

SafeSend Client Portal

HHB is introducing a new client portal through SafeSend that will allow registered users to access all of their tax-related documents in one place. <https://hhbfirm.ssportal.com/>

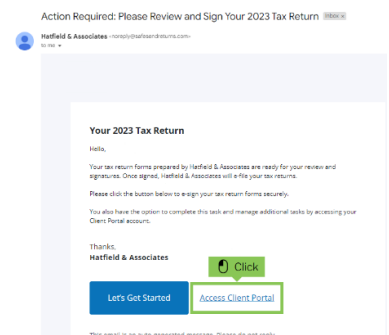
Key Features:

- **Task List:** See all the tasks sent from HHB, such as documents to be signed.
- **Document Repository:** Access and download all files exchanged between you and HHB, including both received and uploaded documents. If the documents are sent via SafeSend, they will be added to your portal automatically - examples are below.
 - If you sign your return electronically through SafeSend Returns
 - If you use an HHB secure upload link from our email signatures
 - If you upload within your SafeSend Portal
 - If you receive a SafeSend Signatures request
- **Merge multiple email IDs:** Add multiple email addresses to your main Client Portal account.
- **Access Anytime & Forward Documents:** Access and forward any available document without contacting HHB first. For example, you can easily forward a tax document to your financial advisor.
- **Unified K-1 Distribution Page:** View and distribute K-s (if applicable).
- **Tax Payment Page:** View and pay both estimated and current year tax payment vouchers for all returns and extensions in a centralized location.
- **Recent Activity Window:** View your most recently accessed files or tasks.
- **Security:** Each time you log in, you will be emailed a one-time passcode. This is an added layer of security to keep your information safe.

Note: This portal is not yet available on mobile devices or tablets. It is currently only compatible with a computer or laptop.

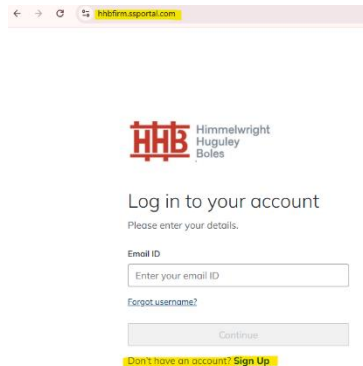
How to Access the Portal:

1. Type in <https://hhbfirm.ssportal.com/> to your laptop's browser.
2. On the HHB website, there is a SafeSend Client Portal link that will take you to the log in page.
3. When you request electronic signatures for a tax return, you will receive an email from noreply@safesendreturns.com. This email will have the option to click "Let's Get Started" to simply sign the return. Or click "Access Client Portal". This same email link can be used anytime to access the portal or return.



New Users - Create Your Account:

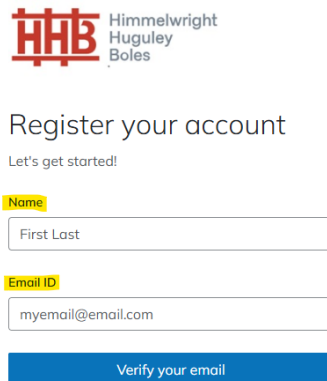
1. When you access the portal for the first time, you will need to create an account. Click “sign up”. →



The screenshot shows a web browser window with the address bar displaying "hhbfirmportal.com". The page features the HHB logo (Himmelwright Huguley Boles) at the top. Below the logo, the text "Log in to your account" is displayed, followed by "Please enter your details." There is a label "Email ID" above a text input field containing the placeholder "Enter your email ID". Below the input field is a link "Forgot username?". At the bottom of the form is a "Continue" button. A yellow banner at the very bottom of the page reads "Don't have an account? Sign Up".

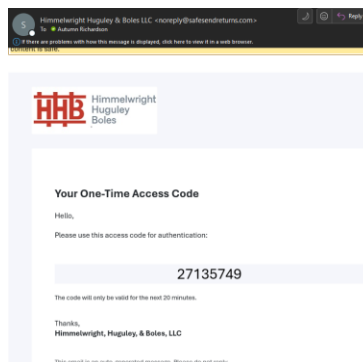
2. Register your account

- Name: Type your first and last name
- Type your most frequently used email address (You can add additional email addresses within the portal later)
- Click verify your email.



