

How to **LOGIN** to your secure MySafe account

1. Visit www.kccpa.com and click on the MySafe icon located on our Home page
2. Click on user name – sent in previous email
3. Password – sent in previous email

What if I can't **LOGIN** to my secure MySafe account?

1. Under the Login box
2. Click “Can’t access your account?”
3. Enter your Login – sent in previous email
4. Enter your email address that would have been associated with your MySafe account
5. Choose one of the following:
 - a. Reset via email
 - b. Reset via security questions (only if previously established)
6. For further assistance, contact Jennifer Miller at jennifer@kccpa.com or Beth Ehrett at beth@kccpa.com or call 816.741.7882.

How to **VIEW** documents in your secure MySafe account

1. Login to your MySafe account.
2. Find the “Documents” heading on the left navigation pane
3. Click on the name of the individual or business to view documents
4. Find the appropriate folder in the middle section of the screen
5. Double click on the appropriate folder(s) until you find the PDF document to view

How to **UPLOAD** documents to your secure MySafe account

1. Login to your MySafe account.
2. Find the “Documents” heading on the left navigation pane
3. Click on the “File Exchange” under the Documents heading
4. Find the appropriate folder in the middle section of the screen
5. Double click on the appropriate folder
6. Click the “Upload” icon in the top toolbar
7. Click “Add files”
8. Browse your computer to attach the appropriate files
9. Repeat the “Add files” steps as many times as necessary to attach all files
10. To remove file click the red circle to the right of file
11. Click “Start upload” when all files are attached