

Kakenmaster & Associates SecureFilePro Connect Instructions

This document includes instructions for:

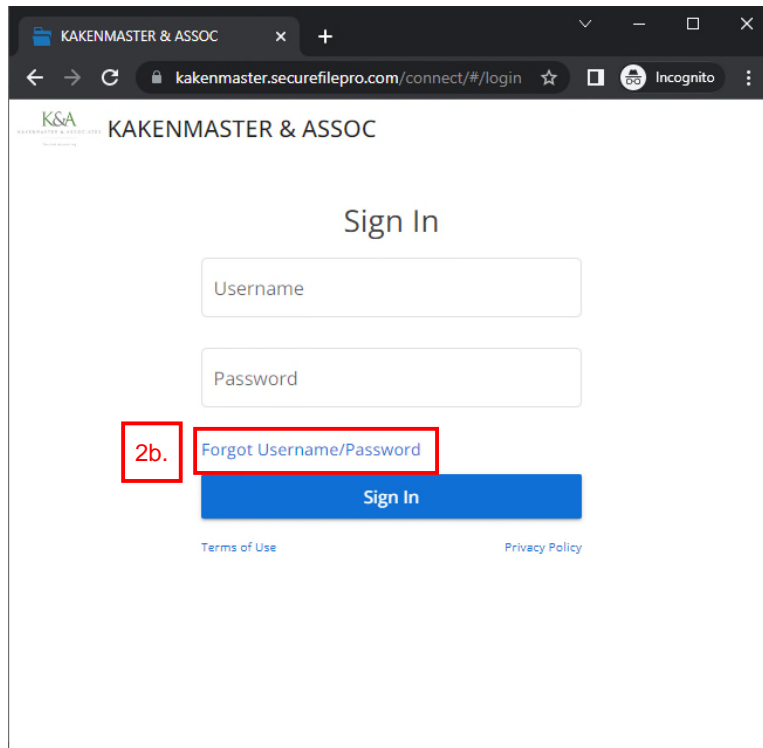
- I. Existing Users: Accessing your SecureFilePro Connect Account (page 1)
- II. New Users: Setting up your SecureFilePro Connect Account (page 2)
- III. Setting up Two-Factor Authentication for existing and new users (page 4)
- IV. Submitting Your Tax Documents and Initiating the Completion of Your Return (page 5)
- V. Signing the Signature Documents Required for Electronic Filing (page 6)
- VI. Accessing Documents from Your Preparer (page 12)

Questions?

If you have any questions, please contact our office by phone at 847-367-0888 or by email at taxpreparation@kakenmaster.com.

I. Existing Users: Accessing your SecureFilePro Connect Account

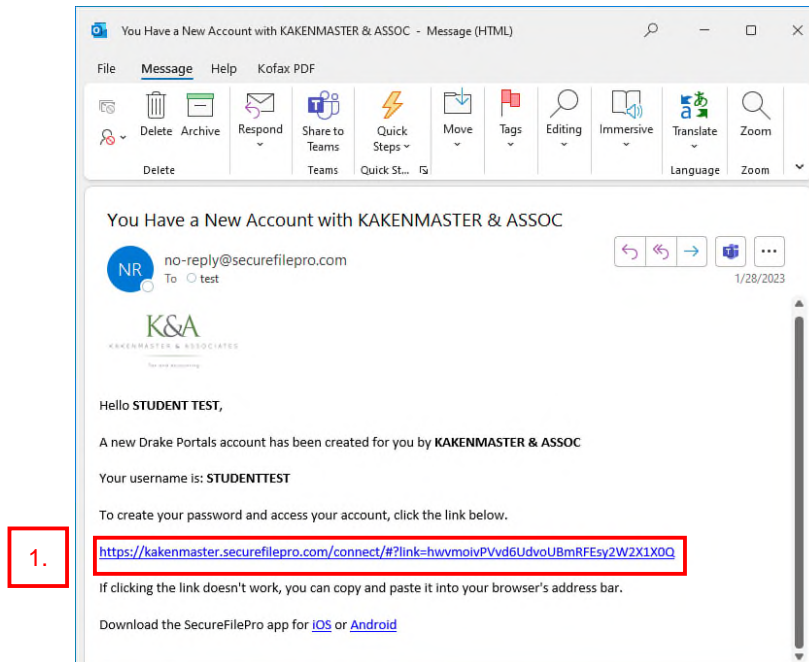
1. Go to the Kakenmaster & Associates SecureFilePro Connect site:
<https://kakenmaster.securefilepro.com/connect/#/login>
2. Enter your Username and Password and click "Login"
 - a. Your Username is in the format "FirstnameLastname" (no spaces and not case sensitive).
 - b. If you have forgotten your Username or Password, use the "Forgot Username/Password" link or contact Kakenmaster & Associates.



The screenshot shows a web browser window with the address bar displaying kakenmaster.securefilepro.com/connect/#/login. The page header includes the KSA logo and the text "KAKENMASTER & ASSOC". The main heading is "Sign In". Below this are two input fields: "Username" and "Password". Under the "Password" field, there is a link "Forgot Username/Password" which is highlighted with a red rectangular box. To the left of this link, the text "2b." is written in a red box. Below the input fields is a blue button labeled "Sign In". At the bottom of the page, there are two links: "Terms of Use" and "Privacy Policy".

II. New Users: Setting up your SecureFilePro Connect Account:

1. Please contact Kakenmaster & Associates to request an account. You will receive an email from no-reply@securefilepro.com with the subject "You Have a New Account with KAKENMASTER & ASSOC". Click the link provided in this email to create your password and access your account.



2. On the Create Password webpage, enter the last 4 digits of your SSN for verification.
3. Create a password for your account and confirm the password. The password must be 8 characters long and it is recommended that it contain an upper case letter, a lower case letter, a number, and a special character (such as !, #, \$).
4. Click the Submit button.

The screenshot shows a web browser window with the URL kakenmaster.securefilepro.com/connect/#/createaccount. The page title is "KAKENMASTER & ASSOC" and the main heading is "Create Password for STUDENTTEST". There are four red boxes with numbers indicating the steps:
1. A red box labeled "2." is next to the "Last 4 of SSN *" input field.
2. A red box labeled "3." is next to the "Password *" input field, which has a note "Minimum 8 Characters" above it.
3. A red box labeled "3." is next to the "Confirm Password *" input field.
4. A red box labeled "4." is next to the "Submit" button.
There is also a "Cancel" button.

