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## Client Log in Instructions:

Once you receive an e-mail that your tax preparer has created a SecureFilePro™ account for you, click the link and follow the steps below to complete your account set up.

1. Enter the last four of your SSN, and establish a password. The password requirements are:
  - a. Minimum 8 characters.
  - b. Contain at least one uppercase letter.
  - c. Contain at least one number.
  - d. Contain at least one special character.
  - e. Cannot contain spaces.

The Test Portal  [Home](#) [Guest Exchange](#) [Settings](#) [Sign Out](#) [Help](#)

Hello Shari Elliott! Using 40.0 MB of 1,000.0 MB

### Enter Your New Password

Enter the last 4 digits of your SSN or EIN, or PIN issued by sender \*

Password \*  [Password Requirements](#)

Confirm password \*

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2. Once this is done, you will be able to log in to the site using your assigned username and the password you created. Make sure you are on the Client Sign In before entering your information.

## Client Sign In

Are you a tax preparer? [Sign in here.](#)

Username:


Password:

Sign In

[Forgot username or password?](#)

## Download Files from Preparer:

After you log in you will be taken to the Client Home page of your tax preparer's site. Follow the instructions below to download your files.

Drake Software Test Account  [Home](#) [Sign Out](#)

### My Folder

- Documents from Preparer
- Documents to Preparer

Public

### Client Home

Upload Sort By Date

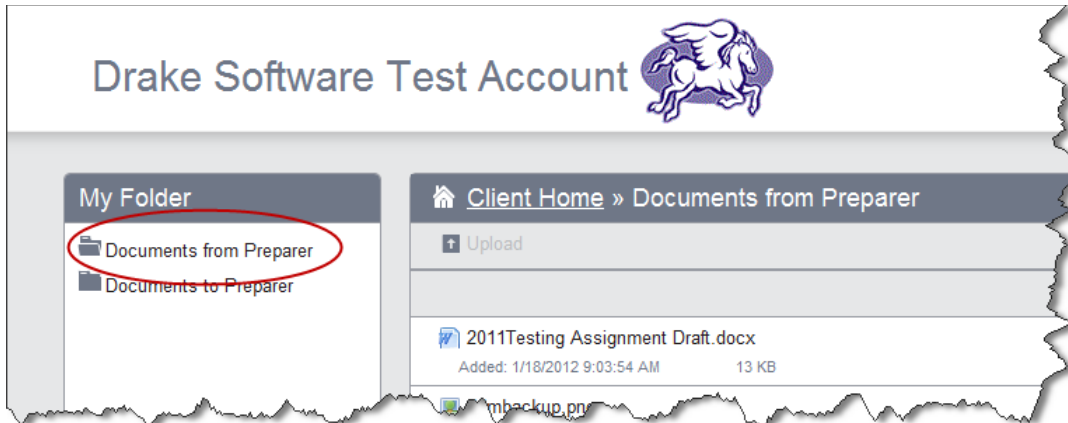
*File uploads not allowed.*

#### Getting Started

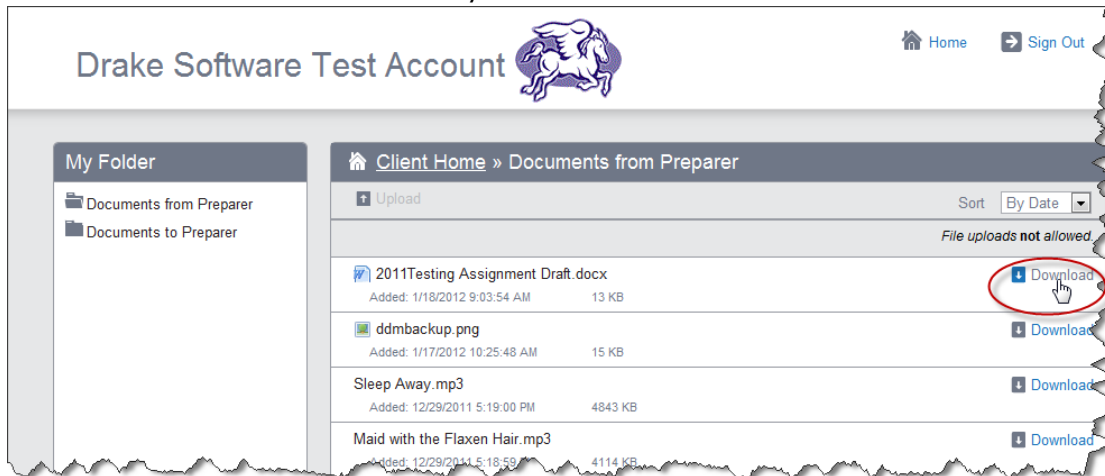
- Click on the folder labeled **Documents from Preparer** or the **Public** section to view files available for download.
- Click on the folder labeled **Documents to Preparer** to upload files to your tax preparer.

