



Using Our Secure Client Portal

CLIENT GUIDE

Our secure client portal is the safest way to send us your tax documents and receive your completed returns. It runs on Microsoft 365 SharePoint, and it takes only a few minutes to set up.

At a glance:

- **Private:** you have your own folder. Only you and our team can see it.
- **No password to remember:** Microsoft emails you a one-time code each time you sign in.
- **Nothing to install:** it works in your web browser on a computer, tablet, or phone.

Step 1: Request access

Contact our office and ask for portal access. Please give us the **email address you want to use**, as your folder will only open for that address.

Phone: 1-403-851-2002

We will set up your private folder and send you a link by email.

Step 2: Open your portal for the first time

1. Look for an email from Microsoft or SharePoint saying that **Rhonda S. Cockwill Professional Corp.** has shared a folder with you. Check your junk or spam folder if you don't see it.
2. Click **Open** in that email.
3. When asked, enter **the same email address** the invitation was sent to.
4. Microsoft will email you a **verification code**. Enter it on the screen. Use it right away, as codes expire after a short time.
5. Your folder opens. Bookmark the page or keep the invitation email so you can find it again.



Already have a Microsoft account? You may be asked to sign in with it instead of entering a code. Either way works, as long as it is the email address we shared the folder with.

Step 3: Upload your documents

On a computer

1. Open your portal folder.
2. Click **Upload**, then **Files**, and choose the documents from your computer.
3. Or simply drag and drop files from your computer into the folder.
4. Wait until each file finishes uploading before closing the page.

On a phone or tablet

1. Open the invitation email and tap the link to open your folder.
2. Tap + or **Upload**, then choose a file or photo.

Tips for clear documents

- **Name files clearly**, for example "2025 T4 – ABC Company" or "2025 RRSP receipt".
- **PDF is best**. Your phone's built-in scanner works well (the Notes app on iPhone, or the scan feature in Google Drive on Android).
- **Include every page**, and make sure the text is flat, well lit, and easy to read.
- **Let us know when you're done** uploading, so we can get started.

Step 4: Download documents from us

When your return or other documents are ready, we will place them in your folder and let you know.

1. Open your portal folder.
2. Click the file to view it or select it and click **Download** to save a copy.
3. Keep a copy of your completed returns for your records.



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Keeping your information safe

- **Your link only works for you.** It opens only with your email address and a code sent to that address, so please don't forward it.
- **Use a private device** when you can. If you use a shared computer, close the browser when you finish.
- **We will never ask for your password** or verification code by phone, text, or email. Never share your code with anyone.
- **Not sure an email is really from us?** Don't click anything. Call our office at 1-403-851-2002 to check.
- **When our work together ends,** we remove your access to the portal.



Troubleshooting

If this happens...	Try this
I never got the invitation email	Check your junk or spam folder. If it isn't there, call us to confirm your email address and we'll send it again.
My verification code doesn't work	Codes expire quickly. Request a new code and use the most recent one only.
It says I need permission or can't find my folder	You may be signed in with a different email or Microsoft account. Sign out, or open the link in a private browser window, and use the email address we shared the folder with.
My upload failed or is stuck	Check your internet connection and try again. Very large files, such as long phone videos, may not upload. Send PDFs or photos instead.
I changed my email address	Let us know. We'll share your folder with your new address.

Prefer paper? You are always welcome to drop off your documents at our office during regular office hours.

Need help?

We're happy to walk you through any step.

Phone: 1-403-851-2002

Email: info@rcockwillcga.com

Online: Book an appointment at www.rcockwillcga.com