The screenshot shows the registration page with the HHB logo at the top. The text "Register your account" is displayed, followed by "Let's get started!". There are two input fields: the first is labeled "Name" and contains the placeholder "First Last"; the second is labeled "Email ID" and contains the placeholder "myemail@email.com". Below these fields is a blue button labeled "Verify your email".

3. Within a few minutes, you will receive an email from noreply@safesendreturns.com that looks like the one pictured below.



The screenshot shows an email interface. The header includes the HHB logo and the text "Himmelwright Huguley Boles LLC". The email body has the subject "Your One-Time Access Code" and the greeting "Hello,". It states "Please use this access code for authentication:" followed by a large box containing the code "27135749". Below the code, it says "The code will only be valid for the next 20 minutes." The email is signed "Thanks, Himmelwright, Huguley, & Boles, LLC". At the bottom, a small note reads "This email is an auto-generated message. Please do not reply."

4. Type the 8-digit code from the email into the boxes on the website. Click confirm.



Verify your email

A One-Time Access Code has been sent to your email address; it **expires in 20 minutes**.

2 7 1 3 5 7 4 9

If you haven't received the code yet, please check your spam/junk folder.
[Resend Code](#)

Confirm

5. The next screen will ask you to create a 6-digit pin, numbers only. **Important- This will be the pin you use every time you log in to the website, so write it down or memorize it.** You can click the eye icon at right to show the numbers you typed to ensure they match. Click create account.



Create your PIN

Final step! Now that your email is verified, create a 6-digit PIN.

Create PIN

000000

Confirm PIN

Create Account

6. If your pin is successfully created, you'll see a small green notification pop up and the screen will redirect to the log in screen.

Logging In After Creating Your PIN:

1. Access the portal anytime by typing <https://hhbfirm.ssportal.com/> in your browser, clicking the link from a SafeSend Returns email, or using the link from the HHB website. Remember that the portal is only available on desktop currently.



Log in to your account

Welcome back! Please enter your details.

Email ID

arichardson@hhbfirm.com

[Forgot username?](#)

Continue

Don't have an account? [Sign Up](#)

2. On the next screen, enter in the exact same 6-digit numeric pin that you created. Click continue. Note—if you enter the wrong pin 3 times, the system will lock you out. You will need to contact the Auburn or Opelika office to get your pin reset.



Enter your PIN

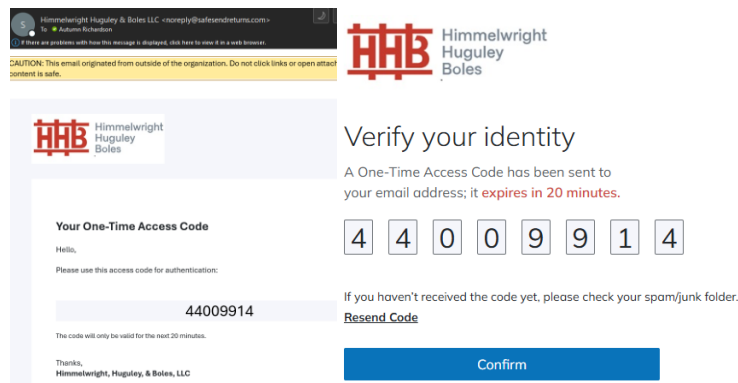
Oops! It seems we don't recognize this device.
Please enter your PIN to continue.

PIN

[Forgot PIN?](#)

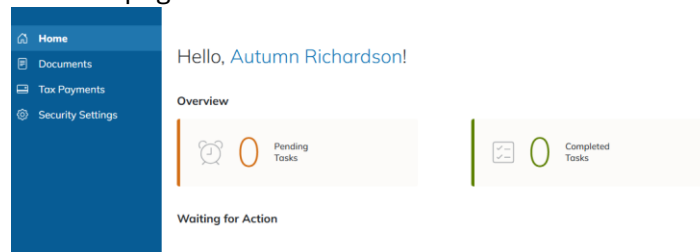
Continue

3. **Each time** you log in, you will receive an access code email for security.