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1. Click **Documents from Preparer**.

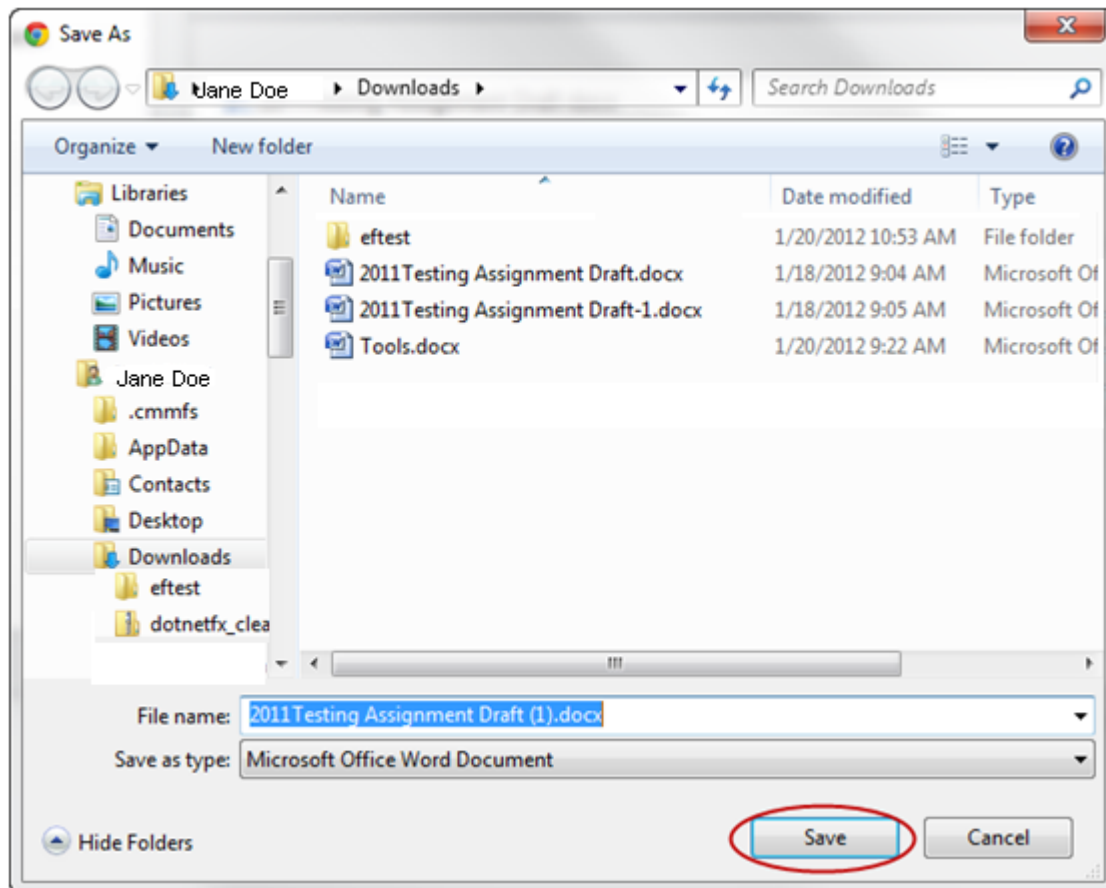


2. Click **Download** beside to the file you want to retrieve.



**NOTE:** You can only download one file at a time.

3. Follow the on-screen instructions to download for your specific browser.

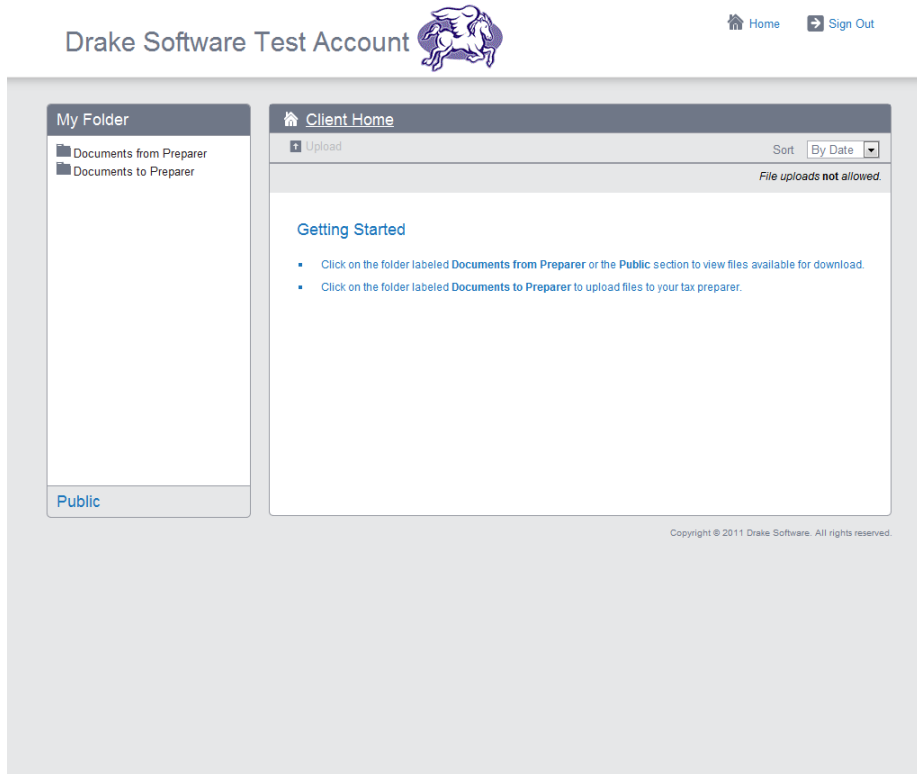


