

Step 1: Log Into Portal

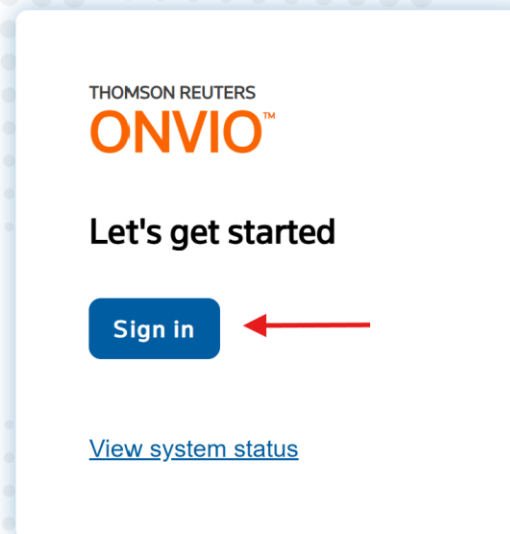


<https://onvio.us/#/>

Instructions:

Log into your portal at <https://onvio.us>.

***** Please note, if married, this process MUST be completed for each spouse separately**



Step 2: Reviewing Your Documents

MGA
MARINO, GOETZ & ASSOCIATES
THE ACCOUNTANTS & ADVISORS
111 MERCER STREET, DECATUR, GA 30030

TASKS **DOCUMENTS**

Client: Personal

FOLDER VIEW LIST VIEW

- Tax Return (2024)

Client Documents

Actions: Add, Download, Delete, Send

Search

☐	Name	Associated Task	Added By	Modified ↓
☐	2024 NY Individual Income Tax Declaration fo...		Someone Else	11/18/2025, 3:34 PM
☐	2024 Form 8879 IRS e-file Signature Authoriz...		Someone Else	11/18/2025, 3:34 PM
☐	2024 Bank Account Verification Worksheet.pdf		Someone Else	11/18/2025, 3:34 PM
☐	2024_US_TaxReturn-ActionRequir...		Someone Else	11/18/2025, 3:02 PM
☐	_2024_NY_TaxReturn-ActionRequir...		Someone Else	11/18/2025, 3:02 PM
☐	_2024_US_Tax Return_1040.pdf		Someone Else	11/18/2025, 3:02 PM
☐	_2024_NY_Tax Return_1040.pdf		Someone Else	11/18/2025, 3:02 PM

Instructions:

If you want to review your invoice, filing instructions, as well as your e-sign documents before you sign them, select **DOCUMENTS**, select **CLIENT DOCUMENTS** and then you can open the three e-signature documents separately. To view your invoice and filing instructions open the document titled **US TAX RETURN ACTION REQUIRED**.

Step 3: Tasks to Do

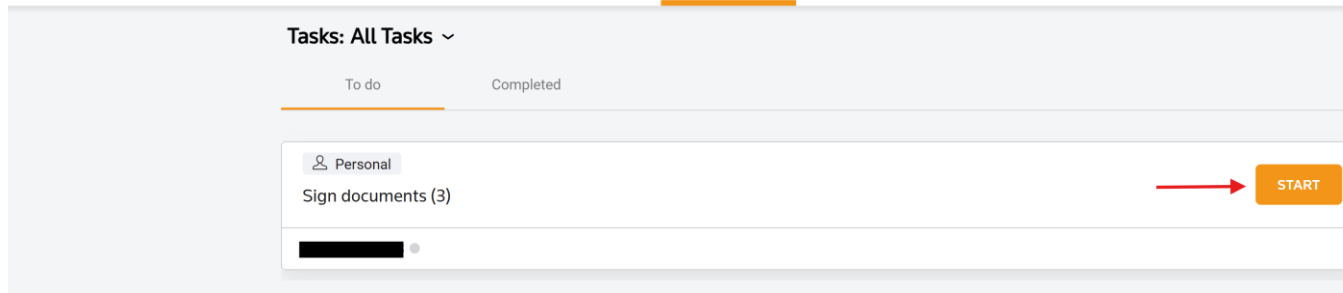


TASKS

DOCUMENTS



Instructions:



Once you log in, you will be brought to the **TASKS** tab.

Under **TO DO**, you will see the outstanding task(s) that you need to do. Select **START** to begin.

Step 4: Prompt to Review Documents

eSignature Request for [REDACTED]
EXPIRES 12/18/2025

Documents to sign:

- 2024 Bank Account Verification Worksheet
- 2024 Form 8879, IRS e-file Signature Authorization
- 2024 NY Individual Income Tax Declaration for eFiling

☒ I have read the [Electronic Record & Signature Consent Disclosure](#) and agree to the terms.