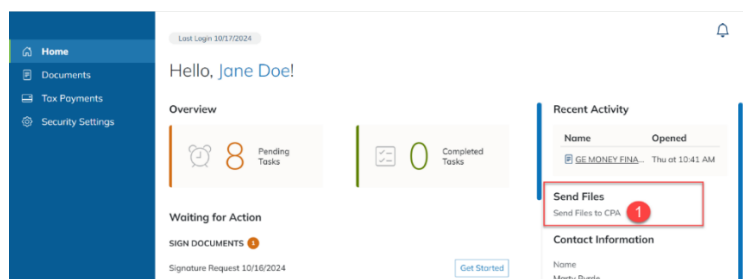


Features on the Home Page

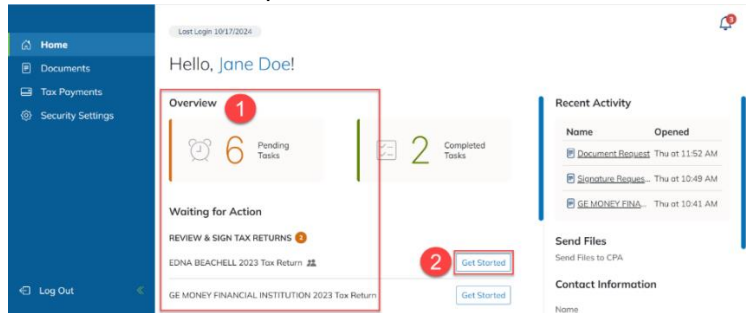
- Here is a picture of the main landing page. You can see pending tasks, completed tasks, and so much more on this page.



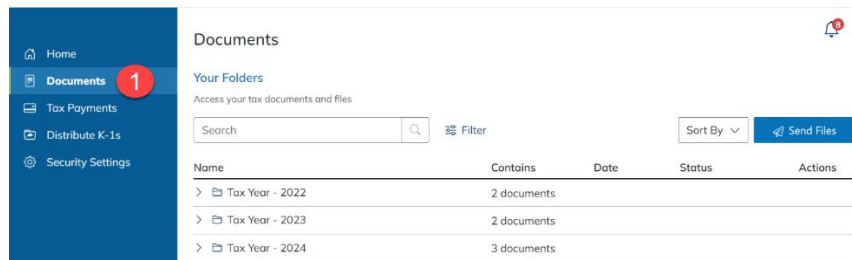
- You can send files to HHB anytime!



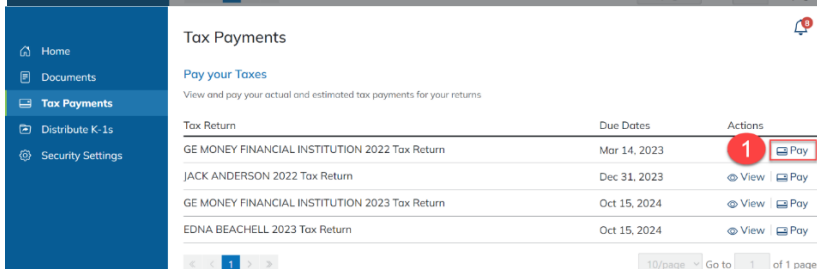
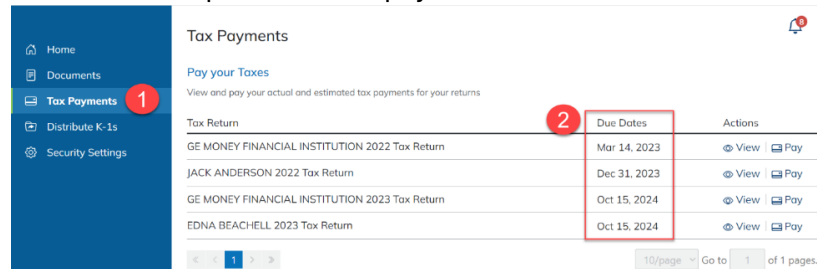
- If you have pending tasks (like signing a tax return), they will be shown on the home page. You can click Get Started to complete that task.



