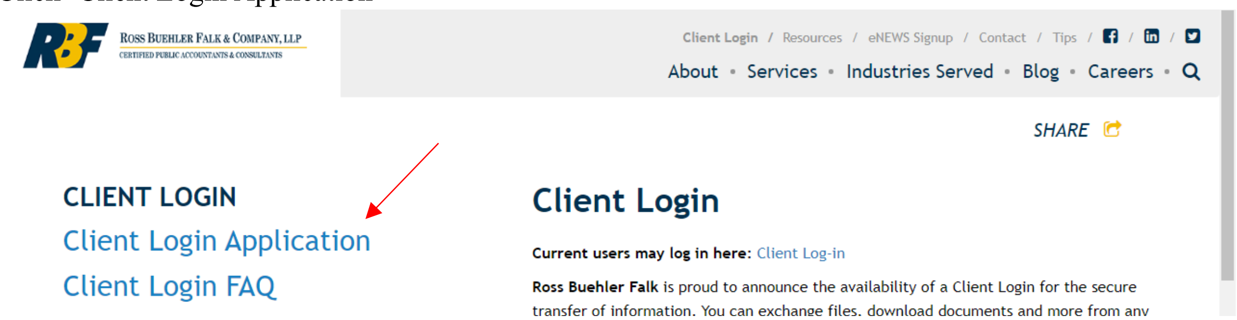
Client Accessing and Using RBFCO Client Login (a.k.a. Portal)

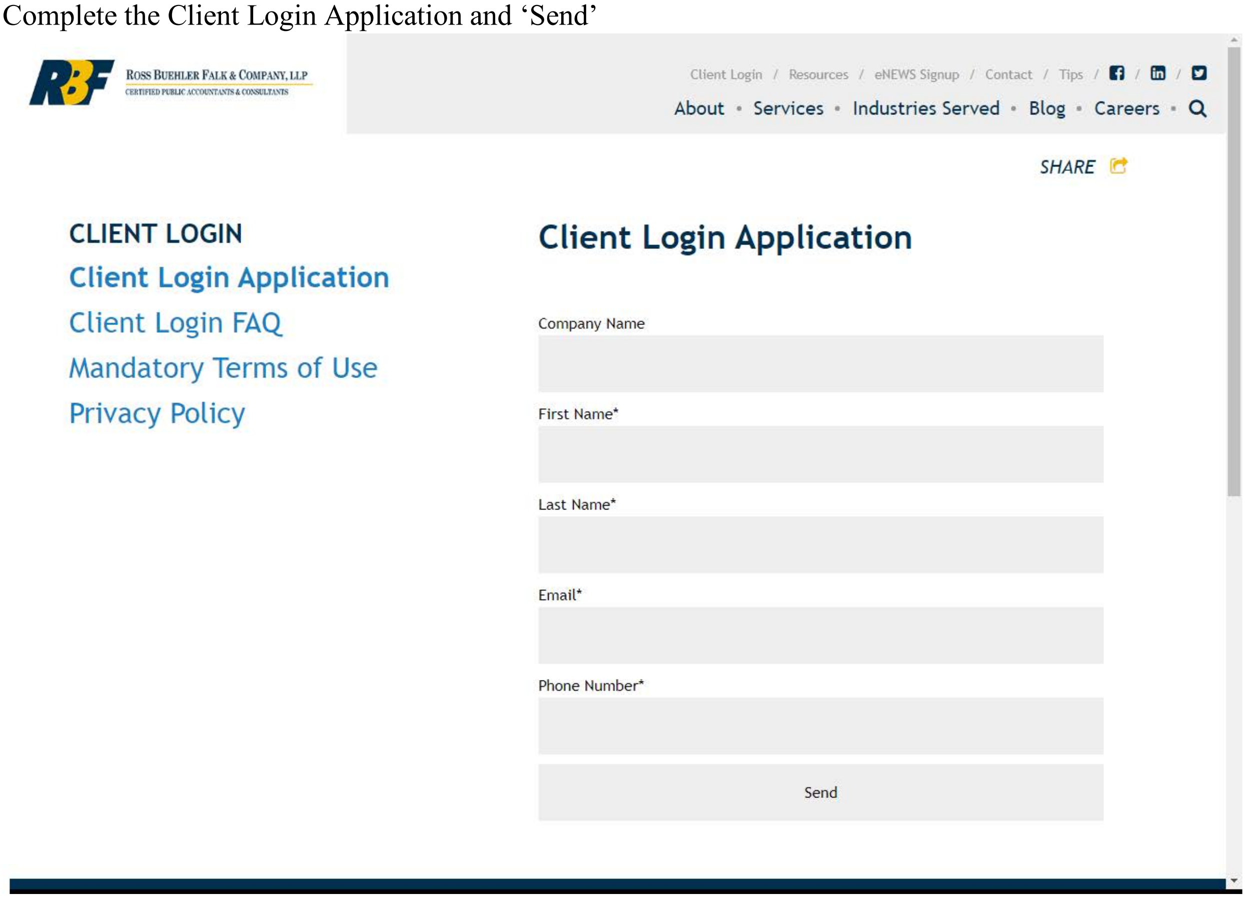
To request a Client Login (Portal):

