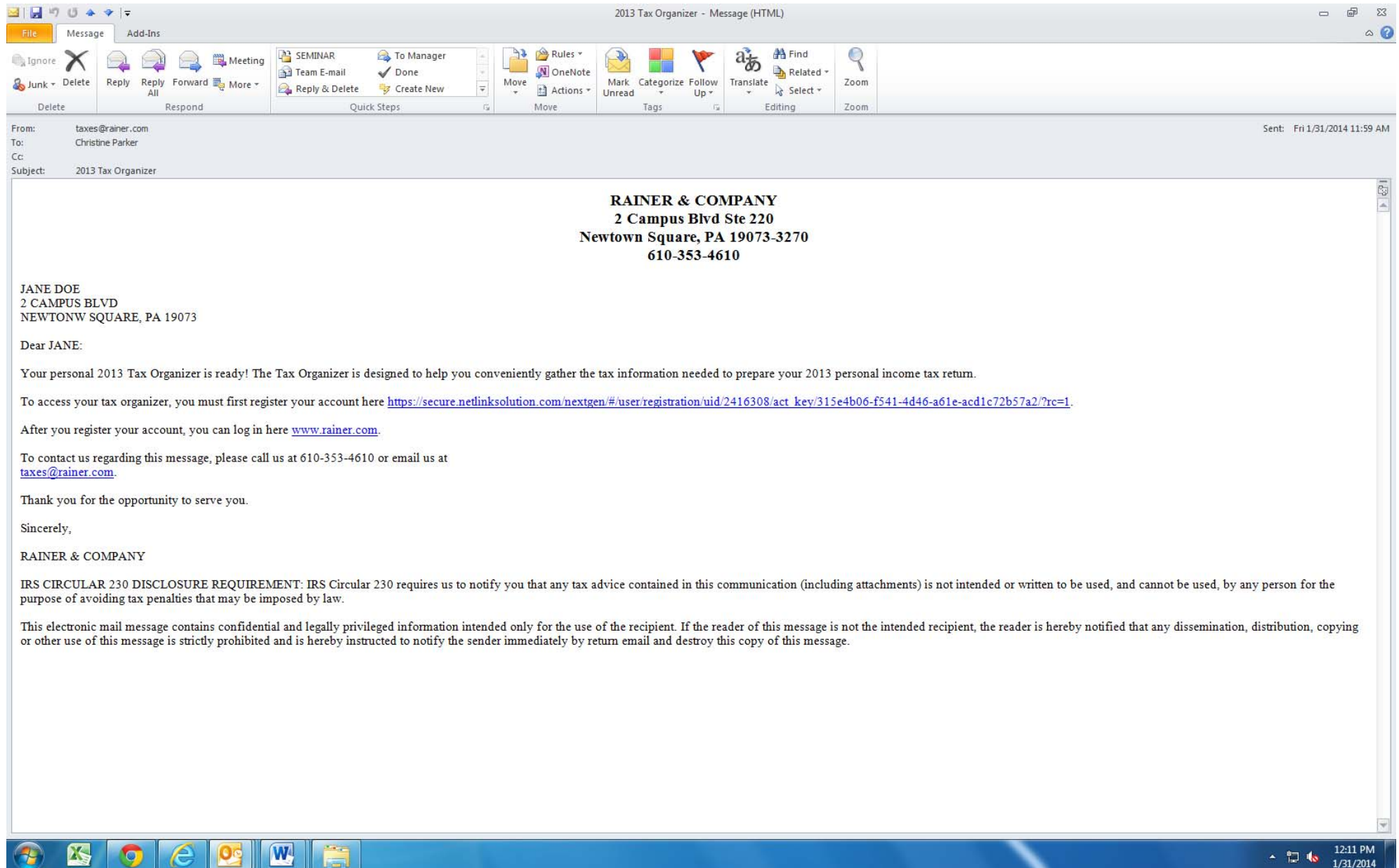


## WEB ORGANIZER/NETCLIENT PORTAL – INSTRUCTIONS FOR CLIENTS:

**Step 1: Once Rainer & Company sets up a Web Organizer (i.e. online tax organizer) for you, you will receive an automated email message indicating that your Web Organizer and NetClient Portal are ready. See sample email below:**



**Step 2:** Next you will be prompted, through a link in the automated email (reference above), to register your NetClient Portal. You register your NetClient Portal by clicking on the Register link in the email, then by entering the last four digits of your SSN followed by clicking the “Next” button (see below):

The screenshot shows a web browser window with the address bar displaying `https://secure.netlinksolution.com/#/user/registration/uid/2413085/act_key/98567e16-8d04-4ff4-b`. The browser's address bar, menu bar (Edit, View, Tools, Help), and toolbar (Favorites, Suggested Sites, Welcome, Home, Back, Forward, Stop, Reload, Print, Page, Safety, Tools, Help) are visible. The main content area of the browser displays a registration form. At the top of the form is the heading "Welcome". Below this is the instruction "Please register your account." followed by a horizontal line. Under the line is a text input field containing the placeholder text "Last 4 digits of EIN / SSN". To the right of the input field is a dark button labeled "Next". A large blue arrow points upwards from the bottom of the input field, and a large green arrow points upwards from the bottom of the "Next" button. The Windows taskbar at the bottom of the screen shows the "Done" button, several application icons (Internet Explorer, Google Chrome, Microsoft Word, Microsoft Office), and the system clock indicating 1:50 PM on 1/30/2014.

Welcome

Please register your account.

Last 4 digits of EIN / SSN

Next

**Step 3: Finish registering your NetClient Portal by creating a login and password, then click the “Register” button (see below):**

The screenshot shows a web browser window with the URL `https://secure.netlinksolution.com/#/user/registration/uid/2413085/act_key/98567e16-8d04-4ff4-b`. The page content includes:

- A "Welcome" heading.
- A horizontal line with the text "Please register your account." to its right.
- A registration form with the following fields and buttons:
  - "Create Login" (text input)
  - "Create Password" (text input)
  - "Confirm Password" (text input)
  - "Register" (button)

Blue arrows are overlaid on the image to guide the user: a large arrow points down from "Welcome" to the form; a smaller arrow points up from "Create Password" to "Create Login"; and another arrow points up from the bottom of the page towards the "Register" button.

**Step 4:** Once your NetClient Portal is registered, log on by going to the Rainer & Company website at [www.rainer.com](http://www.rainer.com), and clicking on the “Client Login” button (see below):

The screenshot shows the Rainer & Company website in a web browser. The browser's address bar displays [www.rainer.com](http://www.rainer.com). The website has a dark blue sidebar on the left with navigation links: ABOUT US, MEET OUR TEAM, OUR SERVICES, RESOURCES, NEWS, CAREERS AT RAINER, and CONTACT US. Below these links, the website lists two office locations: NEWTOWN SQUARE and WEST CHESTER, each with an address, phone number, and email address.

The main content area features a large photograph of two men in suits. Below the photo is the heading "WELCOME TO RAINER & COMPANY" followed by a paragraph about the firm's history and mission. Another paragraph describes the firm's services, and a third paragraph mentions the firm's commitment to client success. Below the text are logos for AICPA, PCPS, AICPA Employee Benefit Plan Audit Quality Center, PICPA, and PCAOB.