REVIEW DOCUMENTS >

DECLINE

Instructions:

You will be shown a list of the documents that you need to review which will include a Bank Account Verification Worksheet, Form 8879 to file your federal return, and NY Tax Income Declaration to file your state return. There will be a form that you need to sign for **EACH** state that you need to file taxes in. Select **REVIEW DOCUMENTS** to start signing your documents.

Step 5: Verify Identity - SSN

Verify Identity

Last 4 digits of Social Security Number?

 Verifying your identity helps safeguard your data.

NEXT >

Instructions:

You will be prompted to enter the last 4 digits of your social security number. Enter them and then select **NEXT**.

Step 6: Verify Identity – Identity Questions

Verify Identity

Answer the following questions to verify your identity.

Once started, you'll have approximately 5 minutes to answer the questions before the document expires. If the document expires, a new document will need to be generated for you to sign.

Which of the following people do you know?

- [Redacted Name]
- [Redacted Name]
- [Redacted Name]
- [Redacted Name]

☐ None of the above

NEXT > **SKIP**

Instructions:

You will be prompted to answer a series of questions to verify your identity. Select **NEXT** to advance through the questions after selecting your answer. ***
Please note: These questions are generated by the IRS NOT MGA. If you fail to answer the questions correctly you MUST contact our office to receive a new set of questions to answer. You will NOT be able to e-sign your forms without verifying your identity. ***

Step 7: Select a Signature



The screenshot shows a web form titled "Confirm Signature". It includes a "Full Name" text input field. Below it are three buttons: "SELECT STYLE" (highlighted with an orange background and a red circle), "DRAW" (outlined with a red circle), and "UPLOAD" (outlined with a red circle). Under the "Signature Style" label is a dropdown menu with a black bar and a downward arrow, which is pointed to by a red arrow. At the bottom left is an orange "NEXT >" button. The form is part of a larger interface with a sidebar on the left containing labels like "eSig", "ZIL", "EXP", "Docu", and a list of items with "2" next to them.

Instructions:

You will be prompted to select a type of signature to sign your documents. You can either **SELECT STYLE** to pick a predetermined style, **DRAW** to hand write your own, or **UPLOAD** a signature that you already may have. Once you have made your choice, select **NEXT**.

Step 8: Prompt to Review Bank Verification

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To Sign

- 2024 Bank Account Verificati...
- 2024 Form 8879, IRS e-file S...
- 2024 NY Individual Income T...

1 of 1

Confirm your signature.

CONFIRM

Form 1040 Bank Account Verification 2024

Name _____ Taxpayer Identification Number _____

You have indicated that you would like to receive a refund via direct deposit or make a tax payment via electronic funds withdrawal (EFW) from your bank account(s). Note that electronic funds can only be withdrawn from the primary account. Make sure sufficient funds are available in the primary account. For IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If there are any changes please make them on this form. Sign and date at the bottom to indicate upon your review and verification that all account(s) listed are correct and return it to our office.

Primary Account

Name of Financial Institution _____

Routing Transit Number _____

Account Number _____

Type of Account _____ CHECKING NO

Joint Account? _____

____ IS SCHEDULED TO BE DIRECT DEPOSITED TO THIS ACCOUNT

Secondary Account #1

Name of Financial Institution _____

Routing Transit Number _____

Account Number _____

Type of Account _____

Joint Account? _____

Secondary Account #2

Name of Financial Institution _____

Taxpayer Signature ALEXANDRA STUBBSMAN 11/18/2025

Spouse Signature _____

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Instructions:

You will begin with the Bank Verification sheet which will be prepopulated with your information, as well as your signature. ***PLEASE REVIEW CAREFULLY.*** Note on the left side you will see a **red !**, this means the document hasn't been signed yet. Select **CONTINUE** to go to the next form.

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You will be prompted to select **CONTINUE** in order to move on to the next document to sign. The **CONTINUE** prompt will need to be selected between the signing of **EACH** document.

