Dear Client,

Thank you for choosing to utilize our secure client portal for your tax documents and tax preparation. It is our goal to make the tax preparation process as easy for you as possible. In this document, you will find information on **how to upload documents, what types of documents are accepted,** and **how to use the client portal the most efficiently.** Please take the time to review this information as well as other resources provided on your portal to make your experience as easy and pain-free as possible.

If you have any questions, please call us at (920) 388-0818 or email us at info@westengraff.com.

Thank you,

Westen, Graff & Co.
413 Milwaukee Street
Kewaunee, WI 54216

What Types of Documents Are Accepted?

We ask that only **Microsoft Word**, **Excel,** and **PDF** documents are submitted to your client portal. Our office is unable to open other document types due to security reasons.

We understand that technology can be confusing and not everyone has access to a personal computer. To make things easier, please review the information below on how to convert JPG (image) documents to PDF's depending on your operating system.

How to Convert JPG (image) files to PDF files:

*Before you take an image of your document, please ensure the document is on a flat, well-lit surface with limited creases or wrinkles.

Windows OS

Open the image file and click **Print** (Ctrl +P**)**. In the **Printer Settings**, select **Microsoft Print to PDF**. Check the photo size and fit you want for the PDF (Letter 8.50" x 11.00" is best) and click **Print**. On the pop-up menu, enter the file name, select the location where you'll like to save the file, and hit **Save**.
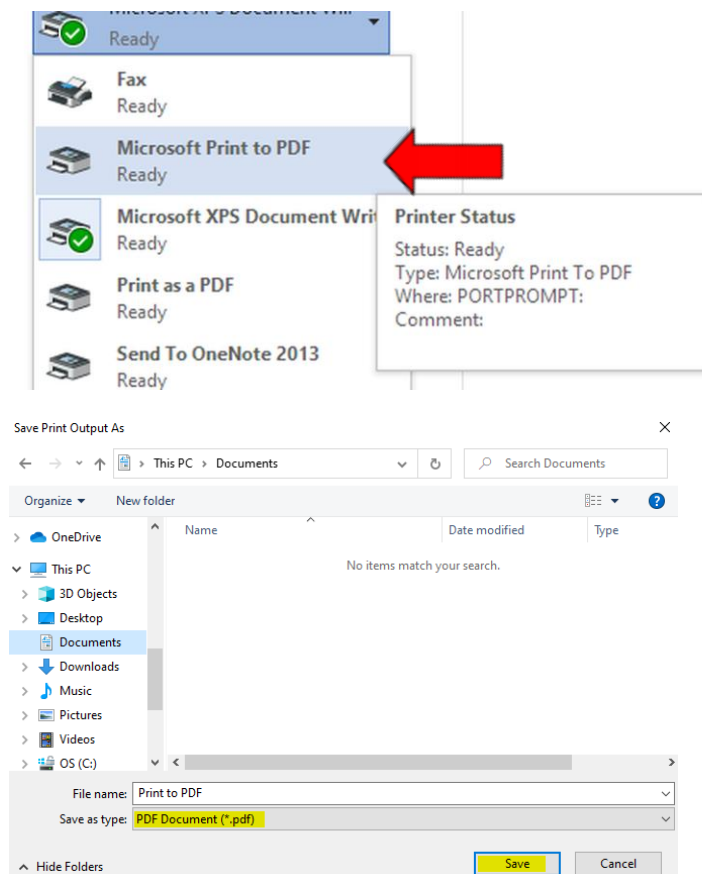
Mac OS

