How to use the **CLIENTS AREA**

ustaxconsultants.es
ustaxconsultants.pt

INDEX

1

INTRODUCTION

U.S. Tax Consultants, aiming to enhance our clients' experience with our firm, has developed a specific Clients Area available from our website.

Through it, you can access information and procedures to ensure that the requested work is carried out more efficiently and quickly. Additionally, each client has access to the activity history, among other functionalities.

It is a user-friendly and "dynamic" tool that is optimized and updated based on needs and new technologies.

Note that it is a highly secure encrypted system that protects all the information contained within it.

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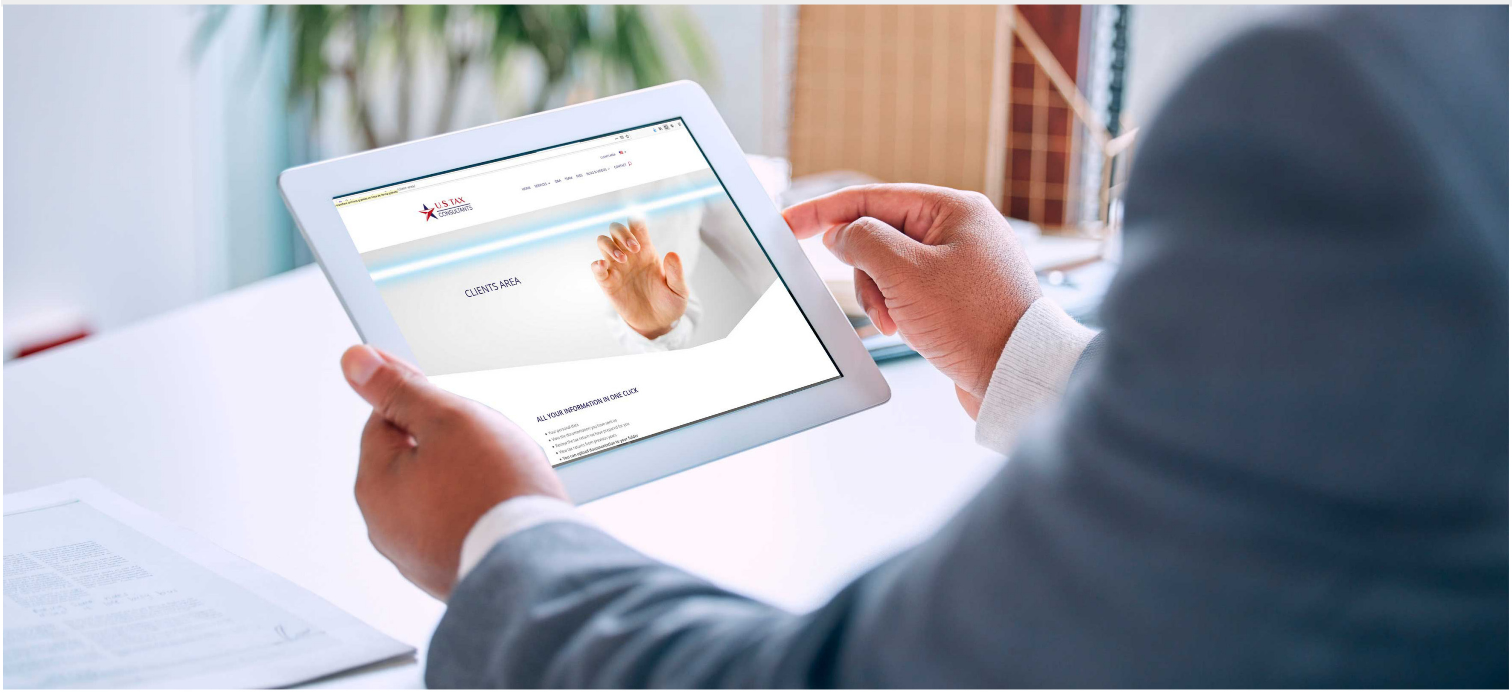
WHAT IS THE CLIENTS AREA FOR?

FUNCTIONALITIES:

- The client can view the personal information we have and request changes.
- The client can upload documentation for us to prepare tax returns.
- View ongoing work.
- Find out which U.S. Tax Consultants professional is responsible for their work.
- Pay outstanding invoices.
- Access and download the history of returns/work.
- We can inform the client of pending documentation for the requested work.
- We can inform the client of work requested in previous years that has not been requested this year yet.



FEATURES:

· *Accessible from our websites:*

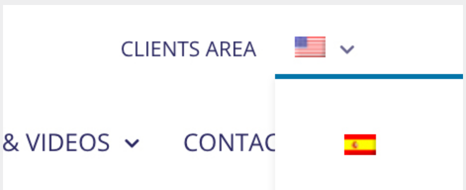
www.ustaxconsultants.es (Spain)

www.ustaxconsultants.pt (Portugal)

Top right corner of the Home page.

· *Multi-language*

You can change the language at any time in the top right corner of the web: English / Español / Português



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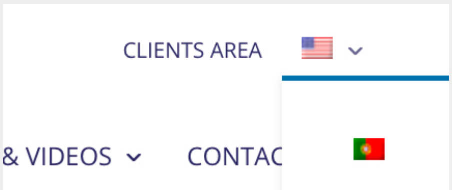

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· *High security*

Encrypted system / secure file transfer.

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WHO CAN ACCESS?

A - New Clients: Can access the “Clients Area” and register.

B - Third Parties: Can access only to upload documentation for a registered client.

C - Registered Clients: Can enjoy all the functionalities of the “Clients Area”.

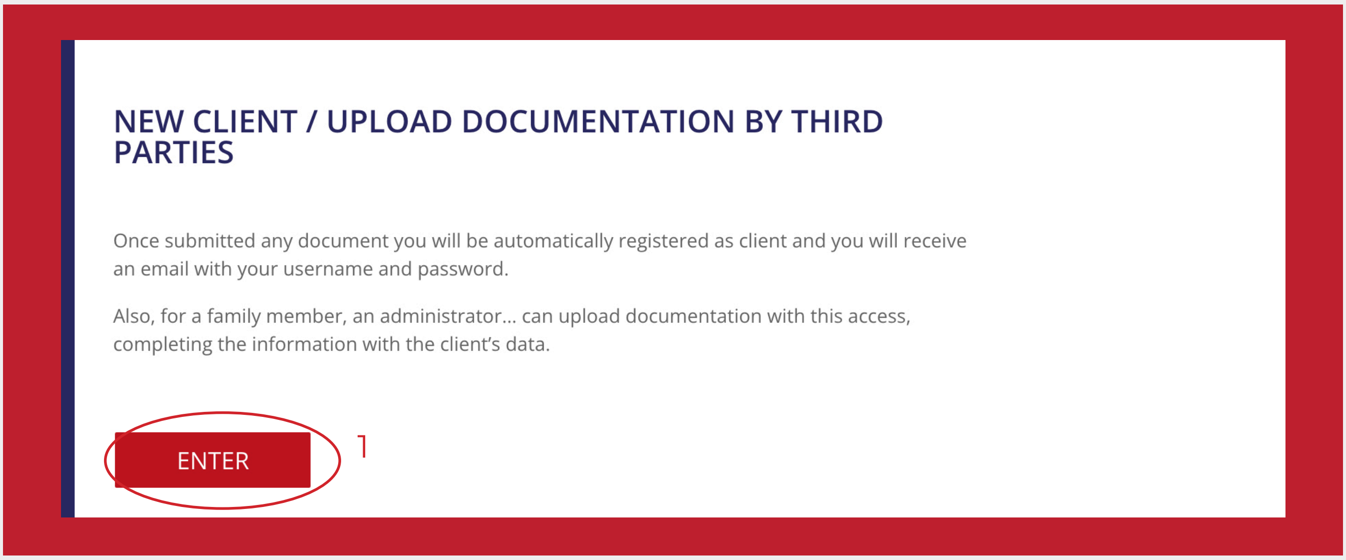
A NEW CLIENTS

HOW CAN I REGISTER FOR THE FIRST TIME?

