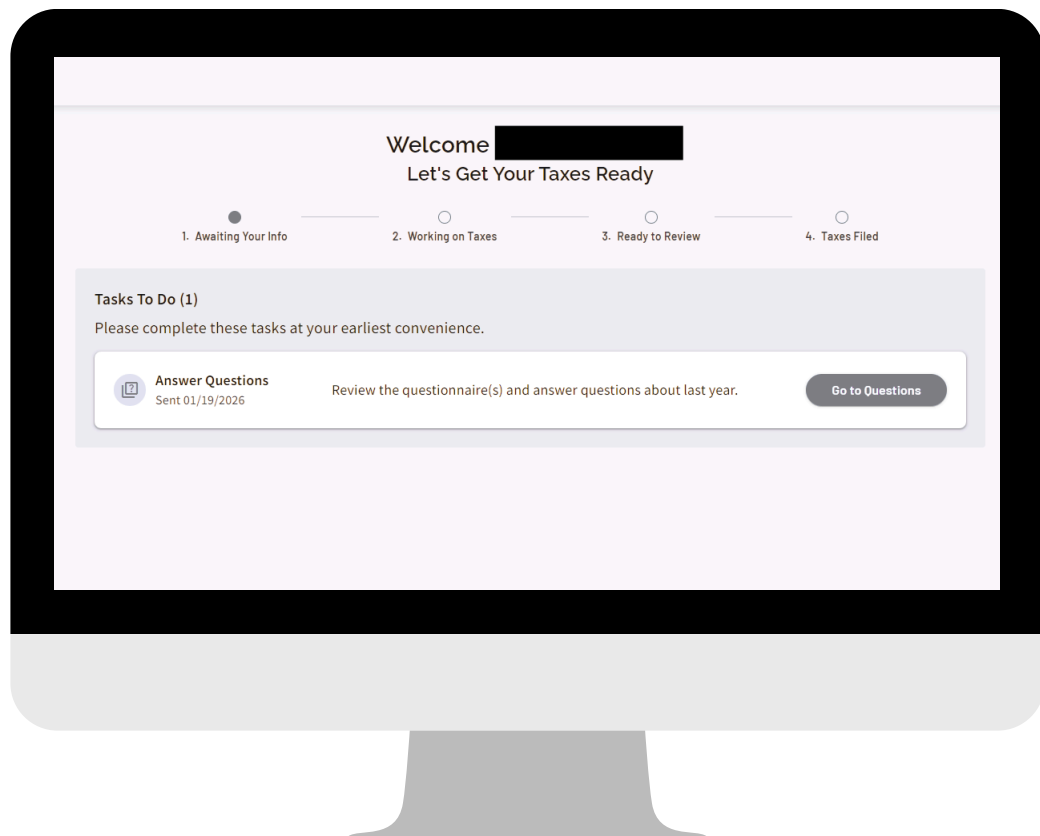


# How to use your Drake Portal

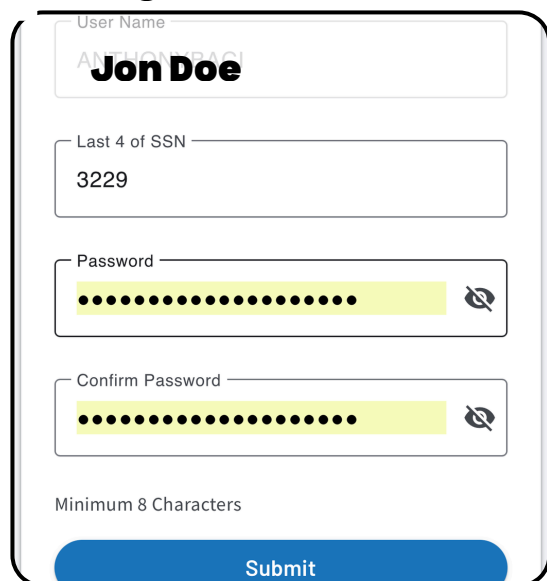


Ask the front desk or call reception anytime for assistance in setting up your portal account!  
**(816)-792-1616**

# I received my email from SecureFilePro...now what?

Your email discloses your username and has a direct link to opening your account. Click the blue button: **Sign In**.

