



Welcome to our Web Organizer. Unfortunately, this is not the most user-friendly program we've ever come across. Hopefully these detailed instructions will help you navigate the program. If you decide it is too daunting, don't feel bad – we've also posted a .pdf of your paper organizer to this portal. You can print it, fill it out by hand and submit it to us as usual (mail, drop off or scan and post on the portal for us to retrieve). Just let us know if you've decided not to do the interactive organizer.

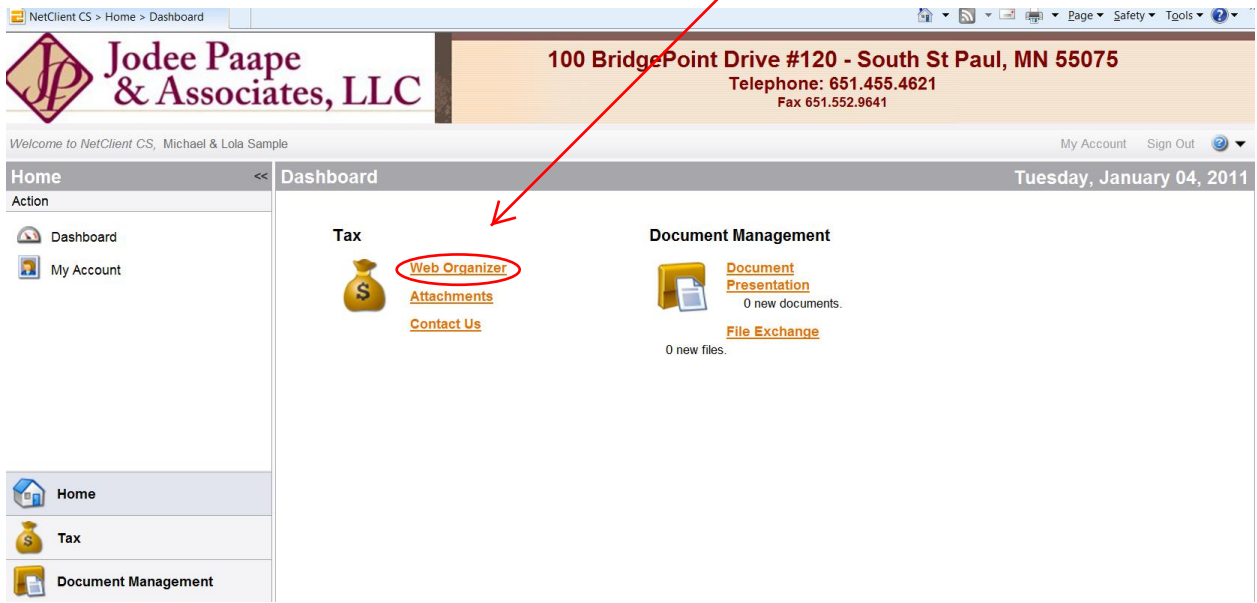


When logging into jodeepaape.com, click "Client Login" on the left side of page.

