

UHY HAINES NORTON PORTAL

STEP BY STEP INSTRUCTIONS

BENEFITS TO YOU

- ✓ Access your relevant documents 24/7
- ✓ Better security than email
- ✓ Easily transfer files to us – no need to deliver your accounting data file or scanned documents to our office, simply upload from your location
- ✓ Ability to sign documents electronically and have the signed document automatically sent back to us

ACCESSING THE PORTAL FOR THE FIRST TIME

- You will be directed to our webpage where you can request access to the UHY Haines Norton Portal.
- Once you have submitted your information, expect a phone call from one of our friendly staff members to run through your requirements with you.
- You will then receive an email with a link to the portal for you to create your own password (*Please note:* passwords must contain at least one capital letter and one number and be at least 8 characters in length).
- Once you have created a password you will be redirected to the UHY Haines Norton Portal login page.
- Enter your email address and password to access the site.

ACCESSING DOCUMENTS

- If you have access to multiple entities the documents will be filed under each entity
- Select the entity you wish to work with by dropping down the search box



- There is also a facility to save the documents under certain filters. We have set up standard filters (financial years) but you can create your own filters by selecting Filters – Create Filter.

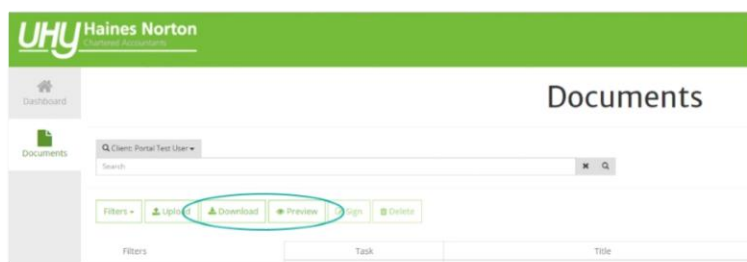


WHEN WE UPLOAD A FILE FOR YOU

- You will receive a notification via email with a link to the UHY Haines Norton Portal
- Click the link and enter your login details
- Access your documents and download as needed

By selecting a file you can choose to:

- Preview - this will open the file in the website to enable viewing.
- Downloading - this will download the file to your computer, the actions after download will depend on the browser that you are using



SIGNING A DOCUMENT

- The portal enables the electronic signing of documents, either for a single person or for multiple signatories.
- If a document has been uploaded for you to sign, you will see the words Sign or Secure Sign appear in the task column next to the document name.

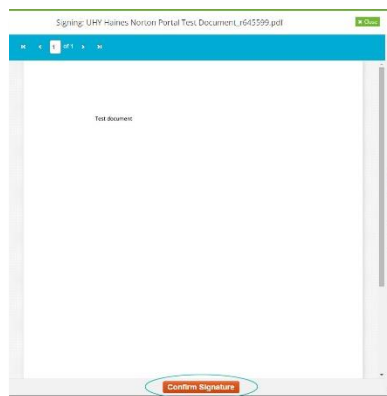


CLICK TO SIGN

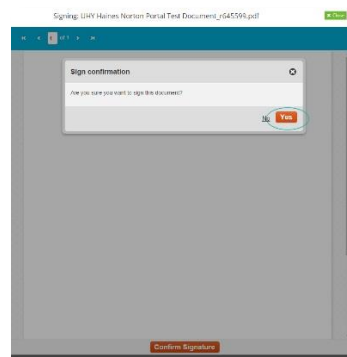
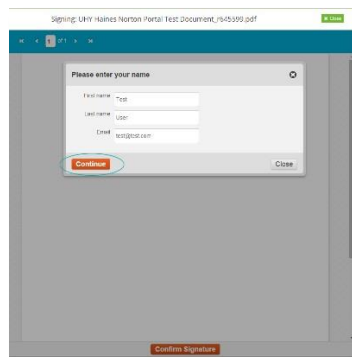
- When a document has been set-up up for Click to Sign, you will receive an email with a link to the document and a pin code. Clicking on the link in the email will take you to the UHY Haines Norton Portal to login and access the document.
- This method of signature is very secure and just requires you to confirm that you accept the entire document.
 - ✓ Select the document
 - ✓ Click the Sign tab and enter the PIN code you received



