

MySafe

—Exchange—

New Login & Login Change Request Forms

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Click here [MySafe_{Exchange}](#) or refer to page #9 and follow the login instructions, to submit your information through your secure online account.

(Note: Complete one Form for EACH Addition/Change.)

PRIMARY Account Contact Change Request

A Primary Account Owner is the only individual authorized to initiate login changes allowing others to view his/her Business and or Individual information.

MySafe Exchange Primary Account Owner Authorizing the Addition or Change:

Primary Account Owner Name:

Title (if applicable):

Account Email:

Phone:

Type of Change:

Additional Primary Account Owner

Replace Primary Account Owner

Authorized User to have Primary Account Owner Status :

Effective Date:

First Name:

Last Name:

Title (if applicable):

Primary Business Address:

Business Email:




Phone:

Reason:

The Authorized User listed above is to be granted **Primary Account Owner Status** and is allowed **FULL ACCESS** to all items posted to their secure  account for the following Businesses or Individuals.

- 1.
- 2.
- 3.
- 4.

Submission is REQUIRED through the Primary Account Owner's  account.

Receipt of this form, by , through the Primary Account Owner's  account, will be deemed as written authorization from the Account Owner. It is the sole responsibility of the Account Owner to notify  of any access changes.

You will be notified when the account access has been completed.

For questions, please call Jennifer Miller at jennifer@kccpa.com or Beth Ehrett at beth@kccpa.com or call  at 816-741-7882.

FULL ACCESS Account Authorization Request

MySafe_{-Exchange-} Primary Account Owner Authorizing the Addition or Change

Account Owner Name:

Title (if applicable):

Account Email:

Phone:

Type of Change:

New Login

Disable Login

Update Current Login Access

Authorized User to be Added or Changed:

Effective Date:

First Name:

Last Name:

Title (if applicable):

Primary Business Address:

Business Email:

Phone:

Notes:

The Authorized User listed above is to be granted **FULL ACCESS** to all items posted to their secure MySafe_{-Exchange-} account for the following Businesses or Individuals.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Submission is REQUIRED through the Primary Account Owner's MySafe_{-Exchange-} account.

Receipt of this form, by McRuer_{-CPAs-}, through the Primary Account Owner's MySafe_{-Exchange-} account, will be deemed as written authorization from the Account Owner. It is the sole responsibility of the Account Owner to notify McRuer_{-CPAs-} of any access changes.

You will be notified when the account access has been completed.

For questions, please call Jennifer Miller at jennifer@kccpa.com or Beth Ehrett at beth@kccpa.com or call McRuer_{-CPAs-} at 816-741-7882.

LIMITED ACCESS Account Authorization Request

 **Primary Account Owner Authorizing the Addition or Change:**

Account Owner Name:
Title (if applicable):
Account Email:
Phone:

Type of Change:

New Login Disable Login Update Current Login Access

Authorized User to be Added or Changed:

Effective Date:

First Name:
Last Name:
Title (if applicable):
Primary Business Address:
Business Email:
Phone:

The Authorized User listed above is to be granted **LIMITED ACCESS** to the items posted to their secure  account for the following Business or Individual.



Business Name/Individual:

Authorized Content (check all that apply):

- Income Tax Returns Income Tax Return Source Documents (if applicable)
- Accounting Software Financial Statements Payroll Information
- Depreciation Schedule Business Licenses Property Tax Assessments
- Sales/Use Tax returns Agreements

Notes:

Submission is REQUIRED through the Primary Account Owner's  account.

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LIMITED ACCESS Account Authorization Request

MySafe Exchange Primary Account Owner Authorizing the Addition or Change:

Account Owner Name:

Title (if applicable):

Account Email:

Phone:

Type of Change:

New Login

Disable Login

Update Current Login Access

Authorized User to be Added or Changed:

Effective Date:

First Name:

Last Name:

Title (if applicable):

Primary Business Address:

Business Email:

Phone:

The Authorized User listed above is to be granted **LIMITED ACCESS** to the items posted to their secure  account for the following Business or Individual.



Business Name/Individual:

Authorized Content (check all that apply):

- | | | |
|--|---|---|
| <input type="checkbox"/> Income Tax Returns | <input type="checkbox"/> Income Tax Return Source Documents (if applicable) | |
| <input type="checkbox"/> Accounting Software | <input type="checkbox"/> Financial Statements | <input type="checkbox"/> Payroll Information |
| <input type="checkbox"/> Depreciation Schedule | <input type="checkbox"/> Business Licenses | <input type="checkbox"/> Property Tax Assessments |
| <input type="checkbox"/> Sales/Use Tax returns | <input type="checkbox"/> Agreements | |

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Title (if applicable):
Account Email:
Phone:

Type of Change:

New Login Disable Login Update Current Login Access

Authorized User to be Added or Changed:

Effective Date:

First Name:
Last Name:
Title (if applicable):
Primary Business Address:
Business Email:
Phone:

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Business Name/Individual:

Authorized Content (check all that apply):

- Income Tax Returns Income Tax Return Source Documents (if applicable)
- Accounting Software Financial Statements Payroll Information
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Update Current Login Access

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Effective Date:

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Last Name:

Title (if applicable):

Primary Business Address:

Business Email:

Phone:

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Business Name/Individual:

Authorized Content (check all that apply):


- | | | |
|--|---|---|
| <input type="checkbox"/> Income Tax Returns | <input type="checkbox"/> Income Tax Return Source Documents (if applicable) | |
| <input type="checkbox"/> Accounting Software | <input type="checkbox"/> Financial Statements | <input type="checkbox"/> Payroll Information |
| <input type="checkbox"/> Depreciation Schedule | <input type="checkbox"/> Business Licenses | <input type="checkbox"/> Property Tax Assessments |
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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