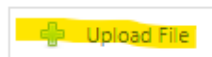
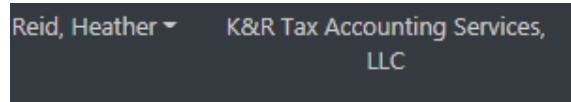
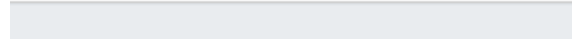


Zip Folder and Office Tools Instructions

We have established a new procedure for this year's tax season. We understand a change in procedure creates questions and confusion. You have most likely received some tax documents in a physical paper format and some in a digital PDF format. The previous instructions discussed creating a single file to upload to our portal. The goal we are trying to achieve is to receive all your documents at one time. When we receive documents in multiple uploads to the portal at various times, it runs the risk of not all your documents being received.

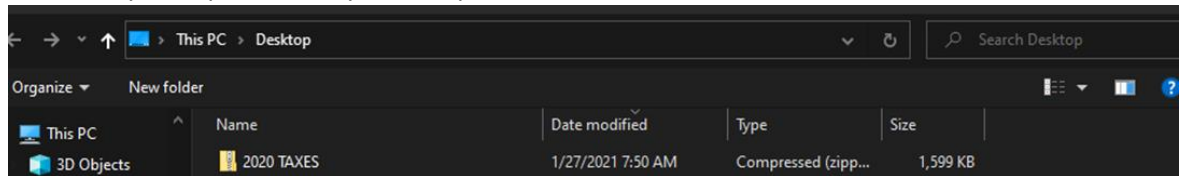
1. On your desktop right click and select NEW > Compressed Zippered File
 - a. Right click on the folder and rename the Zippered File "2020 TAXES"
2. Physical documents will need to be scanned in one sitting to create a single PDF. Add this PDF to your new Zippered File Folder.
 - a. If you do not have a scanner, you can download a free app (Adobe Scan) that will convert jpegs (phone pictures) into one pdf.
<https://acrobat.adobe.com/us/en/mobile/scanner-app.html>
3. Digital copies you received by email or a website login will need to be downloaded to your personal computer and saved to your Zippered File folder.
4. You will then ensure all your 2020 tax documents are contained in the single computer file folder.
 - a. Ensure the file names indicate what they contain.
 - i. Example: "2020 W2 J Smith"
5. You will then navigate to the portal: <https://www.officetoolsportal.com/portal/login>
6. From the log in, select upload file button.



- a. 
7. You will then select a folder.
 - a. 2020 / Tax Organizer
 - b. Send to Kelly
 - c. Select Choose File

d.

8. You will then find your Zip folder on your computer.



a.

9. Double click the upload the single Zippered File Folder from your computer that contains ALL your tax documents.

10. An Office Tools pop-up will look like this:

a.

11. Click Submit

12. K&R will receive an email form the portal that you have submitted your 2020 tax items.