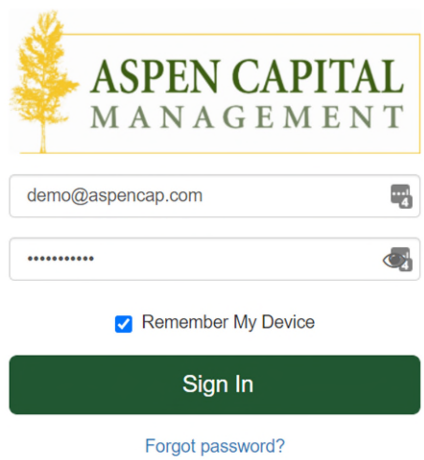
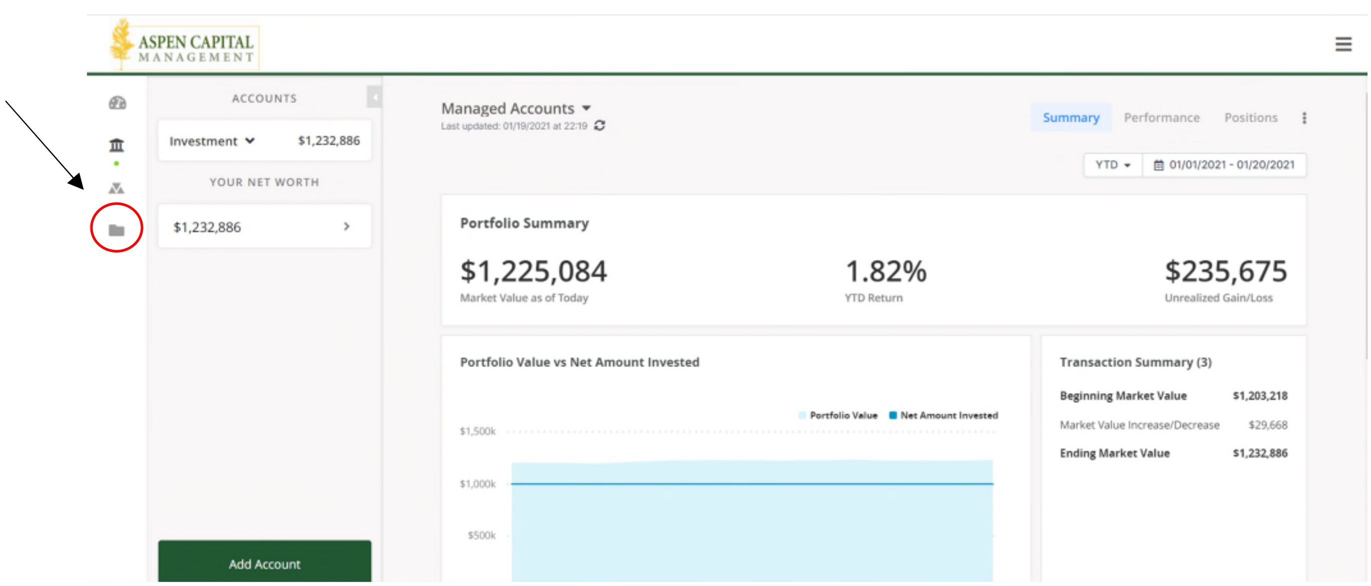
How to Upload Documents to the Client Portal

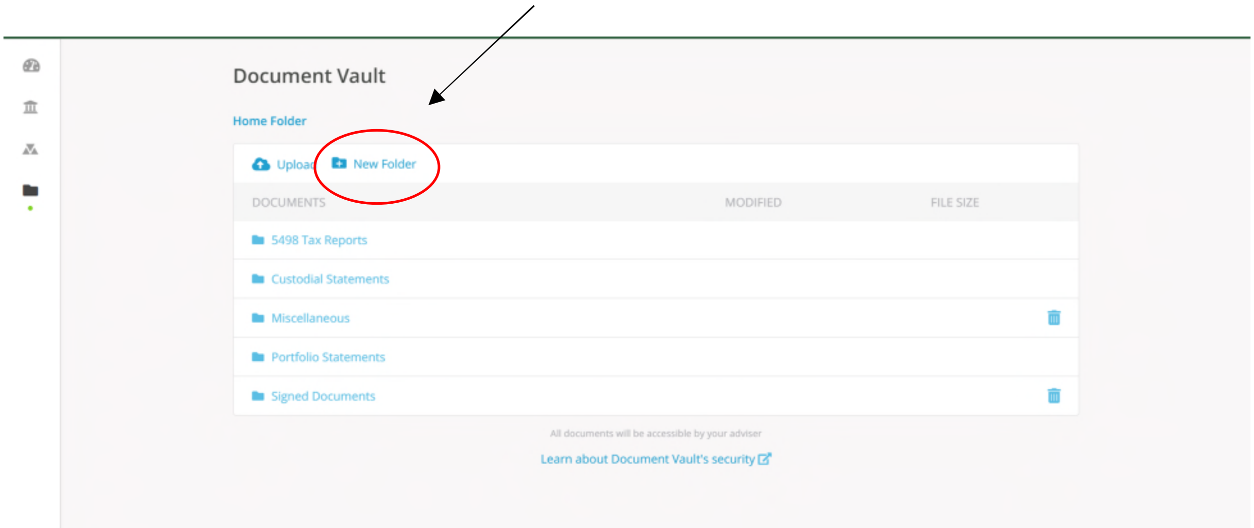
1. Log into the client portal with your username and password.



2. From the portal homepage, click on the folder icon on the left side of the screen to access your document vault:



3. Within the document vault, choose the pre-populated folder you would like to upload your file to, or if none of the folders apply to your file, create a new folder by clicking the “New Folder” button.



4. Once you have navigated to the correct folder you wish to upload your file to, click on the cloud icon that says “Upload” to upload your file.