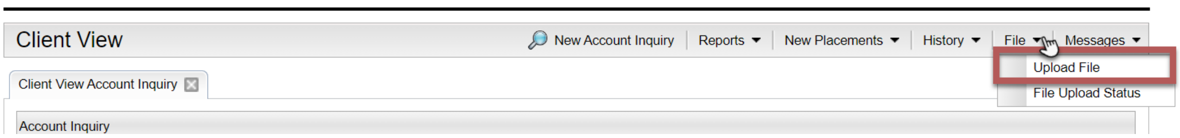
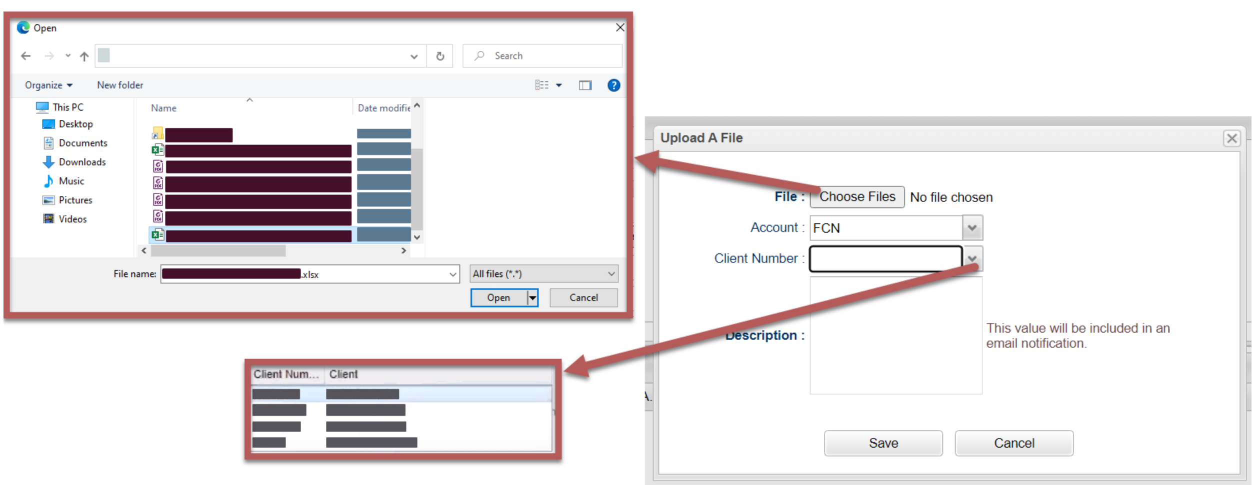
Sending/Uploading Client Files

- Log into the portal.
- Go to the File tab on the top menu bar.
- Select the dropdown arrow, and then select Upload File.



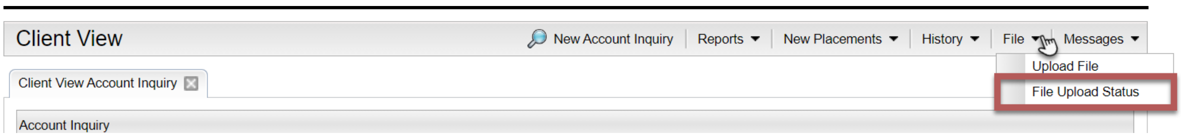
- It will open a new “Upload A File” box.
- Complete the pop-up window.
    - Select Choose Files
        - Find the file you want to upload, click the file, and click open.
    - Account should be filled in as FCN.
    - Click the dropdown arrow beside Client Number
        - If you know which client code you want the file to be listed under, select the appropriate client code.
        - If you do not know which client code you want the file to be listed under, this is an optional field, so you do not have to choose any.
    - In the Description field, add any notes that will help our team decipher what you are sending to us.
        - Example – File upload; Itemized statement



- Click Save, and the file will be sent to us.

Checking File Upload Status

- Log into the portal.
- Go to the File tab on the top menu bar.
- Select the dropdown arrow, and then select File Upload Status.



- It will open a new “Uploaded Files” tab.
- Complete the Uploaded Files Search Form.
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