# Kassouf Client Collaboration Guide

### **Client Collaboration Guide**

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### CREATING A CLIENT COLLABORATION ACCOUNT



You will receive the following email welcoming you to the Client Collaboration Hub. Register your account by clicking "Register my account" or clicking the link below the button. For additional help, watch the registration tutorial video.

1

KASSOUF & CO INC invites you to the Client Collaboration Hub
$ \bigcirc \qquad \bigcirc \qquad \land \qquad$
(i) If there are problems with how this message is displayed, click here to view it in a web browser.
Kassouf CPAs and Advisors
Collaborating with KASSOUF & CO INC has never been easier!
Welcome to the Client Collaboration hub. Your personalized hub is an easy way for you to securely collaborate and communicate with our tax professional team at any time.
To get started on your Two, Test - 2024 Individual Tax follow these steps:
Step 1: Register your account to setup your user ID and password
Register my account
or go to https:
Please note, the Registration link will expire after 90 days. Should you need assistance with the registration process, please watch our <u>registration tutorial video.</u>
Step 2: Log into your Hub
Go to my hub
or go to https://clientcollaboration.cchaxcess.com
We recommend you bookmark this link in your web browser for future reference!
Using a mobile device? Client Collaboration is now mobile! After completing your registration, you can download our app from the iOS App Store or Google Play Store!
Use this following firm key to connect directly to your firm upon your first login or use the button below on your mobile device to get started.
Connect with your firm
Mobile Firm Key: z6UpkEAZ
Once you have established your firm connection, it will be saved for subsequent logins.
Have any questions or concerns before getting started? Contact us today.
Counted on the CRT IT ON
App Store Google Play

2 You will be taken to this screen. Fill in the information, creating your own username and password. Then click the "Register" button.

CPAs ar	id Advis	
MAIL	r your ider	itity
est Two		🥒 Update Name
1 (US) 🗸	hone	Ext
User ID		
Password		
Confirm Password		
I'm not a robot	reC	САРТСНА

KASSOUF & CO INC Client Collaboration Hub – Registration Successful
To ♥ Retention Policy Default Exchange Retention Policy (1 year, 6 months)
(i) If there are problems with how this message is displayed, click here to view it in a web browser.
Kassouf
CPAs and Advisors 🗸
KASSOUF & CO INC, you have successfully registered with KASSOUF & CO INC!
You may now login to your Client Collaboration Hub using the following user ID:
User ID : kassouftest
Go to your personalized hub to get started.
Go to my hub
or go to <u>https://clientcollaboration.cchaxces</u>
We recommend you bookmark this link in your web browser for future reference!
Using a mobile device? Client Collaboration is now mobile! After completing your registration, you can download our app from the iOS App Store or Google Play Store!
Use this following firm key to connect directly to your firm upon your first login or use the button below on your mobile device to get started.
Connect with your firm
Mobile Firm Key: z6UpkEAZ
Once you have established your firm connection, it will be saved for subsequent logins.
Have any questions or concerns before getting started? Contact us today.
Join us on mobile – download our app today!
Countered on the App Store Google Play



4 Sign in with the username and password you created. Verify your identity through text, email, or voice. Welcome to the Client Collaboration Hub!

Kassouf CPAs and Advisors	
User ID	
Password	
۵	
Remember Me Forgot password	
Forgot user ID	
QVVDV C Reset	
Enter text shown above	
Log In	



### GET TO KNOW THE CLIENT COLLABORATION HUB

### Home Page

The Home page contains information about your hub, including contact details, users who have access, invoices, and messages. You can open your tasks from the Home page by clicking the "Go to My Tasks" button on desktop or "My Tasks" on mobile.

