# 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 <u>taxpreparation@kakenmaster.com</u>.

## 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.

늘 KAKENMASTER & AS	soc × +			3	Y	-		×
$\leftrightarrow$ $\rightarrow$ $C$ $\square$ ka	kenmaster.securefil	epro.com/conn	ect/#/login	☆		🔒 In	cognito	
K&A KAKENN	ASTER & AS	SOC						
		Sign In						
	Username							
	Password							
2b.	Forgot Usernam	e/Password						
		Sign In						
	Terms of Use		Priva	acy Policy	,			

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

Please contact Kakenmaster & Associates to request an account. You will receive an email from <u>no-reply@securefilepro.com</u> 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.

Delete       Teams       Quick SE 15       Language       Zoom         You Have a New Account with KAKENMASTER & ASSOC       Image: Society of the state of the s	ت م	Delete	e Archive	Respond	Share to Teams	Quick Steps ~	Move *	Tags	O Editing	Immersive *	Translate	Q Zoom	
A new Drake Portals account has been created for you by KAKENMASTER & ASSOC Your username is: STUDENTTEST To create your password and access your account, click the link below. https://kakenmaster.securefilepro.com/connect/#?link=hwymoivPVvd6UdvoUBmRFEsy2W2X1X0Q													
To create your password and access your account, click the link below. https://kakenmaster.securefilepro.com/connect/#?link=hwvmoivPVvd6UdvoUBmRFEsy2W2X1X0Q	Hell		no-reply@ To test	9securefile	epro.com					() «	5 → [	1/28/202	3
	Hell A ne		no-reply@ To test SA ENT TEST, e Portals a ume is: STU	Securefile ccount has	epro.com been crea	ted for you by	KAKENM	IASTER &	ASSOC	(~) «	5 → [	1/28/202	3

- 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.

← → C A kakenmaster securefilenro.com/connect/#/createaccount			
		ncognito	:
K&A KAKENMASTER & ASSOC			
Create Password for STUDENTTEST			
2. Last 4 of SSN *			
Minimum 8 Characters			
Password * 🔯			
Confirm Password * 🛛 🔊			
Cancel Submit 4.			

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

늘 Kakenmaster & Assoc	× +					×
← → C 🔒 kakenmaster.s	ecurefilepro.com/connect/#/login?un=STL	JDENTTEST	☆	⊜	Incognito	:
K&A KAKENMASTER	& ASSOC					*
	Sign In		_			
5.	Username STUDENTTEST					
	Forgot Username/Password					
	Sign In					
	Terms of Use	Privacy Policy				

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

늘 KAKENMASTER & ASS	x +		~	- 0	×
$\leftrightarrow$ $\Rightarrow$ C $\square$ kak	enmaster.securefilepro.com/connect/#/filelist	☆		😸 Incognit	to :
K&A KAKEN	MASTER & ASSOC		STU	DENTTEST	:
🖹 Files	Correct Descenter				*
Profile	<u>From Preparer</u>			^	
🛐 Sign Forms					
🖿 Payment					
	<u>To Preparer</u>			^	
	Add Folder				
	C 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.

🚔 KAKENMASTER & ASSO	ж × +	v - 6 X
$\leftrightarrow \rightarrow C$ $$ kake	enmaster.securefilepro.com/connect/#/filelist	🖈 🔲 👼 Incognito 🗄
K&A KAKEN	MASTER & ASSOC	STUDENTTEST :
E Files		2. 🗘 Account
Profile	From Preparer	→] Logout
🖄 Sign Forms		
Payment		

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 sixdigit 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.

늘 KAKENMASTER & ASS	soc × +	~	—		×
$\leftrightarrow$ $\rightarrow$ C $\square$ kak	kenmaster.securefilepro.com/connect/#/filelist		🕽 🔒 Inc	ognito	
	IMASTER & ASSOC	ST	UDENTTE	ST :	
<ul><li>Files</li><li>Profile</li></ul>	From Preparer		^		Â
🔊 Sign Forms					
Payment					
	To Preparer		^		
	Add Folder				
	2. Upload				

- 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.

