

Get to Know SmartVault

The secure & convenient way to share documents online

Why should I use the secure SmartVault portal?

Cybercrime activity is on the rise, and e-mail is one of the easiest ways for hackers to get your information.

You should never e-mail documents that contain sensitive information like your Social Security Number, credit card numbers, or other payment and bank information. It's equally important not to leave paper lying around that contains this information.

We realize that in order for us to provide you services, we will need to exchange documents that contain this type of information. That's why we've partnered with SmartVault to offer you a convenient, yet secure, method for sharing important documents.

How does SmartVault keep my information secure?

All interactions with SmartVault occur over an encrypted channel and all documents & information are encrypted using bank-level encryption (that's AES-256 for the tech savvy).

No user can access documents in SmartVault without logging in, and built-in security permissions help us control who has access to your information at all times.

SmartVault offers Two-Factor Authentication (2FA) to add more layers of security to your account. With 2FA, you log in using not only your email address and password, but also a one-time verification code sent to your mobile device or email address that helps verify your identity. Once you set it up, 2FA is automatically activated if anyone tries to access your account from a new web browser or IP address.

How do I use SmartVault?

You can access SmartVault via a web browser or your mobile phone. We'll add you to our SmartVault account as a guest and you'll need to activate your account in order to complete the sign-up process. Follow the steps below to start sharing documents securely!

Activate Your Account

Once we've added you as a user, you'll receive an account activation email from SmartVault.

If you don't receive this e-mail, please let us know.

1. Open your activation email from SmartVault.
2. Click the *SmartVault Activation Link*.
3. Enter your phone number and create a password. *Note: We've already entered the rest of your information.*
4. Click *Create My User*.

Sign in to SmartVault

1. Go to *my.smartvault.com*.
2. Enter your email address and password you created when you activated your account.
3. Click *Sign In*.

Note: If you forget your password, click 'Can't sign in?' and you'll receive a password re-set email.

Uploading Documents

1. Log in to your SmartVault account and navigate to the folder where you would like to upload your files.
2. Drag & drop the document(s) into the window or browse for the file on your computer.
3. Click *Close*.
4. We'll automatically be notified that you've added a document to the folder.

Downloading Documents

1. Log in to your SmartVault account and navigate to the folder containing the files you'd like to download.
2. Click on the PDF to view it in your browser.
3. Click *Download* if you'd like to download the document to your computer.

For more detailed instructions on getting started, visit smartvault.com/topics/training. If you ever need assistance with your SmartVault account, you can reach out to SmartVault support by visiting support.smartvault.com.