

NEW SMART VAULT INSTRUCTIONS!!!

NOTE: If you are a New Client, by now you should have received an email "invite" from SmartVault. Please check your email (try your spam if you can't locate it in your primary inbox) and follow the prompts to "Activate your Smart Vault Account. Sign in with your email and create a new password. Once you have created your new password and successfully signed in, you will proceed to Step 2 of these instructions. ALL RETURNING CLIENTS BEGIN AT STEP 1.

Step 1: Accessing your Smart Vault Portal

You will access the secure portal through our website: www.RCMTaxExpert.com by clicking on the "SmartVault Secure Client Portal" Tab.

RCM Tax Expert & Consultant, Inc.
Enrolled Agents, Reliability You Can Count On

(212) 414-8216
info@rcmtaxexpert.com

Welcome Services Tax Organizer Resources Newsletter Schedule Your Appointment **SmartVault Secure Client Portal**

Welcome


We are a full time, full service Virtual Tax Office. Tax Return Preparation, Tax Problem Solving, Consultations are just a few of the services we provide. We welcome your questions and look forward to continuing relationships with our many returning clients as well as creating new ones.

Please note, we do not conduct "in person" interviews. All appointments will be conducted via Video conference or via Phone. Upon scheduling your appointment, you will receive a confirmation along with instructions on how to proceed. Please feel free to call should you have any questions or concerns.

In our website, we aim to provide you with the most current information and tools that you can access year round. We have added many new links to resources, financial calculators, monthly newsletters, weekly tax tips, and FAQs.

Our goal is to help you, not only with your taxes, but with all facets of your financial life. Please feel free to browse through our pages and let us know what you think. We value your opinions and appreciate your suggestions!!

Kind Regards,


Rosael Carreras-Morris, EA, NTP! Fellow
President

Quick Contact
Tel: (212) 414-8216
Fax: (212) 740-3328
For General Information:
info@rcmtaxexpert.com
New Rochelle, NY 10802
[Schedule Appointment](#)
All appointments are conducted via Video Conference or Phone. No in-person appointments.
We use secure cloud based portals to exchange sensitive information and documentation.

Click on the "Secure Client Portal" Hyper Link

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Welcome Services Tax Organizer Resources Newsletter Schedule Your Appointment SmartVault Secure Client Portal

SmartVault Secure Client Portal

Once you have scheduled your tax appointment you will receive an email invitation to activate your account on our secure client portal.

After completing the activation process you can sign into your account using the link on this page to securely upload your organizers and documentation.

Click here to login to your account on our **Secure Client Portal**

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You will sign in using your email address and your password and clicking on the "Sign In" Tab.



The image shows a green sign-in form with the following fields and elements:

- Sign In** header
- Sub-header: Sign in to your RCM Secure Portal below
- Email Address** field: Contains "Sam@RCM@gmail.com"
- Password** field: Contains "*****" with a "SHOW" link to the right.
- Remember email
- Sign In** button: A red arrow points to this button.
- [Can't sign in?](#) link: Located below the Sign In button.

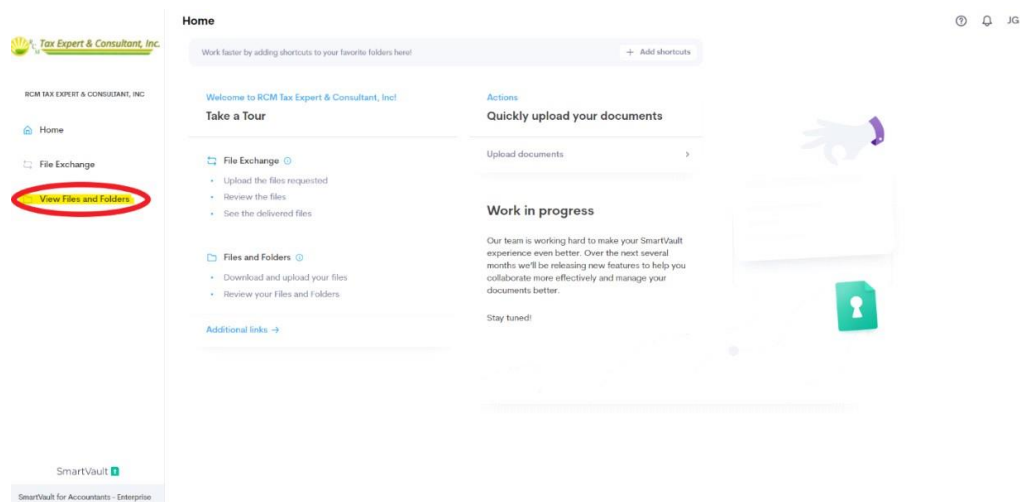
If you cannot remember your password click on “Can’t sign in?” button and follow the prompts to create a new one. Your password should contain 12 characters containing at least 1 uppercase letter, 1 lowercase letter, 1 number and 1 character.



