

James E. Moede, CPA
Tax Return Portal Instructions

The screenshot shows a Gmail interface. At the top left is the Gmail logo. A search bar is at the top center. On the right, the user's email address 'demo.jemcpa@g' is visible. The left sidebar contains navigation options: Compose, Inbox (highlighted), Starred, Snoozed, Important, Sent, Drafts, Categories, ARCHIVED, DEMO Emails (with a '3' next to it), FRESHBOOKS, QUICKBOOKS, WEB ORGANIZERS, and More. The main area shows three tabs: Primary (selected), Social, and Promotions. A single email is displayed in the Primary tab, with a red box around it. The email subject is 'You Have a New Account with James E. Moede, CPA - Hello John & Jane Public, A new SecureFil...'. A red arrow points from a yellow callout box at the bottom right to the email. The callout box contains the text: 'You should get an e-mail like this one.'

James E. Moede, CPA
Tax Return Portal Instructions

Compose

Inbox

- Starred
- Snoozed
- Important
- Sent
- Drafts
- Categories
 - ARCHIVED
 - DEMO Emails 3
 - FRESHBOOKS
 - QUICKBOOKS
 - WEB ORGANIZERS
 - More

You Have a New Account with James E. Moede, CPA

no-reply@securefilepro.com to me

Hello **John & Jane Public**,

A new SecureFilePro account has been created for you by **James E. Moede, CPA**.

Your username is: **jpublic**.

To create your password and access your account, follow the link below.

<https://jemcpa.securefilepro.com/connect/#?link=20pp6daw3uq2nrsavoh1nyr7o7pqxmn8>

If clicking the link doesn't work, you can copy and paste it into your browser's address bar.

Your link will expire in 72 HOURS.

If you have any questions, please contact us.

Reply Forward

E-mail from SecureFilePro. I recommend adding to your contacts to prevent your email from possibly blocking.

This is your username.

Use this link to activate your account

Security Feature: If your link expires, please e-mail me so I may re-send it.

- Files
- Profile
- CheckList
- Messenger
- Sign Forms

Create Password for jpublic

Password * Minimum 8 Characters

Confirm Password *

Create your password - must have at least 8 characters.

- Files
- Profile
- CheckList
- Messenger
- Sign Forms

Login

Username

Password

[Forgot Password](#)

Login

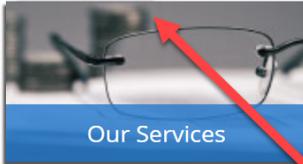
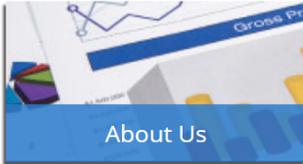
[Terms of Use](#)

[Privacy Policy](#)

FINAL STEP: Log into your account. You have successfully activated your account

James E. Moede, CPA

Website | My News | About Me | Services | **Client Access** | Tax Tools | My Library | Contact Me



Welcome to my website!

January 09, 2020

My website brings financial services directly into your home or business enabling you to more actively participate in your financial management.

{video tour coming soon}

[\[My News\]](#) latest tax and accounting news and news about my firm.

[\[About Me\]](#) my information.

[\[Services\]](#) information about the services my firm offers.

[\[Client Access\]](#) allows my tax and payroll clients to securely share information with my firm.

[\[Tax Tools\]](#) a collection of downloadable forms to help you get ready for your 2019 tax return.

[\[My Library\]](#) a collection of tax, accounting, and other articles available to users of my website.

[\[Contact Me\]](#) to request additional information about my practice and my services.

[Use the Financial Tools](#) to assist you in tax planning, financial planning, or determining loan payments.

Please browse the pages of this site and feel free to e-mail any questions, suggestions or other feedback. Visit often as current news impacting your financial situation will be outlined here.

Subscribe to Newsletter

Click the [Client
Access] tab

Once you activate your account - you will then login through my website using your username and password (that you just created)

James E. Moede, CPA



[Website](#) | [My News](#) | [About Me](#) | [Services](#) | [Client Access](#) | [Tax Tools](#) | [My Library](#) | [Contact Me](#)



Client Access

Please choose the access type below:

Client Access

[Tax Portal](#)

[Payroll Portal](#)

Resouces

[Tax Tips](#)

Click on "Tax Portal"



James E. Moede, CPA



Website | My News | About Me | Services | Client Access | Tax Tools | My Library | Contact Me



Tax Client Portal

[\[Click Here To Access Your Taxes\]](#)

Click the link to access the portal
log in screen

[\[Instructions - pdf\]](#)

Video Instructions



Please note, I am in the
process of updating my
portal instructions. They
should be posted in a
couple of weeks.

[SFP Instructions](#) from [James Moede](#) on [Vimeo](#).