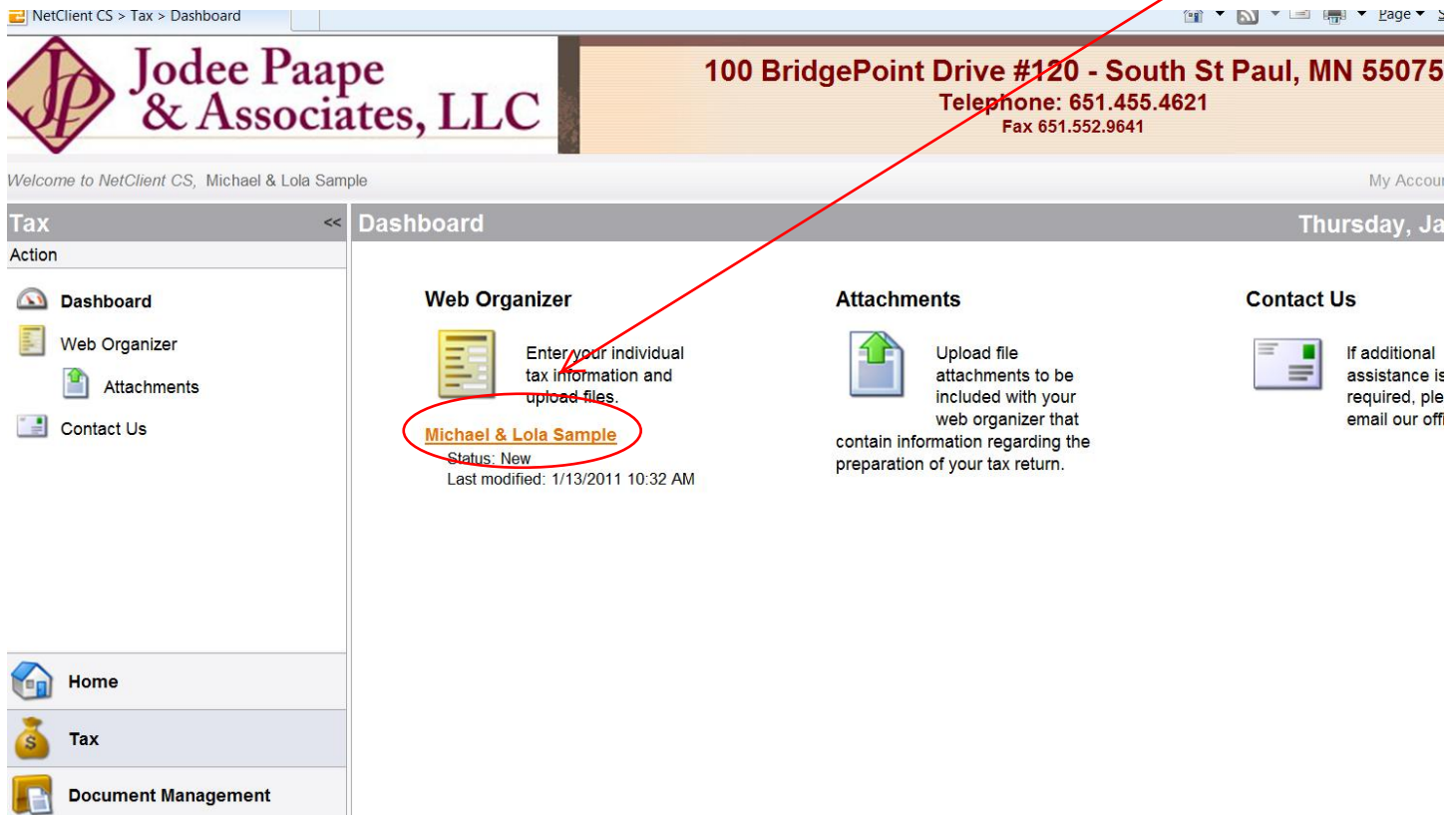


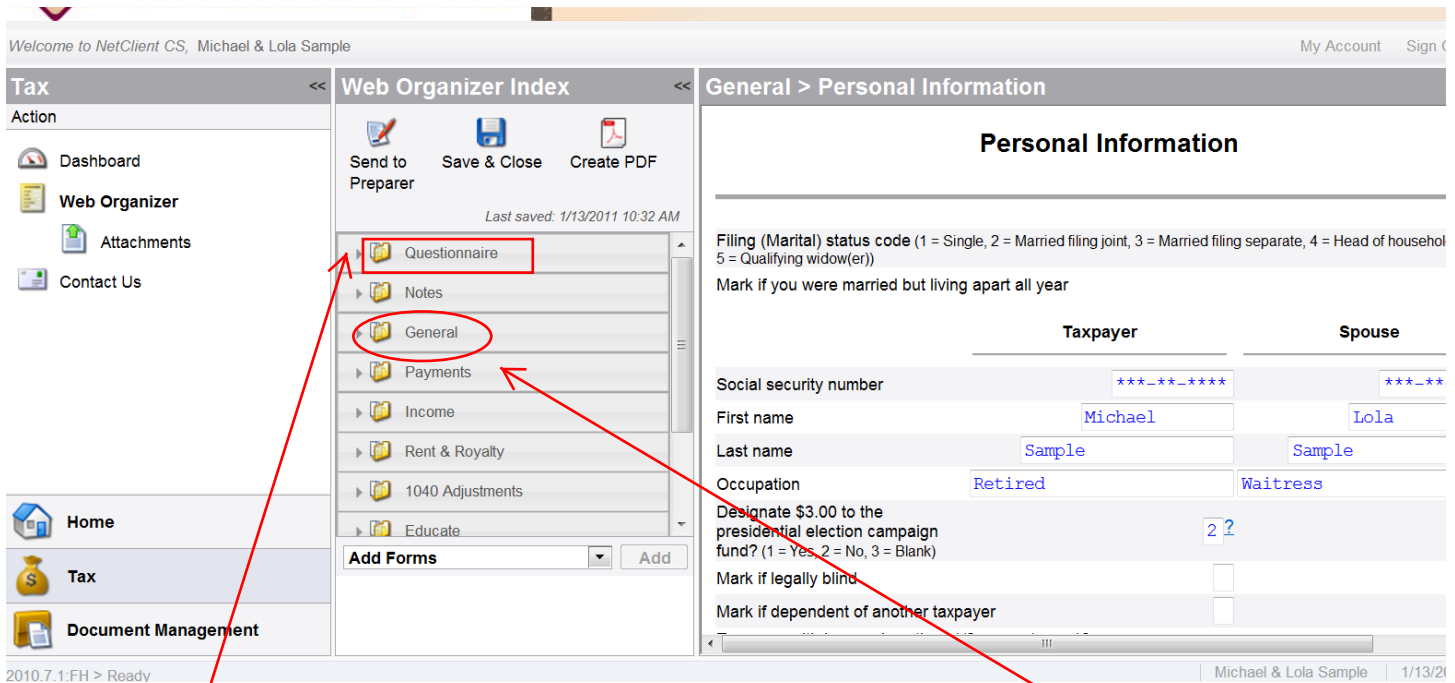
You can access your organizer using the Login we will provide and your social security number as your password.

The screen below is your Dashboard. In order to access your Web Organizer, simply click on the Web