

Client Portal Instructions

1. Go to our website www.scheibecpa.com
2. Use the GREEN *Log-In to Client Portal button
3. Log-In using your username and password

(An email from noreply@accountantsworld.com sends your User Name and a link to set up your password if you have already not done so.)

4. You may get a 2 Factor Authentication (for security purposes), and that will prompt you to get a phone call or a text message with a code, then you should be able to log in.
5. Click on Cloud Cabinet
6. This will take you to the Tax Returns and Payroll folders
7. Click on the year you need and then click on the actual "tax return." You may have to "download" (you can right click on the tax return to get this option to show up) 1st and then you can print, depending on which software program you use and your computer settings.

Tax Returns will be the main folder used



**To Upload - When you are in the "Tax Returns" folder, there is a cloud with an arrow on the dark gray bar at the bottom of the page. You will need to click this for the Upload Option.

Payroll Folder

If you are a Payroll Client, you can utilize all of your payroll reports and pay stubs in the PAYROLL folder.

****Make sure to keep your User Name and Password handy. We do not have access to your Password. You can work with the "Forgot your Password?" link on the log-in screen if needed.****