

Client Portal FAQs

How do I access my Client Organizer or Client Questionnaire?

Starting in 2020, our Client Organizer will be replaced by a simpler and more user-friendly Client Questionnaire. These will be e-mailed to you **mid-December via Constant Contact**, unless you have requested that we mail you a paper copy.

When you receive the e-mail with the fillable Client Questionnaire, download it to your computer or tablet before you begin filling it out.

Once you have completed the Client Questionnaire, save your changes, and include it with your tax documents when you provide them to your preparer.

If you would like a full copy of your Client Organizer, if you would like either the Client Organizer or Client Questionnaire mailed to you or resent to you at any time, please contact our office at 910-256-9995.

How do I upload documents using Share Safe?

Share Safe is a convenient and secure way to share files with your tax preparer without having to remember a username and password.

Scan/save your documents to your computer.

Go to earney.net

Click **Client Login** at the upper part of website.

Click the first option in the dropdown – Upload Share Safe.

To the left, click Upload Now.

Enter your e-mail address, Name, and the Secure Code (this is case sensitive).

Click Send file to: Earney & Company, ShareSafe.

For the Subject, include what documents you are uploading.

For the Message, write a brief description of what documents you are uploading.

Click Add Files and chose the file(s) from your computer.

Click Open.

Once you have selected all the files you want to upload, click Send.

How do I upload documents on my portal?

Go to earney.net

Click Client Login at the upper part of website.

Click the Client Login button in the drop down.

Click Login to the left.

Enter your login information.

Click Log In.

Your username will be your e-mail address.

If you forgot your password, click the "Forgot Password?" button below.

Once you are logged in:

You will see a button that says Upload.

Click Add Files and chose the file(s) from your computer.

Click Open.

Once you have selected all the files you want to upload, click Upload All.

How do I find my tax return(s) on my portal?

Go to earney.net

Click Client Login at the upper part of website.

Click the Client Login button in the drop down.

Click Login to the left.

Enter your login information.

Click Log In.

Your username will be your e-mail address.

If you forgot your password, click the "Forgot Password?" button below.

Once you are logged in:

You will see a folder that says Tax Returns.

Click the tax return folder and click the return that you want to access.

A separate window or tab in your browser will appear with the return you clicked on. You may save and/or print from this screen.

To save right click on the screen and click Save As.

To print right click on the screen and click Print.

Can I pay my bill on the Earney & Company website?

Go to [earney.net.com](http://earney.net)

You will not need to log in to your portal to pay your invoice.

Click the Pay button in the upper right-hand corner.

Select your payment option and click Continue.

- If you chose to pay by credit card you will be charged a 3% convenience fee.
- If you chose to pay via electronic funds transfer no additional fees will be charged.
- If your invoice is \$2,000 or more, you may set up a payment plan.

When asked to enter your Client ID type your first and last name or the name of the business you are paying for.

When asked to enter the Invoice Number(s)/Engagement Info* you can enter the numbers on your invoice OR type your first and last name or the name of the business you are paying for.

Enter the amount you would like to pay.

Click Continue.

Enter your billing information and click Pay Now.

You may also mail in a check payable to Earney & Company, L.L.P. to our office address: 710 Military Cutoff Rd, Ste 250, Wilmington, NC 28405.

Where can I find my payment vouchers and/or estimated payment vouchers?

Starting in October 2020, when your tax returns are complete, you will be contacted by our office informing you that we have your payment vouchers printed and at our front desk for you, or that they have been sent to you securely via SafeSend.

If the files have been sent to you via SafeSend you will be able to access them at any time using the original link that was e-mailed to you.

If you need your payment vouchers resent please contact our office at 910-256-9995 and we can print them out for you and have them available for pick up at our front desk, mail them to your home address, or we can resend them to you via SafeSend.