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

- Click 'Client Login Application'



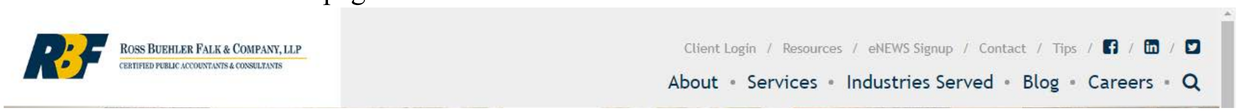
- Complete the Client Login Application and 'Send'



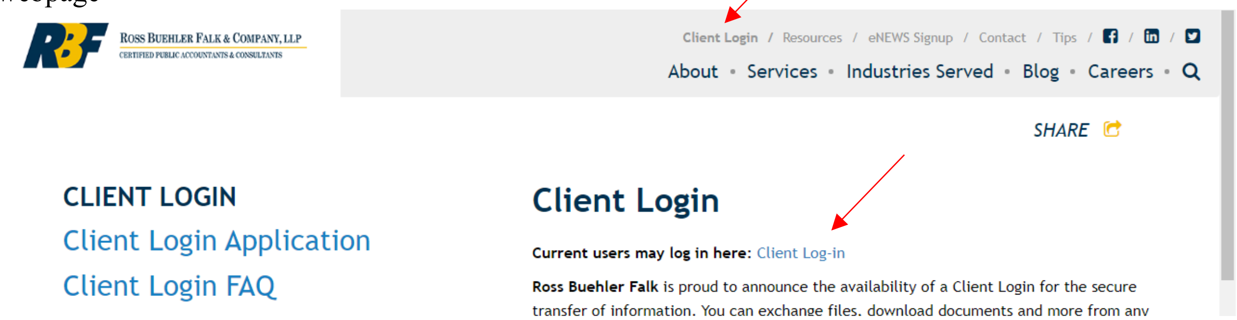
- After the application is processed, you will receive an email from “NetClient” with a link and instructions to complete the portal registration
- Keep track of the User ID and Password

To access the RBFCO Client Login:

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



- Click on **Current users may log in here:** 'Client Log-in' located at approximately the center of the viewed
webpage

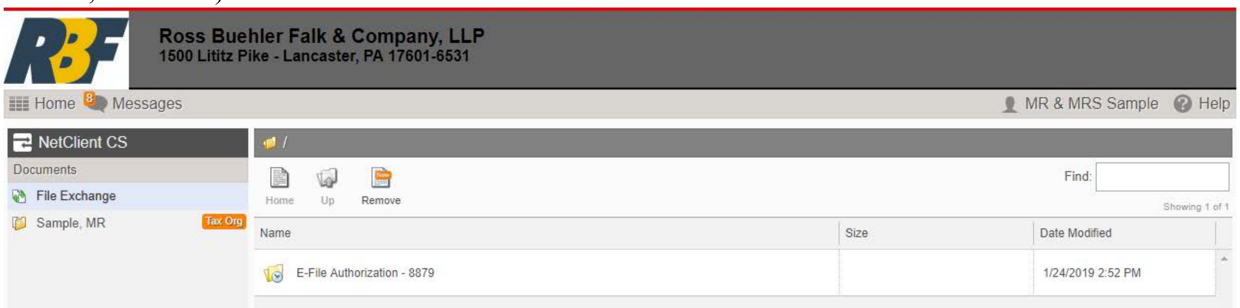


- Alternatively, click here Client Login to go straight to the login screen
- Enter your Login ID and Password.

Once in the Client Login, download or upload files.

