Welcome to the New Texas Home Base Scanning Service

In this packet, you will find –

Each week, we will open and scan your documents. Every Friday, we will begin our process of uploading your documents to your THB account. All documents should be available by Saturday morning.

At this time, we are working on having an email sent by Monday morning with a zipped folder containing your weekly scanned documents. This feature will be released in 2-3 weeks. When you receive this email, you have the option of unzipping the folder to view your weekly documents *or* you can use this email as a notice that you have new documents in your THB account. See "How to Unzip Your Weekly Files Sent via Email" on page 7 if you would like to unzip the folder found in this weekly email.

If you need to update the email address currently on your account home page, please let us know via email to accounts@texashomebase.com and we will update it for you. This email address will be used to send weekly emails containing your zipped folder, confirmation of SHRED/HOLD/FORWARD updates, and any "Forgotten Password" emails.

We are very excited to share these new procedures with our clients. We hope that the documents found in this packet are informative and helpful in viewing your THB account and scanned mail pieces.

How to Log on to Your Texas Home Base Account for the First Time

Step 1: Open https://account.texashomebase.com on your web browser

Step 2: Enter the "Username" and "Password" you received via email from Texas Home Base

Step 3: Click the "Sign In" button

Step 4: Your account will open and a "Change Password" window will pop up on your browser

Step 5: Enter a new unique password of your choice

> ***This new password must contain one digit, one lowercase, one uppercase and a minimum of 11 characters***

Step 6: Confirm your new password by entering it again on the "Confirm Password" line

Step 7: Click the "Change" button on the bottom right hand corner of the window

> If the window does not close automatically and the underline first box is highlighted red, your password was not accepted and you will need to use a different password.

> If the underline second box is highlighted red, your passwords *do not* match and you will need to reenter your password on the "Confirm Password" line

Step 8: Keep this password in a secure place

> If you lose this password at any time, please use the "Forgotten Password" link on the login page – https://account.texashomebase.com

>> When you click the "Forgotten Password" link on this page, a pop up window will open on your browser. Please enter the email address used on your THB account and click the "Done" button. You will receive an email containing a link to change the password on your account. **Don't forget to check your "spam" folder if you do not see the "Forgotten Password" email shortly.**

> If you would like to change your unique password at any time, you can click on your username at the top left hand corner of your account page after you have signed in. The "Change Password" window will pop up in your browser. Follow steps 5-8 to change your password.

Step 9: To sign out of your account, please click the "Sign Out" button at the top left hand corner of your account page.

Note: Our website is designed to lock out any IP address that uses the wrong password underline 20+ times on any THB account. The error page will say –

> "Opppss looks like you entered an incorrect password too many times and your IP has been blocked. In order to remove your IP block contact Texas Home Base."

If you receive this error, please call us at (866) 766-2095 and we will promptly fix the issue.

Basic Instructions on Using the THB Account Section

Step 1: Log into THB account @ https://account.texashomebase.com

Step 2: Select folder you would like to open. Ex. Wk1, Wk2, Wk3, etc.

Step 3: To view your scanned document click the 👁 button to the right of the file name you would like to open

- To download this document, click the ☁ button and follow the download prompts on your browser

Step 4: If you need any documents forwarded, please update your forwarding address by clicking the "Update Address" button at the top left hand corner of the page*

Step 5: Instruct Texas Home Base on what should be done to each document by selecting either SHRED, HOLD or FORWARD next to each file name

Step 6: Click on the "Submit Options" button at the bottom of the screen to submit your instructions.

> **There should be a message stating "MAIL SORTING OPTIONS SUBMITTED" at the bottom of the page**

You will receive an email shortly from Texas Home Base with a list of the files and options you have submitted. Remember to check your spam folder if you do not see this email.

*Any forwarding instructions submitted **before** 3 pm CST will be processed that same business day.
*Any forwarding instructions submitted **after** 3 pm CST or on weekends/federal holidays will be processed the next business day.

Detailed Instructions on Using the THB Account Section:

Step 1: Use instructions for logging into https://account.texashomebase.com on the "How to Log on to Your Texas Home Base Account for the First Time" page

- If you have already changed your password, use the unique password you've chosen and the username given to you.

Step 2: You will find these folders:

(archive) – this folder will contain any documents from the past 3 months that Texas Home Base has not received direction for

Hold – this folder will be updated with files you have chosen to Hold and will only be emptied when you have instructed us to forward these files

Wk1

Wk2

Wk3

Wk4

Wk5

Step 3: Click on the name of the week you would like to open (wk1, wk2, wk3, etc.). If you click on the word "Folder" instead, it will not open.

- You can see an entire list of files uploaded to your account by clicking on the ≡ symbol next to the blue "Sort by Name" button. From this pop up menu, you can also search for specific files.
- Each weekly folder will be updated throughout the month with your files. They will continue to be numbered sequentially and according to the month received (ex: mar01, mar02, mar03, etc.). This number is *not* the day of the month the piece is received, but rather the number we have given the document.
- The date the file was uploaded is in Month/Day/Year order and is at the right of each document.

Step 4: To the right of the document, you will find a 👁 button. This will open a document viewer in a separate window on your browser

Downloading your document:

Click on the ⬇ button next to your document

Each browser will open your downloaded file differently. Please find your preferred browser below for further instruction on how to open your downloaded file.

- **Microsoft Edge (aka Internet Explorer):** Your browser will ask you if you would like to "Save", "Save As", or "Cancel" this download. Please click either "Save" or "Save As."
    - If you click "Save," your browser will ask you if you would like to "Open", "Open Folder", or "View Downloads." The "Open" option will open the PDF in another browser tab, the "Open Folder" option will open your "Downloads" folder on your PC with the document highlighted, and the "View Downloads" option will bring a pop up window on your browser with all of your downloaded files displayed – you can double click on your new file to open it.
    - If you click "Save As," your browser will open your computer's "Downloads" folder. From this folder, you can move the document to any destination on your PC and you will be able to rename the file.