You will receive your "username" and "password" immediately after uploading documentation to the platform for the first time.

- **Steps to follow**

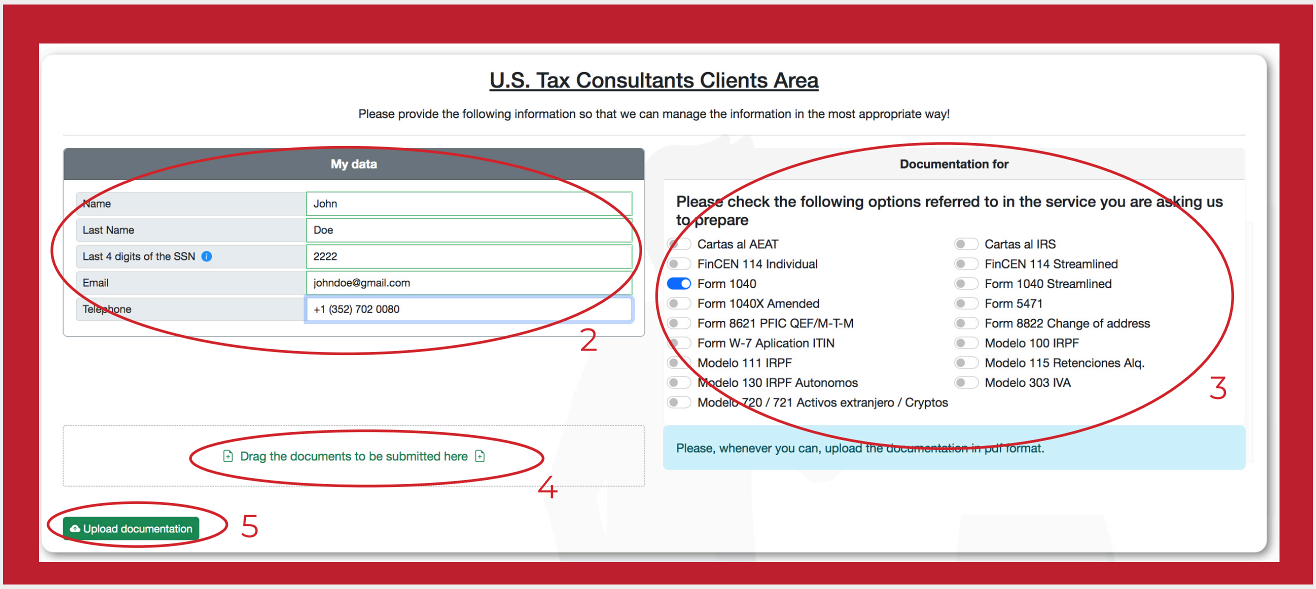
Click the red button at the bottom labeled ENTER (1)



Fill in the requested personal data:

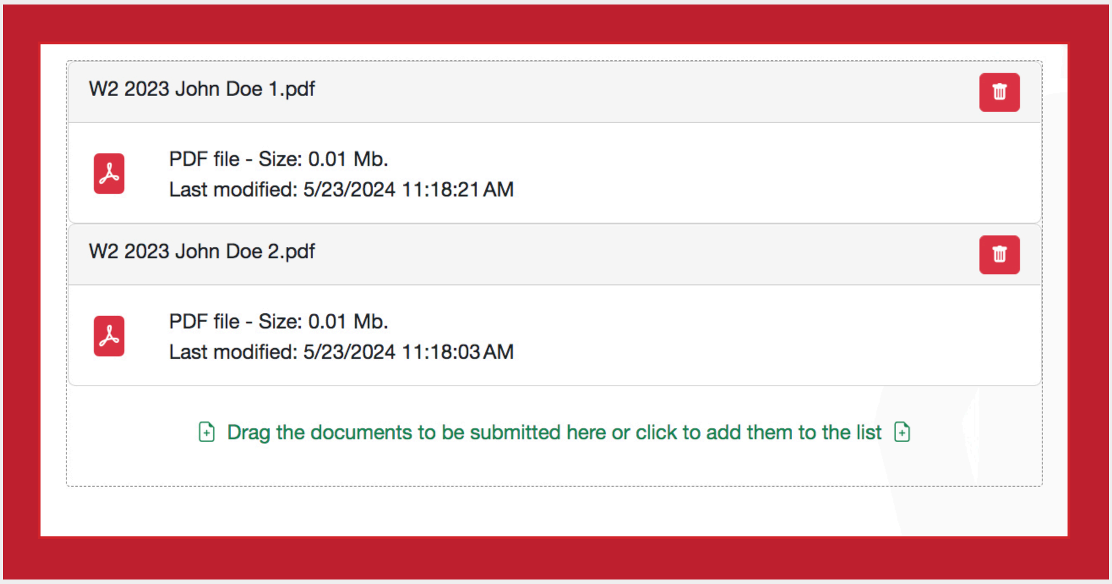
- Your last name, the last 4 digits of your SSN, and your email. If you do not have an SSN, include the last 4 digits of your DNI/NIE. (2)
- Select the service to be performed (optional) (3)
- Drag one or more documents to the designated area. You can also click on that area and select the files you want to upload from the File Explorer (4)

- Click “Upload Documentation” (5)

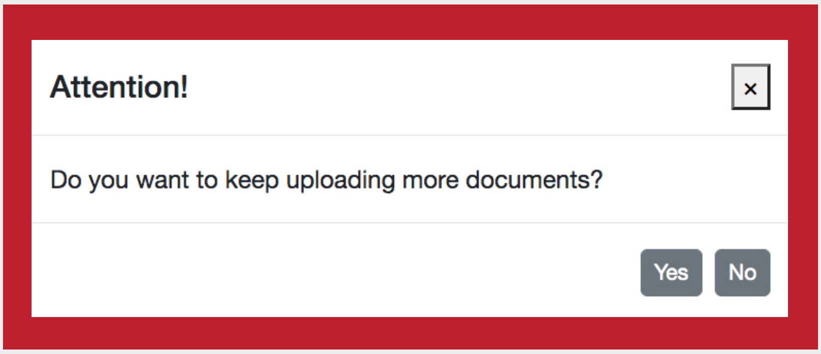


You can upload multiple documents at once by dragging them to the designated area.

