

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

KB staff (name only) - for notifications

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.