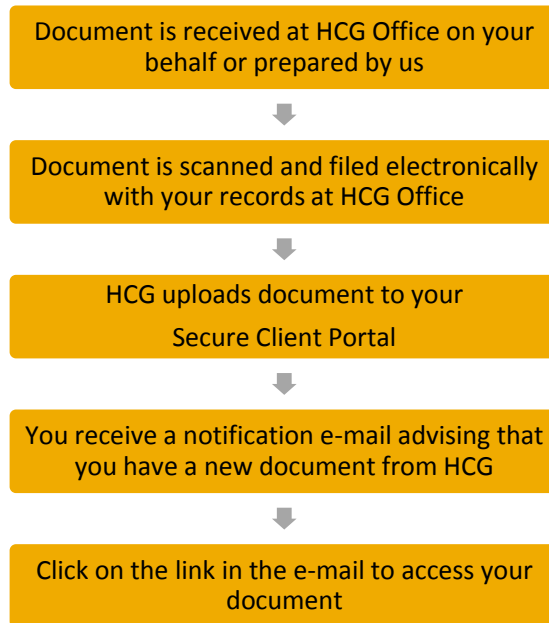# Hall Consulting Group
How to use the HCG Client Portal

Thank you for choosing to use the HCG Client Portal!

Setting up Access

You will receive an e-mail from the HCG Client Portal welcoming you and this will contain instructions for you to follow on gaining access.

How the HCG Client Portal works

Document is received at HCG Office on your behalf or prepared by us

⬇

Document is scanned and filed electronically with your records at HCG Office

⬇

HCG uploads document to your Secure Client Portal

⬇

You receive a notification e-mail advising that you have a new document from HCG

⬇

Click on the link in the e-mail to access your document

Icons in the HCG Client Portal

Icons are used to indicate operations you can perform. If you hover over an icon for a short time, a small message box will appear, describing the action that can be performed. Some common Toolbar icons are:

Help - Opens the On-line Help page for the current menu option.

Add New - Add a new item to the list currently displayed.

Small icons are used within lists and the My Folders display, e.g., ⊞ open a folder, create a new sub folder, upload a file to the folder, ☒ delete a file.

My Folders

This is the location where all of your documents are stored (the documents that you upload to Hall Consulting Group and the documents that we upload to your account).

How to Login to the HCG Client Portal
- 🔶 Go to the Hall Consulting Group website (www.hallconsulting.com.au)
- 🔶 The front page will have an icon "Portal Log In", click this and you will be able to login to the Portal.

To Send Documents to HCG
- 🔶 Login to your HCG Client Portal account
- 🔶 Go to "My Folders"
- 🔶 Click the upload icon 📄, which appears as a document with a blue arrow next to it.
- 🔶 Click 'Browse' and locate your document on your computer.
- 🔶 Highlight the appropriate document you want to send and click 'Open'. If needing to send another document you can select 'Browse' and follow the process again.
- 🔶 Once all documents have been selected, click 'Upload'
- 🔶 The status will show a green circle with white tick when the document has been uploaded successfully, click 'Close'

Once your document has been uploaded, Hall Consulting Group will receive an email notification advising the Admin Team that you have uploaded a file.

There are no restrictions to the size or type of the document you wish to upload.

Organising Your Folders
You are able to file and organise the documents in your folders however you like. You can set up names for folders or sub folders in the portal as best suits you. This will not impact on Hall Consulting Group's viewing of your folders.
Your main folder will be called "To Hall Consulting Group" and will be the only one you are unable to rename.

How to Create a Folder
- 🔶 To create a folder click on the icon 📁, which looks like a folder with a blue plus sign in the middle.
- 🔶 A pop-up box will appear asking what you would like to name the folder. Enter a name and click 'Create'

How to Rename a Folder
- 🔶 Click on the icon of the folder you would like to rename 📁
- 🔶 A Folder Properties pop-up box will appear. Enter the new name of the folder.
- 🔶 Click 'Update'

How to Move a Folder
- 🔶 Click on the icon of the folder you would like to move
- 🔶 A Folder Properties pop-up box will appear.
- 🔶 Click 'Move to', a large pop-up box will appear asking you to select the destination folder
- 🔶 You may have to expand your folders by clicking on the + icon next to the folder icon.
- 🔶 Once you have located the new folder location, click on the folders name.
- 🔶 The pop-up box will disappear and your folder will have been moved to the new location

How to Move a Document
- 🔶 Click on the icon next to the documents name

- A 'File Properties' pop-up box will appear
- Click 'Move to', a large pop-up box will appear asking you to select the destination folder
- You may have to expand your folders by clicking on the + icon next to the folder icon.
- Once you have located the new folder location, click on the folders name.
- The pop-up box will disappear and your document will have been moved to the new location

How to Delete a Folder
- Click on the icon of the folder you would like to delete
- A Folder Properties pop-up box will appear.
- Click 'Delete'
- A notice will appear asking you to confirm you would like to delete the folder, click 'OK'

Alternatively, after locating the folder you wish to delete, in the same line you can find and press the delete symbol , which looks like a folder with a red x in the centre. A pop-up box will appear asking you to confirm. Press 'Ok'.
You will not be able to delete a folder that contains documents

How to Delete a Document
If you have uploaded an incorrect document, you can delete the file. As we instantly receive notification that you have uploaded a document, if you than delete the file without us knowing we may call to confirm that this is what has occurred.
In any other circumstance we discourage deleting files.
- Click on the icon of the file you would like to delete
- A File Properties pop-up box will appear.
- Click 'Delete'
- A notice will appear asking you to confirm you would like to delete the document, click 'OK'

Alternatively, after locating the document you wish to delete, in the same line you can find and press the delete symbol , which looks like a page with a red x in the centre. A pop-up box will appear asking you to confirm. Press 'Ok'.