**NOTE:** If you cannot download the file, check your browser settings to ensure that downloads are allowed.

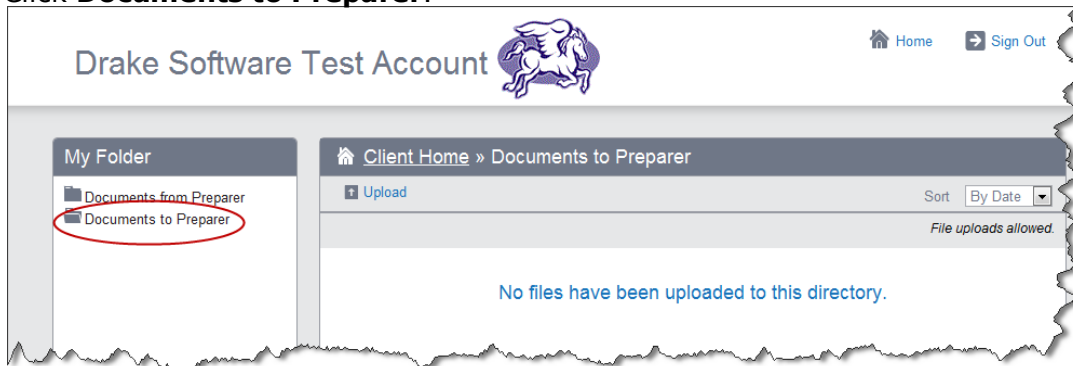
4. Once the file is downloaded to your preferred location, you can view it as needed using your browser's view downloads or Windows Explorer.

## Download Files to Preparer:

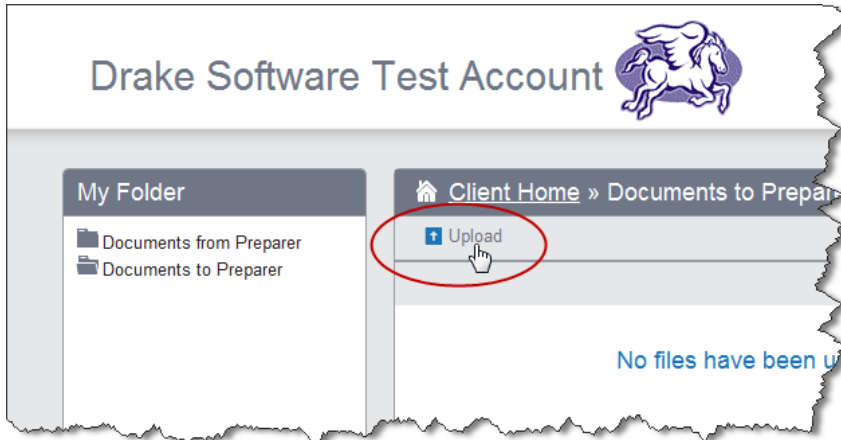
You can Download Files to Preparer by following the instructions below:



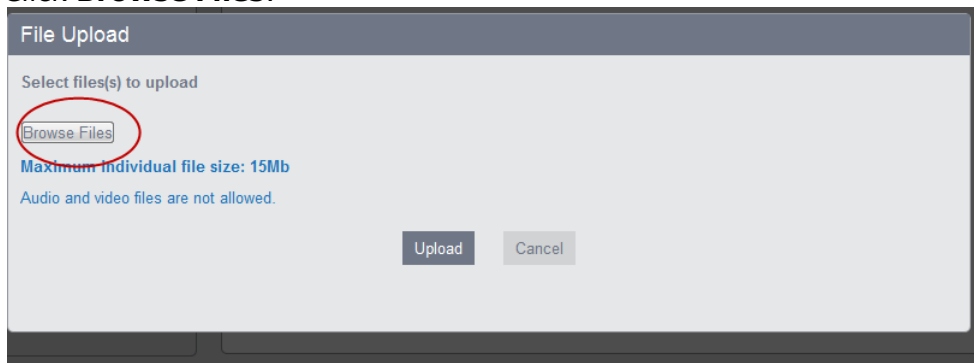
1. Click **Documents to Preparer**.



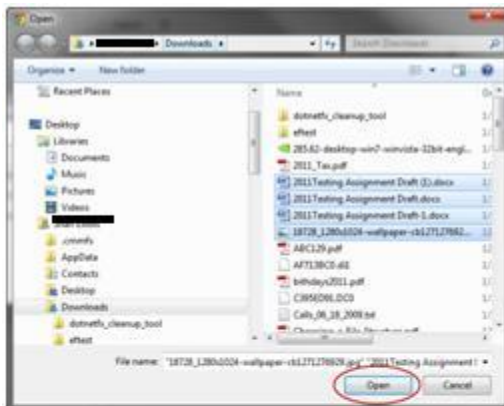
2. Click **Upload**.



3. Click **Browse Files**.




4. Use the browser to locate and select a file to upload and click **Open**.





**NOTE:** You can select multiple files to upload at one time.

5. Click **Upload** to add the selected files to the Documents to Preparer folder.

Drake Software Test Account  [Home](#) [Sign Out](#)

**My Folder**






- Documents from Preparer
- Documents to Preparer

[Public](#)

**Client Home » Documents to Preparer**

[Upload](#) Sort: [By Date](#)

**Batch:** [Delete](#) File uploads allowed.

<input type="checkbox"/>  18728_1280x1024-wallpaper-cb1271276929.jpg	<a href="#">Download</a> <a href="#">Rename</a> <a href="#">Delete</a>
<small>Added: 1/25/2012 1:31:43 PM 1209 KB</small>	
<input checked="" type="checkbox"/>  2011Testing Assignment Draft-1.docx	<a href="#">Download</a> <a href="#">Rename</a> <a href="#">Delete</a>
<small>Added: 1/25/2012 1:31:43 PM 13 KB</small>	
<input checked="" type="checkbox"/>  2011Testing Assignment Draft.docx	<a href="#">Download</a> <a href="#">Rename</a> <a href="#">Delete</a>
<small>Added: 1/25/2012 1:31:43 PM 13 KB</small>	
<input checked="" type="checkbox"/>  2011Testing Assignment Draft (1).docx	<a href="#">Download</a> <a href="#">Rename</a> <a href="#">Delete</a>
<small>Added: 1/25/2012 1:31:42 PM 13 KB</small>	
<input checked="" type="checkbox"/>  ABC129.pdf	<a href="#">Download</a> <a href="#">Rename</a> <a href="#">Delete</a>
<small>Added: 1/25/2012 1:24:09 PM 32 KB</small>	

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