5. The **Sign In** screen displays. Enter your username and password and click the **Sign In** button.

KAKENMASTER & ASSOC

Sign In

Username
STUDENTTEST

Password
.....

[Forgot Username/Password](#)

Sign In

[Terms of Use](#) [Privacy Policy](#)

6. The **Files** page will display.

KAKENMASTER & ASSOC

STUDENTTEST

- Files
- Profile
- Sign Forms
- Payment

From Preparer

To Preparer

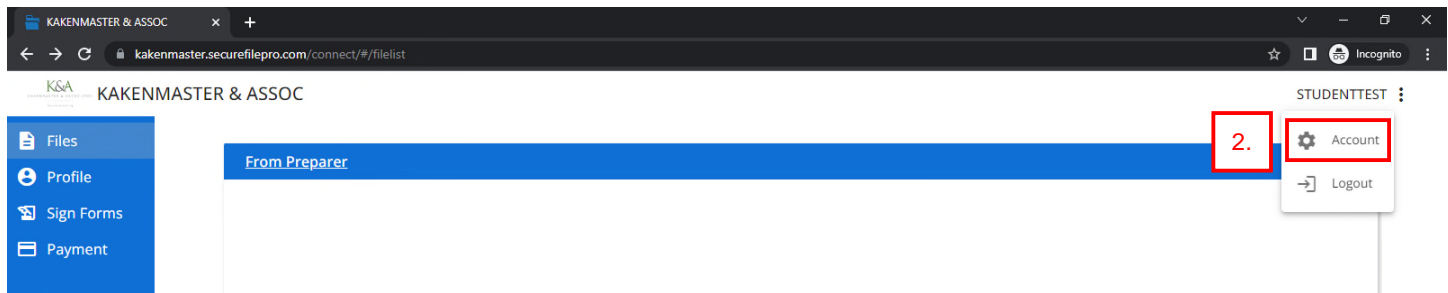
[Add Folder](#)

Upload

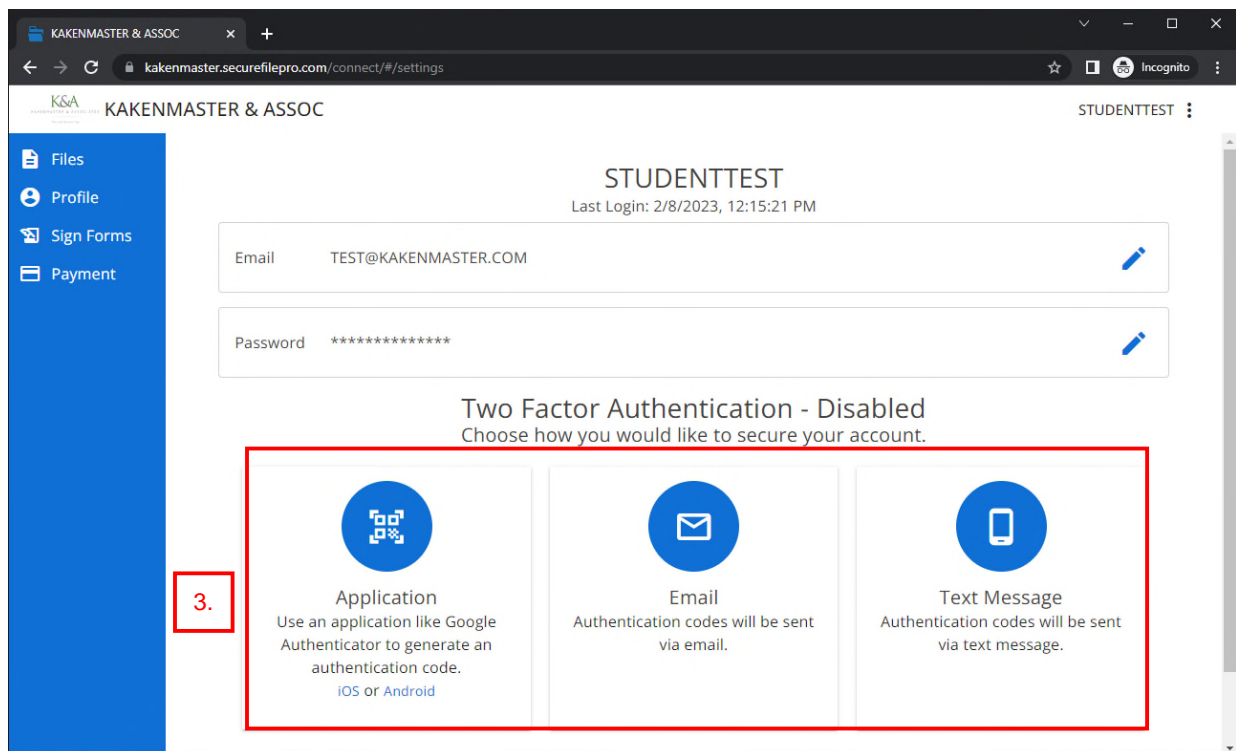
III. Setting up Two-Factor Authentication for existing and new users

Note: Two-Factor Authentication is not required, but is recommended, as it adds an additional layer of security the client portal. If you are unable to log in, or lose your cellular device, please reset your password to disable two-factor authentication. Then reset your password and re-enable two-factor authentication.

1. Login to SecureFilePro at <https://kakenmaster.securefilepro.com/connect/#/login>
2. Click the **username icon** in the upper right-hand corner and select **Account**.