To Edit Who Has Access to See Your Account
You can select and control access rights for other people you need to access your portal account
- Login to your HCG Client Portal account
- Go to 'My Details'
- Select 'Invites' tab
- Select 'New Invite' [+ New Invite], a pop-up box will appear
- Enter in the details of the person you want to have access
- Ensure a tick is within the 'Allow Notifications' area and 'My Folders'
- Click 'Update'
- A pop-up box will appear letting you know that the person you entered has been emailed, click 'OK'
- The pop-up box will disappear and the person you added will now show up in your 'Invites' list.

The invitee will receive an email requesting them to create a login to your account. It is a good idea to make sure the contact is aware they will be receiving the email so that they do not miss it.

When HCG uploads a document to you the notification will received by you as well as your invitee. They will also be able to upload files and create folders.
Your invitee is also able to set up an electronic signature if required.

Remove Someone Previously Given Access to Your Account
- Login to your HCG Client Portal account
- Go to 'My Details'
- Select 'Invites' tab
- Click the blue arrow that corresponds next to the invitee you wish to remove.
- A pop-up box will appear with the contacts details
- Select 'Delete'
- A secondary pop-up box will open asking if you are sure, click 'OK'
- The contact will be removed from your list and no longer have access to your folders

How to Share One of Your Uploaded Documents with Someone Else
If there is a document you would like someone else to view who does not have access to your account, you can elect to 'Share' it. This will mean they only see the document you want them to, not your entire Client Portal folders.
- Login to your HCG Client Portal account
- Go to 'My Folders'
- Locate the name of document you want to share, click on the corresponding hand holding paper icon
- A pop-up box will appear and ask you to complete the contacts details, enter the details of your contact
- Click 'Send'
- A secondary notification will pop-up letting you know an email as been sent to them, click 'OK'

Your contact will be sent an email with a link to the document you have shared. They will need to create a login to view the document.

Setting up an Electronic Signature
You can have your signature setup on the HCG Client Portal, so that you don't have to print a document, scan and re-upload.
To have your signature setup, follow the below steps;
- Sign a blank document and scan
- Upload to the HCG Client Portal
- We will prepare and upload your signature in the correct dimensions and format so all you need to do is follow the setup instructions we send with the prepared signature.

How to Sign a Document
- When you open a link from a HCG Client Portal email you will be taken to the uploaded document we have sent. You should notice in the top right hand corner a button "Sign Document"
- Once you have reviewed the document and are happy to sign, go to the area on the page that requires your signature. If more than one page within the document requires your signature just go to the first one.
- Click the "Sign Document" button. Your signature will appear in the top left hand of the document, you can then use your mouse to position the signature to the correct area.

- Once signature is in position click "Apply Signature" button located in the top right hand corner.
- A pop-up box will appear.

Signing Multiple pages of the same document
  - If you need to sign the document again on another page, click "Sign Again"
  - You will be able to select the next page that requires signing and click "Sign Document". This will make your signature appear again in the top left hand corner of the document, position and click "Apply Signature"
  - You can follow these steps again until all areas of the document that require your signature are done

Co-signing a document
  - If the document also needs to be signed by someone else and they are one of your invitees, you can opt to tick the "Retain for other parties to sign" box.

- Enter your pin and click "Done"
- The system will automatically notify our office that your have signed this document **unless you have ticked the "Retain for other parties to sign" box**
  - If you have used the "Retain for other parties to sign" tick box, a document with the same name will be created within the Client Portal, with the difference being the end of it will have "signed".
  - You will need to notify your Invitee to locate this document within the HCG Client Portal and apply their signature.

Conversations

You can add a note to an uploaded document if there is something you want us to be aware of in particular.

This can be to an existing document in your folders or a recently uploaded document.

- First you need to locate the document you want to add a note to
- On the right side after the document name, there will be a speech bubble symbol
- Click this symbol, a pop-up box will open
- In the 'Comment' field, you can enter text.
- Once you are done, click 'Add Comment'
- The comment will appear above the comment field box and HCG will instantly be emailed with your comment.
- Once you have finished making your note, you can click the 'X' in the top right.

The HCG team can also respond to your comment or send you a comment. Whenever a comment is made the Client Portal system will send an email to the opposite party to let them know a comment has been made.

HELP

If at any point in time you have a question about the HCG Client Portal, or require assistance, please do not hesitate to contact our office.

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