The system will display the files you want to upload.



After uploading the documents, the system will ask if you want to continue uploading with this box.



Upon completion, it confirms the successful upload of all documents in a window similar to this.

All types of files can be uploaded, but only PDFs will be visible later. U.S. Tax Consultants can access all types of files.

You will then receive two emails:

1. A personalized email confirming the receipt of documentation with the following text:

   "We have received your documentation correctly through our secure encrypted transfer system on our server. We will review the received documentation shortly and contact you. The documentation for <your name> has been successfully uploaded. From now on, you will be constantly informed of the work process through our Tracking Model System (TMS). At each step, you will receive an email informing you of the status of your return. There is a specific Tracking Model System for each service offered. Here is the one used for the 1040 form."

2. An email with your username (always your email) and password.

From this moment, you can access the Clients Area as a registered client with all functionalities.

B THIRD PARTIES FOR UPLOADING DOCUMENTATION

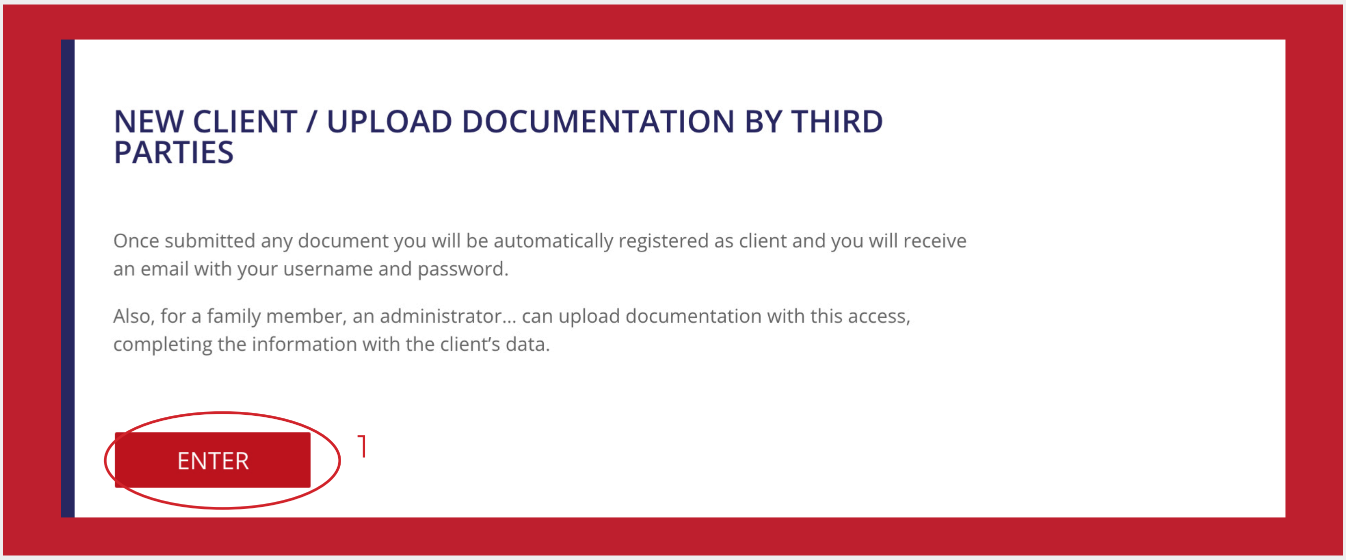
CAN THIRD PARTIES UPLOAD DOCUMENTATION FOR A CLIENT?

Yes. Third parties (advisors, managers, family members...) can access the “Clients Area” without a password exclusively to upload documentation.

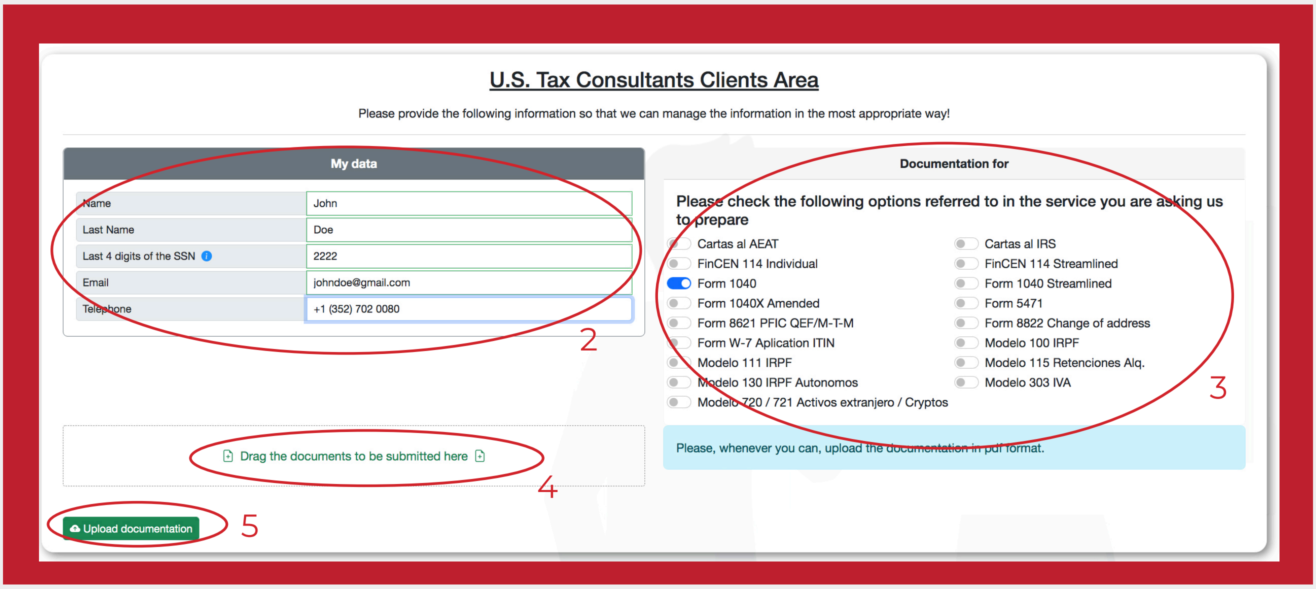
They must know the client’s name, the last 4 digits of their SSN or DNI, and their email to be recognized by the system if they are registered.

Steps to follow

- lick the red button at the bottom labeled ENTER (1)



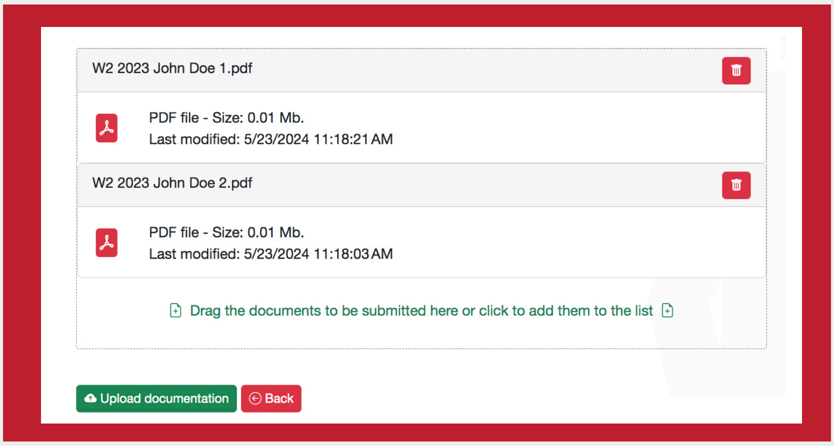
- Fill in the client's personal data requested (2)



In this case, fill in the last name and the last 4 digits of the SSN or DNI.