*This will lead you to the following screen:*



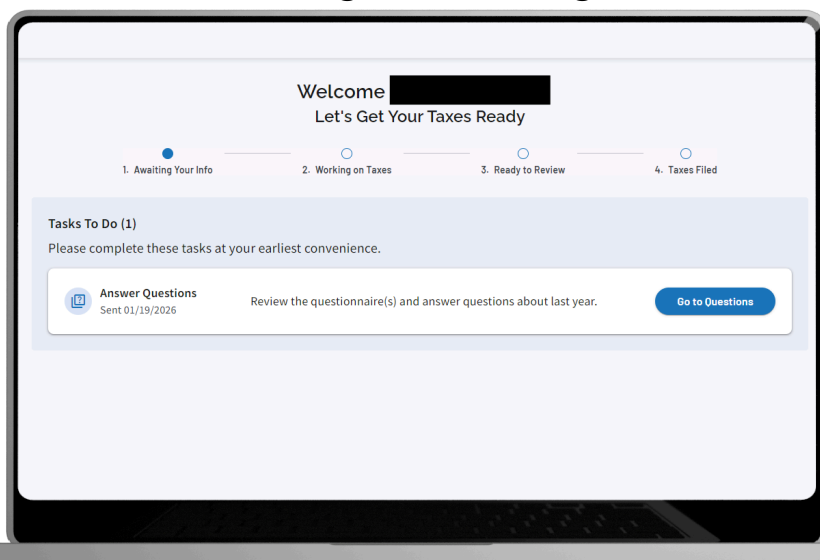
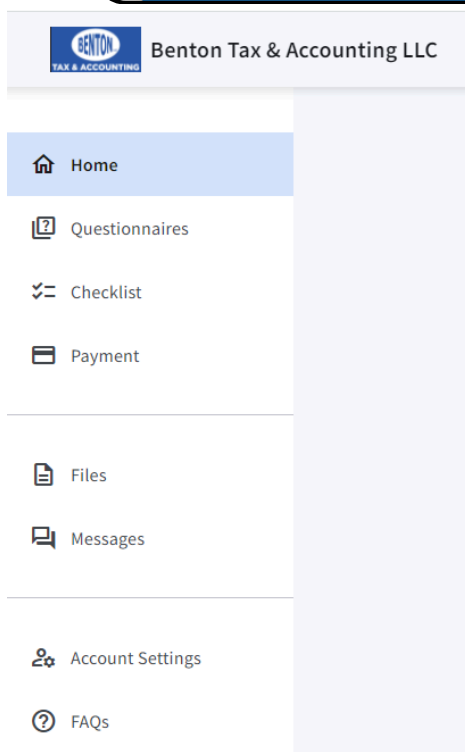
A screenshot of a web form for creating a new account. The form has four input fields: 'User Name' with the text 'Jon Doe', 'Last 4 of SSN' with the text '3229', 'Password' with masked dots, and 'Confirm Password' with masked dots. Below the password fields is a note 'Minimum 8 Characters'. At the bottom is a blue 'Submit' button.

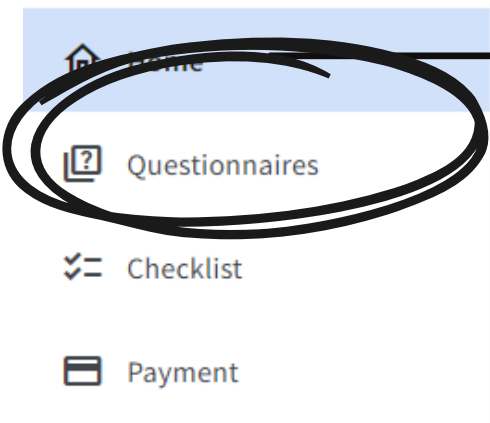
## NEXT,

Fill in the last four of your social security number in the prompted box. Then, create a password. KEEP THIS PASSWORD FOR YOUR RECORDS! Hit **Submit**.

This takes you to your homepage. Click the blue button to complete your tasks.

On the left is your **site menu**. Let's navigate through it!





**This is where you can provide us with your personal information.**

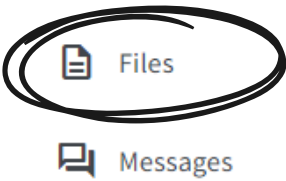
you may see a list like the one below. Click **Start**, fill out the form accurately, and click **Submit**. Do this until all of them are completed. This allows us to begin your taxes.

Choose which topic to start working on.

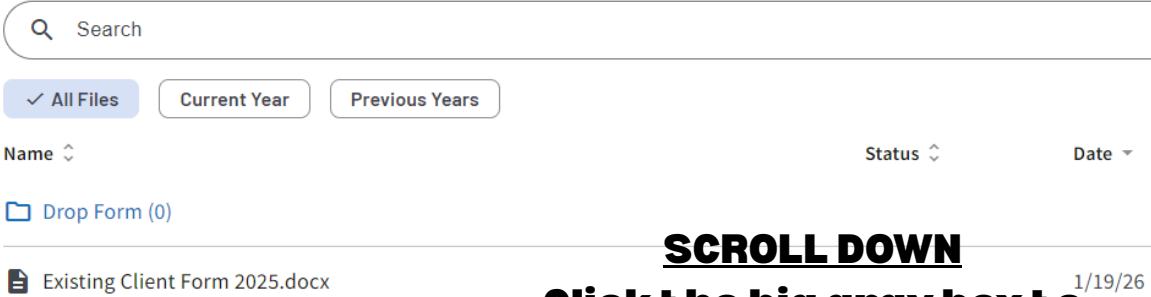
Name	Date Sent	Status	Action
Direct Deposit Information	01/19/2026	To Do	<b>Start</b>

