

Thank You for Becoming a Portal User!

To complete your registration, click on the "Register" link in your email and follow these instructions.
If you are printing these instructions, all clickable links included can be found on the last page.

- Create your login ID. Please use your email address.
- Create a Password. Password must be at least 7 characters long and must include letters and numbers. You can use symbols (e.g., %, #, \$).
- Confirm your Password and Click Register.
- You will be taken back to the login screen. Log in using our new credentials.
- The multi-factor authentication screen will appear and you can select "Reminder Me Later" to bypass (you can set this up later in your account settings) or "Set Up Now" to complete the process.
 - If you are setting up your multi-factor, select "Add Option", "Get Started" and "Choose" on the Thomson Reuters Authenticator.
 - To download the app for an Android phone click [HERE](#).
 - To download the app for an iPhone click [HERE](#).
 - With your app open on your phone or tablet, scan the barcode that is on the computer screen to connect your portal to the Thomson Reuters Authenticator application. Select "Finish".
 - Emergency codes will be provided to use for access if your device is not handy. Select "Copy" or "Print" and then "Done".
- In your portal account, you will be able to access and pay your invoices from inside your portal, access PDF copies of your tax returns and upload tax documents and other files that you want to share with your accountant.

Covenant CPA LLC

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Please register your account.

Create Login

Create Password

Confirm Password

Register

Multi-Factor Authentication Setup

Choose multi-factor option

You can use Thomson Reuters Authenticator (recommended), or a different multi-factor app.

[Learn which MFA option is right for you](#)

USE THOMSON REUTERS AUTHENTICATOR (RECOMMENDED)



Receive notifications on your mobile device and sign in with a single touch.

CHOOSE

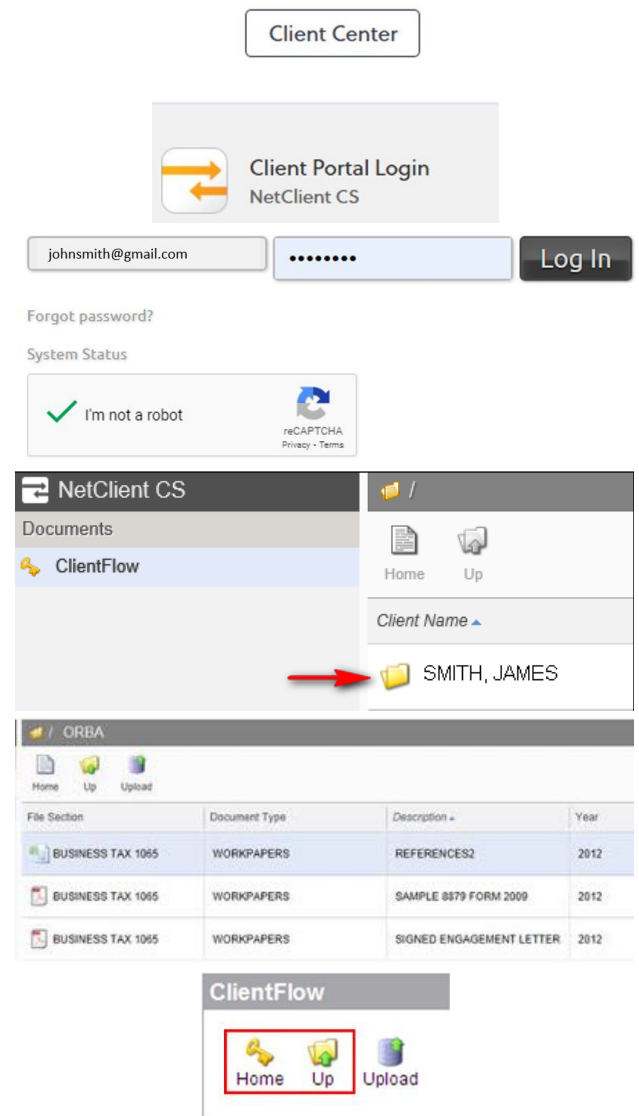
The screenshot shows the NetClient CS portal interface. The top navigation bar includes "Home" and "Messages". The main content area has a sidebar with "My Invoices", "Documents", and "ClientFlow". The main area shows "Home" and "Up" buttons, a "Client Name" dropdown, and a "Client Last Name, Client First Name" field. A user profile dropdown menu is open, showing options: "Edit Account", "Update Password", "Manage Multi-factor Authentication", "Set Security Questions", "Link Account", and "Log Out". The user name "John Smith" is visible in the top right corner.

Accessing Your Files

If you have been a portal user with us prior to 8/1/2022, you will now have two locations for documents: the account named folder(s) on the menu bar, which is referred to as File Exchange, and the new ClientFlow button on the left menu bar.

ClientFlow, which is located inside your already established Portal, interacts directly with our firm's document management system, which allows for a fast and convenient exchange of documents and information between you and our firm.

- **PC:** Log into your portal from the client center of our homepage at www.Covenant.CPA. **App:** Log in to the NetClient app on your mobile device.
- **PC & App:** All tax returns will be located in the File Exchange folder which contains your name on the left side menu bar underneath the Document section. All other documents added or requested to be on your portal will be located in the ClientFlow folder on the left side.
- **PC & App:** Click on the name of the client folder you want to enter. If you only have one account, you will only see one folder. If you have business or other family connected to your portal, you will see all the available accounts here.
- **PC & App:** Click on the document you want to open. If you have a lot of documents, you can enter a search term in the "Find" field to locate your document faster. Depending on your browser, the PDF file will either start to download immediately or will open to preview where you can then print or download directly.
- **PC:** Click the "Up" button to return to your previous screen or "Home" to go back to your main page in ClientFlow. **App:** Click the back button on your phone to go backwards or click on the menu bar in the upper left corner.