At the bottom of the main content area, there is a link to "Click here to read our annual Tax & Planning Guide!" and a "Follow" button for Rainer & Company on LinkedIn. At the very bottom of the page, there are two buttons: "Client Login" and "Employee Login". A large blue arrow points to the "Client Login" button.

The Windows taskbar at the bottom of the screen shows the Start button and several application icons, including Internet Explorer, Google Chrome, Microsoft Word, and Microsoft Excel. The system clock in the bottom right corner indicates the time is 10:14 AM on 1/30/2015.

**Step 5: Enter your login and password where indicated, then click the “Log In” button (See below):**

The screenshot shows a web browser window with the address bar displaying "https://secure.netlinksolution.com/nextgen/?firm=111520". The page content includes a header image of a hand writing on a notepad, followed by the company name "Rainer & Company" and its details: "Certified Public Accountants and Business Consultants", "2 Campus Blvd., Suite 220 - Newtown Square, PA", and "19073-3270". Below this is a login section with the text "Please log in." and three input fields. The first field contains the username "janedoe111", the second field contains a masked password ".....", and the third field is a "Log In" button. Three blue arrows are overlaid on the page: one pointing up to the username field, one pointing up to the password field, and one pointing left to the "Log In" button. The Windows taskbar at the bottom shows icons for Internet Explorer, Google Chrome, and other applications, with the system clock indicating 1:56 PM on 1/30/2014.

R/C Rainer & Company x Rainer & Company x

Thomson Reuters (Tax & Accounting) Inc [US] https://secure.netlinksolution.com/nextgen/?firm=111520



**Rainer & Company**

Certified Public Accountants and Business Consultants  
2 Campus Blvd., Suite 220 - Newtown Square, PA  
19073-3270

Please log in.

janedoe111 ..... Log In

Forgot your password?

1:56 PM  
1/30/2014

**NOTE:** If you forget your password, or just want to change it, you can simply click the link that says, “Forgot Password?” on the client login screen. This will allow you to reset your password (see below):

R.C. Rainer & Company

Thomson Reuters (Tax & Accounting) Inc [US] <https://secure.netlinksolution.com/nextgen/?firm=111520>



## Rainer & Company

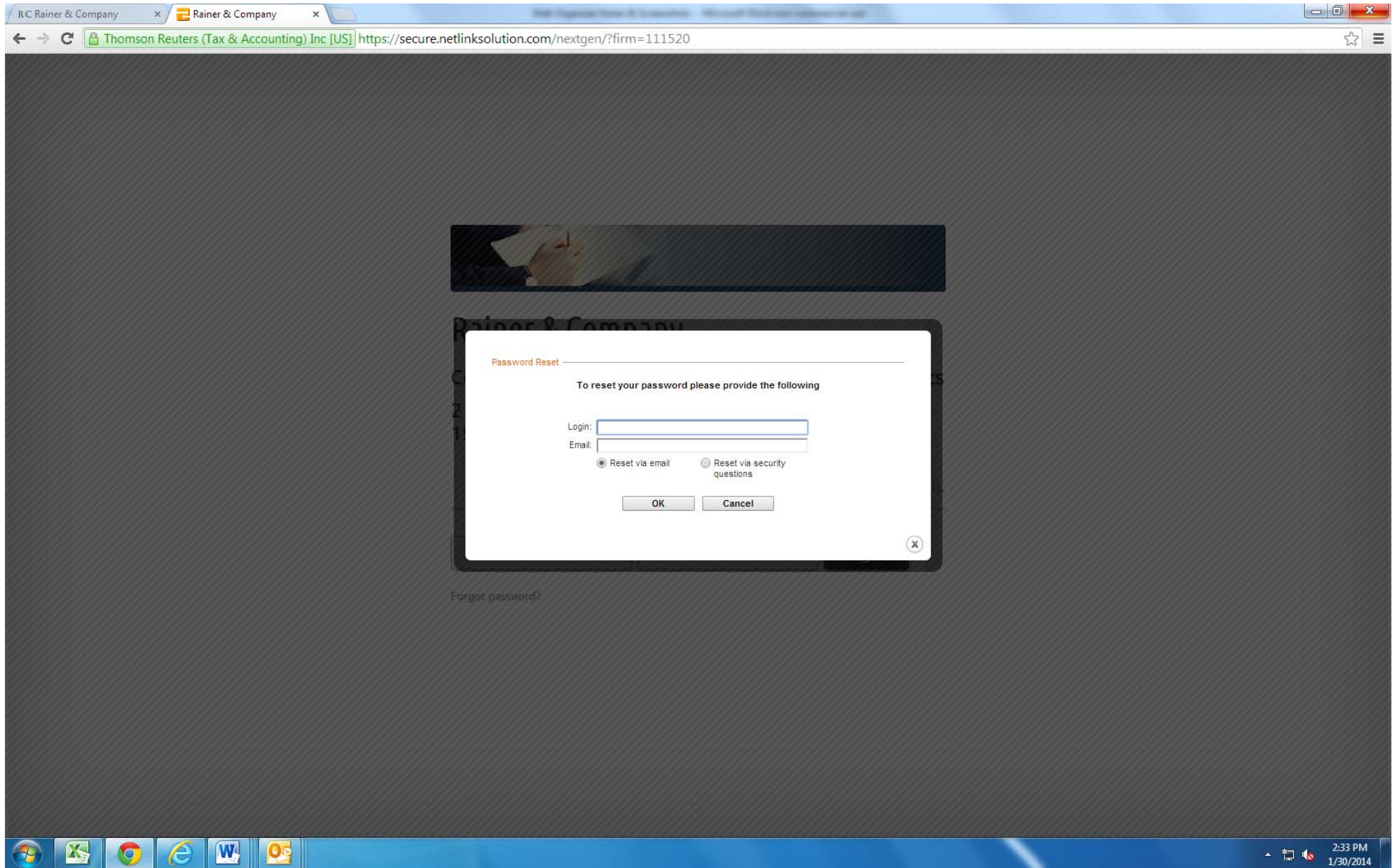
Certified Public Accountants and Business Consultants  
2 Campus Blvd., Suite 220 - Newtown Square, PA  
19073-3270

Please log in.

Login Password Log In

[Forgot password?](#)

2:31 PM  
1/30/2014



**Step 6: Once you are logged onto your NetClient Portal, click on the folder with your name on it under “Documents” to the left side of the screen (see below):**

The screenshot shows a web browser window with the address bar displaying "Thomson Reuters (Tax & Accounting) Inc [US]" and the URL "https://secure.netlinksolution.com/nextgen/go.html#/home/dashboard". The page header includes the logo for "Rainer & Company Certified Public Accountants and Business Consultants" and the address "2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270". The user is logged in as "Jane Doe".

The main content area is divided into two sections. The left sidebar, titled "NetClient CS", contains a "Documents" section with a folder named "Doe, Jane". A large blue arrow points to this folder. The right sidebar, titled "Home", contains a "Tasks" section with three items:

- To simplify future password resets, please select and answer Security Questions for your account. less than a minute ago
- Please view the Action Items document at your earliest convenience in the Doe, Jane folder. 16 minutes ago
- Your personal Tax Organizer is ready! Enter your tax information and then send to your preparer when complete. 16 minutes ago

Below the tasks, there is a "Tax Organizer" section with a sub-section titled "Enter Tax Information". This section shows the user's name "Jane Doe", status "New", and last modified date "1/30/2014 1:41 PM". There is also an "Upload Tax Documents" button.