**Okay I did that. Now I need to upload my documents.**

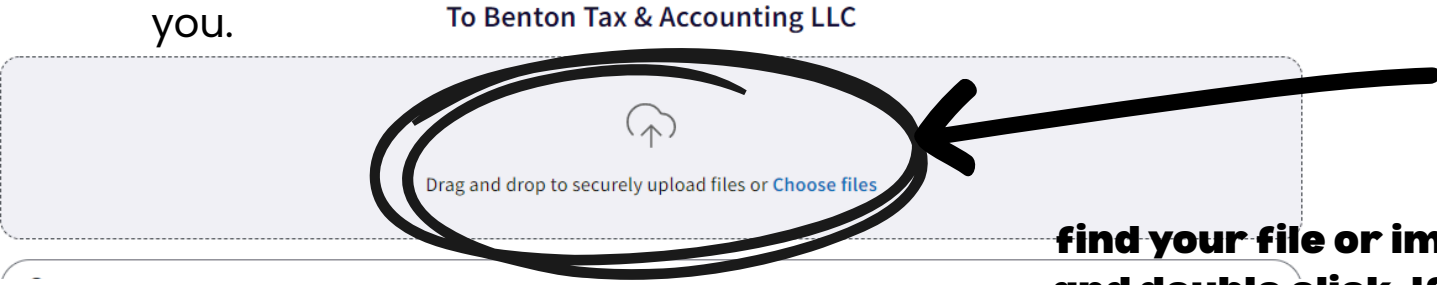
From Benton Tax & Accounting LLC



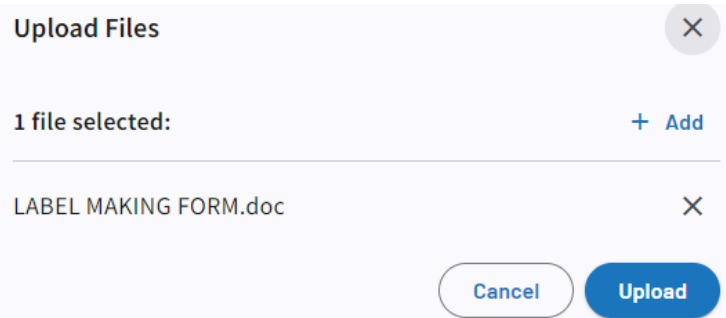
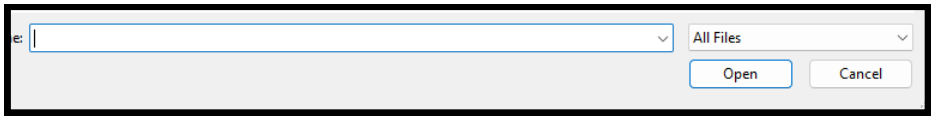
Go back to our site menu and click **Files**. The first half of the page will be documents that your preparer has sent you.



**SCROLL DOWN**  
**Click the big gray box to upload your documents.**



**find your file or image and double click. If you are on your phone, you can upload straight from your photo library!**



Click **Upload**, you have now successfully uploaded a document. Proceed to the back to learn about how to pay, sign, and send a message!

# The finishing steps....

## Pay your preparation fee

When we have completed your taxes, we will call you. Next, you can sign for your taxes and pay for them all in the portal! Click **Payment**

Amount Due	Memo	Date Paid	Status
\$1.00	2022 Tax Prep		<a href="#">Pay Invoice</a>

You will see an invoice. Click the blue button, **Pay Invoice**, fill in your credit card information, and click **Pay**.

## Sign for your taxes

To sign for your taxes allowing permission to electronically file, click into the **Files** tab on the site menu. You will see a file in the first half of the screen titled **2025 8879 (name).pdf**. Click into this.

Existing Client Form 2025.docx	1/19/26	⋮
2024 8879 (BENTON KARLIE M).pdf	Signed 2/28/25	⋮
2023 Signature Documents (BENTON KARLIE M).pdf	3/6/24	⋮

Once you have opened this, scroll down and click into the yellow box to electronically sign. Hit **submit**, and then submit the form via the blue button.

below.  
Your signature ►  Da

## Messages

You can send us messages on the portal! Click **Messages** on the site menu and send us a message anytime. We recommend messaging after uploading and signing documents, that way we can confirm we received them. Call us with any questions about the portal and we will be happy to help.

Home

Questionnaires

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Payment

Files

Messages