## 1 Login

From the Boulder CPA Group website *(bouldercpagroup.com),* click the **Login** button on the home page, or on any page. It will take you to a secure login screen. Enter your Username and Password, and click the **Log In** button. Your Username and Password should have been generated after you received our *welcome email* with a link to Register your account.

*(Please contact us if you did not receive this email)*

Also note the **Portal FAQ** link on the top Portal menu for more info.

## 2 Portal Home Page

Once logged in, you will see the Portal home page. On the right side of the page are helpful Links, Tasks, and News related to our office. There may also be information about your Tax Organizer.

## 3 Navigation

The left side is the navigation pane. The two main areas you will be using are at the top:
File Exchange
TaxOrg (your Tax Organizer).
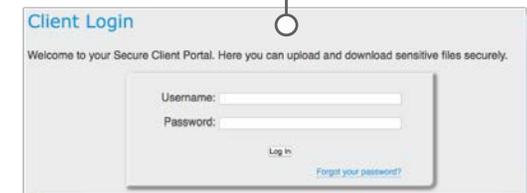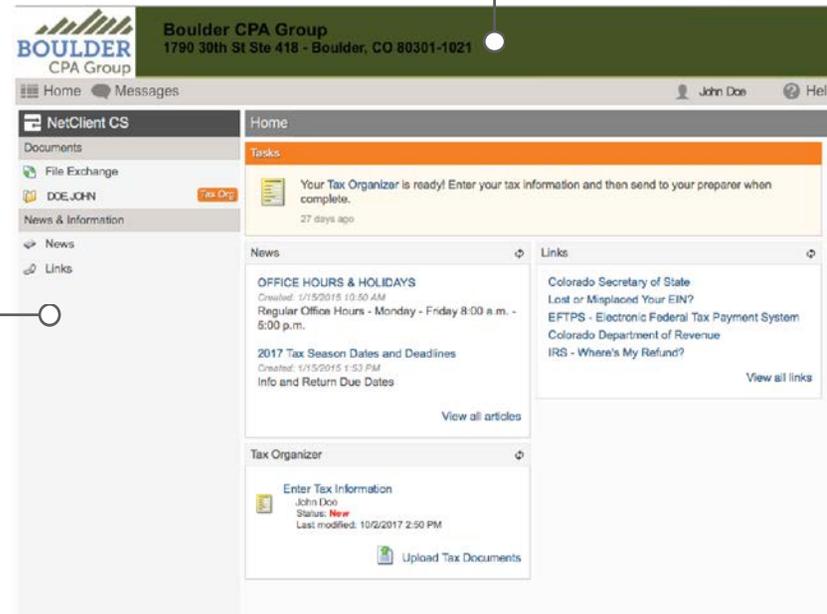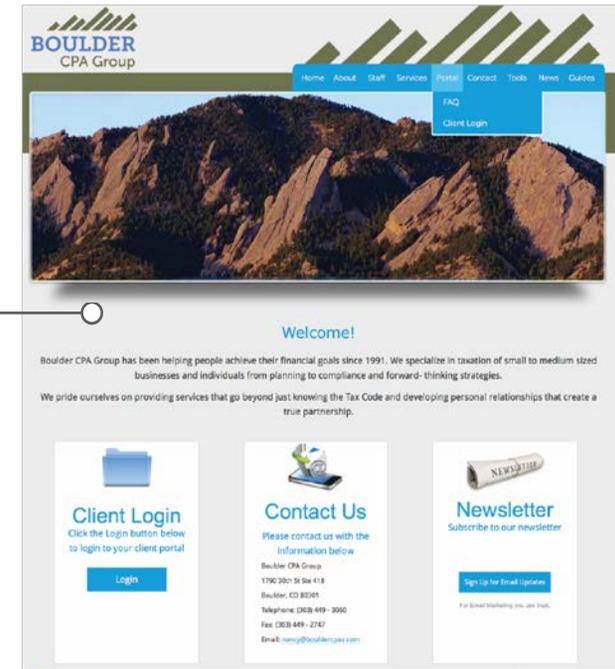
**4 File Exchange**

