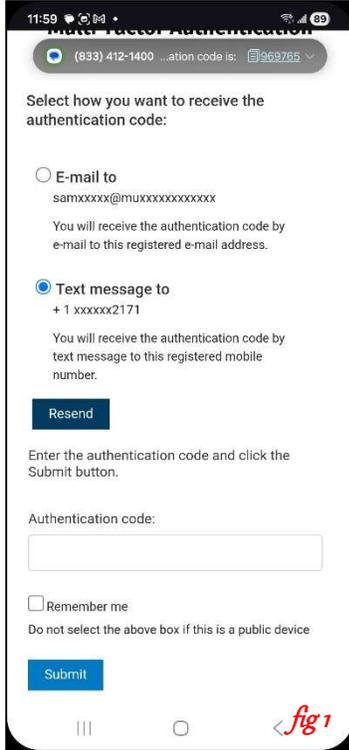


Thank you for using the portal! We have created this guide to assist with some of the specific hurdles associated with using tablets and phones to sign your documents.



Logging in. Due to the sensitive nature of the tax information in your portal, there is a requirement for two-factor authentication (*fig. 1*). Receiving an email to the same device being used to access the portal requires you to navigate away, which interrupts the page connection, causing it to refresh, and voiding the authentication code as sent.

To avoid this frustrating cycle, you can:

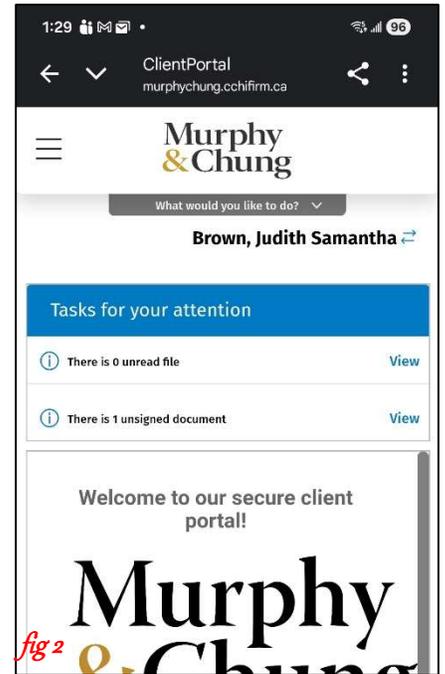
- a) Use a different device to receive your code (by email or text), i.e. your phone if you are using a tablet
- b) If using your phone to access the portal, *swipe* into your notifications to read the code from the summary, without navigating to a different application. This is most effective when receiving a code via text message, and we recommend providing a mobile number which we can attach to your client profile

Finding Your Documents. When you log in to your homepage, there are bars denoting any action items waiting for you, as



pictured to the right (*fig. 2*). If you linked to the portal via the notification email for your signature pages, you will arrive in the “Signatures” section directly, as seen to the left (*fig. 3*).

Select “View” or “Sign Now” as appropriate.



Please note: There is a known issue with the FireFox browser which causes signature pages not to load. Please use either Google Chrome or Microsoft Edge.



