Client Accessing and Using RBFCO Client Login (a.k.a. Portal)

To request a Client Login (Portal):

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• Go to the RBFCO website, <u>www.rbfco.com</u>, and click on the 'Client login' link in the upper middle section of the home page.

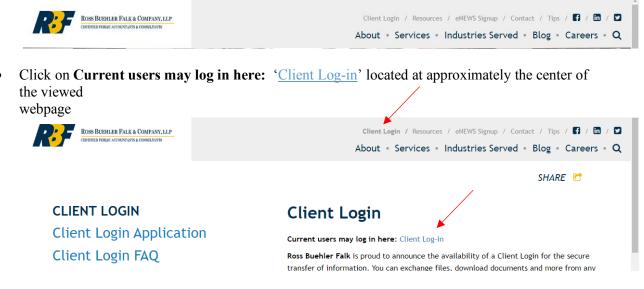
ROSS BUEHLER FALK & COMPANY, LLP CERTIFIED PERIC ACCOUNTAINS & CONSULTANTS		Client Login / Resources / eNEWS Signup / Contact / Tips / 🖬 / 🛅 About • Services • Industries Served • Blog • Careers	
Click 'Client Login Applicat	ion'		
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	/	SHARE 🖻	
CLIENT LOGIN		Client Login	- 1
Client Login Applicati	ion	Current users may log in here: Client Log-in	- 1
Client Login FAQ		Ross Buehler Falk is proud to announce the availability of a Client Login for the secure transfer of information. You can exchange files. download documents and more from any	
Complete the Client Login A	pplication and	'Send'	
ROSS BUEHLER FALK & COMPANY, LLP CRATIFIED PERIC ACCOUNTS AT CONSULTANTS		Client Login / Resources / eNEWS Signup / Contact / Tips / 🖬 / 🖬 About • Services • Industries Served • Blog • Careers	
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CLIENT LOGIN		Client Login Application	- 1
Client Login Applicat	tion		- 1
Client Login FAQ		Company Name	- 1
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Privacy Policy		First Name*	- 1
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		Email*	
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		Send	

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- After the application is processed, you will receive an email from "NetClient" with a link and instructions to complete the portal registration
 Keep track of the User ID and Password

To access the RBFCO Client Login:

• Go to the RBFCO website, <u>www.rbfco.com</u>, and click on the 'Client login' link in the upper middle section of the home page.



- Alternatively, click here <u>Client Login</u> to go straight to the login screen
- Enter your Login ID and Password.

Once in the Client Login, download or upload files.

To retrieve files (download files):

- Click on 'File Exchange'
- Click on the folder containing the documents/files you are retrieving (i.e. Miscellaneous, Tax Returns, To Client)

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Documents			Find:
File Exchange	Home Up Remove		Showing 1 of 1
📁 Sample, MR	Tax Org Name	Size	Date Modified
	E-File Authorization - 8879		1/24/2019 2:52 PM

- Click 'Download All' to download all files within the folder. This will save the files in your Downloads folder as a zip file with the folder name (i.e. Miscellaneous).
- To only download specific files, click the file(s) once and then select 'Download Selected'
- Choose the location to store the document and click 'Save'

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Select 'Home' or 'Up' to view all folders

To copy documents/files (upload files):

- Click on 'File Exchange'
- Click on the folder in which you want to store the document/file (i.e. Miscellaneous, Tax Returns, To RBFCO)

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Documents	Home Up Remove		Find: Showing 1 of 1
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• Click on 'Upload'

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🍋 File Exchange	Home Up Remove Upload Delete Selected	Showing 0 of
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- Click 'Add files' and browse for file(s) or drag file(s) to the window
- Click 'Start upload'

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Filename		Size	Status	
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	Drag files here.			
Add files 🕎 Start upload		0 b	0%	
	Choose from Dropbox			1.

• An email will be sent to the RBF team member informing them of the file(s) uploaded Select 'Home' or 'Up' to view all folders

Retrieve Tax Organizer and Upload Tax Document (s):

• Click on the name/company name folder on the left (i.e. Sample, MR & MRS)

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		Tax Roturns 🚺		
		Tax Organizer		