Open the image file in **Preview**. In the **Preview** menu, click **File**, and then select **Export as PDF**. On the pop-up menu, enter the file name, select the location where you'll like to save the file, and hit **Save**.
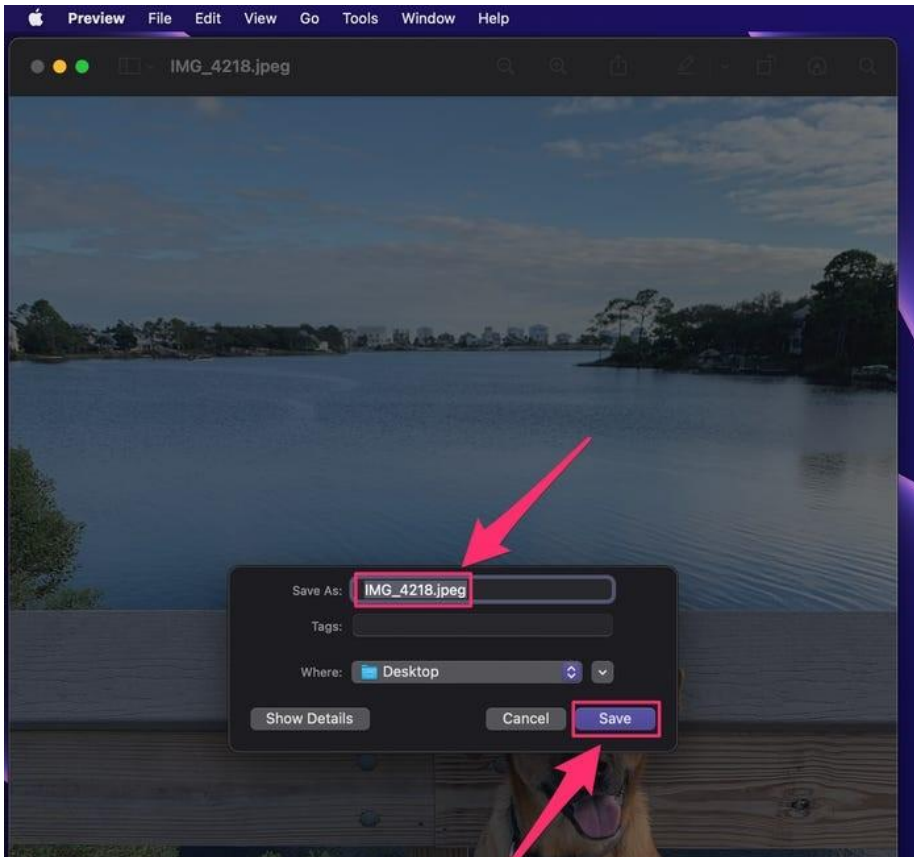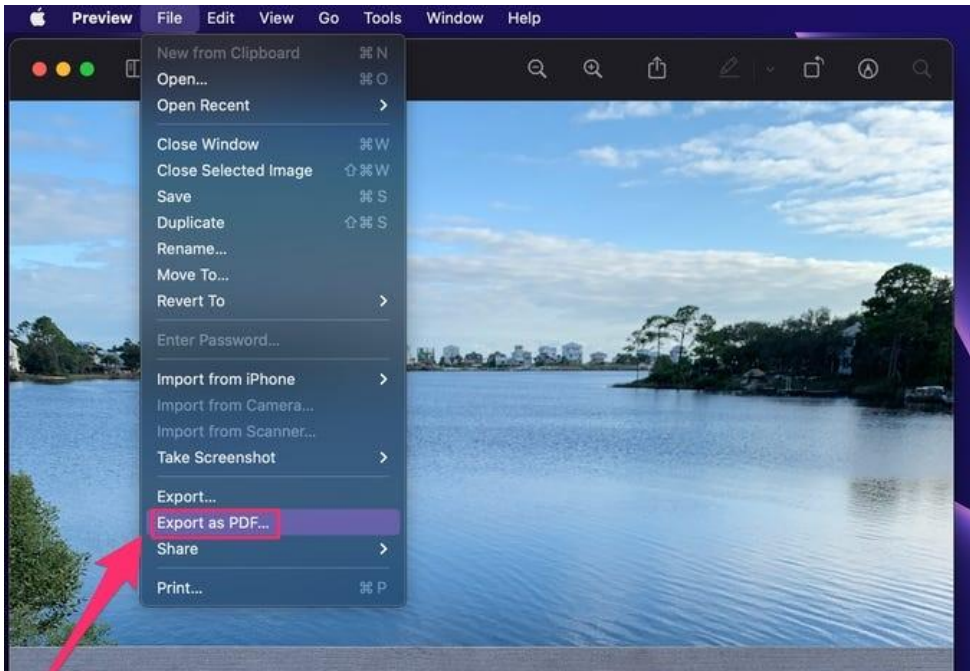
Android

If you're using an Android, you can use the **Scan** feature on the **Google Drive application** that comes predownloaded on your device**.** The Google Drive Scan feature will *automatically* save your file as a PDF for free. This can save a lot of hassle if you do not have access to a personal computer.

