# How to Complete Your Returning Client Organizer

This guide walks returning clients through the client portal to review information, upload documents, and submit updates when ready for tax preparation.

Login into your portal account on portal.9soln.com
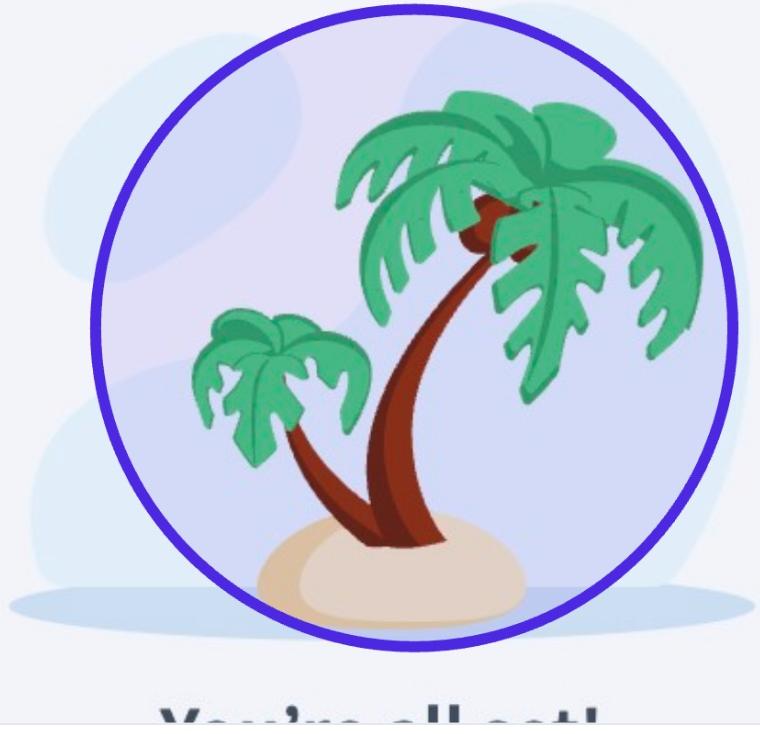
While on the Home Screen, look for the Menu icon

If you are not on the 'home' page click on the 'home' link located in the main navigation area.
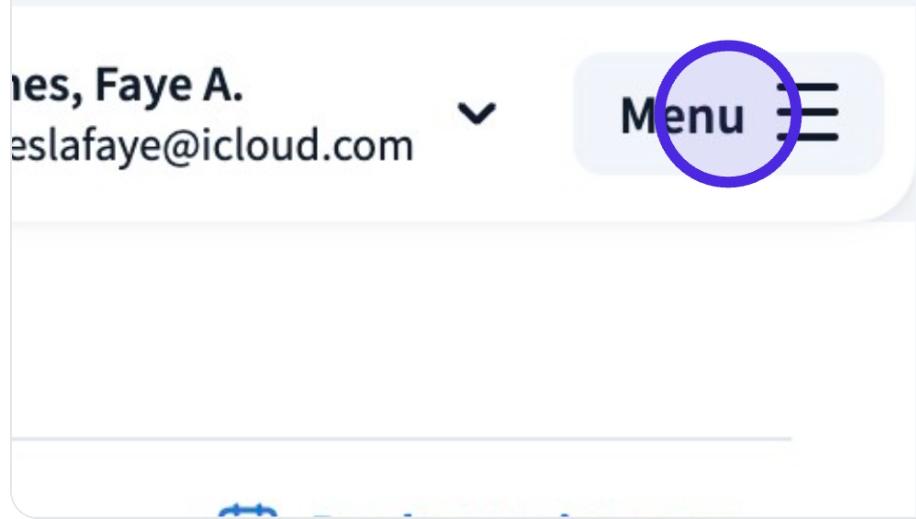
Open the Main Menu

Click on the 'Menu' button in the top right corner of the screen.

Select Organizers Section

From the opened menu, select 'Organizers' to view or manage existing organizers.

Start a New Organizer

Click the 'New organizer' button to begin creating a new tax organizer.

Organizers

Create organizer

Organizer template
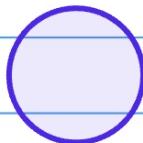
No templates found

[Create]   [Cancel]

Select Organizer Template

Click on the 'No templates found' dropdown menu to see available templates.

Create organizer

Organizer template

No templates found

Previous Client Tax Prep

Update My Account Information Please!

Choose Previous Client Tax Prep Template

Select the 'Previous Client Tax Prep' option from the list of templates.

Create the Organizer

Click the 'Create' button to generate the organizer based on the selected template.

Has your legal name changed since last year?

Yes | No

Has your mailing address changed?

Answer All Required Questions

Answer all required questions in all the sections.

* Please upload all tax documents you have

⊕ Add document

* Are you still waiting on additional tax docu

Initiate Document Upload

Click the 'Add document' button to upload required tax documents.

Select Document Source from Computer

Choose 'From my computer' as the source for the document upload.

Move to Final Acknowledgment

Click 'Next' to proceed to the final step of the organizer.

Confirm Information Accuracy

Select the 'Yes' checkbox to confirm that the information provided is accurate to the best of knowledge.

Is there anything else we should know before prepa
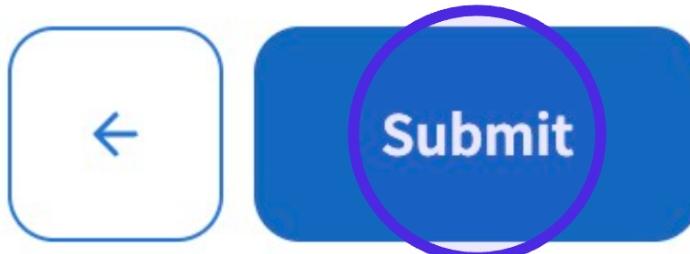
Submit the Organizer

Click the 'Submit' button to finalize and send the completed tax organizer.