This is the same sign-in form as above, but the [Can't sign in?](#) link is circled in red.

Step 2: Downloading Your Tax Organizer and Other Necessary Documents:

Once you have signed in you will see SmartVault’s new Home Page. First Click on “View Files and Folders” in the menu on the left-hand side of the screen:



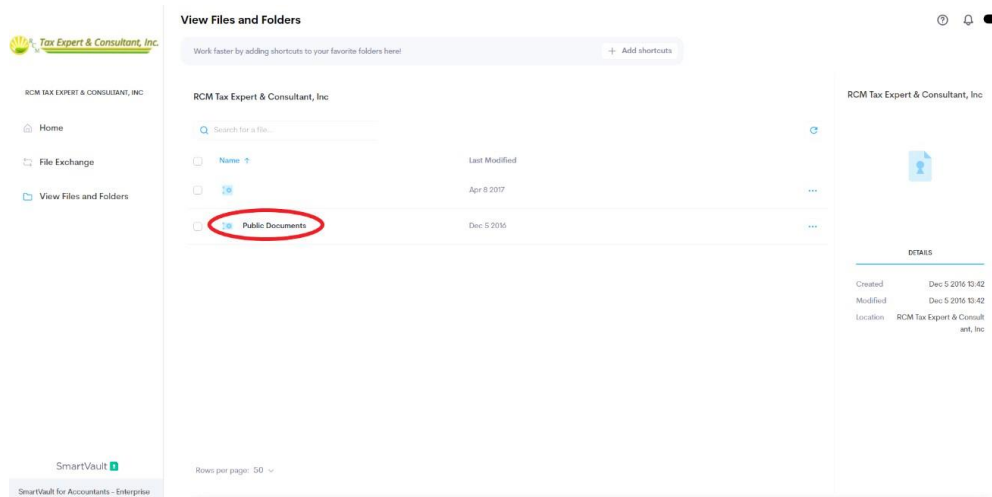
The image shows the SmartVault Home page. On the left-hand side, there is a navigation menu with the following items:

- Home
- File Exchange
- View Files and Folders**: This item is circled in red.

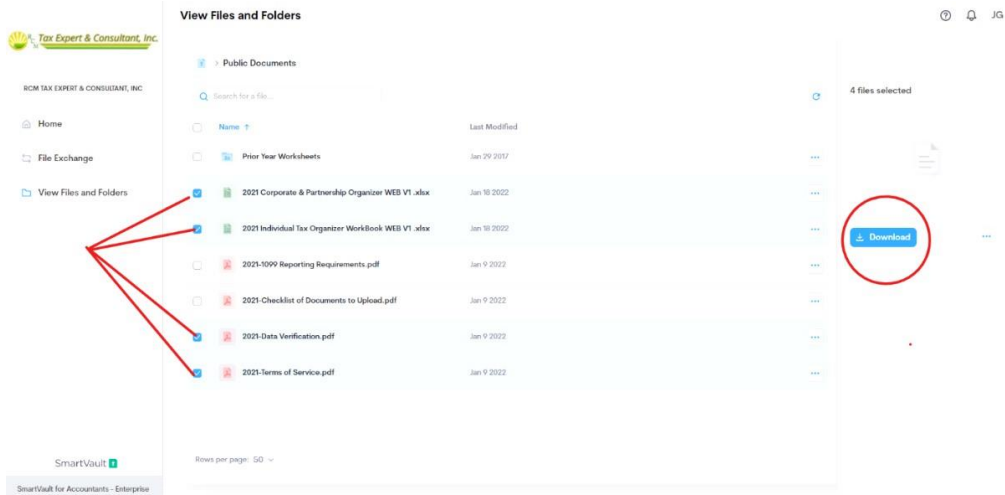
The main content area is titled "Home" and includes:

- A "Welcome to RCM Tax Expert & Consultant, Inc!" message.
- A "Take a Tour" section with a "File Exchange" link and a list of actions: "Upload the files requested", "Review the files", and "See the delivered files".
- A "Files and Folders" link with a list of actions: "Download and upload your files" and "Review your Files and Folders".
- An "Actions" section titled "Quickly upload your documents" with an "Upload documents" button.
- A "Work in progress" section with a message: "Our team is working hard to make your SmartVault experience even better. Over the next several months we'll be releasing new features to help you collaborate more effectively and manage your documents better." and a "Stay tuned!" note.

Then on the “Public Documents” folder.



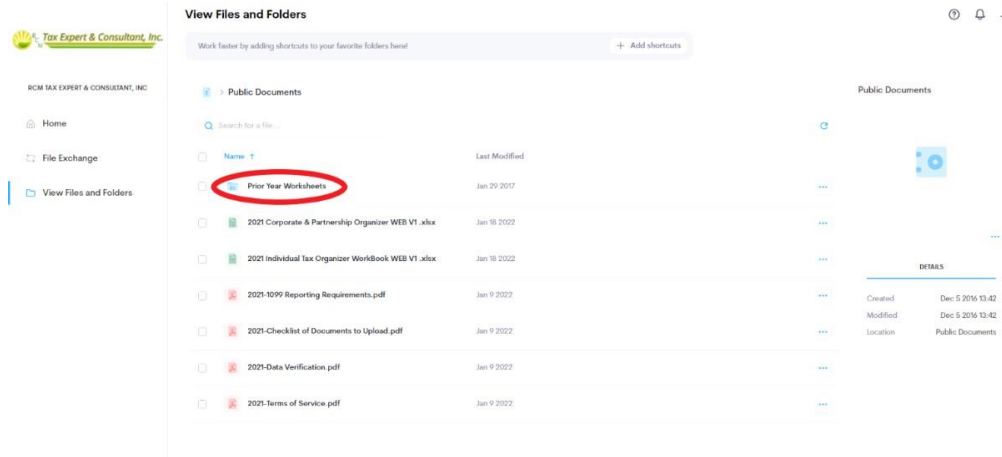
Select the appropriate 2023 Tax Organizer(s) (Corporate and/OR Individual), Data Verification, and Terms of Service documents and click “Download”. *(Feel free to download the checklist from the Public Documents folder to help ensure you have everything you need):*



We suggest creating a 2023 Tax Docs Folder on your Desktop and **saving your downloaded documents**, along with all of your corroborating Tax Documents in this folder so as to make uploading a bit easier.



*(NOTE: If you are filing previous years, you will find the necessary workbooks in the **Prior Years folder**. Just select the year you will be filing, i.e.: TY21 – download the workbook and continue with the instructions below)*