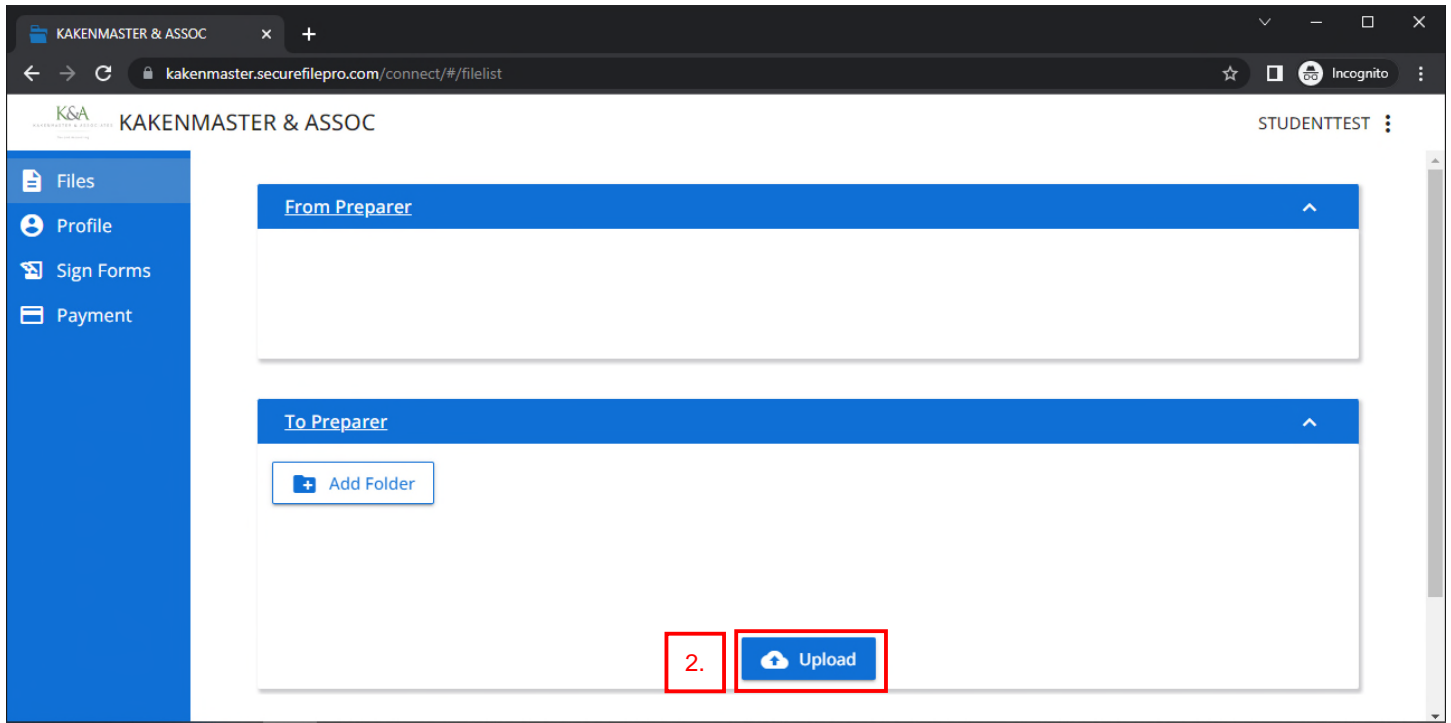
3. Choose from Application, Email, or Text Message authentication. Application authentication requires the use of a phone application like Google Authenticator or Authy to generate an authentication code. Text Message and Email Authentication will send an authentication code via text message or email. If you do not already use an authenticator app on your phone, select Text Message or Email authentication.



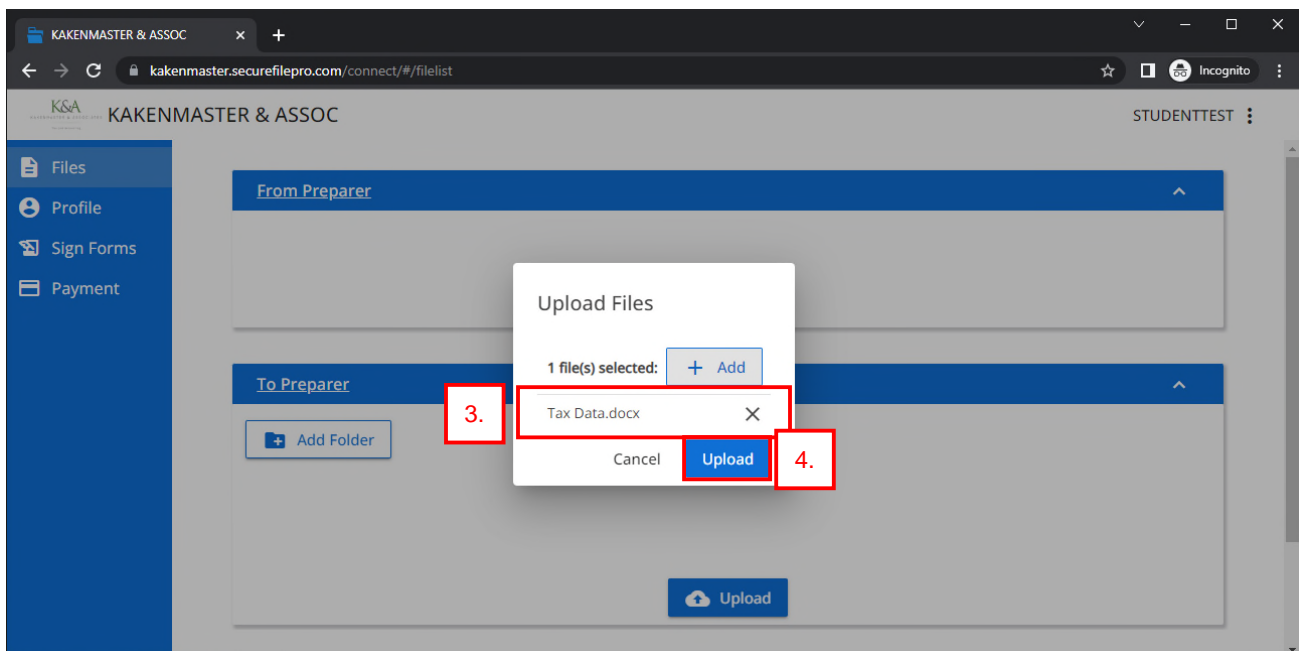
Once the two-factor authentication has been enabled, the user will need to use both their chosen password and the six-digit code generated by their chosen authentication method to log in to their SFP account.