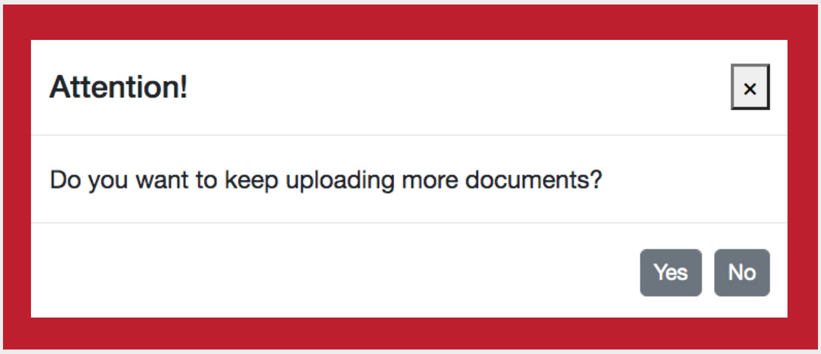
- Select the service to be performed on the right side (optional) (3)
- Drag one or more documents to the designated area. You can also click on that area and select the files you want to upload from the File Explorer (4)
- Upload documentation (5)

WHAT TYPES OF FILES CAN I UPLOAD?



Any type of file can be uploaded, but only PDFs will be visible. The system will display the files you want to upload.

After uploading the documents, the system will ask if you want to continue uploading with this box.

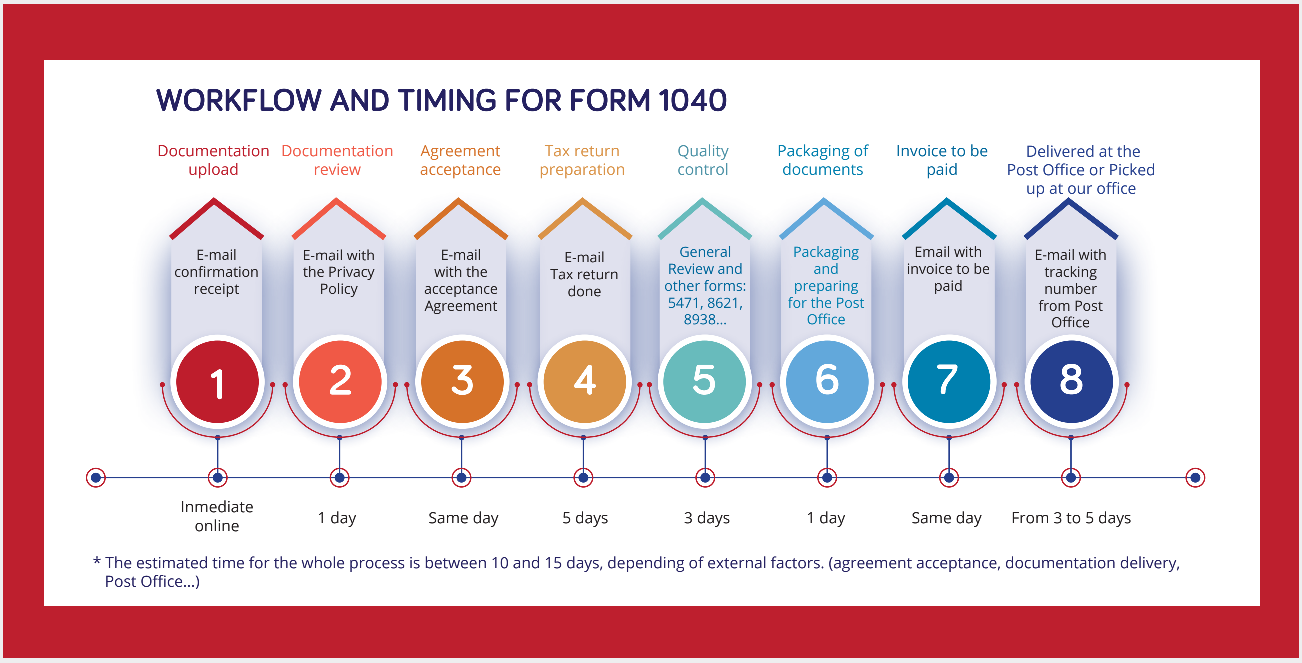


Upon completion, it confirms the successful upload of all documents in a window similar to this.

The registered client will then receive an email:

> A personalized email confirming the receipt of documentation with the following text:
>
> *We have received your documentation correctly through our secure encrypted transfer system on our server. We will review the received documentation shortly and contact you. The documentation for <your name> has been successfully uploaded. From now on, you will be constantly informed of the work process through our Tracking Model System (TMS). At each step, you will receive an email informing you of the status of your return.*

Here is the Tracking Model System (TMS) for the 1040 form."



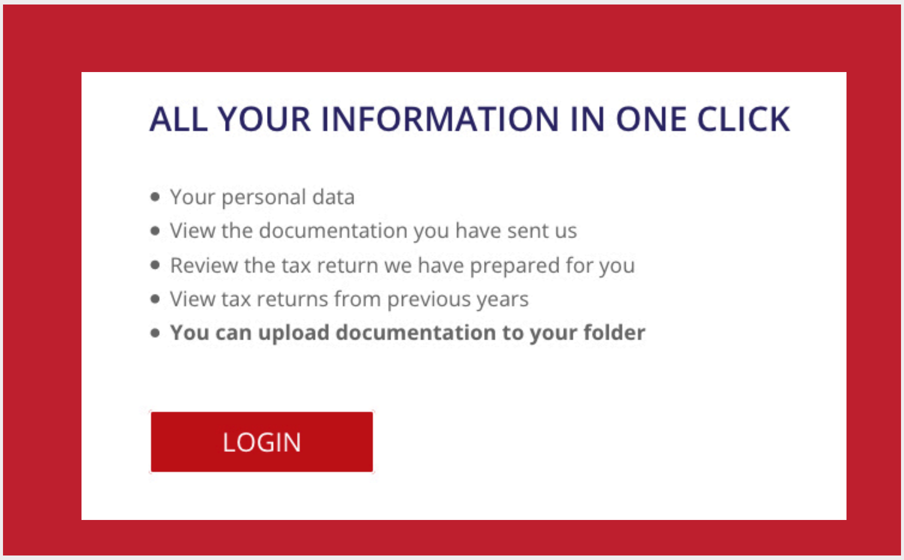
Third parties can only upload information using this procedure and do not have access to other functionalities.