• Click on the 'Tax Organizer' folder

• Click on each item listed on the left and provide needed information

🗄 Home 🦣 Messages	MR & MRS Sample	He He
ax Organizer Index	Questionnaire > Web Questionnaire	
And to Save & Close Create PDF	Please check the appropriate box and include all necessary details and documentation.	Yes No
Uploaded Tax Documents	Personal Information	
Letter	Did your mantal status change during the year?	
- Ö Questionnaire	flyes, explain	
Web Questionnaire	Did your address change from tast year?	
Notes	Can you be claimed as a dependent by another taxpayer? Did you change any bank accounts or do reading transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit or direct addet just that form for tail that for a or bank account during the tax vair?	
🖓 General	Did you receive an identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter.	
Electronic Filing	Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of humcanes, tropical storms, floods as well as widthes.	
🥥 Paymenta		
🛛 📁 Income		Yes No
K1 1065, 11205	Dependent Information	
🔘 K1 1041	Were there any changes in dependents from the prior year?	
Dersonal Sale	If ves, explain	
D 1040 Adjustments		
itemized Deductions	Do you have any children under age 19 or a full-time student under age 24 with unearred income in excess of \$2,100? Do you have dependents who must file a tax return?	HH
1 Health Care	Did you provide over half the support for any other person(s) other than your dependent children during the year?	ΉH
U Other	Did you pay for child care while you worked, looked for work or while a full-time student?	
3 States	Did you pay any expenses related to the adoption of a child during the year?	
•	If you are divorced or separated with children), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? Did any dependents receive an identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS letter.	

Click 'Uploaded Tax Documents' to upload your tax documents
 Click 'Upload'

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III Home 🧤 Messages			1 MR & MRS Sample @ Help
Tax Organizer Index	Uploaded Tax Documents		
Save & Close Create PDF	After you have uploaded all tax documents, click Send to Preparer and NetClie documents until you click Send to Preparer.	nt CS will make the files available to your tax prepa	arer. Your preparer cannot access the
Preparet Last seved: 65/2019 1.52 PM	Uplaad Referent Dates Secure		Find Drewing 5 of 5 James
G Uploaded Tax Documents	Name	Size	Date Modified
. 📁 Letter			

- Click 'Add files' and browse for file(s) or drag file(s) to the window
- o Click 'Start upload'

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Filename	Size	Status	
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Drag files here.			
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😆 Choose from Dropbox			

• Click 'Send to Preparer' if ready to send information to the preparer or 'Save & Close'

Retrieve Tax Return and Action Items:

• Click on the name/company name folder on the left (i.e. Sample, MR & MRS)

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NetClient CS	Sample, MR & MRS		
Documents			Find
File Exchange	Home Up Remove Download All Download Selected Refresh		Showing 2 of 2 in
Sample, MR & MRS 1 10000	Name Name	Size	Date Modified
	🗐 🦳 Tax Returns 🚺		
	Tax Organizer		

• Click on the 'Tax Returns' folder. Two files are in the folder – 'Action items' and 'Tax Return'

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File Exchange	Home	Up	Remove	Download All	Download Selected	Refresh		Showing 2 at 2	
Sample, MR		Name					Size	Date Modified	T
	💷 🔛 Action Items 💶								
	0	1	Tax Return	lies			291.91 KB	8/5/2019 2:57 PI	M

- Click 'Action Items' and select 'Download All'. This will save the files in your Downloads folder as a zip file with the folder name (i.e. Action items).
- Print Action Items
- Sign Engagement Letter, E-File Authorization (8879 Federal & State(s), Bank Account Verification and return to RBF immediately. Signed E-File Authorization (8879) forms allow RBF to submit your tax return for e-filing. Tax Returns cannot be submitted without the signed 8879.
- Local Tax Return, sign and mail the return with W-2(s) and payment, if applicable.
- Select 'Tax Returns' and select 'Download Selected'
- Print and/or Save the Client copy of the tax return. This will save the files in your Downloads folder as a zip file with the folder name (i.e. Tax Return).

To exit the Portal:

- Click on your name in the upper right corner
- Select 'Log Out'

FREQUENTLY ASKED QUESTIONS:

- 1. What do I do if I forgot my User ID? Contact Lisa Steinsnyder (<u>lsteinsnyder@rbfco.com</u>) or Katrina Douglas (<u>kdouglas@rbfco.com</u>) 717-393-2700.
- 2. If forgot my password, what do I do? Select "I forgot my password".
- 3. I changed my device that I use for multi-factor authentication, how do I log into the portal?
 - a. Click your name near the upper-right corner of the portal and choose Manage Multifactor Authentication
 - b. Click the Add Option
 - c. Follow the steps above to add an authentication method
 - d. Click Remove next to the method you no longer with to use

NOTE: If you cannot access your mobile device or other authentication method, contact Lisa Steinsnyder (<u>lsteinsnyder@rbfco.com</u>) or Katrina Douglas (<u>kdouglas@rbfco.com</u>) 717-393-2700 to generate a 24-hour numerical code that you can use during the login process. Then follow instructions above to add a new device.

If these instructions are incorrect or not clear, or if you would like additional folders added to a client, or you have any other questions or concerns, please contact the Client Log-in administrator Lisa Steinsnyder lsteinsnyder@rbfco.com or Katrina Douglas at kdouglas@rbfco.com (717) 393-2700.