#### **Mobile:**

CPAs and Advisors	2
<b>Kassouf &amp; Co., Inc.</b> Two, Test 2024 Individual Tax Return	
Welcome, Test!	
My Tasks We are ready to start your <b>2024</b> Individual Tax Return! <b>4</b> TASKS REQUIRE YOUR ATTENTION.	>
Messages	>
Billing	>
Helpful Links Need to make a federal payment with your return or estimated tax payment?	Ð
Expecting a federal refund? Upload Documents	$\overline{\ominus}$
★ SE C C Home Tasks Doc Locker Messages	<u>:</u> Billing

#### Desktop:

elcome	CPAs and Advisor		2024 Individual Tax Return C for Two, Test	68
<b>С</b> номе	Welcome Test!			
Da Tasks	It's tax seasont We are ready to start your 20% tax return. Please proceed to your task list and complete all the necessary steps. After you have finished all the assigned tasks, make sure to click on Send to My Accountant' to notify us that you're done. Go to My tasks			
CUMENT LOCKER	Helpful Links     Seesages       Federal Payments     Cutert       Referal Refunds     Cutert	TOPIC		*
?	Your Professional Team      MoSSOUF & CO., NC.      2101 Highland Avenue South Suite 300     Brings     G009-4-3-2500			

Note: We are not currently using the billing feature in the Hub.

### Tasks

The Tasks page will guide you through the tax return process. As you complete steps, they will be checked off so you know what's left to complete.

#### Mobile:

Test Two							
Му Та	My Tasks						
III	SIGN Due 0. Test Ty	ENGAGEN 2/28/2025 wo:	MENT LETTER	DED	>		
	ANSV Due 03 0 of 2	VER QUES 3/24/2025 2 complete	TIONNAIRE		>		
ථ	ATTA Due 03 0 of 8	ACH DOCU 3/24/2025 8 complete	MENTS		>		
Ţ	NOTI	FY ACCOU	NTANT YOU A	RE DONE	>		
යි Hom	ne	<b>¥⊟</b> Tasks	Doc Locker	کی Messages	D Billing		

#### Desktop:

are ready to start your 2024 Individual Tax Retur	m		
Gue 02/28/2025			Download unsigned engagement letter 🛈 🖉 Sign Ret law
COMPLETE ORGANIZER Due 03/24/2025		3 Attack Deconante	*
a of 2 complete.	e qf e complete	2 ALBERT DOCUMENTS	Select Send to Ny Accountant when the Questionnaire is complete and you are finished attaching documents.
PREPARING YOUR RETURN Your tax return is in progress. We need me	ore information, your prompt response is appreciated.		
REVIEW & SIGN You will be notified via email when your re	eturn is complete.		

### **Document Locker**

The Document Locker allows you to exchange documents with us that aren't a part of your tax organizer. Please note that any documents you upload here must be manually attached to your organizer at the end of the year. A PDF of your tax return will also be saved here once filed.

#### Add Document Locker FY No documents present 5 ž •()• Home Tasks Doc Locker Messages Billing

**Mobile:** 

#### Desktop:

Welcome	Kassouf CPAs and Advisors						2024 Individual Tax Return for Two, Test	ର ନ
СО номе	∀ Filters	Document Locker           Y         Downland         Tag Files         Delete						± Upload
De TASKS	File Name Enter file name © Date uploaded 🔿 Date expired	C KAME	ACTIONS	TAGS	DATE UPLOADED 47 UPLOADED BY	DATE DOWNLOADED DOWNLOADED	EXPIRATION BY DATE SIZE	
DOCUMENT LOCKER	MM/DD/YYYY         MM/DD/YYYY         M           Tags         Select Tag(s)         V		No document	present.				
?								

#### Messages

The two-way messaging system enables seamless communication between you and our team, right from your dashboard.

#### **Mobile:**



#### Desktop:

R Helpful Links	<b>℃</b> Messages			
Federal Payments	DATE	CLIENT	TOPIC	^
Needo to make a teoerat payment with your return or estimated tax payment?				
Expecting a federal refund?				
			Go To My Messages	
😟 Your Professional Team	💷 Billing 🌻			
KASSOUF & CO., INC. 2011 Highland Avenue South Suite 300 Birmingham, AL 35205 (205) -44-3-2500	No pending invoices for payment	int		

## Help Button

The Help button, found in the **bottom** left corner of the desktop Home page, contains walkthroughs and how-to videos to help you navigate and use the system effectively.