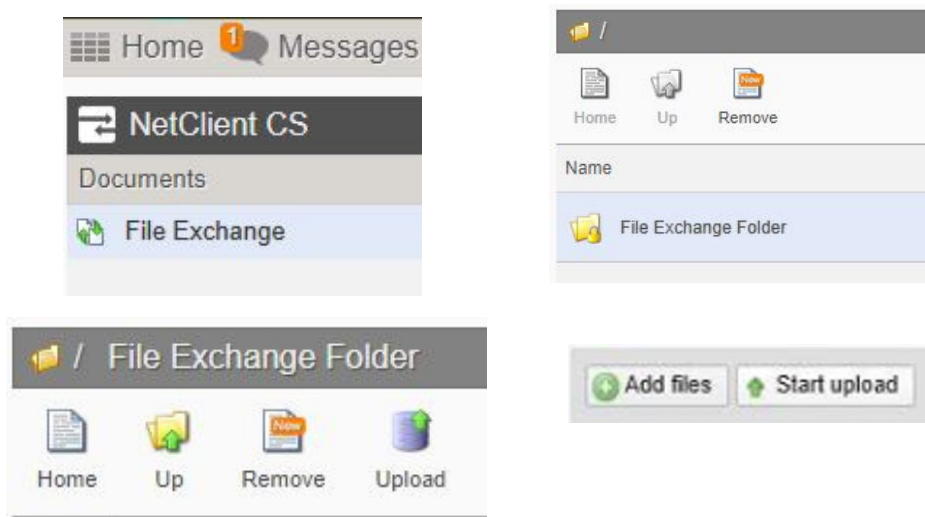
Forgot your Password? Click on the Forgot password? button underneath the login. If you get a warning that you are locked out from trying the wrong password too many times, you will be locked out for 24 hours and will need to wait 24 hours before trying "Forgot password?" on the site. There is no way to release your lock early.



Need help? Contact us by phone at 717-464-2951 or by email at TaxPro@Covenant.CPA.

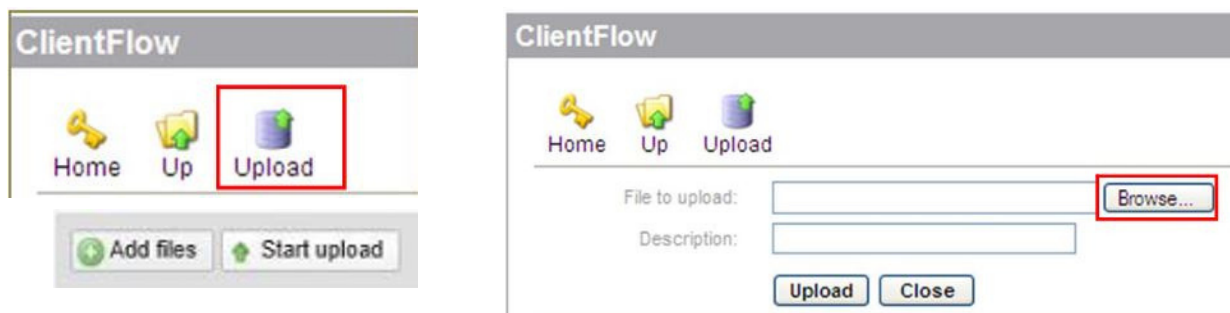
Uploading Files Using File Exchange

- **PC:** To send a document to your accountant, click on "File Exchange" on the left side under Documents. Select the "File Exchange Folder" in the center of the screen, then select "Upload". You can now hit "Add files" to select your pre-saved documents to attach. Be sure to hit "Start Upload" once you have added the files and then finish with the "Upload" button for them to send to your accountant. **App:** Click on the "+" sign in the upper right, select the file and upload.



Uploading Files Using ClientFlow

- **PC:** To send a document to your accountant, click on the "Upload" button, then "Add files". Find the files and select "Upload". **App:** Click on the "+" sign in the upper right, select the file and upload.



Paying Your Invoice

When an invoice is added to your portal, you will receive an email with a link to view the invoice on your portal. You can only pay with credit card through the portal. If you prefer to pay via ACH (electronic check), you can do so on our website by selecting "Pay Bill" on the homepage. You will need to know your invoice number, client ID and payment amount from the invoice to make your payment on our website.

- **PC:** Click on "Invoices" on the top left. Mark the checkbox in the pay column of the invoice you wish to pay. Click the "Pay Selected" button. You will need to re-enter your password and then fill in your payment information and click "Submit Payment". You will receive a receipt in your email.
- **App:** Click on "My Invoices" on the top left. In the Open invoice section, click on the invoice you wish to pay. Enter your credit card information and "Submit". You will receive a receipt in your email.

The screenshot shows a web interface titled "My Invoices". It has two tabs: "Open" (selected) and "Paid". Below the tabs is a table with columns "Client" and "Invoice Date". The table contains one row: "Smith, John" with "12/3/2021". Below the table is a "Total Amount \$:" field with the value "1040.00" and a "Pay Selected" button.

| Client | Invoice Date |
|-------------|--------------|
| Smith, John | 12/3/2021 |

Total Amount \$: 1040.00 **Pay Selected**

The screenshot shows a mobile app interface titled "My Invoices". It features a header with a hamburger menu icon, the name "SMITH, JOHN", and a dropdown arrow. Below the header is a toggle switch with "Open" (selected) and "Paid" options. The main content area displays invoice details: "#26582" with a balance of "\$1.00", and "Date: 09/30/2020" with "Due: 09/30/2020".

SMITH, JOHN

Open Paid

#26582 \$1.00

Date: 09/30/2020 Due: 09/30/2020



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