



# Get to Know SmartVault

The Secure and Convenient Way to Share Documents Online

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## Why Should I Use the Secure SmartVault Portal?

Cybercrime activity is on the rise, and email is one of the easiest ways for hackers to get your information. You should never email or text documents that contain sensitive information like your Social Security Number, credit card numbers, or other payment/bank information without using a secure portal. It's also important not to leave paper lying around that contains this information.

We realize that in order for us to provide you services, we need to exchange documents that contain this type of information. That's why we've partnered with SmartVault to offer you a convenient—yet secure—method for sharing important documents.

## How Does SmartVault Keep My Information Secure?

All interactions with SmartVault occur over an encrypted channel, and all documents and information are encrypted using bank-level encryption (that's AES-256 for the tech savvy).

No user can access documents in SmartVault without logging in, and built-in security permissions help us control who has access to your information at all times.

SmartVault offers Two-Factor Authentication (2FA) to add more layers of security to your account. With 2FA, you log in using not only your email address and password, but also a one-time verification code sent to your mobile device or email address that helps verify your identity. Once you set it up, 2FA is automatically activated if anyone tries to access your account from a new web browser or IP address.

## How do I use SmartVault?

You can access SmartVault via a web browser or your mobile phone. We'll add you to our SmartVault account as a guest and you'll need to activate your account in order to complete the sign-up process. Follow the steps below to start sharing documents securely!

## Activate Your Account—Initial Use

The first time you have been added as a user, you will receive an account activation email from SmartVault. If you don't see the email in your inbox, please check your spam or junk folder. If you need further assistance, please call the office at 303-988-1411.

1. Open your activation email from SmartVault.
2. Click the SmartVault Activation Link.
3. Enter your phone number and create a password.
4. Click Create My User.
5. A verification code will be emailed to you. This code expires in 10 minutes so please complete this process promptly.
6. Once you enter the verification code, you'll be directed to your SmartVault folder.

## To Sign in to SmartVault

1. On a new browser tab on your computer, go to [www.my.smartvault.com](http://www.my.smartvault.com) or download the app on your phone/tablet.
2. Enter your email address and the password you created when you activated your account.
3. Click Sign In. If you forget your password, click 'Can't sign in?' and you'll receive an email to reset your password.
4. You may be asked to enter a one-time verification code that will be sent to your email or texted to your phone, depending on how you set up your account. This is 2FA, and occurs randomly or when signing in from an unknown device as added security.

## Uploading Documents—Submitting Your 2023 Tax Information

1. Log in to your SmartVault account and from the Home Page, Click on View Files and Folders, then choose the account name, then the applicable Tax Year (i.e. TY23) and desired folder:

Your Name>TY23>Client Source Documents

2. Click on Upload File then drag & drop the document(s) from your desktop into the window or Browse for the file on your computer.
3. Click Save.
4. FSM will automatically be notified that you've added a document to the folder.
5. PLEASE SUBMIT TAX RETURN INFORMATION ONLY. You may not remove any documents once uploaded, so if you added something erroneously, please call the office for assistance to delete.
6. You may also download the SmartVault app on your iPhone. This allows you to use the phone's camera to capture images and upload documents directly to your vault.

## Downloading Documents—Organizer, Completed Return, W-2's, etc.

1. Log in to your SmartVault account and navigate to the folder containing the files you'd like to download.
2. Click on the file to view it in your browser and click the blue Download button.
3. Click on the file to open or move to your desired folder on your computer.

For more detailed instructions on getting started, visit <https://vimeo.com/493784146> for a helpful Getting Started video. If you ever need assistance with your SmartVault account, you can reach out to Support by emailing [support@smartvault.com](mailto:support@smartvault.com) or calling the Financial Security Management office at 303-988-1411.