



Included below are some helpful tips for using the Onvio client portal for uploading your tax documents.

- Your portal should include a folder labeled 'Tax Documents (2025)' in the 'Documents' tab. Please upload your documents to this folder, instead of the general folder in Onvio. If you do not see this folder in your portal, please let me know and I can add it to your account. This helps ensure that documents for 2025 are not mixed up with anything from prior years.
- After you have uploaded your documents, review the number of items to make sure all documents are saved to the folder.
- Please upload documents in PDF format whenever possible. These documents are easier to work with in a paperless environment and typically easier to read.
- It is common for sensitive documents, such as W-2's, to include a password. Please open documents before uploading to make sure they are not password protected. If they are password protected, please remove the protection or provide the password so I can open it.
- You can upload documents to the portal at your convenience. Once you have all documents uploaded to your portal, please contact me to let me know that all items have been uploaded. I will not start on your return until you confirm that all documents have been uploaded, to avoid spending time on the return with missing documents.
- When possible, please label documents with a description (such as 'Employer ABC W-2' or 'Mortgage Interest Statement'). This helps me sort and enter items for your return more efficiently than generic numbers created by scanning apps.
- If you have access to more than one account, for a business or another individual, you will need to toggle between the accounts to upload to the proper folders. When logged in to the Onvio portal website you should see a toggle button in the upper left corner. (See picture below)