To use the **Scan** feature, open your **Google Drive** application and click the "+" on the bottom right-hand side. A menu screen will pop up. From here, click **Scan** and accept the permissions. Once your camera is open, take a picture of the document and then **Crop** and **Save** as needed.
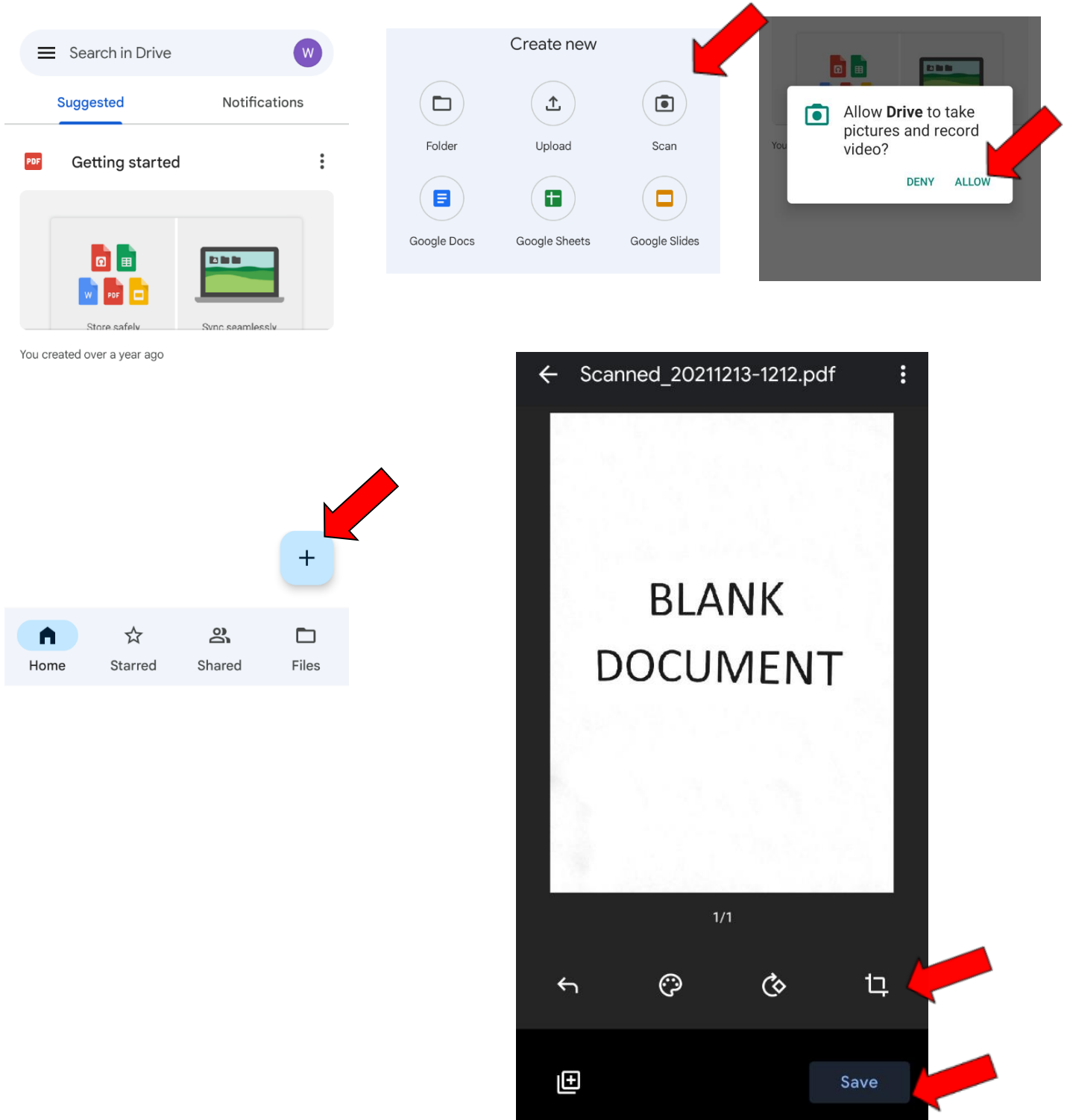
iOS