The Windows taskbar at the bottom shows the time as 1:57 PM on 1/30/2014, along with icons for the Start button, Internet Explorer, Google Chrome, and other applications.

**Step 7: This will open another screen which shows your Tax Return Folder and your Tax Organizer Folder. Double-click on the Tax Organizer folder to open it (see below):**

The screenshot displays a web application interface for R.C. Rainer & Company, a Certified Public Accountants and Business Consultants firm. The interface is accessed via a browser window showing the URL <https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/2666291>. The top navigation bar includes links for Home and Messages, and a user profile for Jane Doe. The main content area is titled 'Doe, Jane' and features a toolbar with icons for Home, Up, Remove, Download All, and Refresh. Below the toolbar is a table listing documents:

| Name          | Size | Date Modified |
|---------------|------|---------------|
| Tax Returns   |      |               |
| Tax Organizer |      |               |

Two arrows are overlaid on the image: a blue arrow pointing to the 'Tax Returns' folder and a green arrow pointing to the 'Tax Organizer' folder. The status bar at the bottom of the browser window shows the URL and the system time, 1:59 PM on 1/30/2014.

## Sample Tax Organizer:

R.C. Rainer & Company

NetClient CS > Tax > Tax

Thomson Reuters (Tax & Accounting) Inc [US] https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/cover\_letter.jsp?folder=-2&folderUnit=-2&form=-2&formUnit=-2

**Rainer & Company**  
 Certified Public Accountants and Business Consultants  
 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages Jane Doe Help

**Tax Organizer Index**

Letter > Cover Letter

Send to Preparer Save & Close Create PDF

Last saved: 1/30/2014 1:41 PM

Uploaded Tax Documents

Letter

Cover Letter

Questionnaire

Notes

General

Electronic Filing

Payments

Income

Retirement

Rent & Royalty

1040 Adjustments

Itemized Deductions

States

**RAINER & COMPANY**  
 2 Campus Blvd Ste 220  
 Newtown Square, PA 19073-3270  
 610-353-4610

Jane Doe  
 2 Campus Blvd  
 NEWTOWN SQUARE, PA 19073

Dear Jane:

This Tax Organizer is designed to help you gather the tax information needed to prepare your 2013 personal income tax return. To help you complete the organizer with minimal time and effort, when available, you will find certain information from your 2012 personal income tax return.

In your Tax Organizer, all social security numbers and bank account numbers have been replaced with asterisks (\*\*\*.\*\*\*.\*\*\*\*) and (\*\*\*\*1234) to protect your privacy and personal information. If you need to change or update a social security number or bank account information, please contact this office. Do not indicate the social security number or bank account change on your Tax Organizer. When you receive your completed tax return(s), please review all social security numbers and bank account information for accuracy. Report any discrepancies to this office immediately.

Enter 2013 information on the Tax Organizer pages provided. If any information does not apply to you or is incorrect, please delete it or make the necessary corrections.

Please answer all applicable questions and use the Notes to Preparer screen to enter additional information not provided in the Tax Organizer. The Notes to Preparer screen is also available for any questions that you may have for our office.

We will also need the following information:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by this office.

You can upload additional files to be included with your Tax Organizer when you click Send to Preparer. This is a convenient and secure way to send information regarding the preparation of your tax return without having to mail or deliver these documents to our office. You can attach the following types of files to your Tax Organizer: Microsoft® Money® or Quicken® tax exchange format (.tax), Microsoft® Excel® (.xls), Microsoft® Word® (.doc, .rtf), Adobe® Reader® (.pdf), image files (.jpg, .bmp, .tif, .png), and web pages (.html).

IRS regulations require paid tax preparers who expect to prepare and file 11 or more federal individual or trust tax returns to file them electronically. To comply with this requirement your return will be electronically filed this year. The benefits of e-filing include a secure way to file tax returns and it provides proof of acceptance that the IRS has accepted your return for processing. Contact this office if you prefer your return be filed on paper.

Add Forms Add

2:00 PM 1/30/2014

**Step 8: Once open, you can go down the list of tabs to the left and fill out the online questionnaire with your current tax information (see below):**

The screenshot displays the Thomson Reuters Tax Organizer web application. The browser address bar shows the URL: [https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/custom\\_questionnaire.jsp?folder=-1&folderUnit=-1&form=-1&formUnit=-1](https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/custom_questionnaire.jsp?folder=-1&folderUnit=-1&form=-1&formUnit=-1). The page header identifies the user as Jane Doe and the company as Rainer & Company, Certified Public Accountants and Business Consultants.

The left sidebar contains a 'Tax Organizer Index' with the following tabs: Send to Preparer, Save & Close, Create PDF, Uploaded Tax Documents, Letter, Questionnaire (highlighted with a blue arrow), Web Questionnaire, Notes, General, Electronic Filing, Payments, Income, Retirement, Rent & Royalty, 1040 Adjustments, Itemized Deductions, and States.

The main content area is titled 'Questionnaire > Web Questionnaire' and includes the instruction: 'Please check the appropriate box and include all necessary details and documentation.' The questionnaire is divided into three sections:

- Personal Information:**
  - Did your marital status change during the year? (Yes/No)
  - If yes, explain: [Text box]
  - Did you enter into a legal (or common-law) marriage to a same-sex spouse in a state that legally recognizes same-sex marriage? (Yes/No)
  - Did your address change from last year? (Yes/No)
  - Can you be claimed as a dependent by another taxpayer? (Yes/No)
  - Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? (Yes/No)
- Dependent Information:**
  - Were there any changes in dependents from the prior year? (Yes/No)
  - If yes, explain: [Text box]
  - Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,000? (Yes/No)
  - Do you have dependents who must file a tax return? (Yes/No)
  - Did you provide over half the support for any other person(s) other than your dependent children during the year? (Yes/No)
  - Did you pay for child care while you worked or looked for work? (Yes/No)
  - Did you pay any expenses related to the adoption of a child during the year? (Yes/No)
  - If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? (Yes/No)
- Purchases, Sales, and Debt Information:**
  - Did you start a new business or purchase rental property during the year? (Yes/No)

The bottom of the page shows a taskbar with various application icons and a system clock indicating 2:00 PM on 1/30/2014.

One of the great features of the Web Organizer is that it rolls over prior year information so that clients only need to update whatever new info they have for the current year. It also displays last year's info for reference. (NOTE: this feature is only applicable if Rainer & Company prepared your tax returns the previous year).