IV. Submitting Your Tax Documents and Initiating the Completion of Your Return:

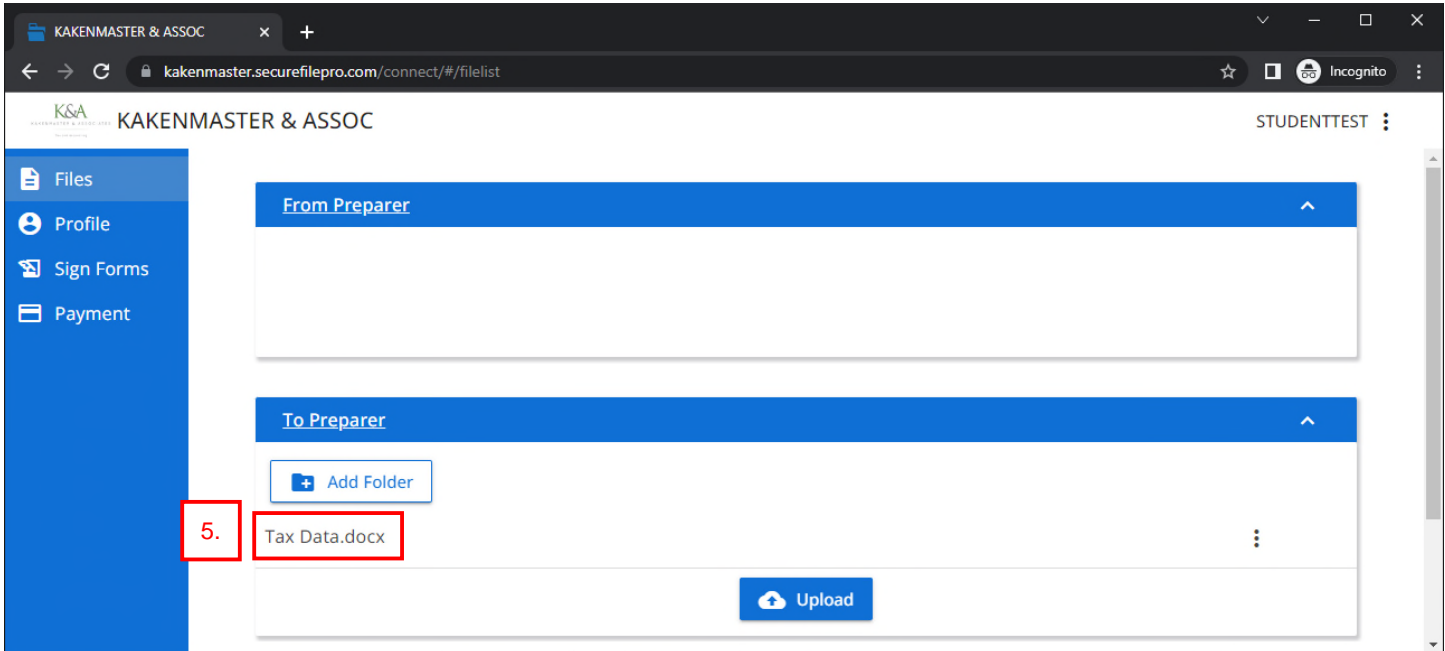
1. Login to SecureFilePro at <https://kakenmaster.securefilepro.com/connect/#/login>
2. Click the **Upload** button under the **To Preparer** section. An **Open** window will open.



3. Navigate to the file(s) you would like to upload. Multiple files can be selected at one time by holding down the 'Ctrl' button. The selected file will be shown in the **Upload Files** screen under the **files selected**.
4. Click the **Upload File(s)** button.



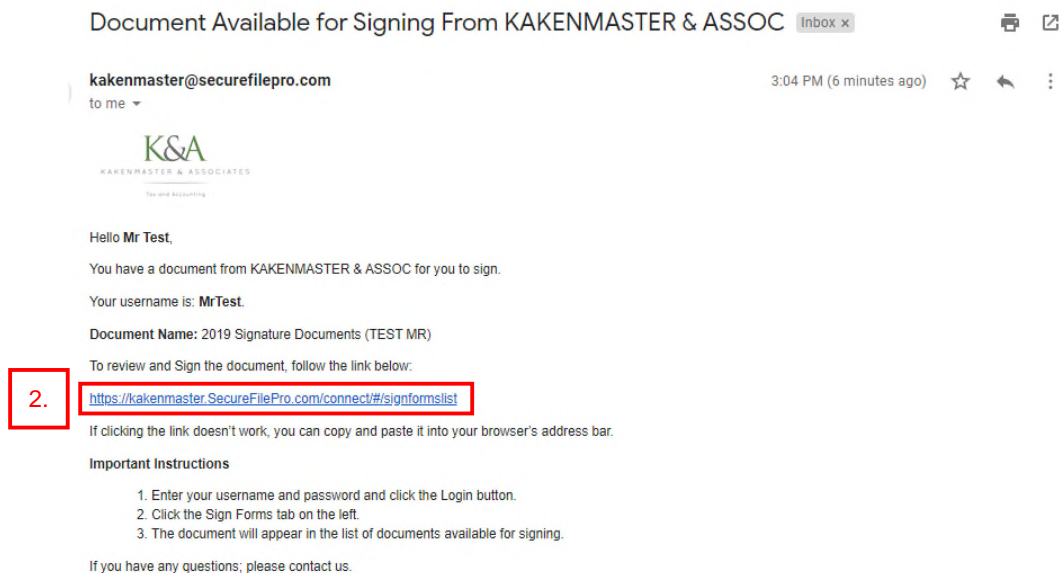
5. The uploaded file will display in the center window.



6. When you begin your upload, our office will email you to ask that you confirm when your upload is complete. Once your upload is complete, your return will be assigned to one of our preparers. The same upload steps should be followed to provide additional data requested by your preparer.

V. Signing the Signature Documents Required for Electronic Filing

1. You will receive an email notification from kakenmaster@securefilepro.com with the subject "Document Available for Signing From KAKENMASTER & ASSOC". Click the link provided in this email to review and sign the document.



2. The **Sign In** screen displays. Enter your username and password and click the **Sign In** button.

KAKENMASTER & ASSOC

Sign In

Username
STUDENTTEST

Password
.....

2.

