

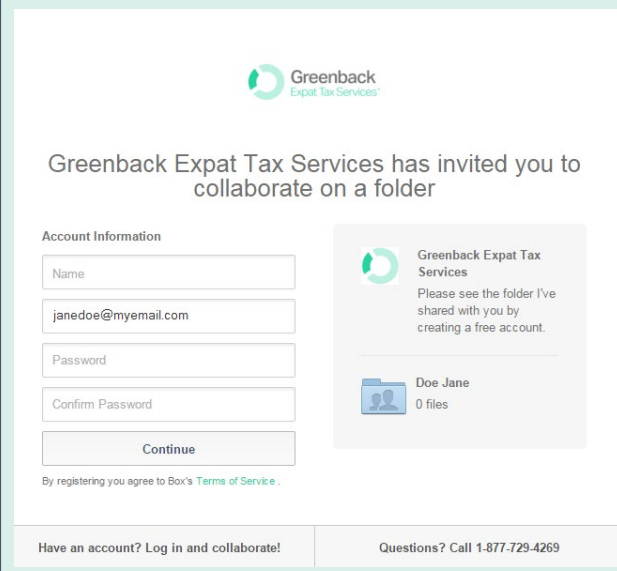
## Step 1

### Set up your new Box account

You'll receive an email invitation from Box shortly. The email will come from noreply@box.com with the subject "Greenback Expat Tax Services has added you to a collaborated folder on Box."

Click on the green "accept invite" button and you will be prompted to enter your name and password to create a unique login for your folder.

If you don't receive this invitation, please [contact us](#) so that we can resend it to you.



The screenshot shows an email invitation from Greenback Expat Tax Services. The header says "Greenback Expat Tax Services has invited you to collaborate on a folder". Below this is a form for "Account Information" with fields for Name, Email Address (pre-filled with janedoe@myemail.com), Password, and Confirm Password. A "Continue" button is at the bottom. To the right, there is a message from "Doe Jane" (0 files) and a note: "Please see the folder I've shared with you by creating a free account." At the bottom, it says "By registering you agree to Box's Terms of Service." and provides a link to log in or contact support.

## Step 2

### Scan your paper documents

If your tax documents are still in paper form, use a scanner to save them as PDF files on your computer.

You should have also received a customer questionnaire to fill out, so that your accountant has all the necessary information to get started.

**TIP:** You may be able to download tax info electronically from some financial institutions.

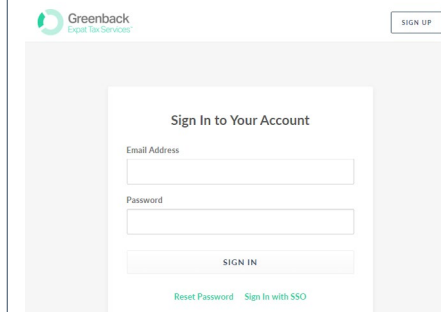
## Step 3

### Login to your secure folder

Once you have completed your customer questionnaire and saved other tax-related documents as PDFs, go to the [Client Page](#) on our website and click "Login to Your Secure Folder Now."

[LOGIN TO YOUR SECURE FOLDER NOW](#)

You will then be directed to the Box login page.



The screenshot shows the Box login page. It has a "SIGN UP" button in the top right. The main heading is "Sign In to Your Account". There are input fields for "Email Address" and "Password", followed by a "SIGN IN" button. Below the button are links for "Reset Password" and "Sign In with SSO".

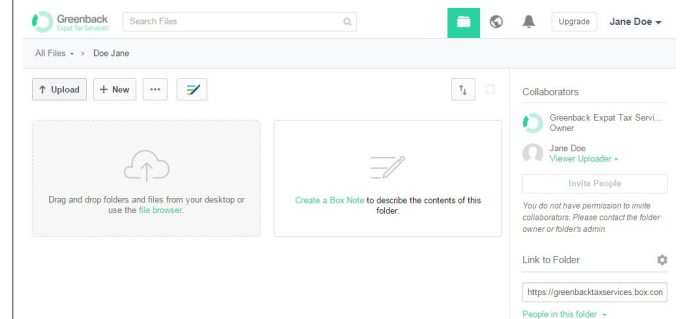
*If you ever forget your password, just click the "Reset Password" link.*

## Step 4

### Upload your documents

To upload new documents, click on your folder with your Last Name, First Name and upload documents inside the folder. Unfortunately, if you upload them outside of your shared folder, your accountant will not be able to access them.

Next, simply select the files on your computer you'd like to upload.



The screenshot shows the Box file upload interface. At the top, there's a search bar and user information for "Jane Doe". Below that, there are buttons for "Upload", "+ New", and a menu icon. The main area has two large boxes: one for "Drag and drop folders and files from your desktop or use the file browser" and another for "Create a Box Note to describe the contents of this folder". On the right, there's a "Collaborators" section showing "Jane Doe" as the "Viewer Uploader" and a "Link to Folder" section with a URL: https://greenbacktaxservices.box.com.

## Step 5

### Your accountant gets to work

When all the files have been uploaded, you'll continue to work with your accountant to finalize your return — making this tax preparation, your most hassle-free yet!

Experiencing an issue or confusion that we haven't covered here? [Get in touch!](#) We're always here to help.