C REGISTERED CLIENTS

HOW DO I ACCESS THE CLIENTS AREA?

Steps to follow

- Click the red “CLIENTS AREA” button (1)

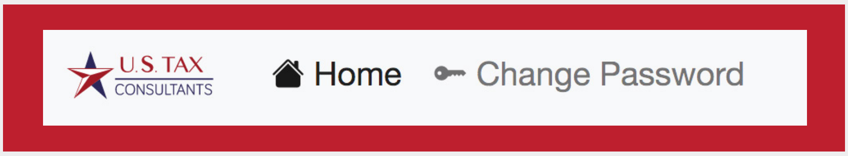


- Fill in your username (email you use with us)
- Fill in your password.

HOW CAN I CHANGE MY PASSWORD?

If you forgot your password, click “Forgot my password”.

This option is also available at the top left of the Clients Area at all times.



The password can be changed at any time. You need the username (email registered with us) and the password the system sends you in an email.

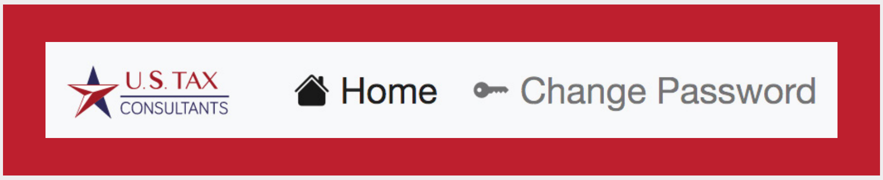
Before accessing, you can click “Forgot your password?” and it will ask for the email you use with us.

- Click “Send verification code” to your email.
- Enter the received code and “verify the code”.
- Click “continue” and it will ask you to enter your new password.
- The password must contain at least 3 of the following elements:
  - a lowercase letter
  - an uppercase letter
  - a number
  - a symbol

and should be changed periodically.

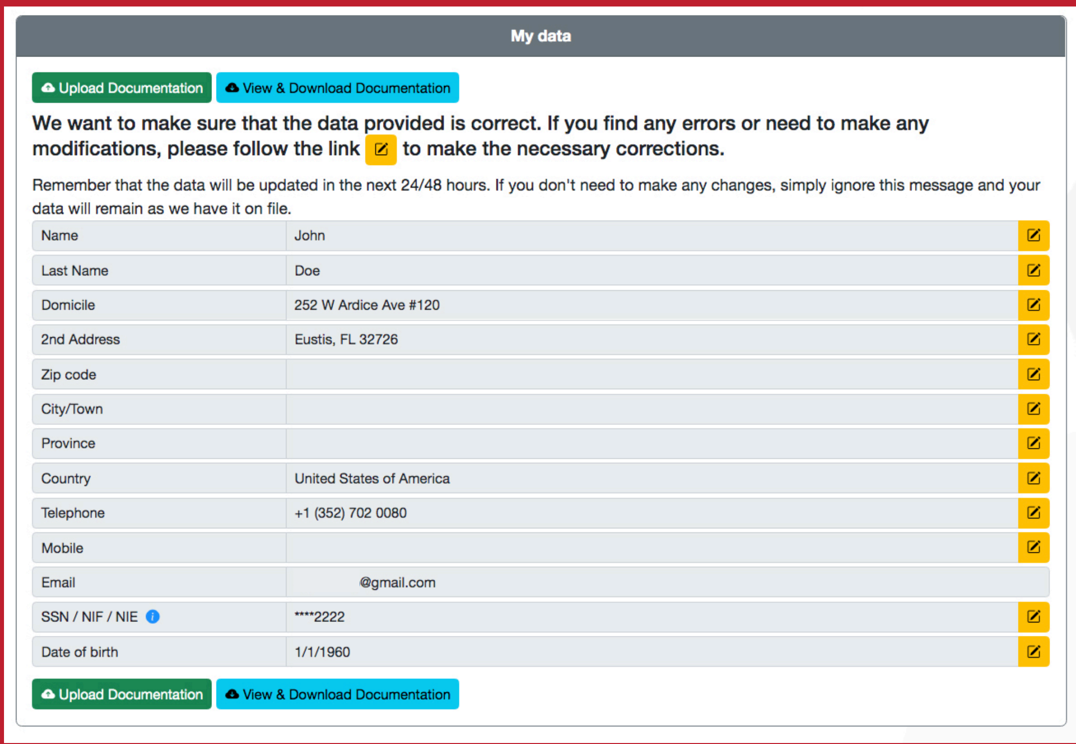
Remember that your name and the button to go to the home screen will always be in the top right corner.

In the top right corner, you can change the language at any time and also have the logout button.



CAN I UPDATE MY PERSONAL INFORMATION?

Yes, from the Clients Area home page:



On the left side, you will see the personal data we have for you, which can be modified by clicking on the yellow buttons.

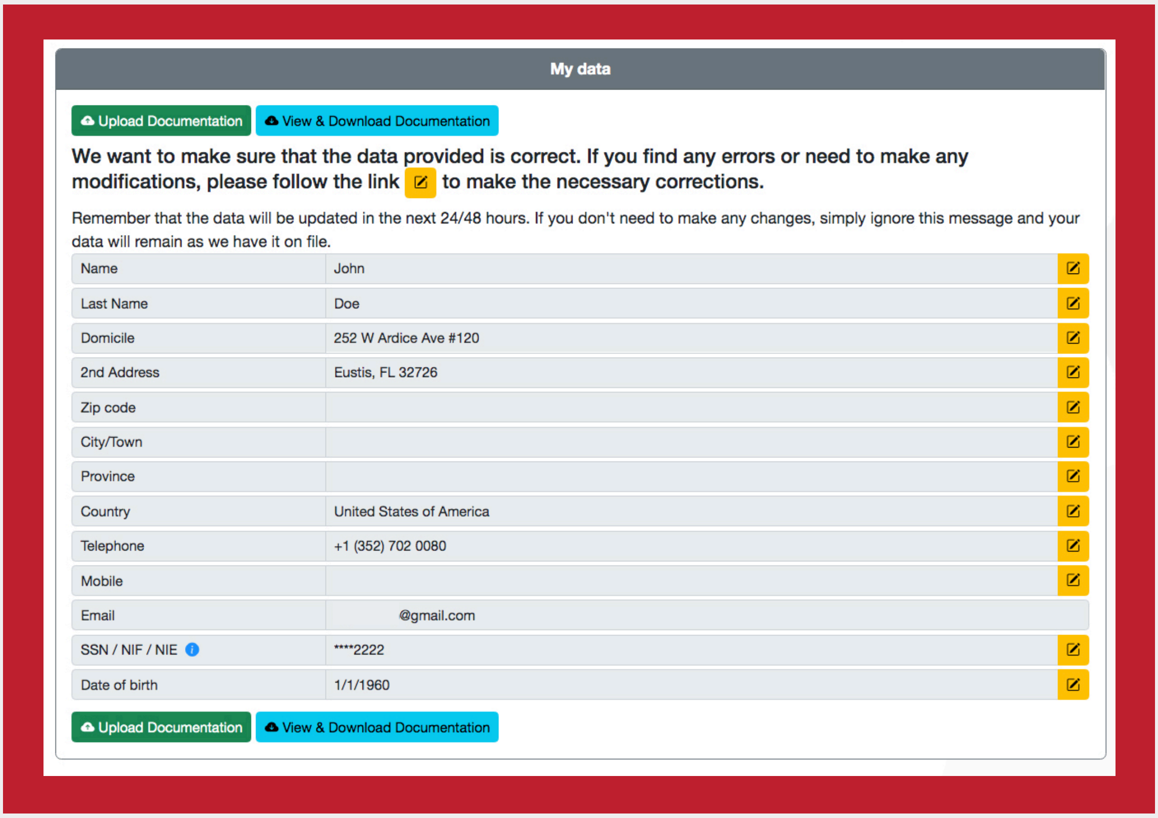
“We want to ensure that the provided data is correct. If you find any errors or need to make changes, please follow the link to make the necessary corrections.