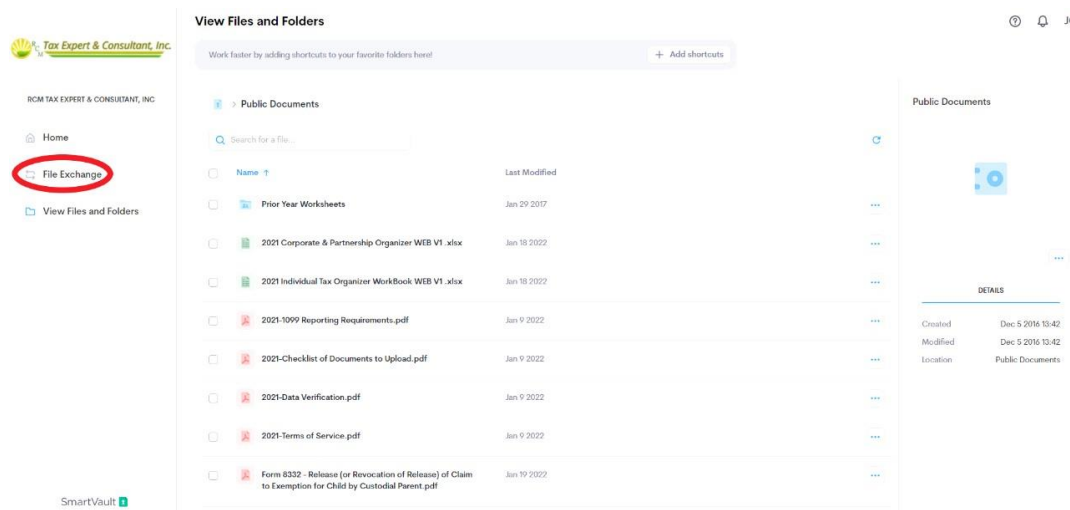
Step 3: Read, Sign, Complete and Save

Once you've downloaded the necessary forms, you should **carefully read the Terms of Service** and Data Verification form. Once you have read these documents, **please sign them where appropriate.**

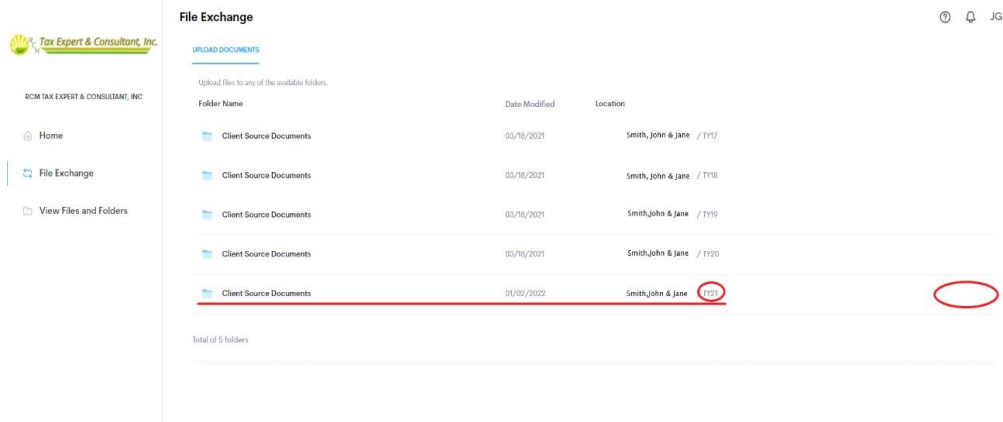
Once you have read and signed your Terms of Service and Data Verification documents, you must then **complete all applicable pages of your Tax Organizer(s)** and Save the Organizer and signed Terms of Service and Data Verification documents. *(Hopefully, you will save them into your newly created 2022 Tax Docs folder on your desktop).*

Step 4: Uploading Your Documents

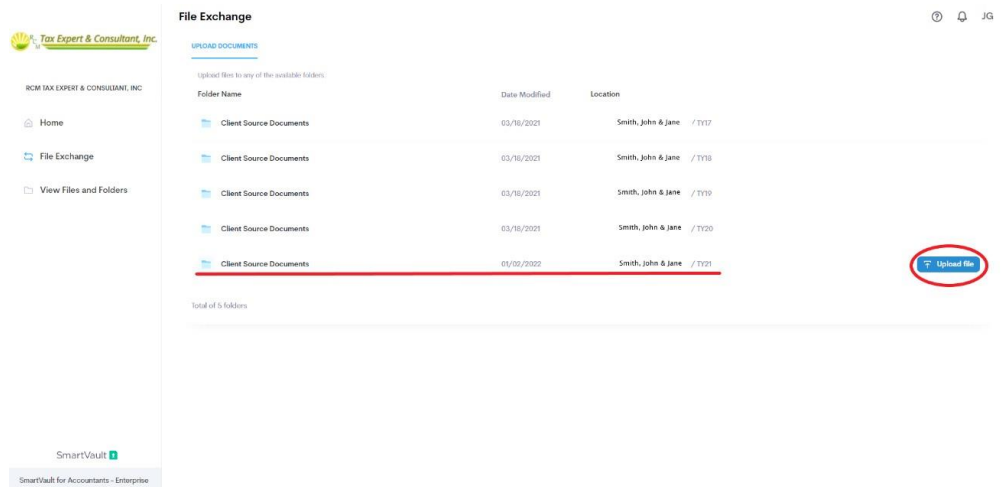
When you are ready to begin uploading your documents, click the "File Exchange" Tab on the left-hand side of the screen.



