

Introducing Client Xchange for Keenan Tax Service

I think you will find the secure website to be user-friendly. I'm including a few screen shots for your reference.

You will receive a message like the following (check your spam/junk folder):

Jeff Keenan has sent you an invitation.



noreply@mytaxdocs.com

Today, 6:53 PM

You



Reply | v



Download Save to OneDrive - Personal

Jeff Keenan has sent you an invitation.

Our team is using this secure online file share portal to collaborate and share tax documents. Please confirm your account with the link below.


Thanks,

Jeff Keenan

[Click Here](#) to create an account and get started.

Click the "Click Here" link and it will take you to the Login Page.





Easily & securely exchange tax information with your tax professional. Complete the form on the right to activate your account & get started.

Basic Information

First Name Last Name

Personal Account Login

Username


Password Confirm Password

I agree to the Terms of Service.

[Get Started ▶](#)

LOGIN

At the Login Page, create a Username and Password and Agree to the Terms. Then click "Get Started". This will take you to the File Cabinet which will look like this:



Navigation

FILES AND FOLDERS

- File Cabinet

FILE CABINET

SORT FILES: ALPHA | DATE

SEARCH FILES

- Home
- Completed Return
- Files for Tax Preparation

UPLOAD DOCUMENTS

The File Cabinet is where you can upload documents to the folder “Files for Tax Preparation”. To upload files, click on “Files for Tax Preparation”. This will open the folder. You can then add files by clicking “Add File” in the upper right corner of the screen. You can upload any file type: PDF, Word document, Photo, Spreadsheet, etc.

When I complete your tax return, a copy of it, along with any instructions, will be in the “Completed Return” folder. You will get an email when the file is added to this folder.

NAVIGATION

The “Navigation” feature (on the left side of the page) allows you to:

- Select Files and Folders.
- Update your profile. This will allow you to update your password or even upload a photo.
- See the Activity.

You might want to bookmark the website (make it as a favorite). The link is also available on my website at www.keenntax.com under the page “Send and Receive Your Tax Documents”.