

## **Client Instructions for Viewing Your Tax Return in Rubex **\*\*FOR NEW USERS\*\*****

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Did you opt to receive your tax return digitally through the “Shared Folder” in Rubex? If so, the following instructions will guide you through creating an account on Rubex (our secure clouds storage software) and viewing your tax documents within the “Sharing Folder” in Rubex.

### **Step 1.**

You will receive 2 emails from “eFileCabinet.” One email will say “You have a new share” and the other will say “New User.” Disregard and delete the “You have a new share” email.

NOTE: If you have multiple tax returns, we will give you access to multiple Sharing Folders in Rubex (as long as the same email address is used for receiving the various documents). For example, if we prepare an individual and a business return for you, you will have access to 2 shared folders, one for your individual return and the other for your business return. When we give you access to multiple shared files, you will get MULTIPLE emails that say “You have a new share” and “New User.” Per the instructions above, delete all “You have a new share” emails and delete all but one of the “New User” emails. You only need to create ONE ACCOUNT to view all the shared folders we have given you access to. You DO NOT have to create multiple accounts to view the multiple shared folders (which is why you delete all but one of the “New User” emails and ALL of the “You have a new share” emails).

### **Step 2.**

Go to the “New User” email. Click the “Get Started” button to set a password to be able to view your shared files in Rubex. **DO NOT try to do this step and the following steps by clicking on the “You have a new share” email.**

### **Step 3.**

You will be redirected to Rubex in which you will need to create a password. **Make sure you save this password in a secure space where you can access it.**

### **Step 4.**

After you create your password, you will be redirected to the Rubex login screen. Your log-on username is the email we sent the initial “eFileCabinet” emails (The emails from Step 1) to and your password is the password you just created in Step 3.

### **Step 5.**

**After logging-in, you will be asked to provide a current, valid phone number in case you need to reset your password. We recommend that all users do this.** If you forget the password you created in Step 3, entering your phone number will allow you to easily reset your password if need be.

### **Step 6.**

After completing Step 5, you have successfully created your Rubex account and will be able to view your Shared Folder and all the files housed within it. You will also receive an email when any additional documents are uploaded to the aforementioned shared folder.

### **Step 7.**

To sign in again later, go to this address <https://www.efilecabinet.com/sign-in/> and click the sign in button under the “Rubex” logo. Use the same login information your created above in Steps 3 and 4.

## **Client Instructions for Viewing Your Tax Return in Rubex **\*\*FOR EXISTING USERS\*\*****

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Did you opt to receive your tax return digitally through the “Shared Folder” in Rubex? If so, the following instructions will guide you through viewing your tax return within the “Sharing Folder” in Rubex.

### **Step 1.**

You will receive 1 email from “eFileCabinet” that says, “You have a new share.” This email was sent to you to notify you that a document was uploaded to your shared folder.

### **Step 2.**

To sign into your EXISTING account to view the documents, go to <https://www.efilecabinet.com/sign-in/> and click the sign in button under the “Rubex” logo. Your USERNAME will be the email address that the email in Step 1 was sent to. Your password is whatever password you chose at the time you initially set up your Rubex Account.

NOTE: If you forgot your password, click the “Forgot Password?” button that is located directly underneath the “Sign In” button. Follow the instructions to reset your password. Make sure you save both your new password and your username in a secure location where you won’t forget it.

### **Step 3.**

Once you have signed into your account, you will be able to view the requisite files in your “Shared Folder”

**\*\* The aforementioned steps to view documents in the “Shared Folder” will remain the same in perpetuity. \*\***