The File Exchange feature allows you and Boulder CPA Group to easily and securely upload and download files. Click one of the folders on the right hand side to view and upload files. To transfer files to BCPAG, click the "Information to CPA" folder and click the **Upload** icon. A new window will appear. Click the **Add files** button and browse your computer files to find the correct file(s). You may select multiple files at one time as well as drag and drop files onto the open window. Once you have selected all files, click the **Start upload** button. Your Tax Manager will automatically get a notification of your uploaded files.
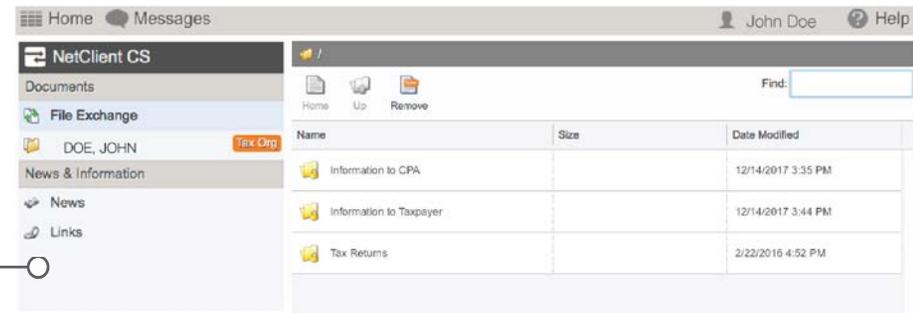
**5 Tax Organizer**

The Organizer allows you to enter information for Boulder CPA Group in an efficient manner. If we completed your prior year tax returns, that information will be pre-populated on the form, allowing you to easily see changes and detect discrepancies or missed deductions. Click the **Save & Close** button to save your information.
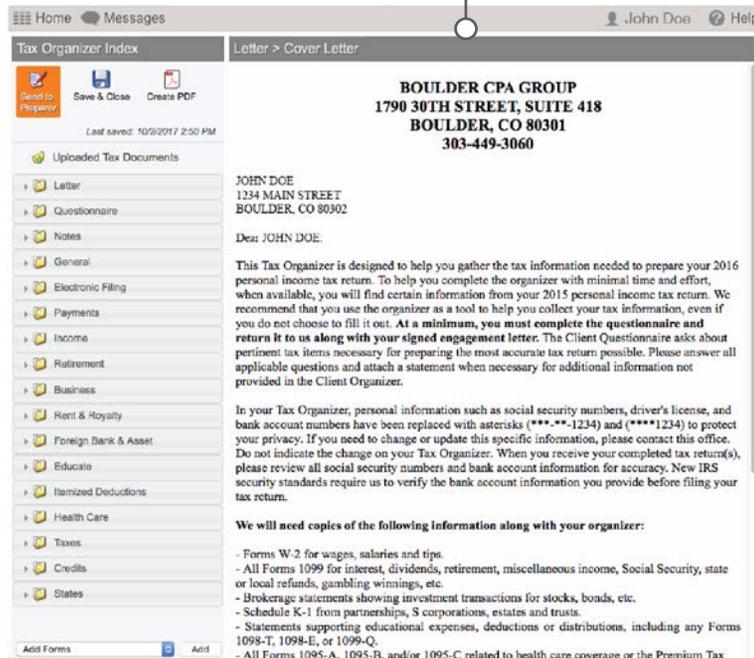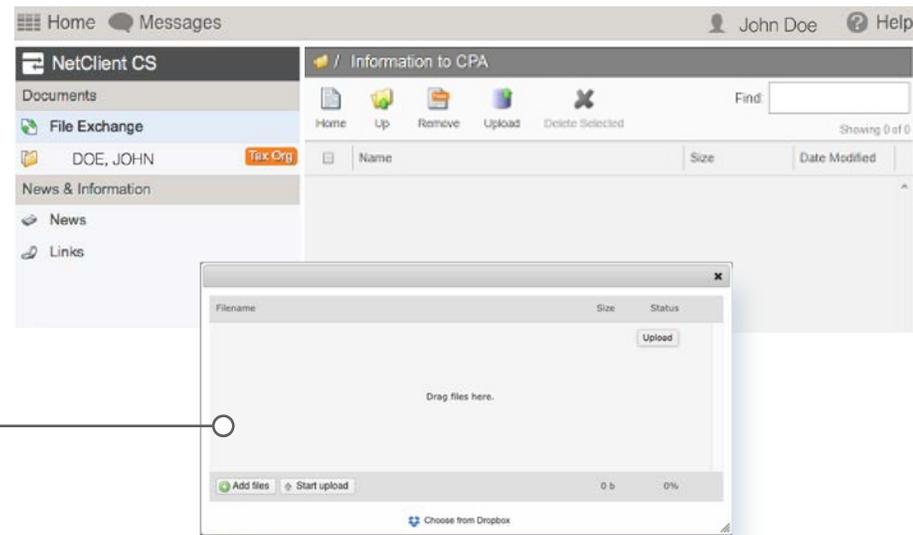
**6 Send to Preparer**

Once finished uploading files and filling out the Organizer, click the **Send to Preparer** button. This closes the Organizer and allows your Tax Manager to view your material.

*Please note: once you select the Send to Preparer button, you will not be able to modify the organizer.*

After sending the Organizer, if you have more documents to send to your tax preparer, please use File Exchange (see #4).

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