- ✓ Once you have read the document and are happy to sign, click on Confirm Signature



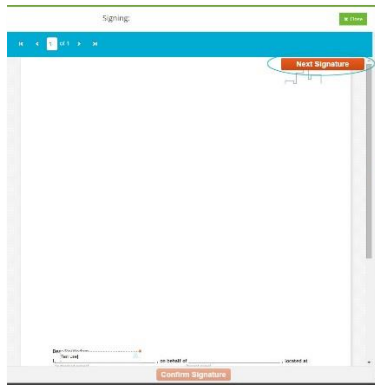
- ✓ You will be presented with a box which is prefilled with your name and email
- ✓ Click on Continue and you will be asked to confirm, select Yes



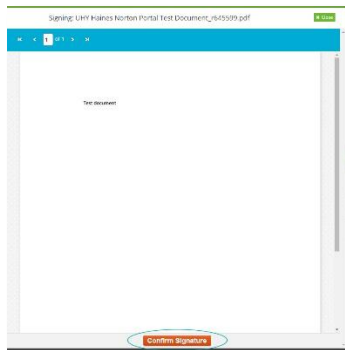
- ✓ Once the document has been signed, your signature footprint details will be added to the document

SECURE SIGN

- When a document has been set-up up for Secure Sign, you will receive an email with a link to the document and a pin code. Clicking on the link in the email will take you to the UHY Haines Norton Portal to login and access the document.
- ✓ Select the document and select the Sign tab
- ✓ Enter the PIN code you received
- ✓ In the document locate and click on the signature panels (*this is done by selecting the Next Signature box on the top right of the document - there could be multiple places that your signature is required*)



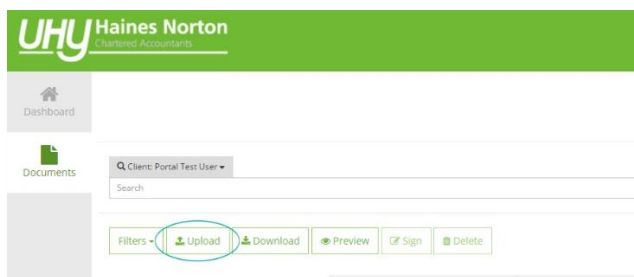
- ✓ Type in your name and click on the writing (*or draw or upload an image of your signature*).
- ✓ Once the signatures are all in place click, Confirm Signature (*at the bottom of the document*)



- ✓ Ensure the prefilled details are correct and press Continue
- ✓ Confirm your agreement to sign, by clicking Yes.
- ✓ Once the document has been fully signed, your signature footprint details will be added to the document.

YOU CAN ALSO UPLOAD FILES TO US

- Use the same logon and password
 - ✓ From the documents tab, select upload file
 - if you have access to multiple entities, select the one you wish to upload to by selecting from the Client drop down menu prior to selecting Upload
 - if you wish to upload to a particular filter, click on the filter prior to selecting Upload



- ✓ File explorer will open, select the file(s) you wish to upload
- ✓ Click open
- A notification will pop-up to show progress and will automatically minimise once the files are fully uploaded.

Hint: Documents can also be uploaded by dragging and dropping them onto the portal website.

RESETTING YOUR PASSWORD

If you have forgotten your password, select “Forgotten Password” on the portal login screen and you will receive an email with a link to reset your password.

If you wish to change your UHY Haines Norton Portal password, this can be done from your Profile (the person image) on the top right of the website.

DO YOU NEED FURTHER HELP?

Should you have problems using the portal, please contact us on 07 3210 5500 or email brisbane@uhyhn.com.au.