### HOW TO CORRECTLY UPLOAD DOCUMENTS

Always upload documents requested as part of your tax organizer to your document request list rather than using the Document Locker. Uploading documents outside of the designated request list can prevent you from tracking your progress.

When you attempt to upload documents to the Document Locker, you'll receive the following message:

	Kassouf		2024 Individual Tax Return for Two, Test	00 10
	CPAS and Advisors #	Document Request List X		_
ГД номе		Your professional team has created a document request list requesting specific files from you. We recommend you upload the requested files into your document request list. Do you want to continue uploading files here or go to your document request list?		
TASKS		Go to Document Request List Continue		
	This is your Document Locker that enables you to	share files (such as receipts) with your accountant when you do not have n active document request available, you can move your files to your request list to complete the list.	t list. When your tax organizer and current request list becomes	
		To visit this again, go to your user profile and select What's New Close		
?				

#### Click "Go to Document Request List" to upload requested documents. Click the double arrows to expand each request.

Welcome	Kassouf			2024 Individual Tax Return for Two, Test	ତ୍ତ୍ର ଥ
СО Номе	< Back to my tasks Questionnaire	Document Request List	Select Send to My Accountant when the Questionnaire is con	nplete and you are finished attachin Send to M	ig documents. V Accountant
De TASKS			Document Request List		
DOCUMENT LOCKER			How do I attach documents?         Your Document Request List is comprised of information from your prior year return (when available), your questionnaire answers (marked with *), and other items your professionalite menetices and a quick note to provide a status. You may also move a socument after it has been upbaced by (clicing on the finame and degrigging and depoing it groups a requested line that me.         Your time to time, your prefessional team may also add or remove requested documents, upload a document, or add a quick note on your behalf.         A Wating on 4 documents       Show only missing documents         A Wating on 4 documents       Clici of complete)         OTHORHALITIES       (a of a Complete)		
			Drag and Drop (or Upload) files here or to each requested item (if any). Note: Attaching a file to the requested item above will mark that item complete and update your progress.		

#### You can also access your document request list through the Tasks screen. Click on "Tasks" in the sidebar and click "Attach Documents."

Welcome	Kass CPAs and A	OU f				2024 Individual Tax Return for Two, Test	\$ 8
С Номе	It's Tax T We are read	Fime! Iy to start your 2024 Individual Tax Return					
TASKS	0	SIGN ENGAGEMENT LETTER			Download u	isigned engagement letter () Sign Sist Tee	
E		COMPLETE ORGANIZER Due 03/24/2025			0		
DOCUMENT LOCKER	0	1 Answer Questionnal 0 of 2 complete.	e o ul s complete.	2 Attach Documents	3 Sence Select Send to My Accountant when the Question documents.	to My Accountant	
	0	PREPARING YOUR RETURN Your tax return is in progress. We need more informatio	n, your prompt response is appreciated.				
	0	REVIEW & SIGN You will be notified via email when your return is compl	ete.				
?							

### You will be taken to the document request list. Click the upload icons to attach your tax documents.

Welcome	Kassouf					2024 Individual Tax Return for Two, Test	88
ធ	< Back to my tasks				Select Send to My Accountant when the Questionnaire is co	mplete and you are finished attachi Send to M	ng documents. Ny Accountant
HOME	Questionnaire	Document Request List	t Notes				
			From time t	to time, your professional team may also add or remove requested documents, upload a document, or add a quick	k note on your behalf.		
TASKS			▲ Waiting	on 4 documents	Show only missing documents		
			ADDITIONA	AL ITEMS	(2 of 2 Complete) >>		
			-	-			
LOCKER			0	Copy of last year's return (if not already provided)			
			0	W-25	0 1 <u>+</u>		
			0	Interest, Dividend and Brokerage Statements	0 1 ± ····		
			0	Retirement Distributions and or Social Security Benefits	<u>0 1</u> <u>↑</u> …		
			$\odot$	K-1 Forms (1065, 11205, 1041)	(1) ···		
			0	Other income (i.e. state refunds, 1099s, unemployment, etc.)	( <u>1</u> )		
			$\odot$	Mortgage Statements	<u>(</u> )		
			$\odot$	Other Deductions	( <u>1</u> )		
				Drag and Drop (or Upload) files here or to each requested item (if any). Note: Attaching a file to the requested item above will mark that item complete and update your pro	ogress.		