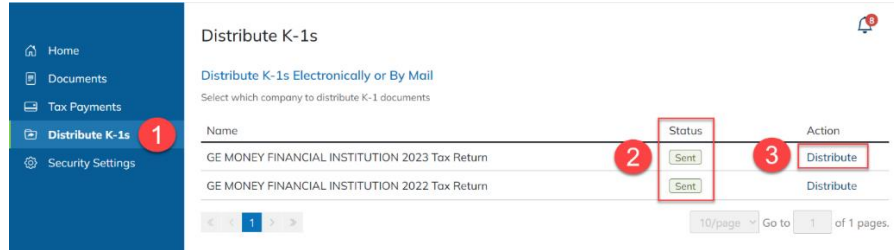
- On the Documents tab, you can view documents that have been uploaded by you or HHB. You can also Send Files to HHB anytime. If you click on any documents, you will have access to download it.



- On the Tax Payments tab, you can view all of the current tax payments. You can both view and pay these within the portal. Note—payments made online are **not** tracked by SafeSend.



- If your email address is connected to a business, you can click Distribute K1s to deliver them to your shareholders.



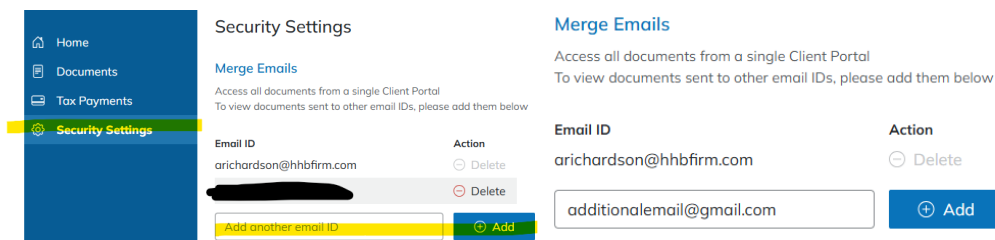
- On the Security Settings tab, you can merge email users, update your PIN, or update your email.

Merge Emails

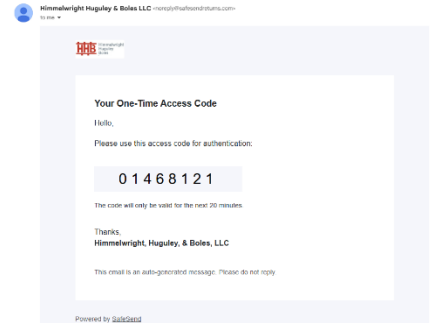
- If you have both a work and personal email, SafeSend will not know the emails are the same person until they are connected. It is suggested that any email address you use is added to your portal to ensure that any correspondence between you and HHB are combined in one place.
- If you plan to have multiple emails connected to one account, only ONE email needs to create the initial main account. They should not create their own account, as SafeSend only allows each email to be connected to one account.
- Any emails that are added as merged email IDs will be sent an email to confirm the connection but will **NOT** have their own login.
 - **Important Note**—the added user must still log in using the main account holder's email address and PIN. The secondary user will **not** have their own log in.
 - The purpose of having the second email address added is so that documents sent to either email are merged. The second “user” is assumed to be the same person, even if it is a spouse, coworker, etc.
 - This means anyone with your log in information can access all your documents. Use this feature at your discretion.
- Any time your account is used to log in, the main account holder will receive an email with an access code. This is a security feature to ensure your account's protection.

How to Merge Emails:

1. **Note**—to connect the account, an email will be sent to the added user. Be sure they can access that email so they can give you the code they receive.
2. **Do NOT create a second account using the additional email address. A secondary email must be added to your account using the steps below.**
3. On the Security Settings tab, under Merge Emails, type in the email you would like to have connected to the account. Then click add.



4. An email will be sent to the email address you entered. The person associated with that email address will need to open the email and tell you the code. The email they receive will look similar to this -->
5. Type in the code they received in the verify email box then click verify code. You should get a green popup in the top right corner to confirm that the email was successfully connected.

Two side-by-side "Verify Email" popups. The left popup shows the initial state with a text input field labeled "Access Code" and a "Verify Code" button. The right popup shows the state after the code "01468121" has been entered into the text field, and the "Verify Code" button is now highlighted in green. Both popups include a "Resend" link for users who didn't receive the code.

If you have any questions related to SafeSend or the Client Portal, feel free to reach out to the Auburn or Opelika office anytime!