

If you have selected the PDF via Sharefile option on your engagement letter, please read on to learn how your tax return will be delivered and the additional information we will need from you.

We are implementing a new **Sharefile Portal** for client use. In the past, you may have received emails from us with a link to securely view or download files from Sharefile. Because these links expire, we are implementing a portal for your tax returns to be uploaded to. This will allow you to access your tax return for a longer period of time. All files in our portal will be accessible for a 3 year period. You will also be able to return your signed 8879 electronically if you wish by using the portal. Before we can activate your account we need you to fill out the attached Sharefile Portal Consent Form. You may also fill out the form online at www.wyocpa.com/sharefileform/. When your account is setup you will receive a welcome email from Sharefile and we will upload your tax return when it is completed. You will receive email notifications when we upload documents into your portal. Please feel free to call our office with any questions or concerns you have.

Frequently Asked Questions:

What if you have multiple accounts with us?

If you have multiple accounts with us, you will only have one Sharefile login to access all your accounts. There will be a separate folder within Sharefile for each account you have.

How do you know who has access to your portal account?

We will setup users based on the Sharefile Portal Consent Form that you will provide us. These users will be added to the folder and have access to your documents until you revoke their access. You may request a User Access Report at any time by contacting our office.

Can you add someone outside your company to your portal account?

We cannot add people outside your company or third-party providers such as a banker or lawyer to your portal account. If you would like to send them a tax return you will have to put in a separate request with our office or you have the ability to forward the electronic files yourself from the portal.

Do you need to save or download tax return for your files?

Although using the Sharefile portal allows you access to your tax return for longer periods of time, you should download and retain the electronic copy for your own records. Your access to files in the portal will be for 3 years. We will retain a copy of your files on our servers in accordance with our standard retention policy which is 10 years for current clients.