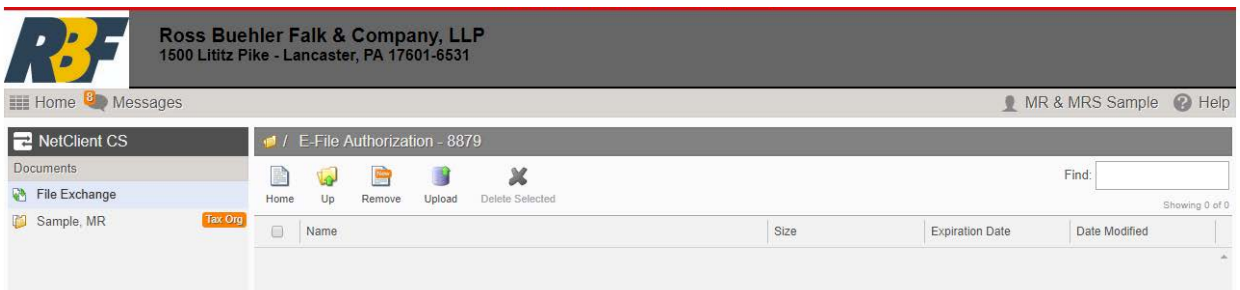
To retrieve files (download files):

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



- 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).

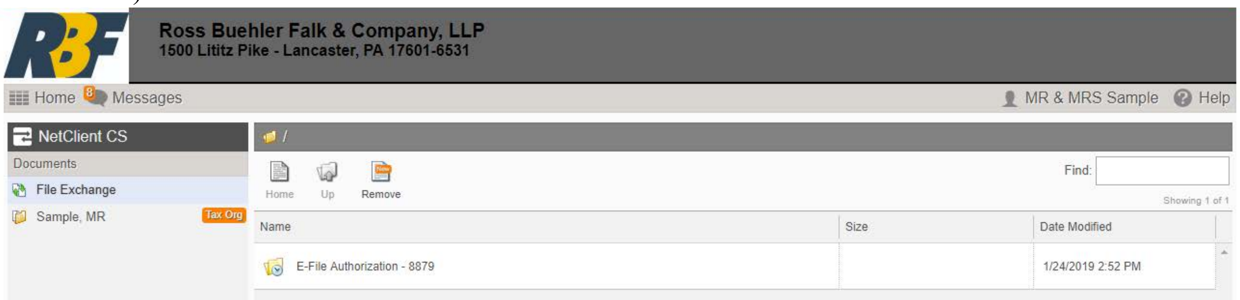
- To only download specific files, click the file(s) once and then select ‘Download Selected’
- Choose the location to store the document and click ‘Save’



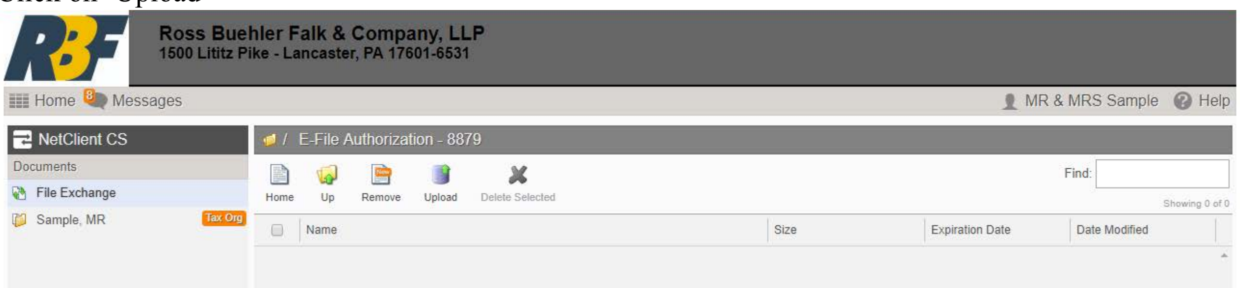
Select ‘Home’ or ‘Up’ to view all folders

To copy documents/files (upload files):