Remember that the data will be updated within the next 24/48 hours. If you do not need to make any changes, simply ignore the text, and your data will remain as registered.”

CAN I UPLOAD DOCUMENTATION?

Yes. This is the process:

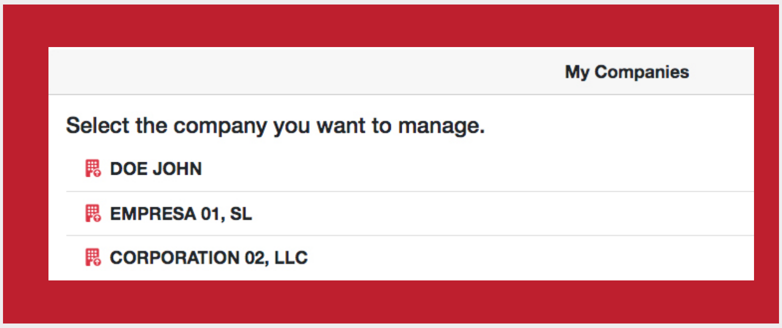
- Log in with your username and password to the home screen, where your personal data appears on the left panel, and the companies you manage appear on the right panel.



- Click the green "Upload Documentation" button for personal documentation for individual returns. (1)

IS THE DOCUMENTATION OF THE COMPANY I MANAGE STORED SEPARATELY?

Yes. But you must first access the relevant company through the right panel.



Note that at the top of the panel it says whether it is “company” or “your data”. Companies may have a different address from your personal one.

Sometimes your name may appear as a company in capital letters, and here you will have all the information about your economic activities as a freelancer or rental of any property in your name.

In any case, you can upload the documentation by clicking the green button, as described in the “CAN I UPLOAD DOCUMENTATION?” section.

WHAT TYPES OF FILES CAN I UPLOAD?

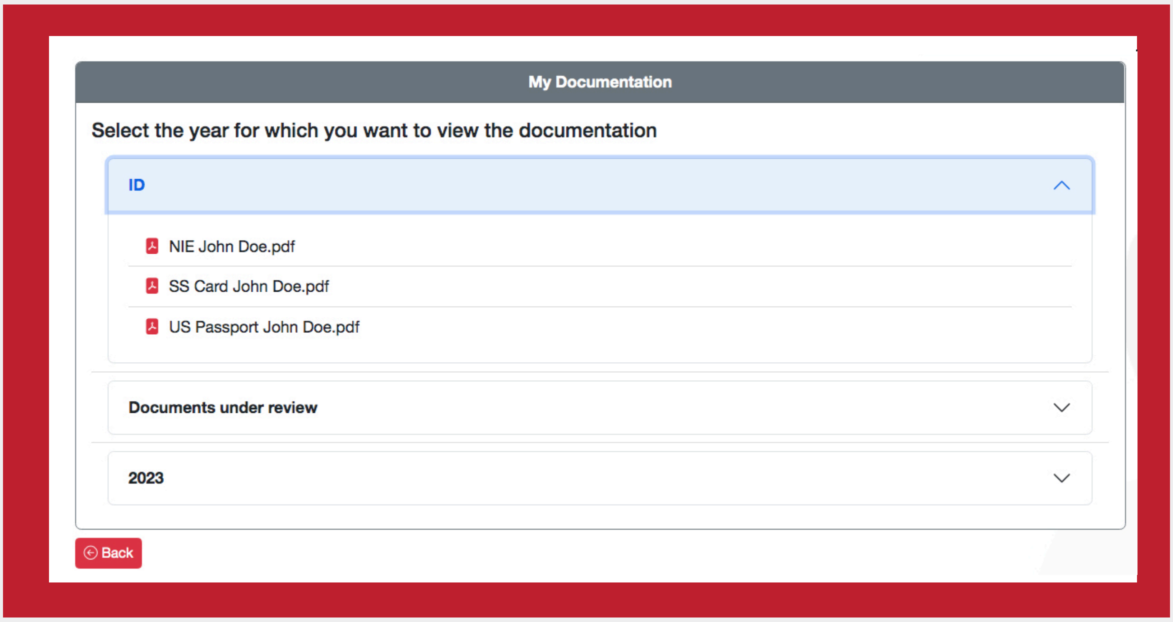
Any type of file can be uploaded, preferably unprotected and, if possible, in PDF. The Clients Area will only display PDFs, although we can access all files you upload. Multiple documents can be uploaded at once by dragging them to the designated area. You can also click on that area and search for the documents you need to upload from your files.

CAN I VIEW THE DOCUMENTATION IN THE CLIENTS AREA?

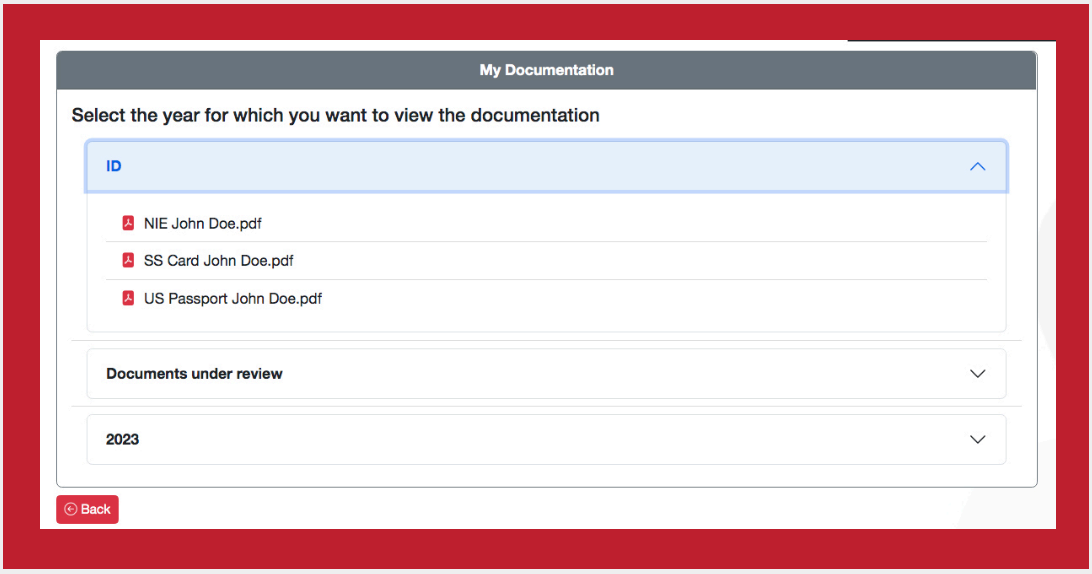
Yes. Simply click the blue "View and Download Documentation" button.