If you are using an iPhone or iPad, you can use the **Scan** feature on the **Notes application** that comes predownloaded on your device. The Notes Scan feature will *automatically* save your file as a PDF for free. This can save a lot of hassle if you do not have access to a personal computer.
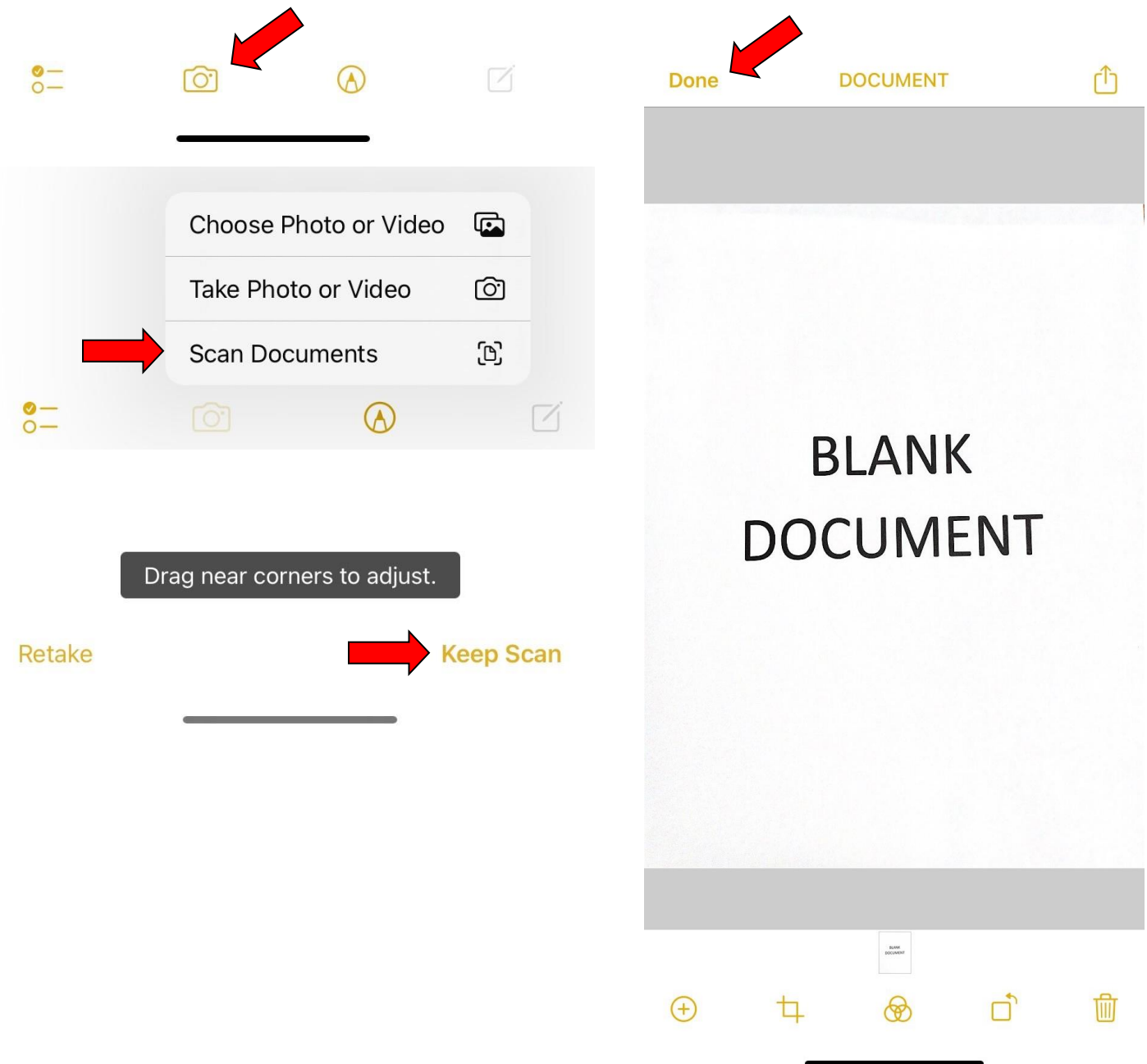
To use the **Scan** feature, open your **Notes** application and click the " ☑ " button on the bottom right-hand side. This will open a new note. Click on the **camera icon** on the bottom of the screen. A menu screen will pop up. From here, click **Scan Document**. Once your camera is open, take a picture of the document and then **Crop** and click **Keep Scan.** You may scan any additional pages and click **Save**. Click on the scanned image to make any additional adjustments and press **Done** in the upper left-hand corner. From here, you can **Save** the PDF file to your desired location.