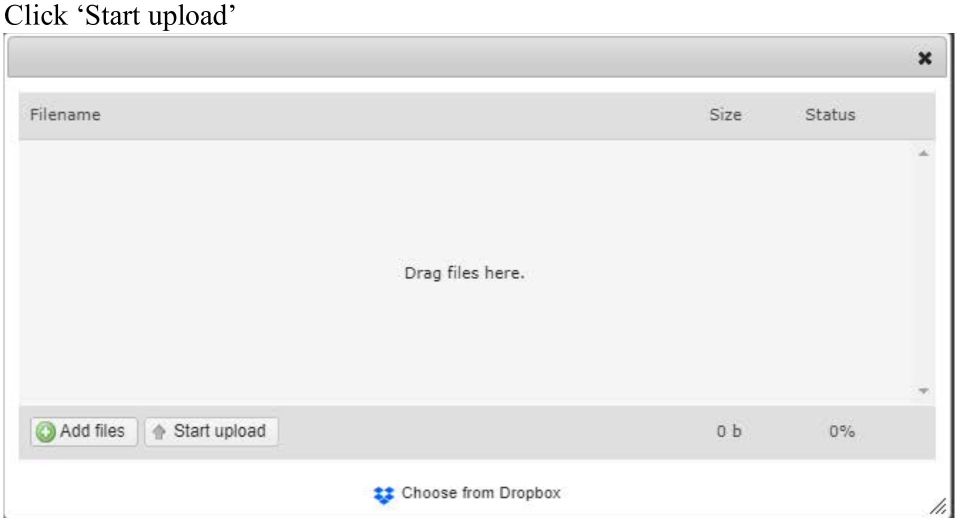
- Click on ‘File Exchange’
- Click on the folder in which you want to store the document/file (i.e. Miscellaneous, Tax Returns, To RBFCO)



- Click on ‘Upload’



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

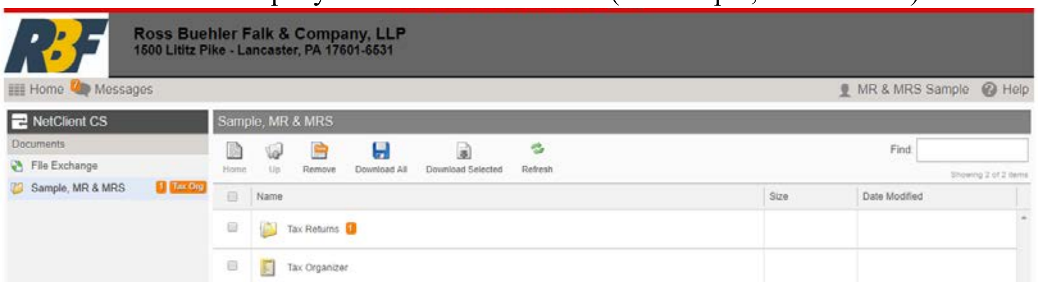


- An email will be sent to the RBF team member informing them of the file(s) uploaded

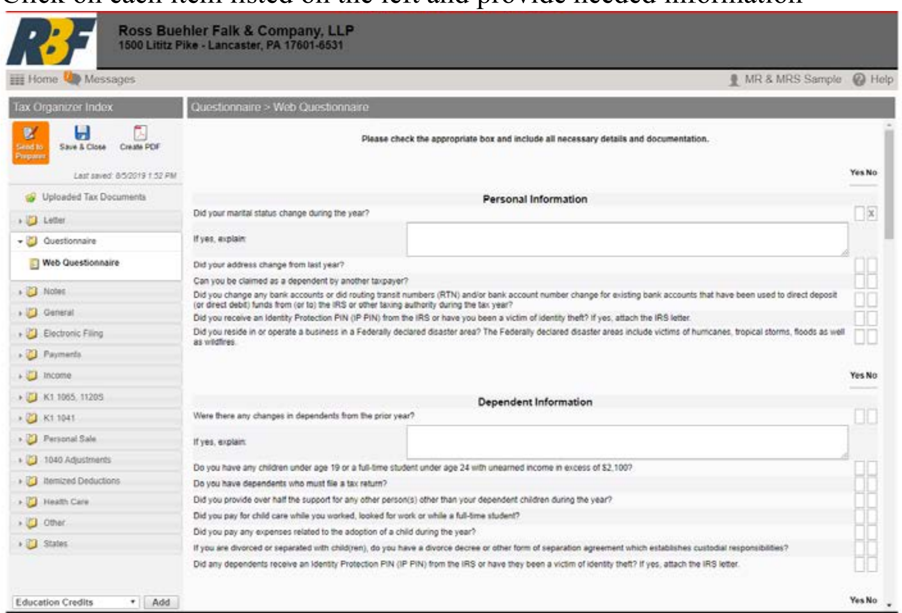
Select ‘Home’ or ‘Up’ to view all folders

Retrieve Tax Organizer and Upload Tax Document (s):

