



• To access your Tax Organizer:

- (1) click on ClientFlow to get to your tax folder(s)
- (2) click on the folder you want
- (3) click on the document labeled 'ORGANIZER' (this is a PDF document of your organizer and will need to be printed and completed)

1

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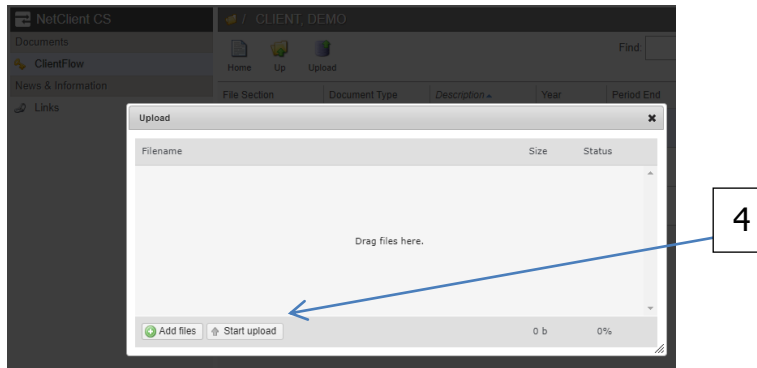
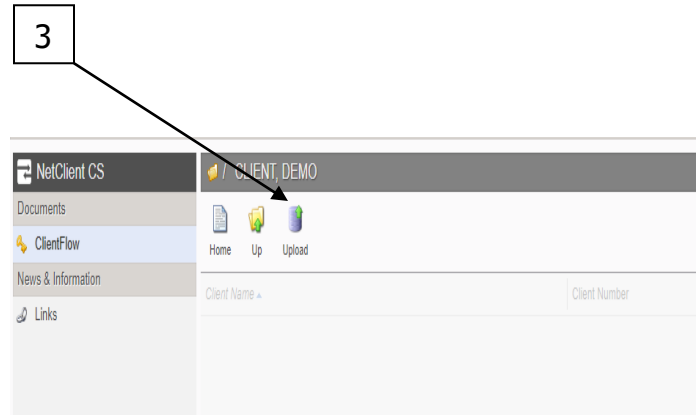
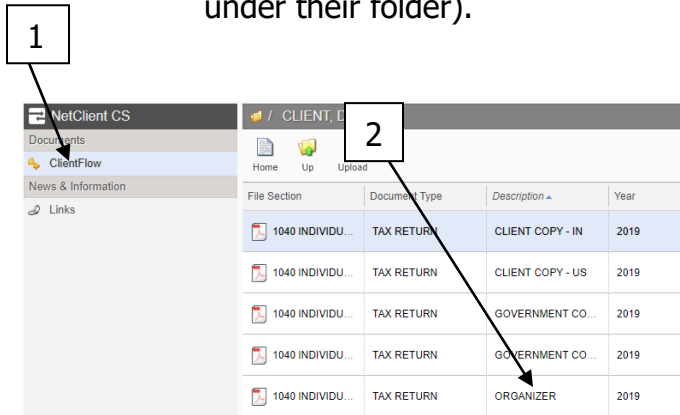
Client Name	Client Number
CLIENT, DEMO	DEMO
TEST	TEST

File Section	Document Type	Description	Year
1040 INDIVIDU...	TAX RETURN	CLIENT COPY - IN	2019
1040 INDIVIDU...	TAX RETURN	CLIENT COPY - US	2019
1040 INDIVIDU...	TAX RETURN	GOVERNMENT CO...	2019
1040 INDIVIDU...	TAX RETURN	GOVERNMENT CO...	2019
1040 INDIVIDU...	TAX RETURN	ORGANIZER	2019

You may also have a Bank Verification form to sign and return. Both the organizer and, if applicable, the Bank Verification form need to be printed, completed, signed, and returned to Huth Thompson by uploading back to the portal. If you prefer, you can mail them to Huth Thompson LLP, PO Box 970, Lafayette IN 47902-0970

- To upload your Tax Organizer:

- (1) click on ClientFlow to get to your tax folder(s)
- (2) click on the folder you want
 - Locate the file(s) on your computer and click and drag them to the upload screen.
- (3) click the upload icon
 - Once the files have been uploaded, you will be taken back to the previous screen and all the uploaded documents will be listed.
- (4) click Start Upload (you can upload multiple files at one time)
 - Once the files have been uploaded, you will be taken back to the previous screen and all the uploaded documents will be listed.
- It is IMPORTANT that you upload documents to their specific folder only (i.e. put your personal documents under your personal folder and your child's documents under their folder).



If you need portal assistance, please contact Sarah Bowlen at (765) 428-5028 or email sbowlen@huththompson.com.