The documentation will appear on the left panel, organized by year.

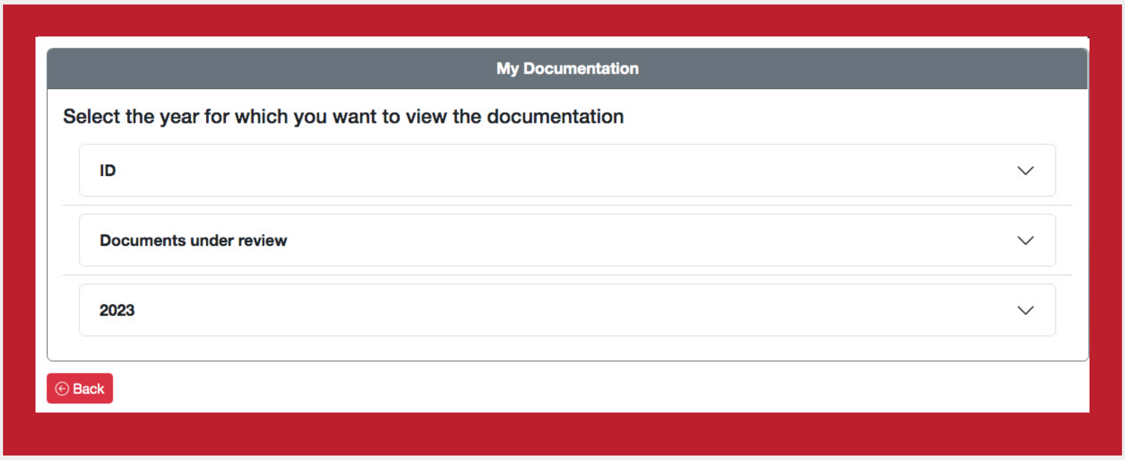
The first folder is always the ID folder containing basic identity documents.



You can also access the documentation for the latest fiscal year, in this example, 2023.



Sometimes there will be a folder called “DOCUMENTS UNDER REVIEW” where newly uploaded files are automatically stored and are yet to be reviewed.



CAN I VIEW MY HISTORY AND DOWNLOAD DOCUMENTS?

Yes. Follow these steps.

On the screen with the grey box indicating “My data”, click the **blue** “Download Documentation” **button**.

Downloading documents allows you to view and download PDFs.

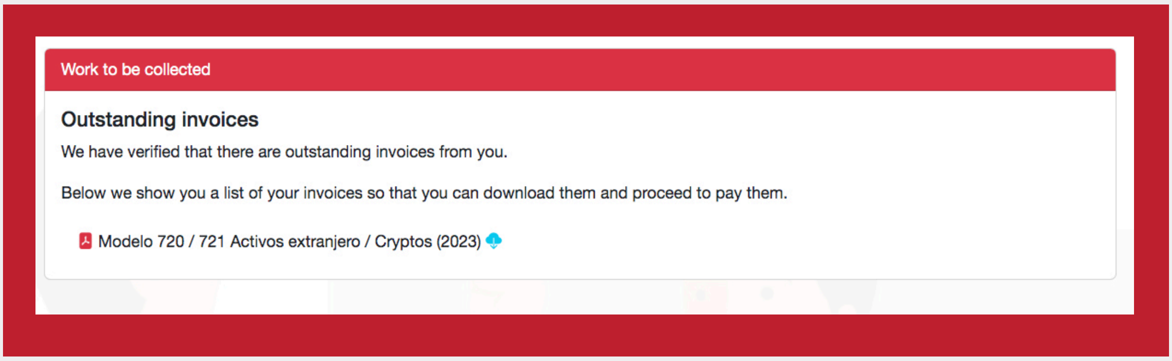
After clicking on download documents:

On the left side, personal PDFs appear classified by year. Clicking on each year will expand it and show the documents for that year. Double-clicking on each document will download it automatically to your computer.

You can download any document by double-clicking on it, but when you try to download a document...

CAN I VIEW/DOWNLOAD DOCUMENTATION IF I HAVE AN OUTSTANDING INVOICE?

If there is an outstanding invoice, the system will not allow you to download, displaying the following box with the message:



Outstanding Invoices

We have detected that there are unpaid invoices. Below is a list of your invoices so you can download and pay them. Once the invoices are paid, you will be able to download any document.

You can download the outstanding invoices to pay them via bank transfer or with a VISA card.

Once payments are made, document downloads will be unlocked immediately.

In the invoice, at the bottom half, the following text appears:

Payment of the proforma invoice will be due upon receipt. The final invoice will be sent automatically once payment has been made. For your convenience, you may use any of the following methods:
El pago de esta factura proforma deberá realizarse a la recepción de la misma. La factura definitiva se remitirá automáticamente una vez realizado el pago. Para su comodidad, puede utilizar cualquiera de las siguientes formas de pago:
O pagamento desta fatura pró-forma deverá ser feito após o recebimento da mesma. A fatura final será enviada automaticamente assim que o pagamento for efetuado. Para sua comodidade, você pode utilizar qualquer um dos seguintes métodos de pagamento:

By credit card: Banco Sabadell will immediately send you an email for the amount due, to request payment click **here**.
Por tarjeta de crédito: *el Banco Sabadell le enviará inmediatamente un correo electrónico por el importe de esta factura, solicite su pago haciendo clic* ***aquí****.*
Por cartão de crédito: *O Banco Sabadell enviar-lhe-á imediatamente um e-mail por valor desta fatura, solicite seu pagamento clicando* ***aquí****.*

By Bank transfer to the following account / por trasferencia bancaria a la cuenta siguiente / por transferência bancária para a seguinte conta:
New Media Lab, S.L.
Banco Sabadell
ES03 0081 7305 1400 0241 7953
BIC: BSABESBB