늘 KAKENMASTER & ASS	ж × +			- 🗆	×
$\leftrightarrow$ $\rightarrow$ $\mathbf{C}$ $\square$ kak	enmaster.securefilepro.com/connect/#/filelist	\$		🖶 Incognito	) :
K&A KAKEN	MASTER & ASSOC	3	STUDI	ENTTEST	
<ul> <li>Files</li> <li>Profile</li> <li>Sign Forms</li> </ul>	From Preparer			^	
Payment	Upload Files 1 file(s) selected: + Add Tax Data.docx × Cancel Upload 4.			^	

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

늘 KAKENMASTER & ASS	oc × +	~			×
$\leftrightarrow$ $\rightarrow$ $\mathbf{C}$ $\cong$ kak	enmaster.securefilepro.com/connect/#/filelist	☆ [	🔒 اncog	gnito	
K&A KAKEN	MASTER & ASSOC	S	TUDENTTES	т:	
E Files					<b>^</b>
Profile	<u>From Preparer</u>		^		
🔊 Sign Forms					
Payment					
	<u>To Preparer</u>		^		
	Add Folder				
	5. Tax Data.docx	:			
	C Upload				•

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

 You will receive and email notification from <u>kakenmaster@securefilepro.com</u> 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.

늘 KAKENMASTER & ASSOC 🛛 🗙	+		~	-		×
$m{\epsilon}  ightarrow {m{C}}$ $m{e}$ kakenmaster.se	curefilepro.com/connect/#/login?un=STU	DENTTEST	☆ [	ı 🔒	Incognito	
K&A KAKENMASTER &	& ASSOC					*
ľ	Sign In					
	Username					
2.	Password					
	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.

늘 KAKENMASTER & ASS	oc × +	∨ – □ X
$\boldsymbol{\leftarrow}$ $ ightarrow$ $\mathbf{C}$ $\widehat{\mathbf{e}}$ kak	enmaster.securefilepro.com/connect/#/signformslist	🖈 🔲 🐽 Incognito 🚦
	MASTER & ASSOC	JOSEPHGEHRKE
Files Profile	Signable Documents	Signatures
🛐 Sign Forms	3. 2021 Signature Documents	0 of 8
Payment		

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.

늘 KAKENMASTER & ASS	soc × +	∨ – 6 X
$\leftrightarrow$ $\rightarrow$ C $$ kal	kenmaster.securefilepro.com/connect/#/signformslist	☆ 🛛 🌧 Incognito 🚦
K&A KAKEN	NMASTER & ASSOC	JOSEPHGEHRKE
<ul> <li>Files</li> <li>Profile</li> <li>Sign Forms</li> <li>Payment</li> </ul>	We will → Back to List opies of your records an ← kfgt → your engagement for up ▲ y ▲ which these documents will be destroyed.         If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-returns documents carefully before signing them. Our engagement to repare your 2021 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.         To affirm that this ketter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this ketter in the space indicated and return it to us in the envelope provided.         Thank you for the opportunity to be of service. If you have any questions, contact our office at (847)367-0888.         Sincerely,         Date         1         1         1       Taxpayer         0         0         1       Totage	
	5. Signatures Submit	

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

ier of the y	cur:
Cancel	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**.

Capture Signatures

Signature: KYLIE A GEHRKE on Engagement Letter



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

🚔 KAKENMASTER & ASSOC 🛛 🗙 🕂		∨ – Ø ×
← → C	//signformslist	🖈 🔲 🌧 Incognito 🗄
KAKENMASTER & ASSOC		JOSEPHGEHRKE
E Files	We will i for a security ords to you at the end of the end of the second security of the second s	*
Profile     Sign Forms	If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2021 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent	
Payment	submittal of your tax return. To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.	
	Thank you for the opportunity to be of service. If you have any questions, contact our office at (847)367-0888. Sincerely,	
	Peto Kahati	
	Peter Kakenmaster Kakenmaster & Associates, Inc Accepted By (Both spouses must sign for preparation of joint returns):	
	Taxpayer Spouse Spouse	
	Date	
	Signatures 8. Submit	

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.

	늘 KAKENMASTER & ASSO	к × +	~ - 0 X
	$\leftrightarrow$ $\rightarrow$ $\mathbf{C}$ $\cong$ kake	nmaster.securefilepro.com/connect/#/signformslist	🖈 🔲 🌧 Incognito 🚦
	K&A KAKENI	MASTER & ASSOC	JOSEPHGEHRKE
	<ul><li>Files</li><li>Profile</li></ul>	Signable Documents Signatures	
9.	🔊 Sign Forms	2021 Signature Documents (GEHRKE JOSEPH M and KYL)-Signature Test 4 of 8	
		Generative         Image: Signer         Im	

- 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**.