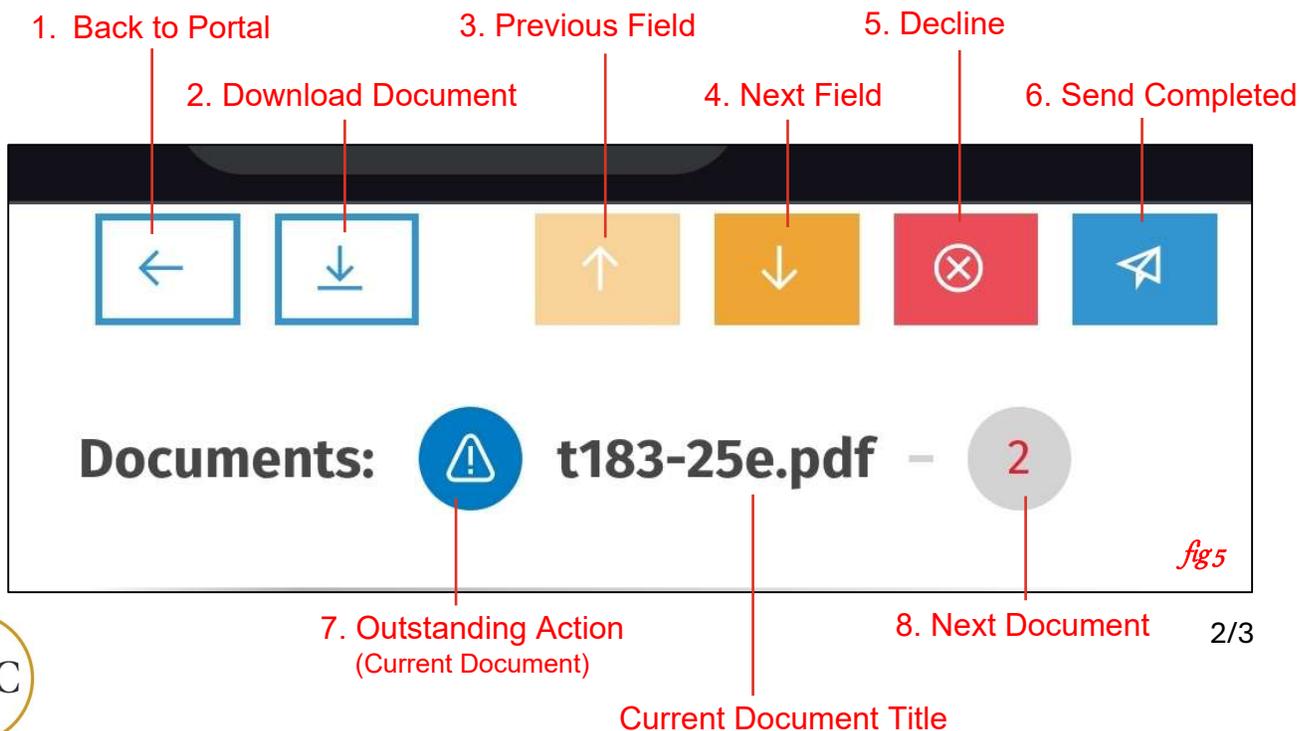
Navigating the Signature Pages. You will be taken to the document awaiting your signature, as seen to the left (*fig. 4*). The fields required are marked on the form in red, and you can navigate between them via the navigation tools at the top of the webpage, enlarged and illustrated below (*fig. 5*)

Navigation Key

1. Left Arrow: Go back to portal
2. Down Arrow: Download document
3. Up Arrow: Goes to previous field
4. Down Arrow: Goes to next field
5. Red X: Decline to sign
6. Paper Plane: send (when complete)
7. Blue Caution Symbol: means there are outstanding action items *Note: this can also be used to navigate back to the

document overview should you need to exit the signature fields

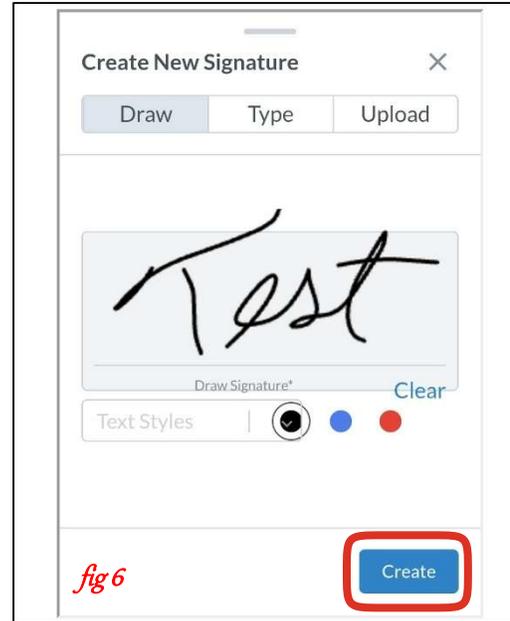
8. Red Number: Indicates if another page is included in the document set. Tapping the number will take you to the next document.



Signing. Tap the first signature field. You have the option to draw your signature, type it, or upload a digital signature if you have one saved. Once you have done so, click “Create”, the blue button to the bottom right of the signature (*fig. 6*).

You will return to the document overview. If a date is required, simply tapping the date field will auto-fill with today’s date.

If a second page requires signature, tap the red number pictured here (*fig. 7*). As you have already created your signature, you will only have to tap the signature field on the second page to complete it.



Sending. When all fields are marked as completed, you can tap the blue paper airplane to send the document back to us. Once received, you will be re-routed to the main portal, where you will see (*fig. 8*) no documents require signature.

As always, if you need further assistance, please do not hesitate to reach out. Our administrative staff can be reached en masse at admin@murphychung.ca, or contact our office manager directly at extension 101, and via email at samantha@murphychung.ca.