Organizer and you will be brought to the name of your Organizer.



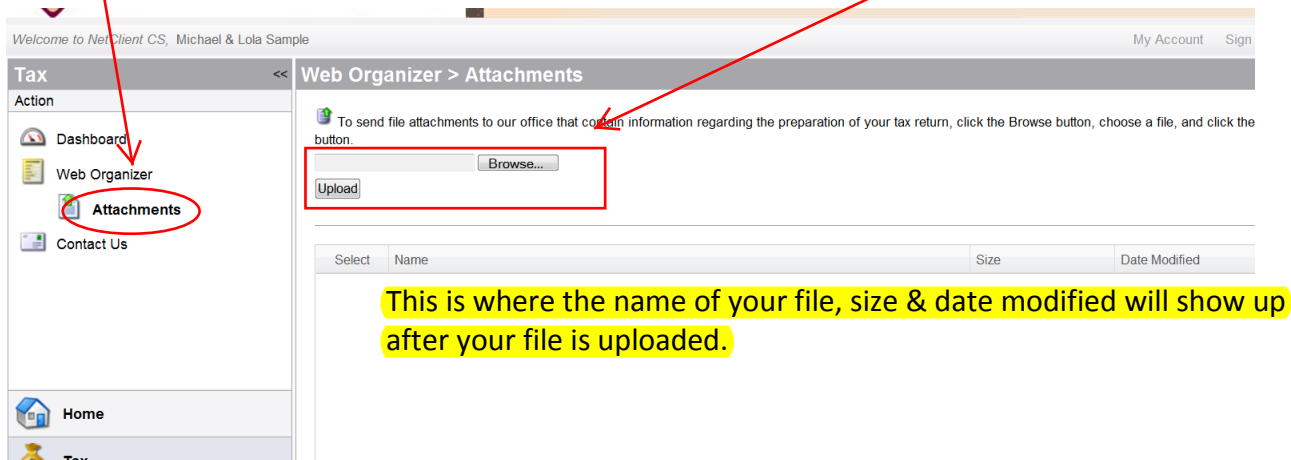
After you click Web Organizer, the screen below shows you an example of how your file will look. Click on your file name (Michael & Lola Sample) and it will bring you to the next screen.





