



# ROESNER | KENNEY

## TAX & ACCOUNTING

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## CLIENT PORTAL USE POLICY

Roesner | Kenney Tax & Accounting provides a secure portal to its active clients for approved use as described below. Portals are only available to clients actively receiving services. **By accessing and using the portal you agree to all of the terms below. If you do not agree with ALL of the policies below DO NOT use the secure portal.**

“Approved Use” is defined as the use of the portal to exchange acceptable documents with Roesner | Kenney Tax & Accounting only. It does not include the storing of your personal documents, the exchange of documents with other parties outside of Roesner | Kenney Tax & Accounting, or uploading, downloading or storing unacceptable documents.

“Acceptable Documents” is defined as any document deemed necessary for Roesner | Kenney Tax & Accounting to provide services. It does not include any documents of a personal nature, including but not limited to personal pictures, vacation pictures, family pictures, family documents, or sexually explicit material of any nature.

“Active Client” is defined as any person or entity that has received services from Roesner | Kenney Tax & Accounting within the last 6 months or for tax services within the last 12 months. Clients who provide notification of intent to cease services are not active clients. Therefore, the secure portal will be deleted within 15 days of the notice received date.

### Terms of use:

- 1) Roesner | Kenney Tax & Accounting leases the secure portal from a third party and is bound by their terms of use. By using the portal you agree to be bound by these terms as well. A copy of the terms of use are available for your review upon request.
- 2) You must provide a valid email address to obtain access to the portal. You agree to notify us within 5 days in the event any of the following occur:
  - a. The provided email address is terminated (you must provide a new valid email address);
  - b. The provided email address is hacked or compromised in any way
- 3) Each user of the portal is required to have their own user id and password.
- 4) You agree not to share or provide your user id and password to anyone else. You will not allow anyone other than yourself to use the portal for any reason.
- 5) Documents in your secure portal may be accessed by any employee of Roesner | Kenney Tax & Accounting, but will not be shared with anyone else without your written authorization unless required by law.
- 6) The portal uses encryption services and other methods to keep your documents secure. Additional information regarding these safeguards is available upon request. In the event that the secure portal is breached, you agree to release Roesner | Kenney Tax & Accounting from any and all liability or claims.
- 7) Documents will be kept in your secure portal for a minimum of 1 month after the upload date. You agree to immediately retrieve documents and store them on your personal devices or in your personal files.
- 8) The secure portal is not meant for use as a storage location. It is meant for use as a means to securely transfer documents between you and Roesner | Kenney Tax & Accounting so services may be provided.
- 9) You agree to release Roesner | Kenney Tax & Accounting from any and all claims of damages or other injury resulting from your use of the secure portal.
- 10) Roesner | Kenney Tax & Accounting reserves the right to change these policies at any time.