#### By uploading into the Document Request List, you can track your tax return progress in real-time as you upload documents.

Welcome	Kass CPAs and A	OU Courses		2024 Individual Tax Return for Two, Test	88
ы номе	It's Tax 1 We are read	ime! to start your 2024 Individual Tax Return			
LASKS	<b>→</b> ⊘	SIGN ENGAGEMENT LETTER Signatures completed on 02/28/2025		Download signed engagement letter Signed Institue	
B		COMPLETE ORGANIZER Due 03/24/2025			
DOCUM	->0	1 Answer Questionnaire	2 Attach Documents	3 Send to My Accountant Select Send to My Accountant when the Ouestionsaire is consider and use are finished attaching	
		2 of 2 complete.	to of to complete.	documents.	
	Ó	PREPARING YOUR RETURN Your tax return is in progress. There are no missing items at this time.			
		REVIEW & SIGN			
		You will be notified via email when your return is complete.			

Tax Return	82
,	

### SIGNING AN E-FILE THROUGH CLIENT COLLABORATION

Your 2024 tax return... ensure the privacy of your confidential information. Inc. Kassouf & Co. 1:59 PM To verify your identity you will be asked to answer 3 To: randomly generated questions from a third party Reply To: Inc. Kassouf & Co. @ > based on information available through public records and credit reports. This information is not shared with anyone including the IRS. This dynamic knowledge-Your 2024 tax return and ebased authentication process is used by many financial institutions and government agencies as a file authorization from means of fraud prevention and does not create a credit inquiry or affect your credit report. Kassouf & Co., Inc. are available for you to sign Please log into Client Collaboration or click on "Begin Signing" below to proceed. If you choose not to electronically sign or have any questions regarding Dear the return, please email me at Your 2024 income tax return is complete and ready Thank you. for electronic filing. In order to e-file, we need you to review the return and sign the e-file Signature Authorization form(s). Kassouf & Co., Inc. For your convenience you may electronically sign the form(s) on a computer, tablet or smartphone. This method requires that you verify your identity to Begin Signing ensure the privacy of your confidential information. If you have a Client Collaboration hub, Click Here To verify your identity you will be asked to answer 3 randomly generated questions from a third party based on information available through public records and credit reports. This information is not shared with Document ID:082ff0c9-6a8a-46bc-934e-b28401497e1f anyone including the IRS. This dynamic knowledgebased authentication process is used by many Wolters Kluwer financial institutions and government agencies as a means of fraud prevention and does not create a Document signing powered by Nintex AssureSign. credit inquiry or affect your credit report. ©2025 Nintex UK Ltd All Rights Reserved. Plasea log into Client Collaboration or click on "Ragin 

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@kassouf.com.





Welcome to Client Collaboration	<pre> Kassouf CPAs and Advisors User ID Username </pre>
Connect with your accountant, send and receive tax and other documents, provide information for your upcoming tax return, sign your tax return and much more!	Password       •••••••     Image: Constraint of the second
Your accounting professionals	Forgot password
KASSOUF & CO INC	Forgot user ID
Connect to another firm	C Reset Audio tyunc Log In
	🐏 Wolters Kluwer
powered by 🥑 Wolters Kluwer	© 2025 Wolters Kluwer and/or it's affiliates. All rights reserved.



Once logged in, you will see the first screen below. Click on "My Tasks." It will take you to a second screen where you can sign required documents. Click "Review & Sign." You will be asked to leave Client Collaboration to AssureSign. Click "Continue."

