

ICHANNEL PORTAL SETUP FORM

Name or client # \_\_\_\_\_

Optional: Additional sites to include with login (e.g. Partnerships, Corporations, Estates, or Trusts) \_\_\_\_\_

Security level to allow access to:

*Confidential\**      *General\*\**      *Returns-Reports\*\*\**

Full name and email address

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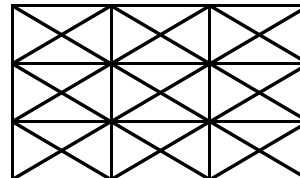
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KB staff (name only) - for notifications

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Explanation of security areas

- \*Confidential - Reserved for confidential documents only.
- \*\*General - Audit, litigation, medical, and valuation documents.
- \*\*\*Returns-Reports - All tax returns. Also compensation, flash, payroll, and write up reports.