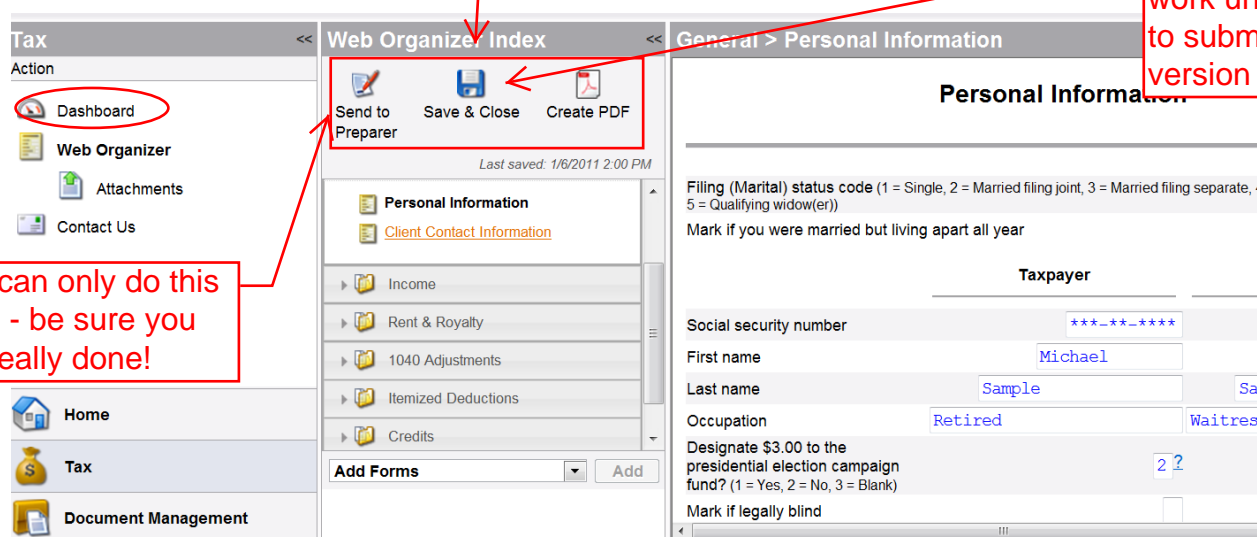
This is what your page will look like after you have selected your organizer file name. You can start filling in your information under the index. As you can see by the example above, we have started with the "General" section where you would enter your personal information, etc. Then you can go through the index and enter your income, adjustments, itemized deductions, etc. until everything is entered into the organizer. Be sure to answer the questions in the Questionnaire folder. The Notes folder is for you to ask questions or explain certain items.

To send file attachments to our office that contain information regarding the preparation of your tax return, go to "Attachments" under "Web Organizer" on the left side. Click the Browse button, choose your file, and click the Upload button to upload the documents you would like us to see. The screen shot below shows where the "Browse" and "Upload" buttons are located.



After you have everything entered into your web organizer and you have any attachments uploaded, you can now go back to your Dashboard (see screen shot below) and go to your Web Organizer and double click your tax return name. Once you double click on your tax return name, you will be brought back to the following screen and this is where you can either Save & Close your organizer, Create a PDF file, or you can Send to Preparer. If you think you are ready to send to the preparer, simply hit the "Send to Preparer" button. **PLEASE NOTE: Once you hit the "Send to Preparer" button, you will NOT be able to send your organizer again, nor access it from your portal.** So if you are not ready to send your organizer, simply save & close it and you will be able to work on it again at another time.

