

Mark Schwanbeck Tax Preparation

Mark Schwanbeck, EA

Enrolled Agent admitted to practice before the IRS

How to Upload Files to your ShareFile Folders

Gather all your tax documents

After you have gathered all tax papers, scan and save them to your computer.

You can also take pictures of the pages with your mobile phone.

If this is your first time logging in

Open the link your received in your welcome email. You will be asked to check your identity information and create a password.

If you have previously logged in

In your browser, open this link: <https://mstaxprep.sharefile.com>. You can also use the client login button on the Mark Schwanbeck Tax Preparation website: <https://mstaxprep.com>.

You will need your email address and password to access ShareFile. If you forgot your password, click on the **Forgot Password?** link.

Copy files to ShareFile from a web browser

In ShareFile, click on Shared Folder, Your Tax Return Folder, and then click on 2018 Tax Return folder. You should see this screen:

Click on the Blue + Button to open the upload screen.

On the upload screen, either drag and drop your files from Windows Explorer or click on the Browse Files link to navigate to the correct folder to upload your documents.

Copy files to ShareFile from your phone

To upload documents on your phone, you can open ShareFile in the browser or download the ShareFile app from the Google or Apple app stores.

Please call or email me if you have any questions.