Choose Photo or Video

Take Photo or Video

Scan Documents

Drag near corners to adjust.

Retake   Keep Scan

Done   DOCUMENT

BLANK

DOCUMENT

How to Upload Documents to the Client Portal

Go to our website https://westengraff.com/ and click on **Client Portal** on the bottom of the menu. Click on the link to **Log Into your custom client portal.** Enter in your E-mail and Password to **Login.** It may ask you for an authentication code from your E-mail address. Once you have authenticated your login, continue to your portal.

There should be folders for each Tax Year. To upload to the current tax year, click on the specified folder. **Please make sure that your documents are being uploaded to the correct tax year before uploading.**

On the upper right-hand corner, click on the + **Upload** button.
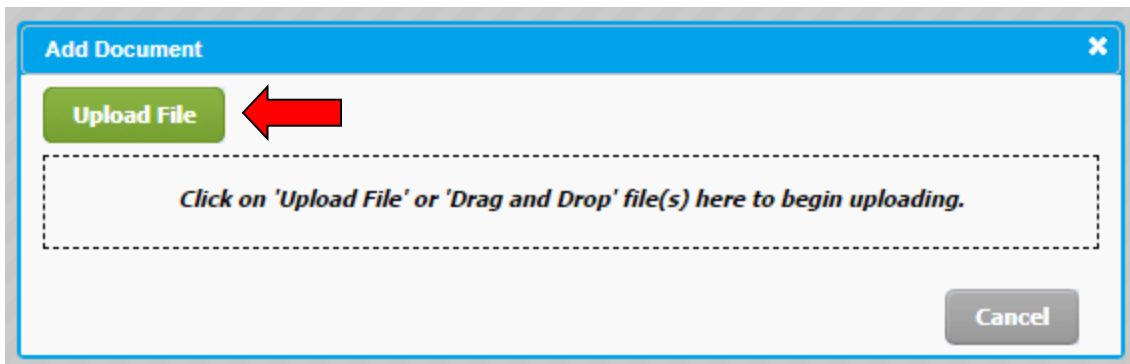
Then click **Upload File** and locate your tax documents. It should automatically upload your file into the folder once you have selected the desired files.

Once you have finished uploading all your tax documentation, please notify us via phone at (920) 388-0818 or email at info@westengraff.com. Your return will then be put in the queue for preparation. **Please note, if you do not notify us that you have uploaded your tax documentation, we will not begin your tax return preparation.** Our preparers may also request that you upload additional information. If this happens, we will ask you to notify us once you have finished uploading the requested documentation.

How to Use the Client Portal

After you have uploaded your documentation and notified us that you have done so, your return will be put in the queue for preparation. Once we have finished preparing your return, you will be notified via phone or email.

We will upload a **signature packet** to your client portal in the specified tax year folder. This packet will contain your **three-year tax summary**, a letter explaining your refund or balance due amounts, your **tax preparation invoice**, and an **8879 form**. Per Federal regulations, we must receive your signed Form 8879 prior to electronically filing your income tax return. You must sign the 8879 form and reupload the signed document to the portal for us to electronically file your tax return.

We can collect payment for your tax preparation fee **in person**, **over the phone**, or via **check in the mail**. Once we have collected your payment for the tax preparation as well as the signed 8879 form, we will electronically file your tax return. We will also upload a copy of your tax return to the portal for your records at this time.

If you are expecting a refund, they are normally received within 21 days. **To check the status of your refund, please visit www.irs.gov and click on the link "Where's My Refund?"**

If you have a balance due, your payment **must be made on or before the April 15th filing deadline** to avoid interest and penalties. We can arrange for the funds to be automatically withdrawn from your account on any date on or before April 15th. If you expect to owe money and wish for the funds to be automatically withdrawn from your account, please indicate that you would like your funds to be direct debited from your account on your client questionnaire.