늘 KAKENMASTER & ASSOC	× +					×
$\leftrightarrow$ $\rightarrow$ $C$ $\square$ kakenm	aster.securefilepro.com/connect/#/signformslist	☆		🔒 Inco	ognito	:
K&A KAKENMA	STER & ASSOC	J	OSEP	HGEHRI	KE :	
<ul><li>Files</li><li>Profile</li></ul>						
<ul> <li>Sign Forms</li> <li>Payment</li> <li>11.</li> </ul>	No Signable Forms You don't currently have any files to sign.					

- 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.

🚔 KAKENMASTER & ASSOC X +	∨ – □ ×
← → C  in kakenmaster.securefilepro.com/connect/#/filelist	🖈 🔲 👼 Incognito 🚦
K&A KAKENMASTER & ASSOC	JOSEPHGEHRKE
Files	
B Profile	^
Sign Forms 13. 2021 Signature Documents	:
Payment	
<u>To Preparer</u>	^
Add Folder	
4	Upload

## VI. Accessing documents from your preparer:

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

© ☐ —	Respond	Share to Teams	Quick Steps ~	Move *	Tags	Editing	Immersive	Translate	Zoom	
Delete		leams	Quick Steps 1					Language	Zoom	
You Have New	File(s) fr	om KAk	KENMAST	R & A	ssoc					
no-reply@	securefile	pro.com			SR	eply	Reply All	-> Forwar	rd 📑	
To test								Mon 2	2/13/2023 1	1:01 AM
KEAREN MASSEE & ASSOCIAT	£ 5									
KARENASTEA A ASSOCIAT	5									
Hello STUDENT TEST, You have received new	es v file(s) fron	n <b>KAKENM</b>	ASTER & ASS	DC.						
Hello STUDENT TEST, Your have received new Your username is: STU	es v file(s) fron JDENTTEST.	n KAKENM	IASTER & ASS(	DC.						
Hello STUDENT TEST, You have received new Your username is: STU To download your file	es v file(s) fron J <b>DENTTEST.</b> (s), follow th	n <b>KAKENM</b> ne link belo	IASTER & ASS(	DC.						
Hello STUDENT TEST, You have received new Your username is: STU To download your file https://kakenmaster.st	es v file(s) fron <b>JDENTTEST.</b> (s), follow th <u>securefilepro</u>	n <b>KAKENM</b> ne link belo o.com/coni	IASTER & ASS( ow. nect/#/filelist	DC.						
Hello STUDENT TEST, You have received new Your username is: STU To download your file https://kakenmaster.si If clicking the link does	v file(s) fron DENTTEST. (s), follow th securefilepro	n <b>KAKENM</b> ne link belo <u>o.com/coni</u> ou can copy	IASTER & ASSO ow. nect/#/filelist y and paste it	DC.	browser	's addre	-ss bar.			
Hello STUDENT TEST, You have received new Your username is: STU To download your file https://kakenmaster.s If clicking the link does If you have any questi	v file(s) fron DENTTEST. (s), follow th eccurefilepro sn't work, yc ons, please (	n <b>KAKENM</b> ne link belo <u>o.com/con</u> ou can cop contact us.	ASTER & ASS( w. nect/#/filelist y and paste it	DC.	browser	's addre	ss bar.			

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

🚔 KAKENMASTER & ASSOC × +	∨ – □ X
← → C	🖈 🔲 🌧 Incognito 🗄
K&A KAKENMASTER & ASSOC	STUDENTTEST
Files   Profile	^
Sign Forms 3. Tax Data.docx	:
Payment	
<u>To Preparer</u>	^
Add Folder	
▲ Upload	

4. 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.

늘 KAKENMASTER & ASS	oc × +		~	- 0	×
$\boldsymbol{\leftarrow}$ $ ightarrow$ $\mathbf{C}$ $$ kak	enmaster.securefilepro.com/connect/#/filelist	☆		😸 Incogni	to :
K&A KAKEN	IMASTER & ASSOC		STU	DENTTEST	:
Files	From Dronovor				A
Profile	<u>rrom rieparer</u>			^	
🔊 Sign Forms	▼ Downloaded ▼				- 1
🖿 Payment	4. Tax Data.docx			:	
	<u>To Preparer</u>			^	
	Add Folder				
					-
🖷 Tax Data.docx	<b>^</b> 4.			Show	all X

5. 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.

Drake-produced PDF	1 / 17	5.	<b>±</b>	ē	□ -
	FOR TAX YEAR 2019 MR & MRS TEST				