[Forgot Username/Password](#)

Sign In

[Terms of Use](#) [Privacy Policy](#)

3. The **Sign Forms** tab will display with your **Signable Documents**. Click the **Signature Documents** file.

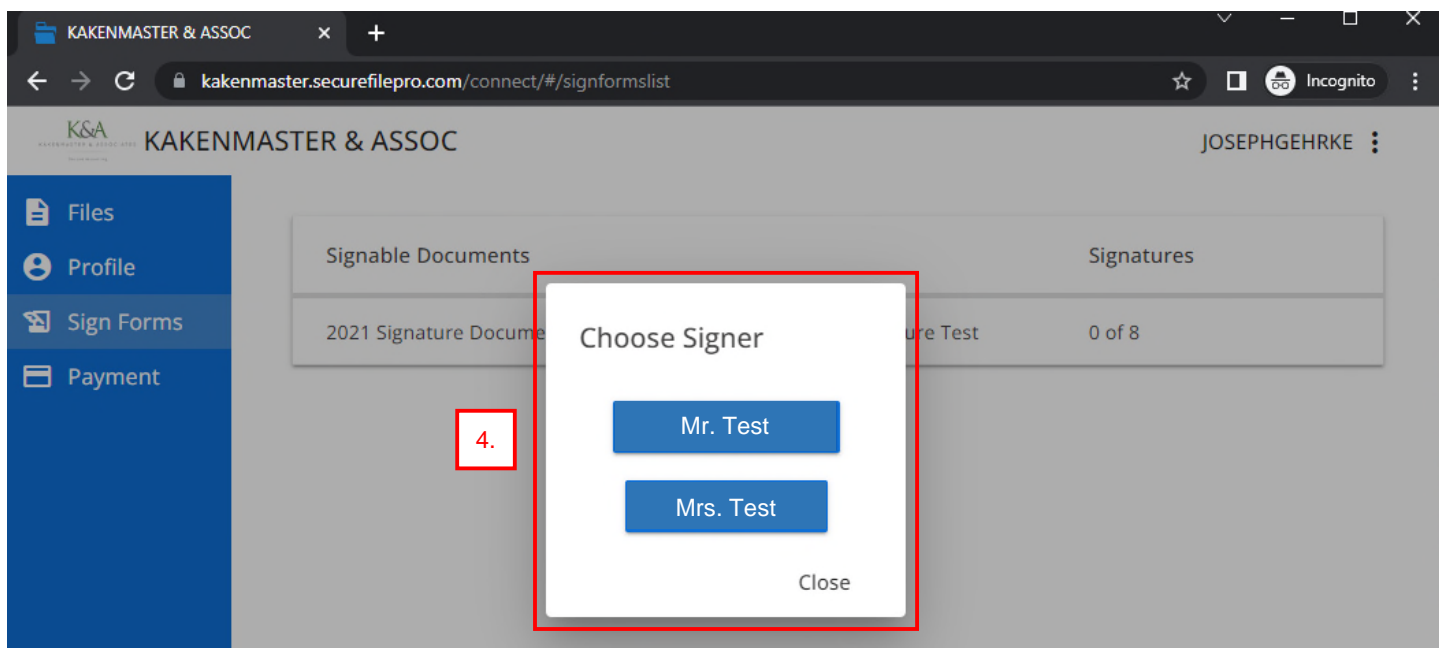
KAKENMASTER & ASSOC

JOSEPHGEHRKE

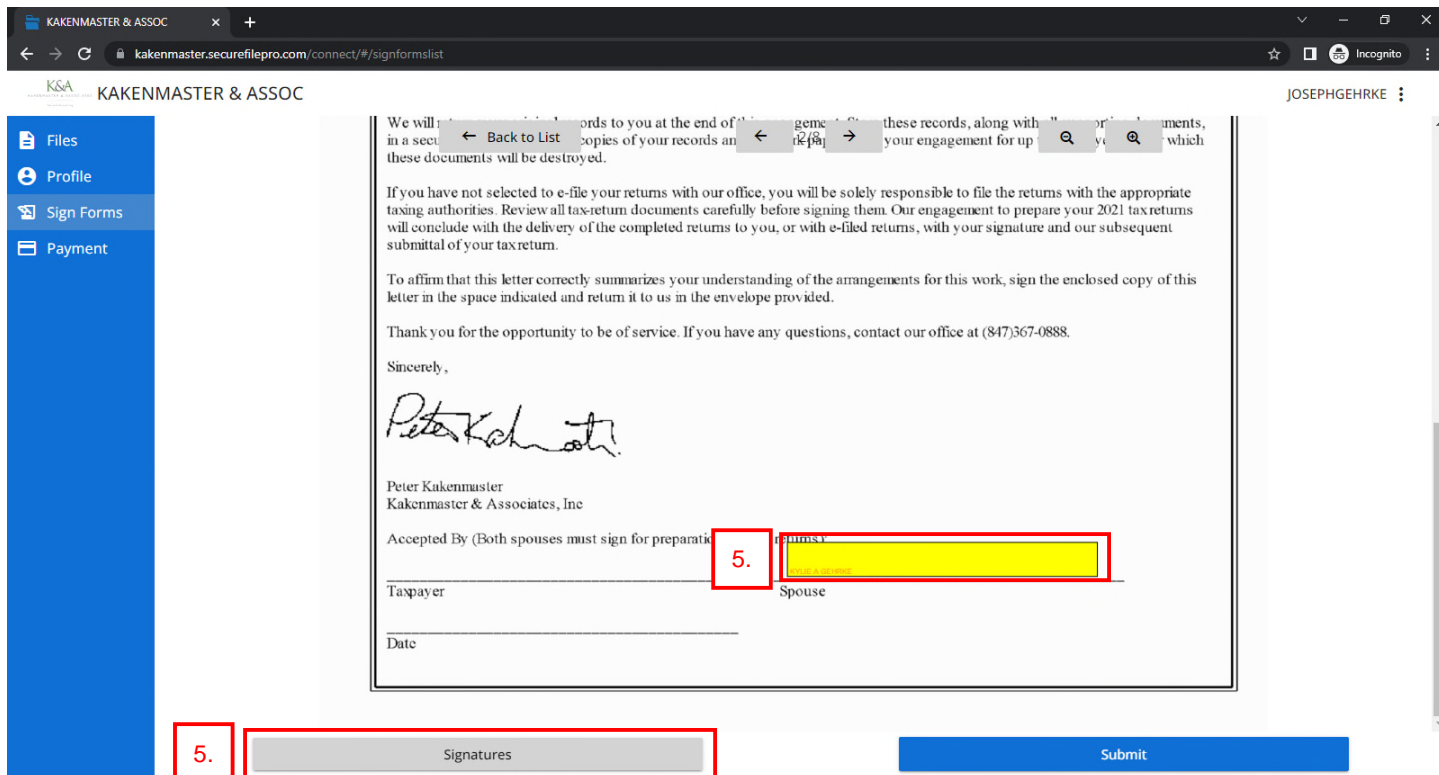
- Files
- Profile
- Sign Forms**
- Payment

Signable Documents	Signatures
3. 2021 Signature Documents	0 of 8

4. For Married Filing Joint returns, the first step is to select the signer. Otherwise, go to the next step.



5. Use the Signatures button at the bottom of the screen to see a list of all forms that require signature and the page numbers. You can either click the signature pages from the Signatures window or use the front and back arrows to navigate through the pages. The required signature fields will be highlighted in yellow.