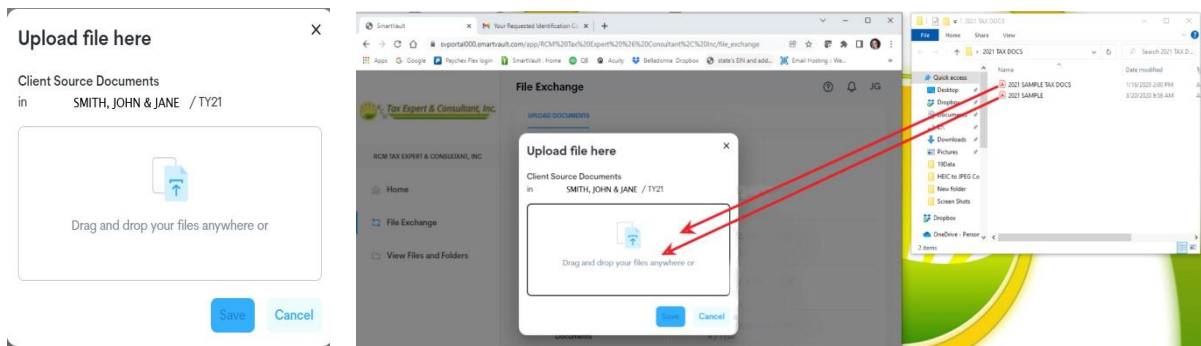
Locate "Client Source Documents" for Tax Year 2023 (TY23) and Hover over the blank space on the right-hand side:



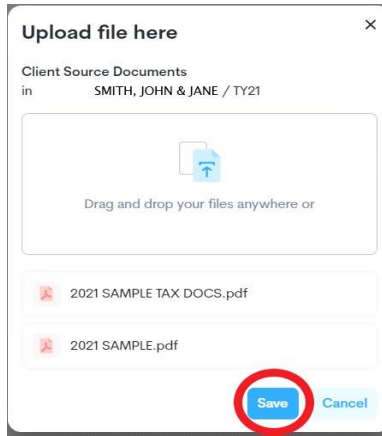
A blue “Upload” button will appear. Click on it:



A drag and drop upload box will appear. Drag and drop the files (hopefully from your 2023 Tax Docs folder on your desktop) into the upload box:



Then click “Save” at the bottom of the window to save your documents into the portal.



Please remember to also upload the following documents:

- Copy of a valid ID if you are a new client or if you have updated your ID within the last year.
- Copy of a voided check for direct deposit if you are a new client or if you have changed banks within the last year.
- A signed Terms of Service form (Please read carefully before executing)
- A signed Data Verification form (Please read carefully before executing)
- Fully Completed Tax Organizer(s)
- **All applicable and corroborating tax documents such as W2s, 1099s, etc. Feel free to download the checklist from the Public Documents folder to help ensure you have everything you need.**
- **If this is your first time filing with RCM Tax Expert, OR if it has been more than three (3) years since you filed with us, please also upload a copy of your 2021 and 2022 Tax Returns.**

Once your documents are successfully uploaded you will receive a notification:

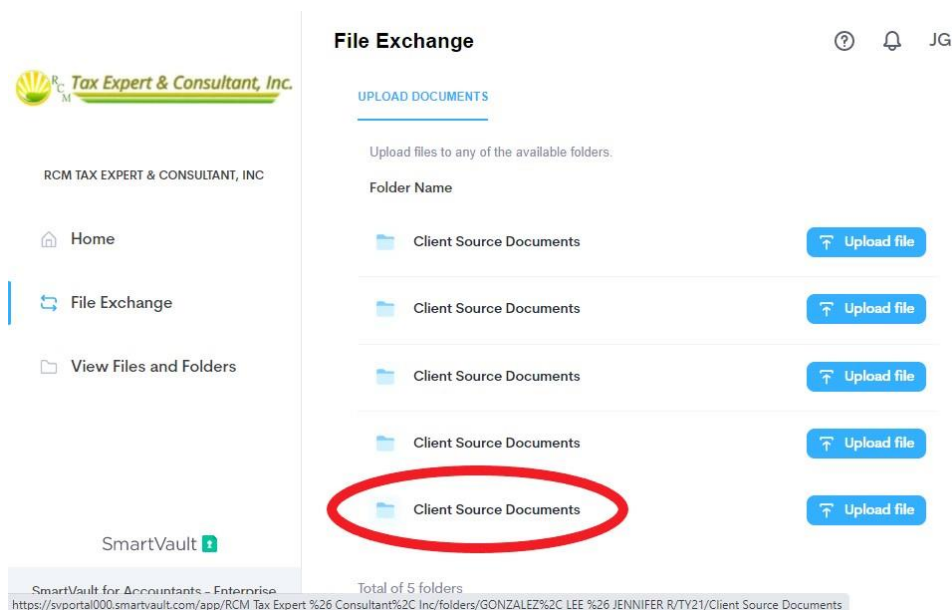
Folder Name	Date Modified	Location
Client Source Documents	03/18/2021	Smith, John & Jane / TY17
Client Source Documents	03/18/2021	Smith, John & Jane / TY18
Client Source Documents	03/18/2021	Smith, John & Jane / TY19
Client Source Documents	03/18/2021	Smith, John & Jane / TY20
Client Source Documents	01/02/2022	Smith, John & Jane / TY21

Notifications:

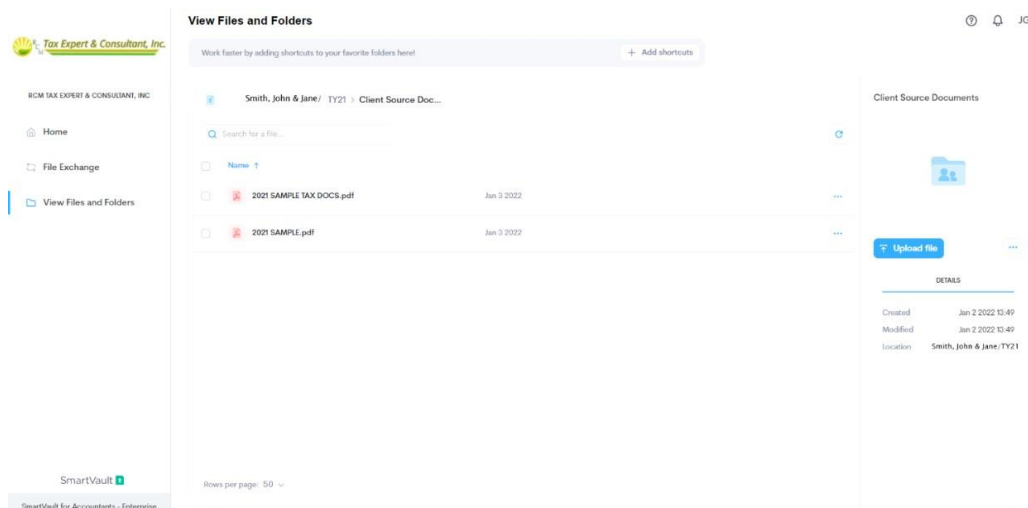
- ✔ "2021 SAMPLE TAX DOCS.pdf" uploaded successfully
- ✔ "2021 SAMPLE.pdf" uploaded successfully

Step 5 (Optional): Double Checking your Documents

If you would like to double-check that your documents HAVE been uploaded, click on the Client Source Folder:



Here you will see the documents you successfully uploaded. You may review them at your leisure. Please take note that you can NOT delete any documents once they have been uploaded. If you desire to have something removed, please contact the office via email or by phone:



All documents MUST be uploaded BY 3:00 P.M. OF THE BUSINESS DAY PRIOR to your appointment to ensure we have time to review your documents to better address your issues at your appointment. FAILURE TO UPLOAD YOUR DOCUMENTS TIMELY MAY RESULT IN THE NEED TO RESCHEDULE AND A POSSIBLE LATE CANCELTION FEE IN THE SUM OF \$50.

Kind Regards,
RCM Tax Expert and Consultant, Inc.