BUCKNO LISICKY & COMPANY

BUCKNOLISICKY.COM

A Professional Corporation

Certified Public Accountants | Business Consultants

Before accessing your ShareFile account, be sure to verify your computer has Adobe Acrobat Reader DC installed. Visit the Client Portal page on our website, www.bucknolisicky.com, for a free download, if needed.

How to Access and Download Your Client Copies of Your Tax Returns from ShareFile:

1. Once your accountant uploads a file (for example, a tax return) to your secure designated ShareFile folder, you will receive an email notifying you that your file(s) are ready to download.

2. Open the email and there will be a link to download your file(s).

3. Click on the link to download your file(s) and you will be directed to the ShareFile website.

4. You will then be prompted to complete the final steps of setting up and creating your ShareFile account which includes:
   a. Verifying your first and last name and
   b. Creating your password

5. This password will grant you access to your ShareFile account. For additional security, all tax returns are password protected with either the taxpayer's social security number or business employer identification number, no dashes.

6. Once your account is setup, you will be directed to your folder and your files will be available for you to download and save for your records.

7. You will continue to receive all action required items including, but not limited to, copies of payment vouchers, estimated payment coupons and/or any additional forms required to be paper filed via mail.

How to Log-on to ShareFile and Navigate to Your Folder:

1. Visit our website at www.bucknolisicky.com.

2. Click on "Client Portal" in the upper right-hand corner.

3. You will be directed to the main client portal hub. In order to log-on to your previously created ShareFile account:
   a. Click on the blue "Client Portal" button in the middle of the screen.
   b. Enter your email address and password.

4. You will now have access to your ShareFile account.

5. On the left-hand side bar, click on "Folders" and "Shared Folders" to view all folders which you have access to.

6. Click on the Shared Folder which contains your copy of your tax return(s) that are available for download.

How to Download Files from ShareFile:

1. After you have logged onto ShareFile, click on “Folders” and “Shared Folders” to view all of the folders to which you have access.

2. Click on your business or personal tax return folder.

3. To download your files, you have two options:

   Option 1: Click on the small box located to the left of your file.

      i. Then click “Download” above the file.

   Option 2: Click on the file name.

      i. This will open a preview of your file.
      ii. Click “Download” on the right-hand side of your screen or by using the blue “Download” button in the middle of your screen.

4. The file will then appear in the bottom left of your screen.

5. Click on file and you will be prompted to enter a password.

6. For additional security, all tax returns are password protected with either the taxpayer’s social security number or business employer identification number, no dashes.

7. Be sure to save this file to your personal computer or print a copy for your records. Files will only be retained in the ShareFile portal for two years.

How to Upload Files to ShareFile:

1. After you have logged onto ShareFile, click on “Folders” and “Shared Folders” to view all of the folders to which you have access.

2. Click on the folder where you would like to upload a file.

3. Click on the plus sign in the blue circle on the top right of your screen.

4. A dropdown menu will appear where you can select “Upload”.

5. To locate the file you wish you upload, click on “Browse files”
   a. This will open up a directory of your files
   b. Navigate to where your file is stored
   c. Click on your file
   d. Click “Open”

6. Once you have added your file(s), click on “Upload” in the bottom left-hand corner of your screen.