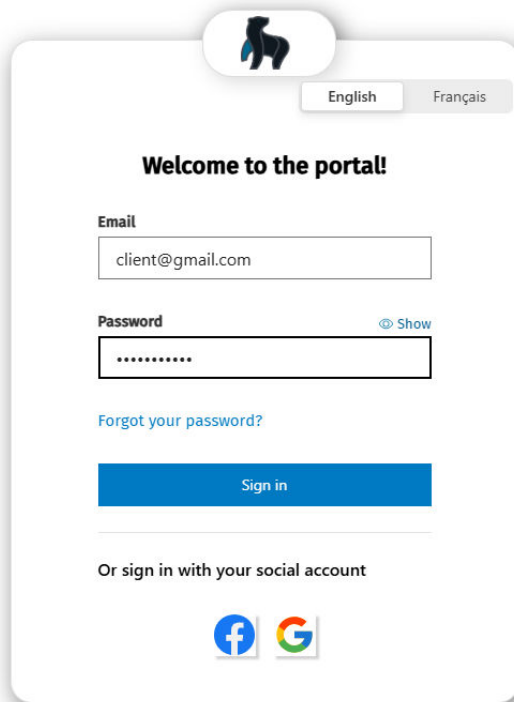


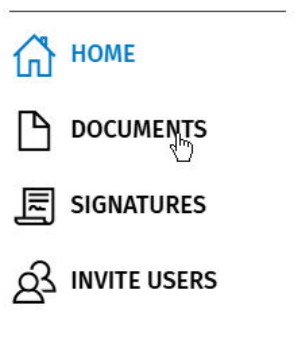
UPLOADING DOCUMENTS TO THE CLIENT PORTAL

1. Open your browser and go to <https://pacificcpa.cchifirm.ca/clientportal> to access the Portal login window
2. Log in to your Portal using the email address and password previously set up by you, or using your social media account. Note that we recommend using “forgot your password?” if you have previously registered for an account but can’t remember your login. If you are unable to access your account and retrieve your password using “forgot your password” then please contact our office and we will send you a new registration link.



The screenshot shows the login interface for the Pacific CPA LLP client portal. At the top, there is a logo and language selection buttons for 'English' and 'Français'. Below this, a 'Welcome to the portal!' message is displayed. The login form includes an 'Email' field with the placeholder 'client@gmail.com' and a 'Password' field with a 'Show' toggle. A 'Forgot your password?' link is provided below the password field. A blue 'Sign in' button is located at the bottom of the form. Below the button, there is a section for social media login with the text 'Or sign in with your social account' and icons for Facebook and Google.

3. Click on Documents



- Click on “Docs from clients to Pacific CPA”

Folders

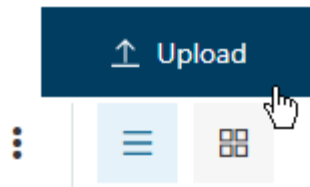


- Click on the reporting year you wish to upload documents for

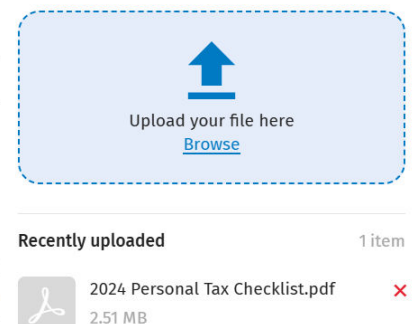
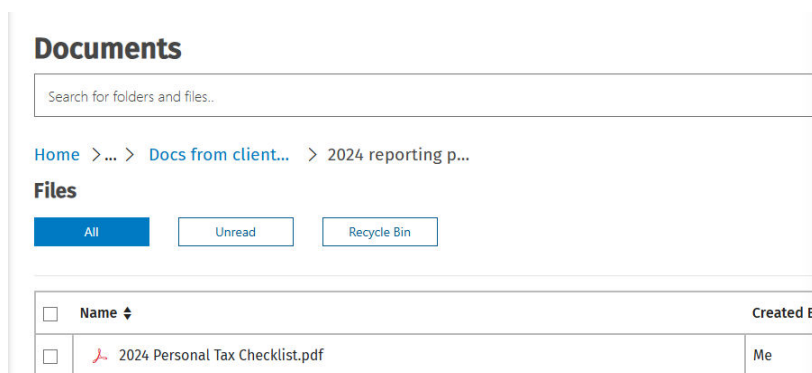
Folders



- Click on “Upload:



- You can either hit “Browse” or drag and drop all of your documents in at once – they will automatically upload and send a notification to your accountant that they have been uploaded. **Please avoid doing multiple uploads and wait until you have all of your tax documents to submit at once, as we will receive a separate email notification for each document if they are dragged and dropped in one-by-one.**





8. If you wish to delete a document, click the box to the left of the file you wish to delete, then click on the 3 dots under the “upload” button and select “Delete”

Home > ... > Docs from client... > 2024 reporting p...

Files

All Unread Recycle Bin

Download
Delete
Add Folder

☒	Name	Created By	Last Modified	File Size
☒	2024 Personal Tax Checklist.pdf	Me	2025-04-02	2.5 MB

9. Any documents that you have deleted can be restored by going to the “Recycle Bin”

Documents

Search for folders and files..

Home > ... > Docs from client... > 2024 reporting p...

Files

All Unread Recycle Bin