Instructions for Sending Tax Documents

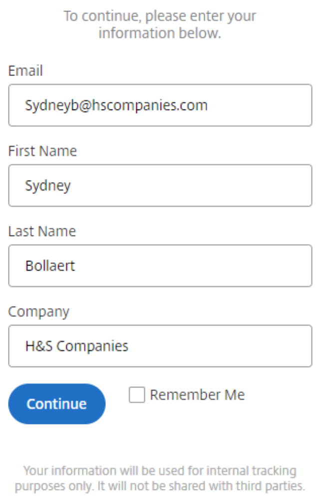
Preparing Documents

- Electronic copies directly downloaded from your financial institution is preferred. *As a reminder,* please do not email the source documents. Instead use the secure upload option on the H&S Website. See below for instructions.
- For best quality of documents, send the original electronic copy or scan the hard copy. *Please do not take photos of documents.*
- When scanning documents please keep these tips in mind:
    - Scanner settings of 300 DPI, black and white scans is preferred
    - Ensure the pages are scanned in the correct orientation (i.e. Landscape documents scanned in landscape format, portrait documents in portrait format)
    - Keep all pages of a multi-page document together
    - Only scan one document per page (i.e. Do not scan two different source documents to one single page)
    - Save documents as PDF or TIFF only.
    - Source document files should be deskewed, if this option is available on your scanner.
    - Please do not use the despeckle function when scanning for submission to our office.
- As a rule, if you are having trouble reading the document; we will also have difficulties. Please rescan and adjust scanner settings if necessary. Examples of scenarios when adjustments are necessary:
    - Image too light
    - Watermark appears on the document
    - Image background too dark
- If mailing documents to the office, please do not send copies. Send the original document; it will be returned to you when preparation is complete.

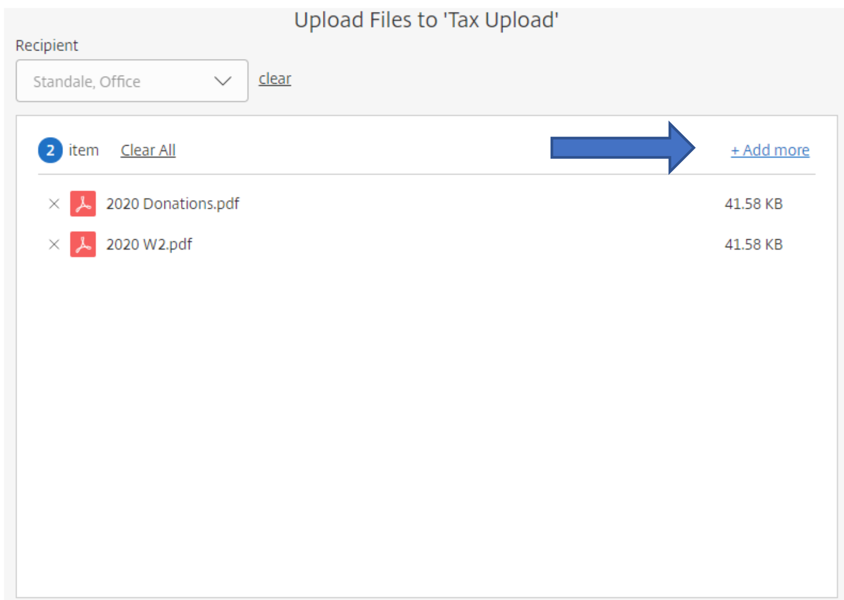
Sending via the H&S Portal

- Go to hscompanies.com, mouse over "Client Tools" and select "Upload Tax Documents"
    - *Or, click here to be taken directly to the portal*

- Enter in your email and name (and company if this is a business return) and select “continue”



- Select which office you work with from the “Recipient” drop down
- Drag documents from your desktop to upload, or select “Browse Files”
    - You can upload multiple documents at once. To do so, select “+Add More” in the upper right corner



- Once you have added all your documents, select “Upload” in the lower left corner. This will take up to 1 minute. When the documents have finished uploading, they will have a green box to the right saying “Uploaded” – you can close the webpage after all documents have uploaded.

**Please call Lauren Miller at 989-817-4900 should you have any questions or need assistance.*