**R.C. Rainer & Company**  
 Certified Public Accountants and Business Consultants  
 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages

**Tax Organizer Index**

Send to Preparer Save & Close Create PDF

Last saved: 1/30/2014 1:41 PM

Uploaded Tax Documents

- Letter
- Questionnaire
- Notes
- General
- Electronic Filing
- Payments
- Income
  - Salaries & Wages -**
  - Interest Income
  - Dividend Income
  - Stocks and Securities (1099-B and 1099-S)
  - Other Income
- Retirement
- Rent & Royalty
- 1040 Adjustments
- Itemized Deductions
- States

**Income > Salaries & Wages -**

**Wages and Salaries #1**

Please provide all copies of Form W-2.

|                                                                                                                 | 2013 Information | Prior Year Information |
|-----------------------------------------------------------------------------------------------------------------|------------------|------------------------|
| Taxpayer/Spouse (T, S)                                                                                          |                  |                        |
| Employer name                                                                                                   |                  |                        |
| Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Farming / Fishing, 4 = National Guard) |                  |                        |
| Mark if this is your current employer                                                                           |                  |                        |
| Federal wages and salaries (Box 1)                                                                              |                  |                        |
| Federal tax withheld (Box 2)                                                                                    |                  |                        |
| Social security wages (if different than federal wages)                                                         |                  |                        |
| Social security tax withheld (Box 4)                                                                            |                  |                        |
| Medicare wages (if different than federal wages)                                                                |                  |                        |
| Medicare tax withheld (Box 6)                                                                                   |                  |                        |
| SS tips (Box 7)                                                                                                 |                  |                        |
| Allocated tips (Box 8)                                                                                          |                  |                        |
| Dependent care benefits (Box 10)                                                                                |                  |                        |
| Box 13 -                                                                                                        |                  |                        |
| Statutory employee                                                                                              |                  |                        |
| Retirement plan                                                                                                 |                  |                        |
| Third-party sick pay                                                                                            |                  |                        |
| State postal code (Box 15)                                                                                      |                  |                        |
| State wages (if different than federal wages)                                                                   |                  |                        |
| State tax withheld (Box 17)                                                                                     |                  |                        |
| Local wages (Box 18)                                                                                            |                  |                        |
| Local tax withheld (Box 19)                                                                                     |                  |                        |
| Name of locality (Box 20)                                                                                       |                  |                        |

Add Forms Add

Wages and Salaries #2

2:01 PM 1/30/2014

**Step 9: You can also upload your tax documents such as W-2, 1099, 1098, K-1 etc by clicking the “Uploaded Tax Documents” link (see below):**

The screenshot shows a web browser window with the URL: [https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/custom\\_questionnaire.jsp?folder=-1&folderUnit=-1&form=-1&formUnit=-1](https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/custom_questionnaire.jsp?folder=-1&folderUnit=-1&form=-1&formUnit=-1). The page header identifies the user as Jane Doe and the company as Rainer & Company, Certified Public Accountants and Business Consultants.

The main content area is titled "Questionnaire > Web Questionnaire" and includes a instruction: "Please check the appropriate box and include all necessary details and documentation." The form is organized into sections with "Yes" and "No" columns for responses.

**Personal Information**

- Did your marital status change during the year? ☐ Yes ☐ No
- If yes, explain:
- Did/have you celebrate(d) marriage to a same-sex spouse in a state that legally recognizes same-sex marriage? ☐ Yes ☐ No
- Did your address change from last year? ☐ Yes ☐ No
- Can you be claimed as a dependent by another taxpayer? ☐ Yes ☐ No
- Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? ☐ Yes ☐ No

**Dependent Information**

- Were there any changes in dependents from the prior year? ☐ Yes ☐ No
- If yes, explain:
- Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,000? ☐ Yes ☐ No
- Do you have dependents who must file a tax return? ☐ Yes ☐ No
- Did you provide over half the support for any other person(s) other than your dependent children during the year? ☐ Yes ☐ No
- Did you pay for child care while you worked or looked for work? ☐ Yes ☐ No
- Did you pay any expenses related to the adoption of a child during the year? ☐ Yes ☐ No
- If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? ☐ Yes ☐ No

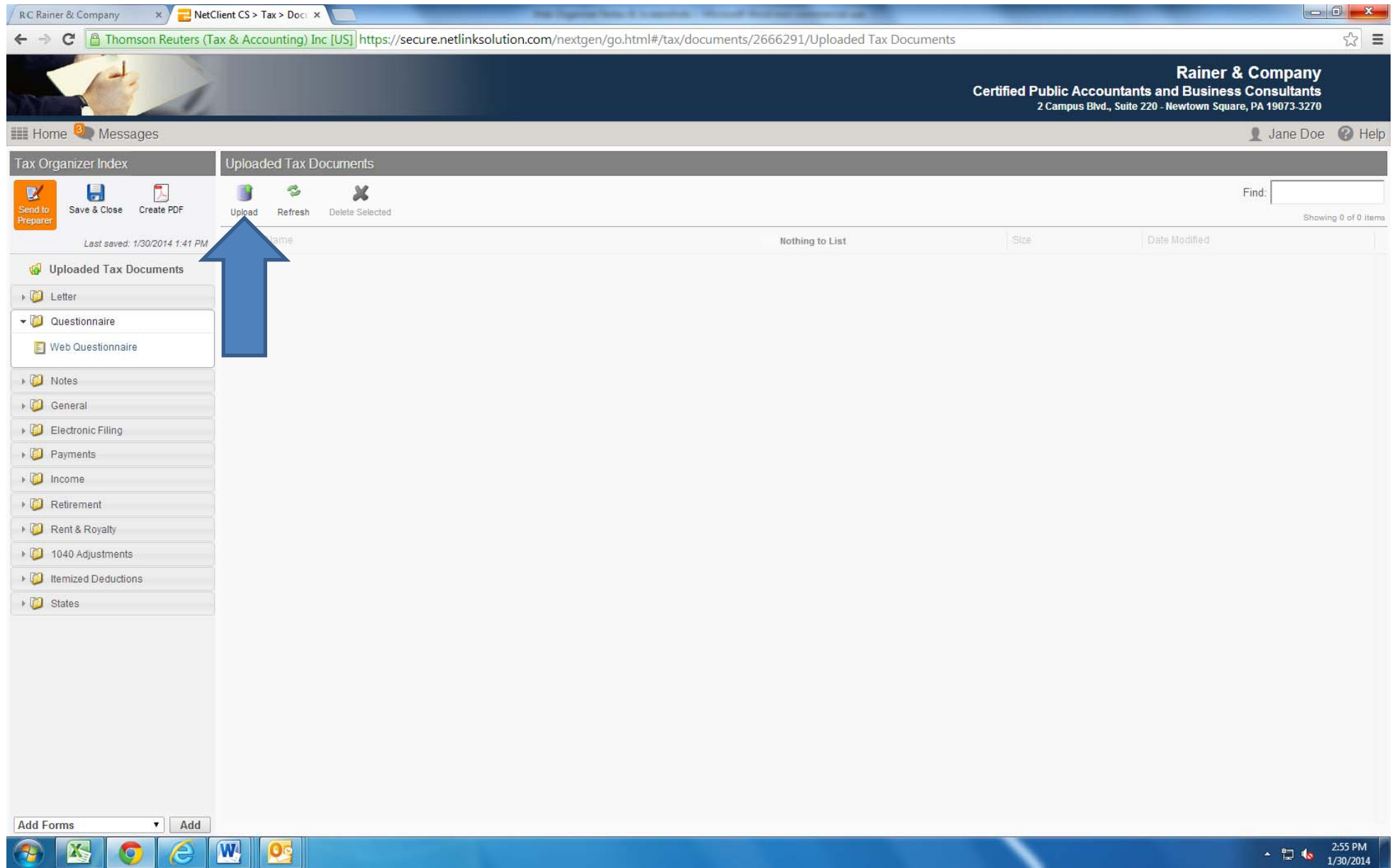
**Purchases, Sales, and Debt Information**