- **Google Chrome:** Click on the file name at the bottom of your browser screen to open it up in a separate tab <u>or</u> you can right click on the download and chose to –
    - "Open" – this will open the file up in a separate tab on your browser
    - "Always Open with System Viewer" - selecting this option will automatically open anything downloaded with your Chrome browser in a separate pop up window
    - "Show in Folder" - this option will open your computer's "Downloads" folder. From this folder, you can move the document to any destination on your PC and you will be able to rename the file

- **Firefox:** After clicking the "Download" button on your pop up window. Firefox will open a separate window indicating: You have chosen to open: filedoc.pdf, What should Firefox do with this file?
    - "Open with" – this will open your file with a default program or a PDF reader of your choice. Depending on which programs are downloaded onto your PC.
    - "Save File" – this will download the file and save it to your "Downloads" folder on your PC. There will be a blue arrow at the top left hand side of your browser. Click on this arrow to see a list of your downloaded documents. You can either click on the file name to open the document or click on the folder icon to open your "Downloads" folder. From this folder, you can move the document to any destination on your PC and you will be able to rename the file.

Updating Your Forwarding Address:

While logged into your account, you will have the option of updating your forwarding address with Texas Home Base. You can see the address currently on file for you by clicking the "Forwarding Address" button at the top left hand corner of your account page. **We ask that you send us the update before you instruct us to "Forward" any of your mail pieces so that your mail is sent to the correct address*.**

To do so –

- o Click on the "Update Address" button on the top left hand corner of your account screen.
- o Enter your Name, Street Address, City, State, Zip, Phone Number, and Mailing Method you would prefer Texas Home Base uses to send your mail – USPS Priority, USPS 1st Class, UPS, FedEx.
    - o If you choose FedEx or UPS, please specify which service you would like us to use by selecting one of these options – Overnight, 2nd Day or Ground
- o Please double check your address and then click the "Change" button at the bottom of the pop up window

Forward/Hold/Shred Instructions:

After you have read your weekly files, you can let us know what to do with each document.

Step 1: Click on the option you would like to use for each document – options include "Hold", "Forward" and "Shred." **Remember to update your forwarding address *before* you instruct us to forward any documents*.**

Step 2: After you have selected an option for each document, click on the "Submit Options" button at the bottom right hand corner of the page

> You will see the message "MAIL SORTING OPTIONS SUBMITTED" at the bottom of the page.

You will receive an email shortly from Texas Home Base with a list of the files and options you have submitted. Remember to check your "Spam" folder if you do not see this email.

Ex: Texas Home Base mail sorting options summary
        Timestamp: 2017-03-01_12:00:00 CST
        FILENAME – SORT OPTION
        mar01.pdf – HOLD
        mar02.pdf – SHRED

*Any forwarding instructions submitted **before** 3 pm CST will be processed that same business day.

*Any forwarding instructions submitted **after** 3 pm CST or on weekends/federal holidays will be processed the next business day.

How to Unzip Your Weekly File Sent via Email

Each week, you will receive an email containing a short notice that you have new mail documents in your THB account along with a zipped folder of your mail documents attached. When you receive this email, you will have the option of unzipping the folder to view your weekly documents **or** consider the email as a notice that you have new documents in your THB account. It is available to you to add a level of convenience to our new process. If you chose to unzip the folder and view your documents through the email, you will then need to log in to your account to instruct us to shred, hold or forward your mail pieces. Please *do not* reply to this automatic email as we will not receive your reply. We will use the email address on your account home page to send these weekly emails. If this address is incorrect, please let us know via email to accounts@texashomebase.com.

Step 1: Download the zipped folder attached to your weekly email

> You will find detailed instructions on how each browser will download a file/folder on page 5.

Step 2: Locate the zipped folder you have downloaded onto your PC

Step 3: Do one of the following:

- To unzip a single folder, open the zipped folder, then drag the file or folder from the zipped folder to a new location
- To unzip all the contents of the zipped folder, press and hold (or right click) the folder, select "Extract All"
    - A pop up window will open asking you to select a destination for the extracted files
    - Select the "Browse" button and select the folder you would like the unzipped files to be dropped into
    - Click "Extract" at the bottom right hand corner of the window
    - The folder you have selected will open showing you the unzipped files/folder

Step 4: Read your unzipped files and use the instructions found on page 6 to instruct THB on what you would like done to each file. Please *do not* reply to the email that the zipped folder was attached to as Texas Home Base will not receive your reply.

Some information on this page was found on –

https://support.microsoft.com/en-us/help/14200/windows-compress-uncompress-zip-files

By signing the statement below:

- I agree that I shall not make any duplicate copies of the Scanning client's mail that I scan, sort, or forward.
- I agree that I shall not allow any other persons outside of Texas Home Base to access the Scanning client's mail or personal information.
- I agree that I shall act in the best interest of all Scanning clients at all times.
- I agree that I shall do my best to ensure that the mail is not misappropriated, intercepted, deleted, destroyed or used by others.
- I agree that I shall not disclose any Scanning client's personal information to any unauthorized persons without the knowledge and approval of the scanning client, unless required by law.

Signed: *Elaine Pennartz*   Date: *March 30, 2017*

Signed: *Julie Stewart*   Date: 3-30-2017

Signed: *Dru Pennartz-Morrison*   Date: 3-30-2017

Signed: *[signature]*   Date: 3-30-17