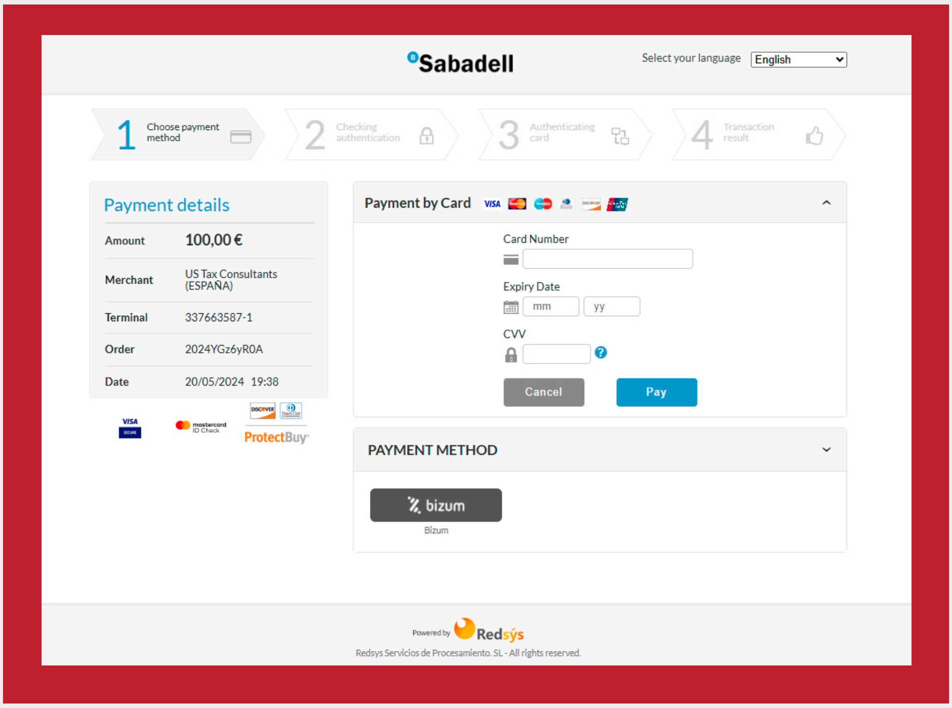
By clicking **"here"**, Banco de Sabadell will send you an email where you can access their platform and securely pay the invoice with a credit/debit card or by Bizum.

The process is confirmed on your screen with this message:

Your request for payment by credit card has been correctly sent to Banco de Sabadell, which is currently sending you an email to make the payment directly with your bank.
Su solicitud de pago con tarjeta de crédito ha sido correctamente enviada al Banco de Sabadell, que le está enviando en estos momentos un correo electrónico para poder realizar el pago directamente con su banco.

In your email inbox, you will see a message similar to this:

Finally, by clicking on the link in the email, you will reach the payment screen:



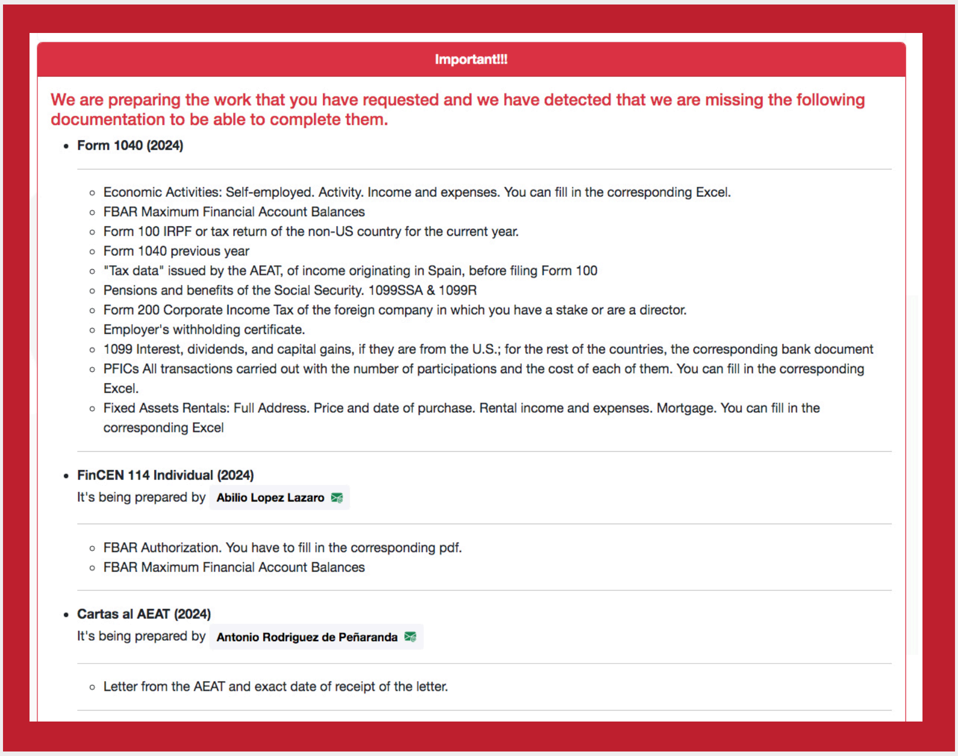
CAN I FIND OUT IF I HAVE PENDING DOCUMENTATION TO UPLOAD?

Yes. On the right panel, below the list of companies, there may be three types of information blocks, each with a different colored box: red, green, and blue.

The first is the **red box**, containing **important** information: a list of missing documentation needed to provide the requested service.

The name of the person preparing the work also appears, with an email access icon to the right of the name, so you can easily ask any questions you may have about the documentation.

Without the pending documentation, we cannot complete the work.



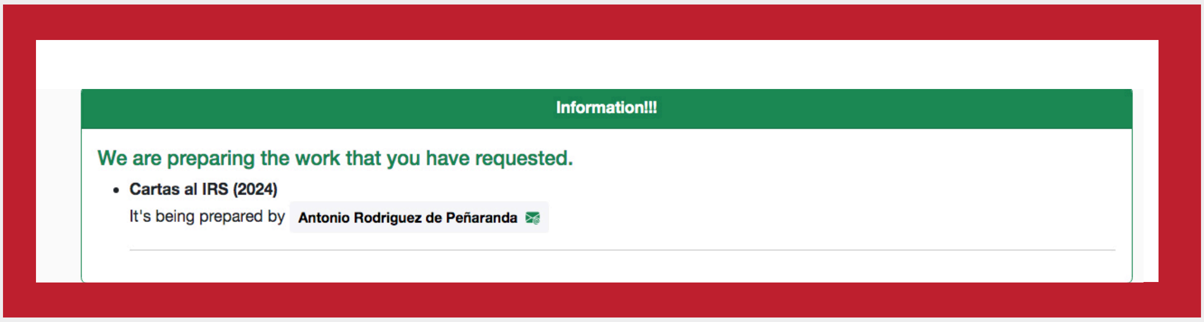
It is not necessary to upload documentation we already have: you can check what we have in the blue box on the left "view and download documentation".

CAN I FIND OUT WHICH PROFESSIONAL IS IN CHARGE OF MY WORK?

Yes. In the same red box of pending documentation, the name of the US Tax Consultants team professional responsible for the work will appear.

CAN I FIND OUT WHAT WORK IS IN PROGRESS?

We have incorporated **a green box** below the red one, which contains **information**: a list of the work we are preparing and the name of the person doing it. This means we have all the necessary information and will confirm the completion of the work shortly.



CAN I FIND OUT IF I HAVE FORGOTTEN TO SUBMIT ANY FORMS THIS YEAR?

In a **blue box** below the green one, you will find **a notice** informing you of forms submitted in previous years that you have not yet requested this year. You have the option to confirm whether you want us to prepare the service or cancel it for this year.

"We have noted that you have requested the following services in previous years. Please confirm if you are interested in having us prepare them again this year by uploading the necessary documentation."

Confirm: I want it prepared / I do not want it prepared.

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