

# SmartVault Instructions

*Forget your password? Go here:* <https://reedaccounting.smartvault.com/secure/Reset.aspx>

## To Upload Files

1. Click on link to SmartVault and set up username and password.
2. You will be taken to a screen that shows a Public Documents file and file under your name.
3. Click on the file with your name.
4. Click on TY18 (or the tax year that you are getting prepared).
5. Click on Client Source Documents.
6. Click on "Upload File".
7. Once you upload a file, it should show up below the upload button.
8. Please select the option to have us notified when files are uploaded or send us an email to notify us.

## To Download our Questionnaire and Agreements

1. Click on link to SmartVault and set up username and password.
2. You will be taken to a screen that shows a Public Documents file and file under your name.
3. Click on the Public Documents file.
4. Click on TY18 (or the tax year you are getting prepared).
5. Click on the icon at the right with a green arrow.

## To Access your Final Return

1. Click on link to SmartVault and set up username and password.
2. You will be taken to a screen that shows a Public Documents file and file under your name.
3. Click on the file with your name.
4. Click on TY18 (or the tax year that you are getting prepared).
5. Click on Client Tax Returns.
6. You will then be able to access and/or download your return.