James E. Moede CPA

James E. Moede, CPA Tax Return Portal Instructions

jemcpa.securefilepro.com/connect/#/login

James E. Moede, CPA

- Files
- Profile
- CheckList
- Messenger
- Sign Forms

Login

Username

Password

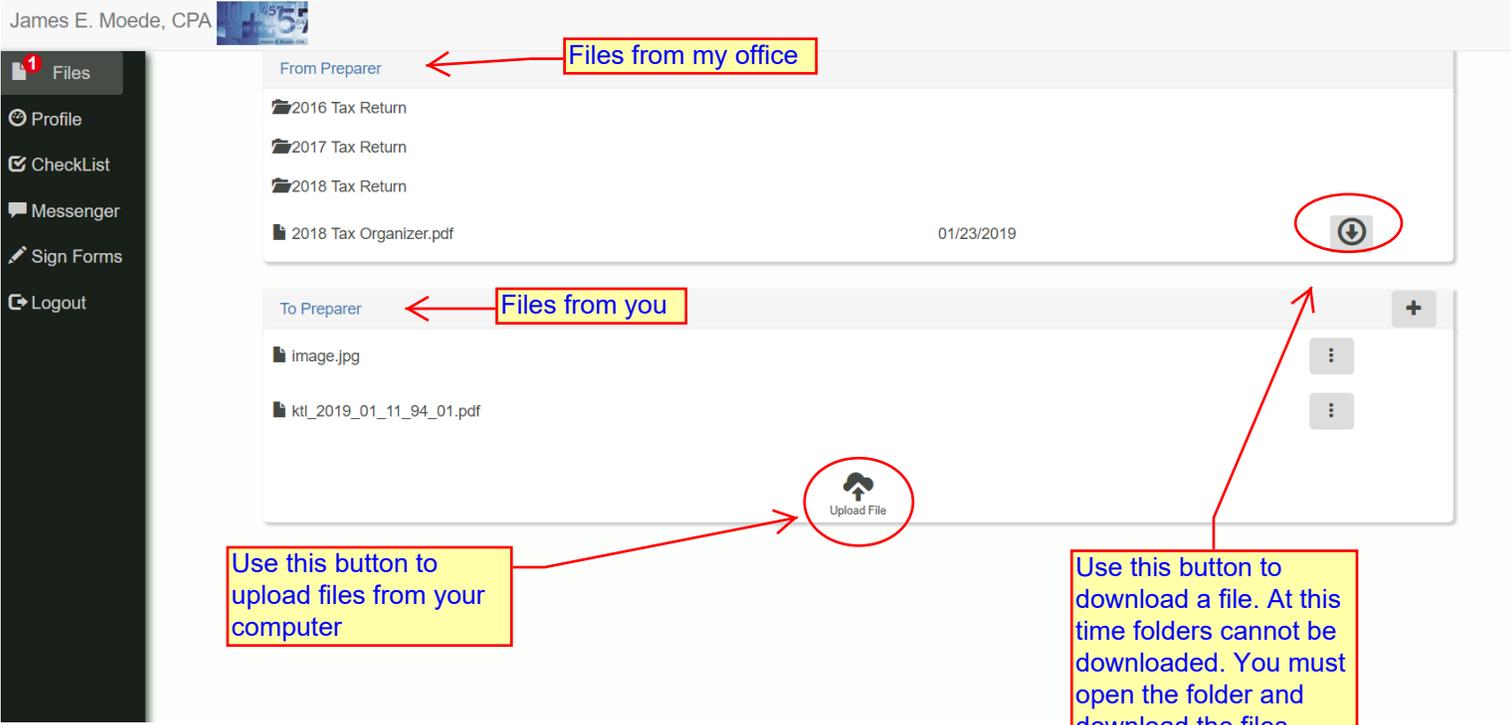
[Forgot Password](#)

[Login](#)

[Terms of Use](#) [Privacy Policy](#)

You should see this screen - enter your username and password.
You may use the "Forgot Password" link to reset your password.

James E. Moede, CPA Tax Return Portal Instructions



Use this button to upload files from your computer

Use this button to download a file. At this time folders cannot be downloaded. You must open the folder and download the files inside.

- ① Files - allows you to download and upload files
- ② Profile - allows you to update personal information online (see p10).
- ③ Checklist - a list of items that may be needed to prepare your return (see p11).
- ④ Messenger - send secure messages to my office about your return (see p12).
- ⑤ Sign Forms - electronically sign your return (see p13).
- ⑥ Logout - To end your session (see p14).

You are not required to complete the entire process in one session. Many clients choose to upload files as they are received. Other clients wait until they have all of their documents and upload in one session. Use the option that works best. IMPORTANT - when you are done, use [Messenger] to let me know that you are ready for me to start working on your return.

Questions - if you are having issues accessing or using your account, please email me "jmoede@jamesmoede.com" or call (612) 217-4272.

