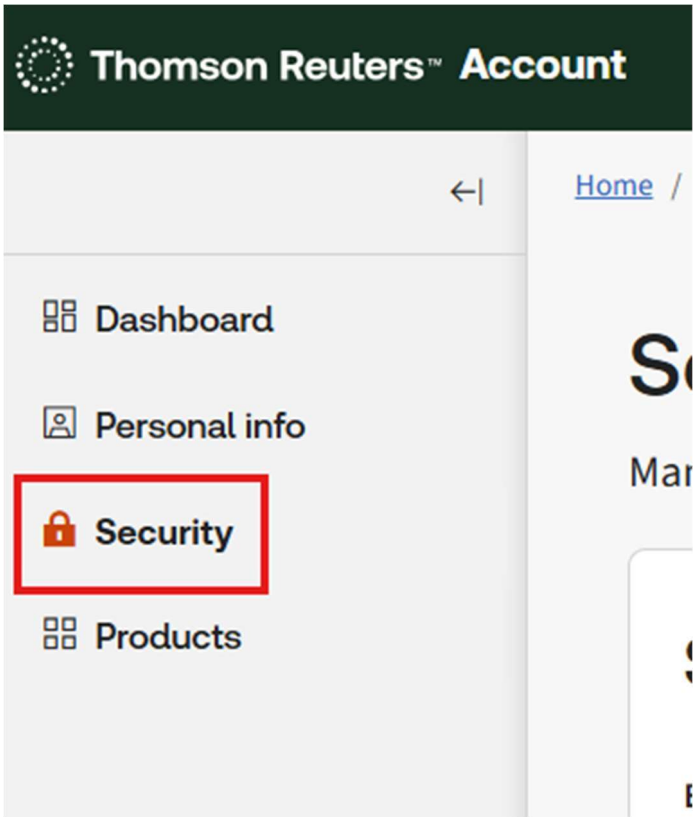
How to Update my Email or Password

Once logged into the portal click on your name in the upper right corner

Then select Manage your Thomson Reuters Account

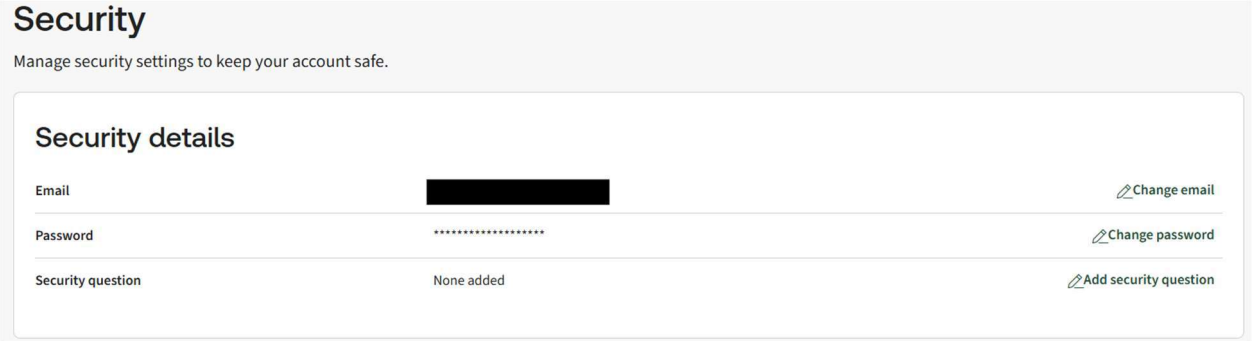


Click on Security on the left side



You will be prompted to approve the sign in again.

The select change email or password.



To ensure no errors occur we must update the email on the back end of the portal as well. Please notify SSA that you update the email.