5.

Signatures			
Name	Page	Signed	
Kylie A Kakenmaster on Engagement Letter	2		
KYLIE A KAKENMASTER on 8879	3		
KYLIE A KAKENMASTER on IL8453	6		

Close

6. After clicking the first yellow signature field, Signers are required to verify their identity through Knowledge-Based Authentication. Click **Continue** in the **Knowledge Based Questions** window. A series of questions will be asked to confirm your identity. Answer each question and click “Next” to complete all questions.

Knowledge Based Questions

You will be asked a series of questions to verify your identity. These questions are generated from public and private data.

You have three attempts to answer three out of four questions correctly.

You can choose to skip one question if you are unsure of the answer.

Canceling the session via the Cancel button on a question window or by closing your window will count as one attempt.

After the third failed attempt you will not be able to sign documents remotely for the remainder of the year.

Cancel


6.
Continue

7. After you have answered all questions, click the yellow signature field again and a Capture Signatures window will open. Use a stylus, finger, or mouse to sign in the gray box. Click “Next” to sign each form. On the final form, click **Apply**.

7.

Capture Signatures

Signature: KYLIE A GEHRKE on Engagement Letter



Cancel

Next

8. After all signatures are complete, click **Submit**. You will be asked to Confirm Signature Submission, to continue click **Submit**.

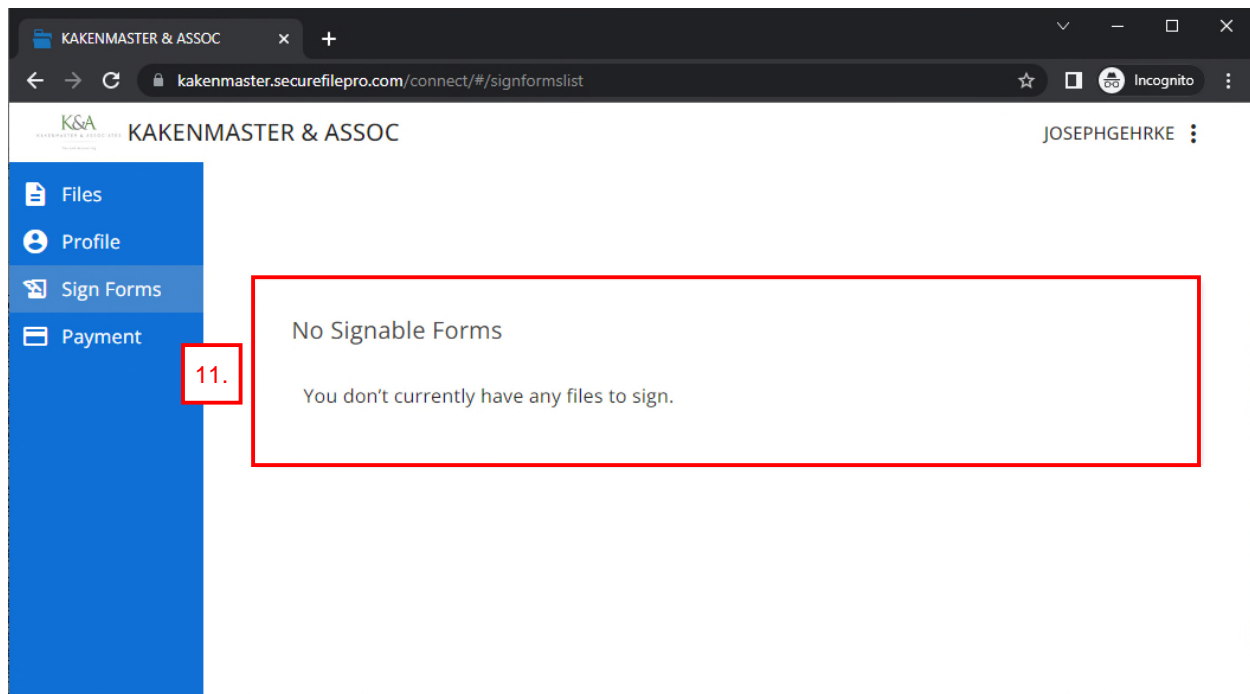
The screenshot shows a web browser window with the URL kakenmaster.securefilepro.com/connect/#/signformslist. The page header includes the KAKENMASTER & ASSOC logo and the user name JOSEPHGEHRKE. A left-hand navigation menu contains links for Files, Profile, Sign Forms, and Payment. The main content area displays a document with a signature of Peter Kakenmaster. Below the signature, there are fields for 'Accepted By (Both spouses must sign for preparation of joint returns):', 'Taxpayer', 'Spouse', and 'Date'. A red box highlights the 'Submit' button at the bottom right of the document area.

9. For a Married Filing Joint return, the second Signer will need to complete their signatures. Return to the Sign Forms Screen on the left-hand navigation, click the Signature Documents file, and select the second signer.

The screenshot shows the same web browser window. The 'Sign Forms' menu item in the left-hand navigation is highlighted with a red box. The main content area displays a table with two columns: 'Signable Documents' and 'Signatures'. The table contains one row: '2021 Signature Documents (GEHRKE JOSEPH M and KYL)-Signature Test' with '4 of 8' signatures. A 'Choose Signer' dialog box is open in the center, with 'Mr. Test' and 'Mrs. Test' options highlighted by red boxes. The 'Close' button is at the bottom right of the dialog box.