- Did you start a new business or purchase rental property during the year? ☐ Yes ☐ No

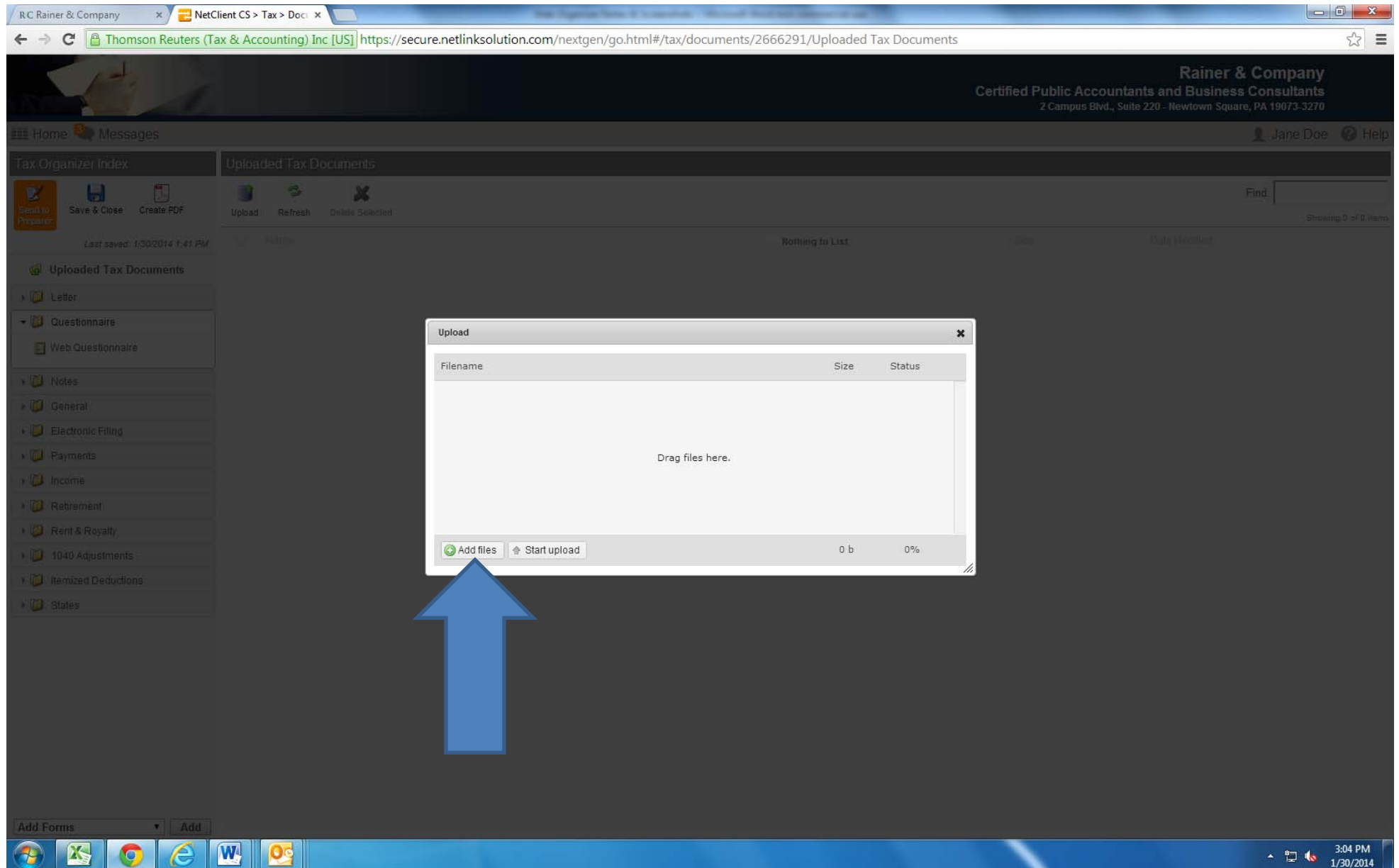
The left sidebar contains a "Tax Organizer Index" with links to various document types. A blue arrow points to the "Uploaded Tax Documents" link, which is highlighted. Other links include Letter, Questionnaire, Web Questionnaire, Notes, General, Electronic Filing, Payments, Income, Retirement, Rent & Royalty, 1040 Adjustments, Itemized Deductions, and States.

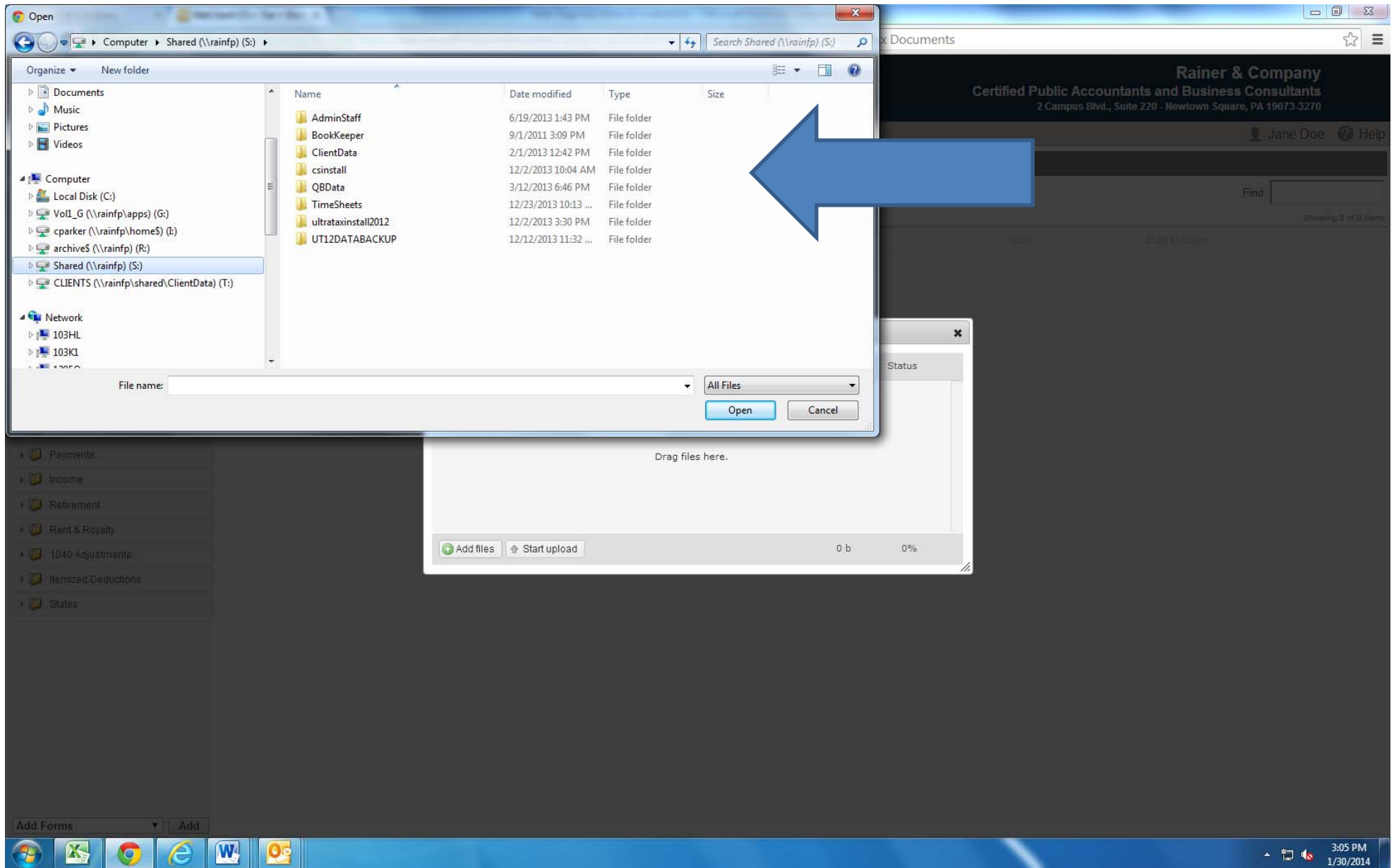
The bottom of the screen shows a Windows taskbar with icons for Internet Explorer, Google Chrome, Microsoft Word, and Microsoft Excel. The system clock indicates the time is 2:54 PM on 1/30/2014.