> **First Screen: Second Screen:** Kassouf Q Q My Tasks **REVIEW & SIGN** Welcome, Please review and sign your 8879 so we may e-file your return. 0 > Taxpayer: SIGNATURE NEEDED > My Tasks Your Individual Tax Return has been completed by your tax professional and is now ready for Review & Signature. **Previously Completed** SIGN ENGAGEMENT LETTER Completed 01/23/2025  $\downarrow$  TASKS REQUIRE YOUR ATTENTION. ANSWER QUESTIONNAIRE Completed 01/23/2025 5 Messages ATTACH DOCUMENTS You submitted your tax data on 01/23/2025. Your data has been locked from change, but you may download a copy for your reference. Contact your accountant to provide any needed changes or additional information You have no unread messages > Billing NOTIFY ACCOUNTANT YOU ARE DONE No pending invoices at this time npleted 01/23/2025 Download all Supporting Documents 👤 Helpful Links Need to make a federal payment with your return or  $\Theta$ estimated tax payment? Expecting a federal refund? Θ No files from your professional 扫 D B -0ŵ ·()· f žΞ D Home Tasks Doc Locker Messages Billing Home Tasks Doc Locker Billing



At the AssureSign page, answer your KBA questions. Once you have successfully answered the questions, you will be given a password. Save this password. You will need it to log back in, should you not complete the e-sign at your initial login. Click "Continue."



You will see a screen where you can begin signing forms. You can scroll through and see the entire return. There is also a download option. To begin signing, click "Start Signing."



Once you complete signing, submit your forms by clicking the "Submit" button. After you submit, you will be taken back to the Client Collaboration Hub. You will have an option to download the signed return by clicking the "Download Return" button. This file will also be available in your document locker in the Client Collaboration Hub.

<						
You're almost done. You have entered all requested information and signatures. When ready, select <b>Submit</b> to complete the signing process. Back	My Tasks Nice job! You're done with tasks!					
2024US IAAAtest \ ≎ ● ● 🕙 🔪	Previously Completed					
2 ♀ 01 26 1 Model from 0.1 to 2 in the 400 to 10 1 Model in the 2 in the 400 to 10 1 Model in the 2 in the 400 to 10 1 Model in the 2 in the 400 to 10 1 Model in the 2 in the 400 to 10 1 Model in the 2 in the 400 to 10 1 Model in the 2 in the 400 to 10 1 Model in the 4	V SIGN ENGAGEMENT LETTER Completed 01/23/2025					
Pageneria	ANSWER QUESTIONNAIRE     Completed 01/23/2025					
Page 4 secure     Page 4 secure     Page 4 secure     Page 5	<ul> <li>ATTACH DOCUMENTS</li> <li>You submitted your tax data on 01/23/2025. Your data has been locked from change, but you may download a copy for your reference. Contact your accountant to provide any needed changes or additional information</li> </ul>					
New Workson State	NOTIFY ACCOUNTANT YOU ARE DONE     Completed 01/23/2025					
	REVIEW & SIGN Completed 02/14/2025 Taxpayer: SIGNED 02/14/2025 Download return					
Part X     Induces that I have makened the dates tapper's Kalakena websited importe to stress and that the activity as a final set of the activity and the activity as a final set of the activity and the ac	Download all Supporting Documents ⊥					
Actions	the					
Nintex AssureSign Terms of Use Privacy Policy	Home Tasks Doc Locker Messages Billing					

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You will receive the following email and can access your return documents from that email. The email gives you a password you will need to open the document if you click "View Document." The password is the last four digits of your social security number.



If you input your password, you can choose to download the documents from here. You will see the following screens. If you are downloading from your phone, click the blue arrow in the upper left corner of your screen. It will take you to your downloads folder. The file will not automatically open. You will need to open it from the downloads folder.

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	Kasso	ouf & Co.,	Inc.						
This docum and attachm Download	ent is part o nents are sh all docume	f an envelo nown below nts 🕑	ppe. All docu	ments					
2024U	S IAAAtest V	V1_TaxRet	urn-efileAuth	orization			_	_	
Nintex Assures	Sign		Terms of Use P	rivacy Policy		Hide Dist	racting I	tems	Ø
						Downloa	ds		J
					Manage Extensions			4 ච <del>ා</del>	
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