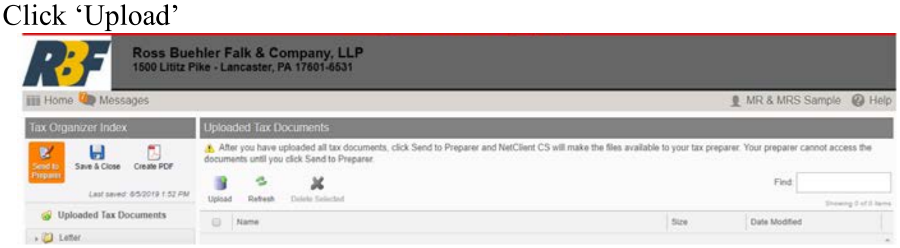
- Click on the name/company name folder on the left (i.e. Sample, MR & MRS)



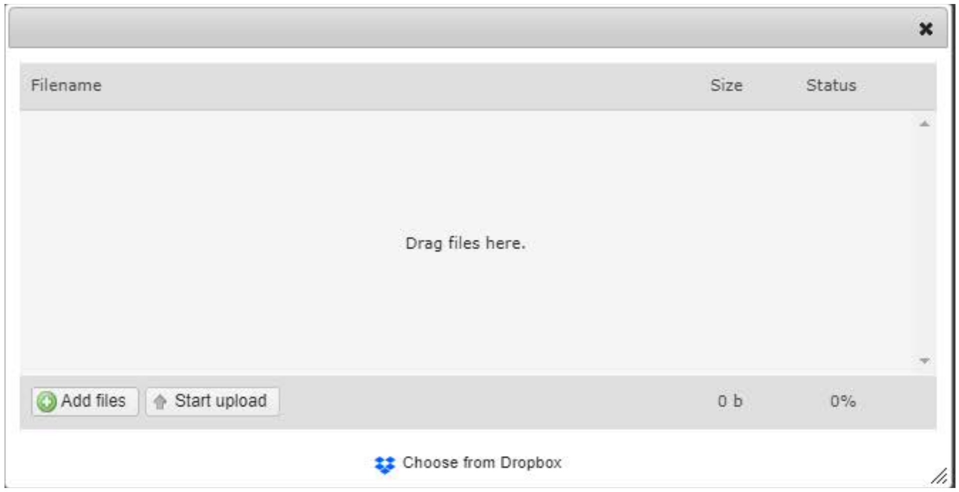
- Click on the 'Tax Organizer' folder
  - Click on each item listed on the left and provide needed information



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



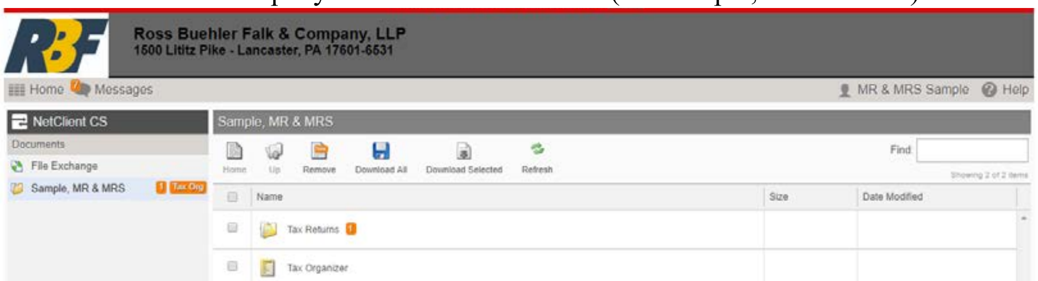
  - Click 'Add files' and browse for file(s) or drag file(s) to the window
  - Click 'Start upload'



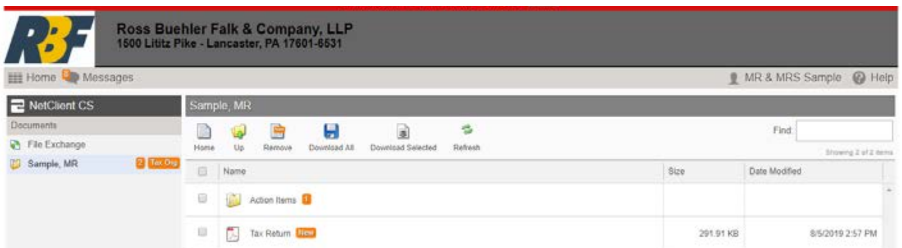
- Click ‘Send to Preparer’ if ready to send information to the preparer or ‘Save & Close’

Retrieve Tax Return and Action Items:

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



- Click on the ‘Tax Returns’ folder. Two files are in the folder – ‘Action items’ and ‘Tax Return’



- 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 (lsteinsnyder@rbfco.com) or Katrina Douglas (kdouglas@rbfco.com) 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 Multi-factor 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 (lsteinsnyder@rbfco.com) or Katrina Douglas (kdouglas@rbfco.com) 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.