James E. Moede, CPA Tax Return Portal Instructions

James E. Moede, CPA 

Files
Profile
CheckList
Messenger
Sign Forms
Logout

Taxpayer

SSN: 123-45-6789
Name: John Public
Phone:
Email: demo.jemcpa@gmail.com
DOB: 03/12/1980

Mailing Address

Address: 222 Bay Road
City: Savage
State: Minnesota
Zip: 55378
County: Scott

Spouse

SSN: 111-11-1109
Name: Jane Public
Phone:
Email: jjpublic@woohoo.com
DOB: 11/24/1981

Health Insurance

Entire household covered all year:
Insurance through health exchange:

Dependents

Floyd Public May Public +  Click the "+" to add a dependent

Dependent: Floyd Public

First name: Floyd
Last name: Public
SSN: 111-11-1110
DOB: 07/12/2006
Lived with taxpayer all year:

You may update your profile online using this screen instead of updating it on the organizer. There is a box to check when you are complete at the bottom.



- Files
- Profile
- CheckList
- Messenger
- Sign Forms
- Logout

CheckList

Income
W2 - ABC Computer Software
Business income - John's IT Consulting
W2 - DEF Supply Company
1099-MISC - ABC Bank
1099-DIV - ABC Corporation
1099-INT - ABC Bank
State/local taxable refund
Deductions
Cash contribution
Non-Cash contribution
Form 1098 - Mortgage Interest ABC Bank
State Income Taxes
Taxes Paid
Credits/Payments
Dependent Care - Kids Kare Inc

This checklist was prepared based on your prior year's tax return and is similar to the checklist included with your organizer. You may have new tax documents and some may no longer apply.

James E. Moede, CPA Tax Return Portal Instructions

James E. Moede, CPA 

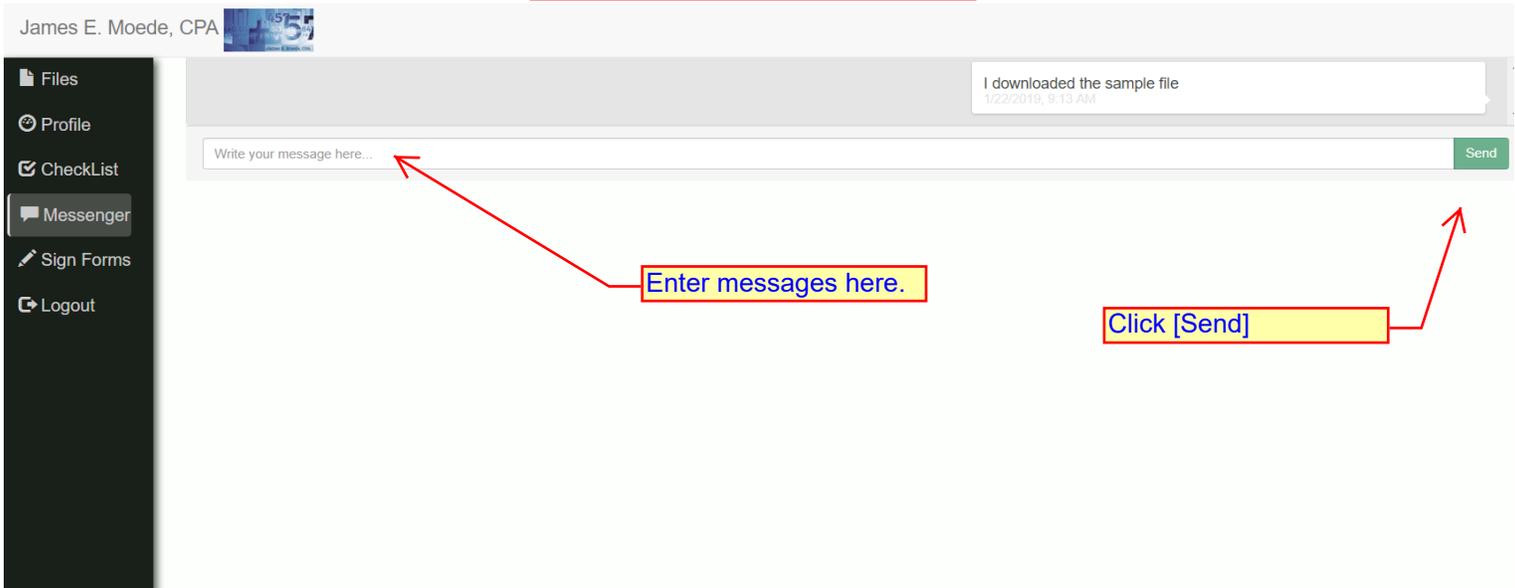
- Files
- Profile
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I downloaded the sample file
1/22/2019, 9:13 AM

Write your message here... Send

Enter messages here.

Click [Send]



James E. Moede, CPA



- Files
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Documents Available to Sign

Coming Soon - When your return is done and ready to electronically file, you will use this screen to electronically sign your return. There will be instructions.

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James E. Moede, CPA 

You are logged out

Login

Username

Password

[Forgot Password](#)

[Login](#)

[Terms of Use](#) [Privacy Policy](#)

[Logout](#)

Indicates that you have logged out

Click [Logout] to finish your session. NOTE: The logout is located under your {Account} information in the upper-left corner.