**Step 10:** This opens up a screen that will allow you to upload your saved documents by first clicking the “Upload” button (see below):



**Step 11: Then clicking on the “Add Files” button. (This allows you to browse your computer to where your saved documents are that you wish to upload) (see below):**





**Step 12:** Once you find the document that you want to upload, simply double-click on it to add it to the upload screen (see below):

The screenshot shows a web browser window with the address bar displaying "https://secure.netlinksolution.com/nextgen/go.html#/tax/documents/2666291/Uploaded Tax Documents". The page header identifies the user as "Jane Doe" and the company as "Rainer & Company, Certified Public Accountants and Business Consultants". The main content area is titled "Uploaded Tax Documents" and shows a list of files. A blue arrow points to the "1099-MISC.pdf" file in the "Upload" dialog box.

**Uploaded Tax Documents**

| Filename      | Size  | Status |
|---------------|-------|--------|
| 1099-MISC.pdf | 29 KB | 0%     |

Buttons: Add files, Start upload

29 KB 0%

**Step 13: Click on the “Start Upload” button to start the upload process:**

The screenshot shows a web application interface for 'Rainer & Company', a Certified Public Accountants and Business Consultants. The browser address bar shows the URL: <https://secure.netlinksolution.com/nextgen/go.html#/tax/documents/2666291/Uploaded Tax Documents>. The application has a sidebar with a 'Tax Organizer Index' and a main area titled 'Uploaded Tax Documents'. An 'Upload' dialog box is open in the center, displaying a table with the following data:

| Filename      | Size  | Status |
|---------------|-------|--------|
| 1099-MISC.pdf | 29 KB | 0%     |

Below the table, there are two buttons: 'Add files' and 'Start upload'. A large blue arrow points to the 'Start upload' button. The status bar at the bottom of the browser shows the time as 3:08 PM on 1/30/2014.

**Step 14: When finished uploading, you should be able to see your uploaded documents in the “Uploaded Tax Documents” screen (see below):**

R.C. Rainer & Company x NetClient CS > Tax > Doc x

Thomson Reuters (Tax & Accounting) Inc [US] <https://secure.netlinksolution.com/nextgen/go.html#/tax/documents/2666291/Uploaded Tax Documents>

**Rainer & Company**  
Certified Public Accountants and Business Consultants  
2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages Jane Doe Help

**Tax Organizer Index**

Send to Preparer Save & Close Create PDF

Last saved: 1/30/2014 1:41 PM

**Uploaded Tax Documents**

Upload Refresh Delete Selected Find: Showing 1 of 1 items

|                          | Name          | Size     | Date Modified     |
|--------------------------|---------------|----------|-------------------|
| <input type="checkbox"/> | 1099-MISC.pdf | 29.49 KB | 1/30/2014 3:10 PM |

Add Forms Add

3:11 PM 1/30/2014

You can save a PDF of your Web Organizer if you choose by clicking on the Adobe PDF icon that says, “Create PDF” (see below):

R.C. Rainer & Company

NetClient CS > Tax > Tax

Thomson Reuters (Tax & Accounting) Inc [US] <https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/form.jsp?folder=23&folderUnit=1&form=152&formUnit=1>

**Rainer & Company**  
 Certified Public Accountants and Business Consultants  
 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages Jane Doe Help

**Tax Organizer Index** States > Pennsylvania

Send to Preparer Save & Close **Create PDF**

Last saved: 1/30/2014 1:41 PM

Uploaded Tax Documents

- Letter
- Questionnaire
- Notes
- General
- Electronic Filing
- Payments
- Income
- Retirement
- Rent & Royalty
- 1040 Adjustments
- Itemized Deductions
- States
  - Pennsylvania**

**Pennsylvania General Information**

County of residence

School district name

Taxpayer Spouse

Final return ☐

**Contributions**

Amount of contributions you wish to make to:

|                                                           | Taxpayer             | Spouse               |
|-----------------------------------------------------------|----------------------|----------------------|
| Breast and Cervical Cancer                                | <input type="text"/> | <input type="text"/> |
| Wild Resource Conservation Fund                           | <input type="text"/> | <input type="text"/> |
| Military Family Relief Assistance                         | <input type="text"/> | <input type="text"/> |
| Governor Robert P. Casey Memorial Organ/Tissue Trust Fund | <input type="text"/> | <input type="text"/> |
| Juvenile (Type 1) Diabetes Cure Research Fund             | <input type="text"/> | <input type="text"/> |

**Part-year Resident Information**

If you were a part-year resident during the tax year, enter the dates you lived in Pennsylvania

|                            | Taxpayer             | Spouse               |
|----------------------------|----------------------|----------------------|
| Part-year residency dates: |                      |                      |
| From                       | <input type="text"/> | <input type="text"/> |
| To                         | <input type="text"/> | <input type="text"/> |

Add Forms Add

3:35 PM 1/30/2014

You can also stop and start your Web Organizer whenever you want by clicking the “Save and Close” button before you exit the Web Organizer (see below):

R C Rainer & Company | NetClient CS > Tax > Tax |

Thomson Reuters (Tax & Accounting) Inc [US] | <https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/form.jsp?folder=23&folderUnit=1&form=152&formUnit=1>

**Rainer & Company**  
 Certified Public Accountants and Business Consultants  
 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home | Messages | Jane Doe | Help

**Tax Organizer Index**

- Send to Preparer
- Save & Close
- Create PDF
- Uploaded Tax Forms
- Letter
- Questionnaire
- Notes
- General
- Electronic Filing
- Payments
- Income
- Retirement
- Rent & Royalty
- 1040 Adjustments
- Itemized Deductions
- States
  - Pennsylvania

**States > Pennsylvania**

**Pennsylvania General Information**

County of residence:

School district name:

Taxpayer: ☐ Spouse: ☐

Final return: ☐

**Contributions**

Amount of contributions you wish to make to:

|                                                           | Taxpayer             | Spouse               |
|-----------------------------------------------------------|----------------------|----------------------|
| Breast and Cervical Cancer                                | <input type="text"/> | <input type="text"/> |
| Wild Resource Conservation Fund                           | <input type="text"/> | <input type="text"/> |
| Military Family Relief Assistance                         | <input type="text"/> | <input type="text"/> |
| Governor Robert P. Casey Memorial Organ/Tissue Trust Fund | <input type="text"/> | <input type="text"/> |
| Juvenile (Type 1) Diabetes Cure Research Fund             | <input type="text"/> | <input type="text"/> |

**Part-year Resident Information**

If you were a part-year resident during the tax year, enter the dates you lived in Pennsylvania

Part-year residency dates:

From:  To:

Taxpayer: ☐ Spouse: ☐

Add Forms | Add

3:38 PM 1/30/2014

**Step 15: When you are finished inputting your information into the Web Organizer and/or uploading your tax documents, simply click the “Send To Preparer” button. This will electronically transmit your info to Rainer & Company where the admin staff will retrieve it and import it into our tax software so that the accountants can begin preparing your tax returns (see below).**

The screenshot displays the Rainer & Company NetClient CS interface. The browser address bar shows the URL: <https://secure.netlinksolution.com/nextgen/go.html#/tax/documents/2666291/Uploaded Tax Documents>. The page header includes the company name "Rainer & Company" and their address: "2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270".

The main content area is divided into two sections:

- Tax Organizer Index:** This section contains a sidebar with various tax-related categories: "Send to Preparer", "Save & Close", "Create PDF", "Documents", "Questionnaire", "Web Questionnaire", "Notes", "General", "Electronic Filing", "Payments", "Income", "Retirement", "Rent & Royalty", "1040 Adjustments", "Itemized Deductions", and "States". A blue arrow points to the "Send to Preparer" button.
- Uploaded Tax Documents:** This section displays a table of uploaded documents. The table has columns for "Name", "Size", and "Date Modified". One document is listed: "1099-MISC.pdf" with a size of "29.49 KB" and a date modified of "1/30/2014 3:10 PM".

The bottom of the interface shows a Windows taskbar with various application icons and a system clock indicating the time is 3:23 PM on 1/30/2014.

R.C. Rainer & Company x NetClient CS > Tax > Doc x

Thomson Reuters (Tax & Accounting) Inc [US] https://secure.netlinksolution.com/nextgen/go.html#/tax/documents/2666291/Uploaded Tax Documents

**Rainer & Company**  
Certified Public Accountants and Business Consultants  
2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages Jane Doe Help

**Tax Organizer Index**

Send to Preparer Save & Close Create PDF

Last saved: 1/30/2014 1:41 PM

**Uploaded Tax Documents**

Upload Refresh Delete Selected

Find:

Showing 1 of 1 items

| Name          | Size     | Date Modified     |
|---------------|----------|-------------------|
| 1099-MISC.pdf | 29.49 KB | 1/30/2014 3:10 PM |

**Send to Preparer Confirmation**

Thank you for completing your 2013 Tax Organizer. We will gather this information and get back to you if we need anymore information.

If you need to enter more information please click Cancel.

Cancel OK

Add Forms Add

3:28 PM 1/30/2014

**Step 16: Once the Web Organizer is submitted to Preparer, the status on the home page of your NetClient Portal will change from “New” to “Completed” (see below).**

The screenshot displays the NetClient CS Home dashboard for Jane Doe. The browser address bar shows the URL: <https://secure.netlinksolution.com/nextgen/go.html#/home/dashboard>. The dashboard header includes the Rainer & Company logo and contact information. The main content area is divided into sections: Home, Messages, and a sidebar with NetClient CS and Documents. The Home section features a Tasks list with two items: a security question reset reminder and an action items document. Below the Tasks list is the Tax Organizer section, which shows a task titled "Enter Tax Information" for Jane Doe, with a status of "Completed" and a last modified date of 1/30/2014. A large blue arrow points to the "Completed" status. An "Upload Tax Documents" button is also visible in the Tax Organizer section. The Windows taskbar at the bottom shows the time as 3:30 PM on 1/30/2014.

R.C. Rainer & Company

NetClient CS > Home > D

Thomson Reuters (Tax & Accounting) Inc [US] <https://secure.netlinksolution.com/nextgen/go.html#/home/dashboard>

Rainer & Company  
Certified Public Accountants and Business Consultants  
2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages

Jane Doe Help

NetClient CS

Documents

Doe, Jane Tax Org

Home

Tasks

- To simplify future password resets, please select and answer Security Questions for your account.  
about 2 hours ago
- Please view the Action Items document at your earliest convenience in the Doe, Jane folder.  
about 2 hours ago

Tax Organizer

Enter Tax Information  
Jane Doe  
Status: **Completed**  
Last modified: 1/30/2014

Upload Tax Documents

3:30 PM  
1/30/2014

**Step 17:** Once the Web Organizer data is retrieved by the Rainer & Company admin staff, the status on the home page of your NetClient Portal will change from “Completed” to “Retrieved”. This is your confirmation that you have successfully submitted your Web Organizer and/or uploaded tax documents to Rainer & Company (see below).

The screenshot displays the NetClient CS home dashboard. The browser address bar shows the URL: <https://secure.netlinksolution.com/nextgen/go.html#/home/dashboard>. The page header identifies the user as Jane Doe and provides contact information for Rainer & Company, Certified Public Accountants and Business Consultants, located at 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270.

The dashboard layout includes a left sidebar with navigation links for Home, Messages, Documents, and a list of users (Doe, Jane). The main content area is titled 'Home' and features a 'Tasks' section with a message about security questions. Below this, the 'Tax Organizer' section is highlighted with a large blue arrow pointing to it. The 'Tax Organizer' section shows the user's name (Jane Doe), the status 'Retrieved' in green, and the last modified date (1/31/2014). A link to 'Upload Tax Documents' is also visible.

Windows taskbar at the bottom shows the time as 11:22 AM on 1/31/2014.

To access your Tax Returns through your Client Portal, go back to the Home screen by clicking the “Home” button, then click on the link to the left with your name on it. This will display your “Tax Returns” folder (see below).

The screenshot displays the NetClient CS web interface. At the top, a blue header bar contains the company name "Rainer & Company" and their address. Below this, a navigation bar shows "Home" and "Messages" buttons. The main content area is titled "Doe, Jane" and features a sidebar on the left with a "Documents" section. In the sidebar, the "Doe, Jane" link is highlighted with a green arrow. The main area shows a list of documents with columns for "Name", "Size", and "Date Modified". The "Tax Returns" folder is highlighted with an orange arrow. The "Tax Organizer" folder is also visible. The bottom of the screen shows a Windows taskbar with various application icons and the system clock.

