FREQUENTLY ASKED QUESTIONS

What is a portal?

A portal is a private doorway to information. NetClient CS portals are password-protected, secure areas on the Internet accessible to you via our website.

Is NetClient CS secure?

Absolutely! Your software and data are in the most secure location available. The data center takes every precaution to guarantee the safety and integrity of your data.

How do I register?

You should have received an email that contains a link to register for the portal. We can resend if needed, so please let us know!

You will enter a Login ID & Password of your choosing. You will also be prompted to enter the last 4 digits of the social security number of the person listed as "Taxpayer" on your income tax return.

Do I need a password?

Yes. Once you sign up to use NetClient CS, you'll create your own private ID and password.

Forget your password? Click on the "forgot your password" link on the log-in screen.

Forget your User ID? Contact our office.

What will be in my portal?

During the first phase of our portal rollout you will see copies of your signed and unsigned engagement letters, tax extensions, tax organizers, copies of your income tax returns, and invoices.

For clients who receive our write-up services, you will eventually have access to your financial statements, and other business filings available as well.
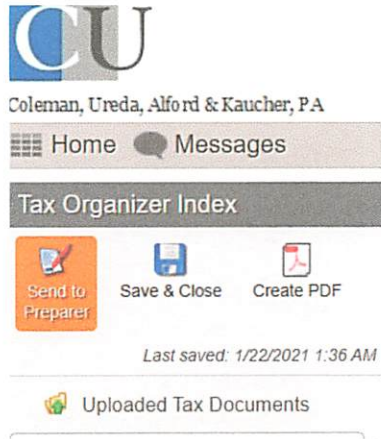
Also, in a future roll-out, you'll be able to upload your monthly documents through the portal. It will be similar to sending through Hightail, except it will remain in your portal (for a time) to refer back to.

How will I know if a document is in my portal?

An email will be sent to the email address listed on your account. You can view/change this by clicking on your name in the upper right of the screen and selecting "Edit Account."

I can no longer enter data into my tax organizer. What should I do?

As you work on entering data into the organizer, you can click "Save & Close" as many times as needed. However, if you select "Send to Preparer" you will no longer be able to add to your organizer or upload tax documents. If that happens you can Create PDF, print the organizer and add the rest of your information. After completion you can then mail or upload to our Hightail.

Coleman, Ureda, Alford & Kaucher, P.A

Home   Messages

Tax Organizer Index

Send to Preparer   Save & Close   Create PDF

Last saved: 1/22/2021 1:36 AM

Uploaded Tax Documents

How do I access my portal moving forward?

1. Visit our website at www.cu-cpa.com.
2. Click on the Client Login tab on the main page.

   Also check out our "Blog" & "Covid-19 Info" pages for helpful information!

3. Follow the prompt to access the portal page.
4. Login using your User ID and password.