

Lang Allan has a portal for clients and third parties to access and share secure documents with our firm. **We must assign you a portal** before any of this can take place. Use of the portal is subject to current terms and conditions, of which you must agree to electronically before you begin.

- 1- To send us sensitive files electronically, please upload [through the portal](#), via file exchange.
 - a. Your portal may have your personal folder (for personal returns we may prepare) and multiple folders for each company you are related to.
 - b. File exchange is the feature which you use to send us secure documents. You do not have a “file exchange” for you personally or per company you are affiliated with. File exchange also does not have a “per year” folder.
 - c. You simply upload documents via file exchange and we gain access and move them into our system/network.
- 2- You must have the document(s) on your computer/network in order to attach the files to the portal.
- 3- Login to your portal.
 - a. Select the file exchange icon (top left corner), then a folder to upload documents to and then upload the documents to us.
 - i. If your portal does not have a file exchange folder in the top left, please [click here to send us a quick email](#), we will then turn this feature on for you before you can continue.
 - ii. We will be notified when/where you upload documents, so simply select any folder and attach/upload files.
 - iii. Select the “upload” icon.
 - iv. Select “add files” icon (select all the files you wish to upload to us – you can select all at once and/or add to the one upload).
 - v. Select “start upload” icon.
 1. This feature can work with simply drag and drop technology, or you may search for files and upload. After you select the folder, then select the “upload” icon.
 2. Depending on the number and size of files you are sending, it may take some time, **please wait for the files to upload before closing your browser.**
 - vi. Logout of your portal – select your name top right corner, logout.

****** if you are returning e-file authorization forms, please DO NOT send back via your tax-organizer please use the file exchange instructions above******