NetClient CS > Document

Thomson Reuters (Tax & Accounting) Inc [US] <https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/2666291>

**Rainer & Company**  
Certified Public Accountants and Business Consultants  
2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270

Home Messages Jane Doe Help

NetClient CS

Documents

Doe, Jane Tax Org

Home Up Remove Download All Refresh

Find:

Showing 2 of 3 items

| Name          | Size | Date Modified |
|---------------|------|---------------|
| Tax Returns   |      |               |
| Tax Organizer |      |               |

<https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/2666291>

1:59 PM  
1/30/2014

Click on the “Tax Return” folder to reveal PDF copies of tax returns for each year that you used a Client Portal (see below).

The screenshot shows a web browser window with the address bar displaying "Thomson Reuters (Tax & Accounting) Inc [US]" and the URL "https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/2666291/Tax Returns". The page header includes the logo for "Rainer & Company" and their contact information: "Certified Public Accountants and Business Consultants, 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270". The user is logged in as "Jane Doe".

The main content area is titled "Doe, Jane / Tax Returns". It features a navigation bar with icons for "Home", "Up", "Remove", "Download All", and "Refresh". Below this is a table listing documents:

| Name     | Size | Date Modified |
|----------|------|---------------|
| 12-31-14 |      |               |
| 12-31-13 |      |               |

A large blue arrow points to the "12-31-13" folder. The bottom of the screen shows a Windows taskbar with icons for Internet Explorer, File Explorer, Google Chrome, Microsoft Word, and Outlook. The system clock indicates "5:21 PM 1/7/2015".

Double click on the year-end folder to display the actual returns (see below).

The screenshot shows a web browser window with the address bar displaying the URL: <https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/2666291/Tax>Returns/12-31-13>. The page header includes the logo for Rainer & Company, Certified Public Accountants and Business Consultants, located at 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270. The user is logged in as Jane Doe.

The main content area shows a document management interface for "Doe, Jane / Tax Returns / 12-31-13". It includes a sidebar with "Documents" and a "Tax Org" button. The main area displays a table of documents:

| Name          | Size     | Date Modified    |
|---------------|----------|------------------|
| Action Items  |          |                  |
| PA Tax Return | 70.90 KB | 2/3/2014 8:47 AM |
| US Tax Return | 50.29 KB | 2/3/2014 8:47 AM |

A large blue arrow points to the "US Tax Return" document, indicating it should be double-clicked to view the actual returns.

Depending on your preference, Rainer & Company will send you your actionable tax return items, that is any item that requires action on your part such e-file authorization forms that need to be signed and sent back to Rainer & Co, federal and/or state payment vouchers that need to be paid and remitted to the IRS and/or the state, any estimated payment vouchers that need to be paid and remitted, etc, either by mail or via your “ACTION ITEMS” folder on your NetClient Portal. Therefore, be sure that you check your “ACTION ITEMS” folder for any urgent actionable documents that may require your attention (see below).

The screenshot displays the NetClient CS web portal interface. The browser address bar shows the URL: <https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/2666291/Tax>Returns/12-31-13>. The page header includes the Rainer & Company logo and contact information: "Rainer & Company, Certified Public Accountants and Business Consultants, 2 Campus Blvd., Suite 220 - Newtown Square, PA 19073-3270". The user is logged in as Jane Doe.

The main content area shows a list of documents for Doe, Jane / Tax Returns / 12-31-13. A green arrow points to the 'Action Items' folder, which is highlighted in blue. Below it, two tax return documents are listed:

| Name          | Size     | Date Modified    |
|---------------|----------|------------------|
| PA Tax Return | 70.90 KB | 2/3/2014 8:47 AM |
| US Tax Return | 50.29 KB | 2/3/2014 8:47 AM |

The taskbar at the bottom shows the Windows 7 operating system with various application icons (Internet Explorer, Google Chrome, Microsoft Word, etc.) and the system clock indicating 5:31 PM on 1/7/2015.

If Rainer & Company sends your actionable items via your NetClient Portal, you will get an email, such as the one below, notifying you that there are actionable documents waiting for you in your "ACTIONS ITEMS" folder (see below):

*(Sample Email Notification Once Tax Returns are Completed and Transmitted to Client Portal):*

**RAINER & COMPANY**  
**2 Campus Blvd Ste 220**  
**Newtown Square, PA 19073-3270**  
**610-353-4610**

Client Name  
Client Address

Dear \_\_\_\_\_:

A copy of your 2014 individual tax return has been posted to NetClient CS, a private, secure web portal. Once you log in, click the folder under "Documents" to access your returns.

Additional tax documents have also been posted that require your immediate attention and response such as e-file authorization forms, payment vouchers, estimates, etc. These documents can be found in the folder marked, "Action Items". Please make sure that you review these Action Items as soon as possible as these documents are time sensitive and require immediate action on your part.

To access your tax returns, enter your login (janedoe111) here [www.rainer.com](http://www.rainer.com).

If you don't remember your password, you can reset it by entering your login (janedoe111) and your email address ([jdoe@rainer.com](mailto:jdoe@rainer.com)) here <https://secure.netlinksolution.com/nextgen?firm=111520&showPasswordReset=true>.

To contact us regarding this message, please call us at 610-353-4610 or email us at [taxes@rainer.com](mailto:taxes@rainer.com).

Thank you for the opportunity to serve you.

Sincerely,

RAINER & COMPANY

This electronic mail message contains confidential and legally privileged information intended only for the use of the recipient. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution, copying or other use of this message is strictly prohibited and is hereby instructed to notify the sender immediately by return email and destroy this copy of this message.

To properly log out of your NetClient Portal, click on the link with your name to the right of the screen. From the drop-down menu select “Log Out” (see below).

The screenshot shows the NetClient Portal interface for R/C Rainer & Company. The user is logged in as Jane Doe. The main form is titled "Pennsylvania General Information" and includes fields for County of residence, School district name, Taxpayer, and Final return. A blue arrow points to the "Log Out" option in the user menu.

**States > Pennsylvania**

**Pennsylvania General Information**

County of residence:

School district name:

Taxpayer:

Final return: ☐

**Contributions**

Amount of contributions you wish to make to:

|                                                           | Taxpayer             | Spouse               |
|-----------------------------------------------------------|----------------------|----------------------|
| Breast and Cervical Cancer                                | <input type="text"/> | <input type="text"/> |
| Wild Resource Conservation Fund                           | <input type="text"/> | <input type="text"/> |
| Military Family Relief Assistance                         | <input type="text"/> | <input type="text"/> |
| Governor Robert P. Casey Memorial Organ/Tissue Trust Fund | <input type="text"/> | <input type="text"/> |
| Juvenile (Type 1) Diabetes Cure Research Fund             | <input type="text"/> | <input type="text"/> |

**Part-year Resident Information**

If you were a part-year resident during the tax year, enter the dates you lived in Pennsylvania

|                            | Taxpayer             | Spouse               |
|----------------------------|----------------------|----------------------|
| Part-year residency dates: |                      |                      |
| From                       | <input type="text"/> | <input type="text"/> |
| To                         | <input type="text"/> | <input type="text"/> |

User Menu: Edit Account, Update Password, Set Security Questions, Log Out

For questions and/or assistance with your Web Organizer or NetClient Portal please contact:

Christine Parker  
Firm Administrator  
(Ph) 610-353-4610  
(Email) [cparker@rainer.com](mailto:cparker@rainer.com)

On behalf of Rainer & Company, thank you for the opportunity to serve you!