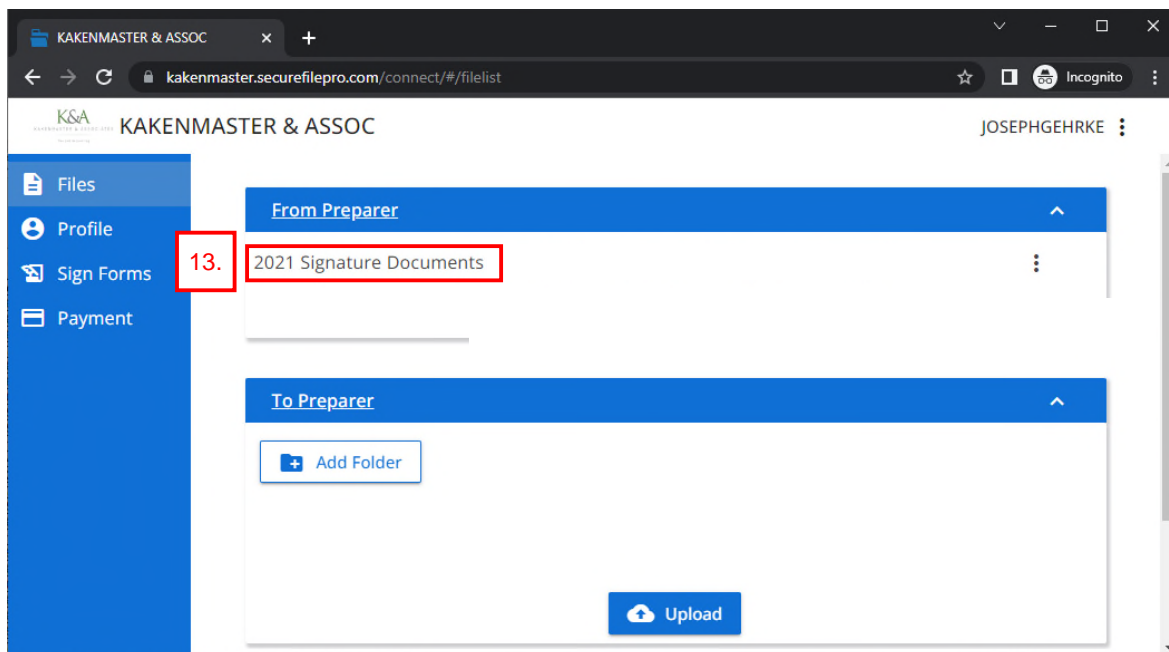
10. Follow steps 5-8 above for the second signer.

11. After all signatures have been completed, the **Sign Forms** tab will show **No Signable Forms**.



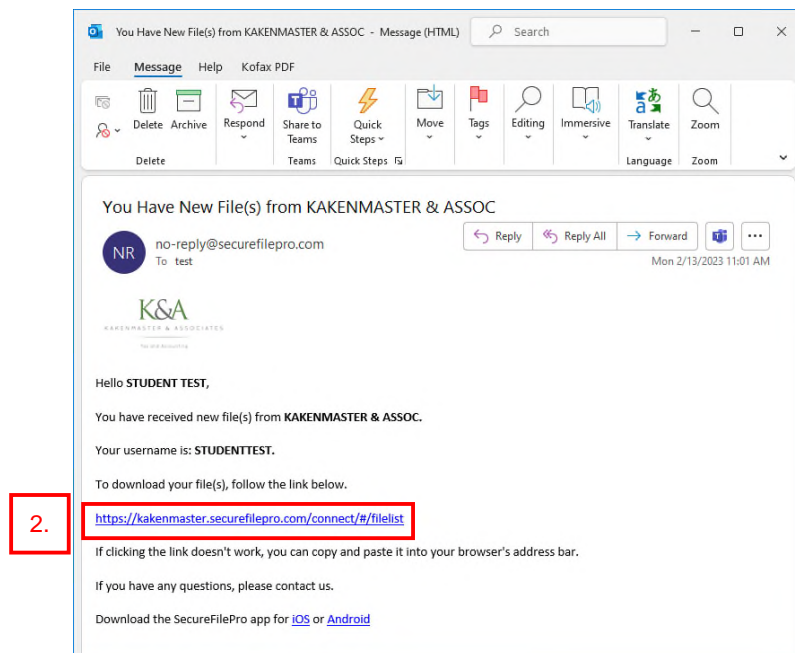
12. Our office will be notified when the signatures have been completed and will proceed with electronic filing. You will receive an email notification with the Federal return has been accepted.

13. A copy of the signed form will be available on the **Files** page and can be downloaded and saved for your records. Files in your SecureFilePro account will automatically expire and be deleted after 6 months.