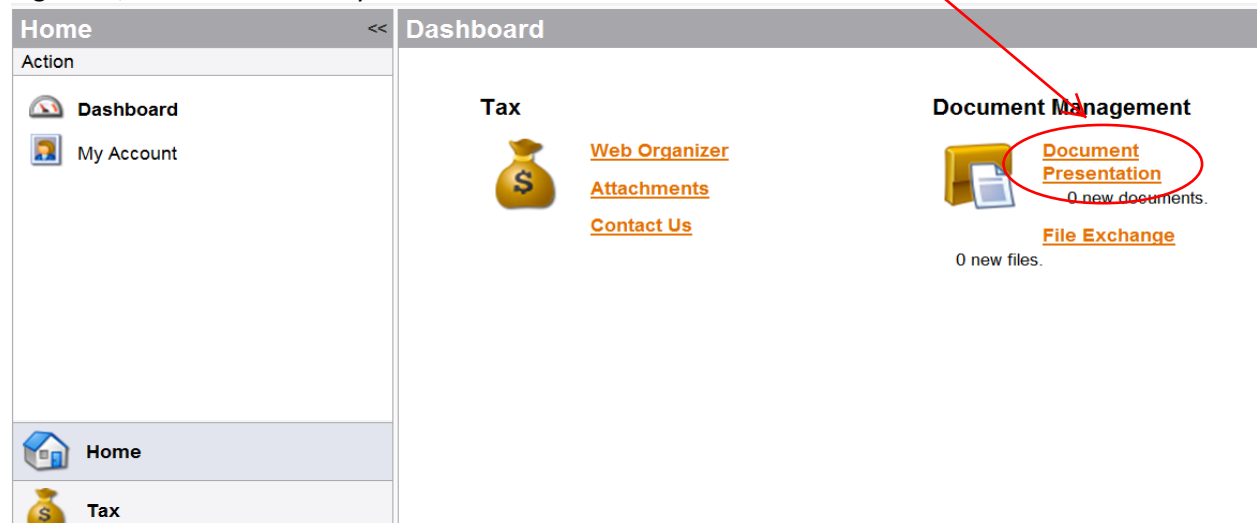
Use this to save your work until you're ready to submit the final version




You can only do this once - be sure you are really done!

Once you have sent your organizer, our office will receive a notice that your organizer is ready to be retrieved. If you are having any difficulty with the web organizer or just have a question, please just hit the "Contact Us" and you will be able to send an e-mail and we will be happy to help you.

If you feel the web organizer is something you don't want to work with and choose to print out your regular paper organizer that you would've received in the mail, you also have that option. You can print out the paper organizer, fill it out as you normally would and then scan it into your portal and send it back to us. Your paper organizer will be under the Document Management icon and click on "Document Presentation". Here you will click on your tax return File Name, click on "Tax Return", and then "12-31-10", which will bring you to a .pdf file "Client Organizer". Here you will be able to see your paper organizer and can print it out and fill it out as you normally would if it would have been mailed. After filling it out on paper, you can simply scan it into a file and then go back to where your "Attachments" icon is and upload the file, select the file to be sent and "Send to Preparer". Our office will once again get a notice that your organizer/attachment is ready to be retrieved.



The screen shot below shows you an example of how your "paper" organizer which has been converted to a .pdf file will look. You simply click on the "Client Organizer" and "Supplemental Organizer Pages", print them out, fill them out and either mail them to our office or scan them into a file and upload the documents and send them through the portal to our office. Again, if you have questions or need any assistance with anything when trying to access your organizer or portal, please don't hesitate to call our office at 651-455-4621.

**Jodee Paape  
& Associates, LLC**

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Telephone: 651.455.4621  
Fax 651.552.9641

Welcome to NetClient CS, Michael & Lola Sample My Account Sign Out

**Document Management** << **Document Presentation**

Action



- Dashboard
- Document Presentation**
- File Exchange

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- Home
- Tax
- Document Management**

Home Up Remove

/ Sample, Michael & Lola / Tax Return / 12-31-10

Name	Client	Size	Date Modified
 Client Organizer		79.10 KB	1/6/2011 1:50 PM
 Supplemental Organizer Pages		143.44 KB	1/10/2011 1:34 PM

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