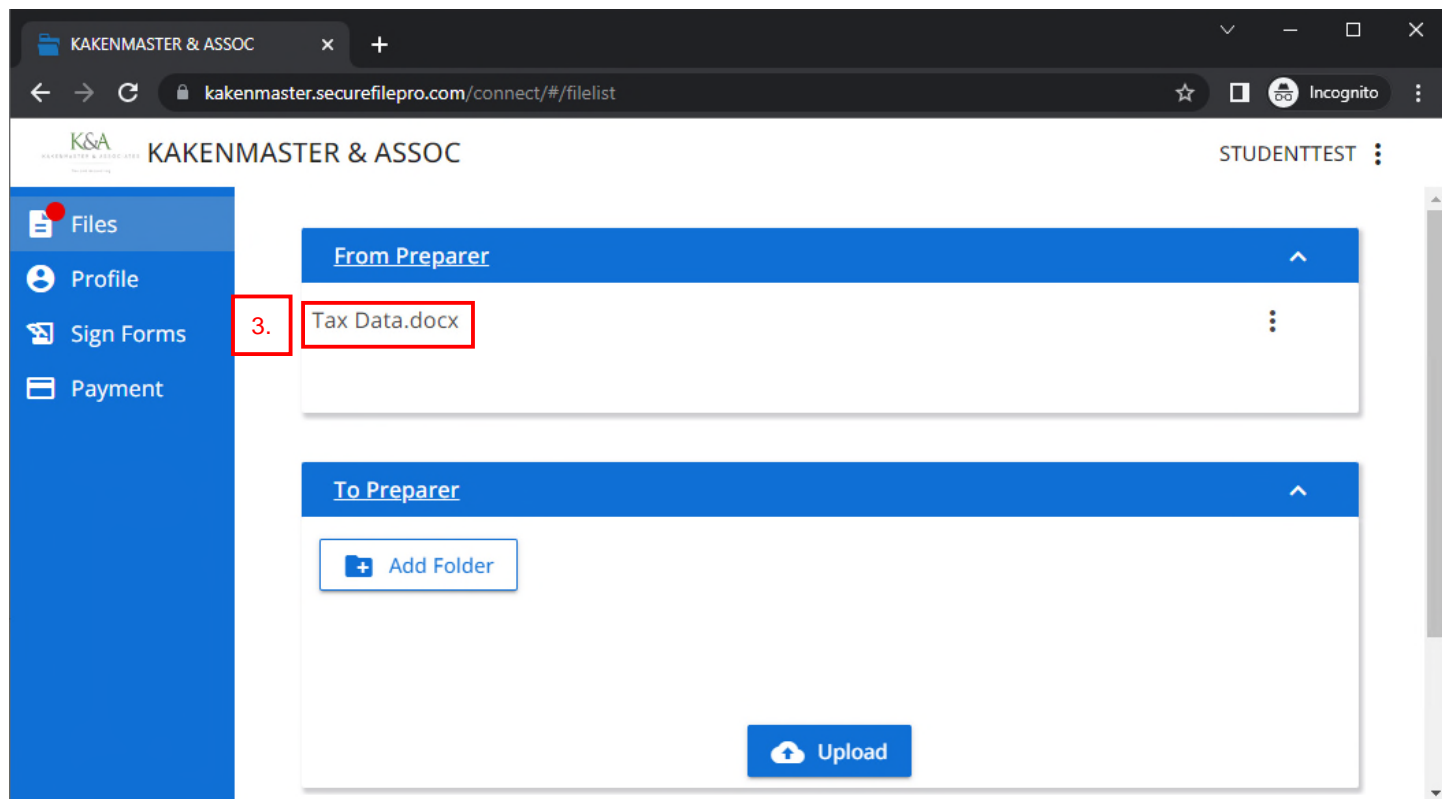


VI. Accessing documents from your preparer:

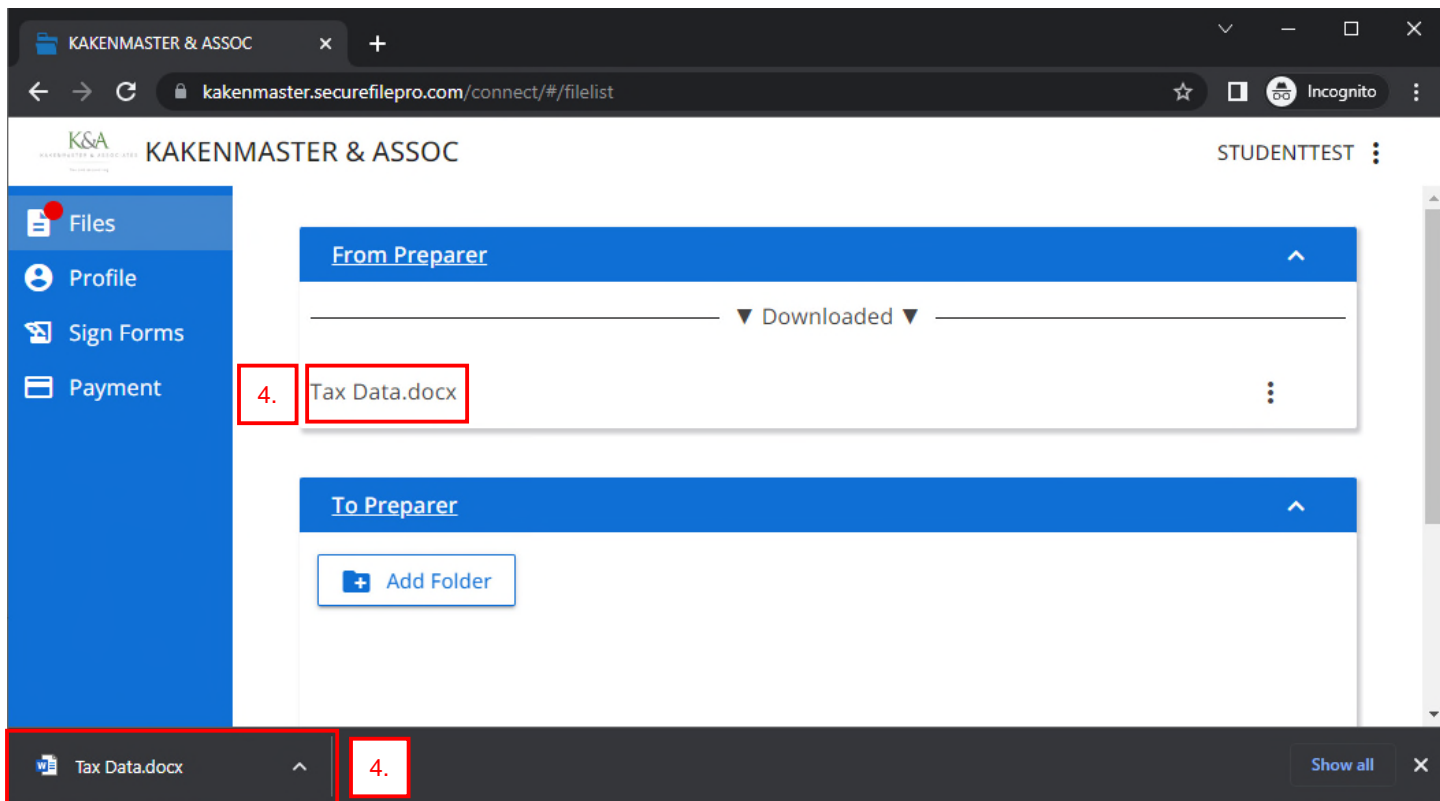
1. You will receive an automated email from no-reply@securefilepro.com when a file has been uploaded to the portal for your review.
2. Login to SecureFilePro Connect at <https://kakenmaster.securefilepro.com/connect/#/login> or use the link provided in the email.



3. On the **Files** window, your documents will appear under **From Preparer**.



- Click the document to open the file. The downloaded file will appear in the bottom left-hand corner of the window. Click the file to open or save it.



- Once the file opens, click the downward facing arrow to Save, then follow the normal procedure you use when saving a file to your computer. Files in your SecureFilePro account will automatically expire and be deleted after 6 months.