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20250204 11/16/2025 3:01 PM

Form 8879 (Rev. January 2021) Department of the Treasury Internal Revenue Service		IRS e-file Signature Authorization ERO must obtain and retain completed Form 8879. Go to www.irs.gov/Form8879 for the latest information.	
Submission Identification Number (SID) 11368220252870066093		OMB No. 1545-0047	
Taxpayer's name [REDACTED]	Social security number [REDACTED]		
Spouse's name [REDACTED]	Spouse's social security number [REDACTED]		
Part I Tax Return Information — Tax Year Ending December 31, 2024 (Enter year you are authorizing.)			
Note: Form 1040-SSE files use line 4 only. Leave lines 1, 2, 3, and 5 blank.			
1 Adjusted gross income		1	[REDACTED]
2 Total tax		2	[REDACTED]
3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099		3	[REDACTED]
4 Amount you want refunded to you		4	[REDACTED]
5 Amount you owe		5	[REDACTED]
Part II Signature Authorization (Be sure you get and keep a copy of your return)			
(I am/ we are the preparer of the income tax return (original or amended). I am now authorizing, and to the best of my knowledge, I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) that I am submitting to the IRS for electronic filing. I consent to allow my immediate service provider, transmitter, or electronic return originator (ERO) the IRS (a) an acknowledgment of receipt or reason for rejection of the transmission, (b) the reason for the rejection, if applicable, and (c) the date of any refund, if applicable. I authorize the U.S. Treasury and its designated third party (direct deposit) entry to the financial institution account indicated in the tax preparation software for (and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization will remain in effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a signature authorization, call the ERO at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days after the date of the original authorization. I also authorize the financial institutions involved in the processing of the electronic payment of tax to answer inquiries and resolve issues related to the payment. I further acknowledge that the signature for the income tax return (original or amended) I am now authorizing and, if applicable, my spouse's signature, is being used by the ERO to prepare and transmit the return to the IRS.)			
& ASSOCIATES, INC. to enter or generate my PIN [REDACTED] as my signature on the income tax return (original or amended). I am now authorizing. Check this box ☒ if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.			
Your signature [REDACTED] Date 11/18/2025			
Spouse's PIN: check one box only			
☐ I authorize [REDACTED] ERO firm name [REDACTED] to enter or generate my PIN [REDACTED] as my signature on the income tax return (original or amended). I am now authorizing. Check this box ☐ if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.			
Spouse's signature [REDACTED] Date 11/18/2025			
Practitioner PIN Method Returns Only—continue below			
Part III Certification and Authentication — Practitioner PIN Method Only			
ERO's EFINPIN: Enter your six-digit EFIN followed by your free-digit self-selected PIN. 11368212549 Don't enter all zeros			
I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorizing to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.			
ERO's signature DEBORAH GOETZ Date 10/14/25			
FRO Must Retain This Form — Fee Instructions Print & Submit This Form to the IRS by the deadline indicated. Page 1 of 1 Line 8 Required and 30% off			
For Paperwork Reduction Act Notice, see your tax return instructions.			
Form 8879 (Rev. 01-2021)			

The Form 8879 sheet will be prepopulated with your information, as well as your signature. ***PLEASE REVIEW CAREFULLY.*** Note on the left, you will now see a blue next to the document that has been successfully signed. Select **CONTINUE** to go to the next form..

Step 11: Prompt to Review State Income Declaration

Marino, Goetz & Associates, Inc.

To Sign

- ✓ 2024 Bank Account Verificati...
- ✓ 2024 Form 8879, IRS e-file S...
- ! 2024 NY Individual Income T...

Department of Taxation and Finance
New York State E-File Signature Authorization for Tax Year 2024
For Forms IT-201, IT-201-X, IT-203, IT-203-X, IT-214, and NYC-210

Electronic return originator (ERO): Do not mail this form to the Tax Department. Keep it for your records.

Taxpayer's name: [Redacted] Spouse's name (jointly filed return only): [Redacted]

Purpose
Form TR-579-IT must be completed to authorize an ERO to e-file a personal income tax return and to transmit bank account information for the electronic funds withdrawal.

General instructions
Taxpayers must complete Part B before the ERO transmits the taxpayer's electronically filed Forms IT-201, Resident Income Tax Return, IT-201-X, Amended Resident Income Tax Return, IT-203, Nonresident and Part-Year Resident Income Tax Return, IT-203-X, Amended Nonresident and Part-Year Resident Income Tax Return, IT-214, Claim for Real Property Tax Credit, and NYC-210, Claim for New York City School Tax Credit. Note that an electronic signature can be used as described in TSB-M-20(1)(c), (2), E-File Authorizations (TR-579 forms) for Taxpayers Using a Paid Preparer for Electronically Filed Tax Returns.

For returns filed jointly, both spouses must complete and sign Form TR-579-IT.

Part A – Tax return information
1. Estimated adjusted gross income, less nonrefundable credits

1. [Redacted]
2. [Redacted]
3. [Redacted]
4. [Redacted]
5. [Redacted]

Confirm your signature.

CONFIRM

Personal savings ☐ Business checking ☐ Business savings ☐
I, the undersigned, being duly sworn, depose and say that the information furnished to me by the taxpayer, if the taxpayer furnished me a completed paper 2024 New York State return signed by a paid preparer, is true, correct and complete. I am authorizing and agree that I may revoke this authorization for payment only by contacting the Tax Department no later than two (2) business days prior to the payment date.

Part C – Declaration of electronic return originator (ERO) and paid preparer
Under penalty of perjury, I declare that the information contained in this 2024 New York State electronic personal income tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed paper 2024 New York State return signed by a paid preparer, I declare that the information contained in the taxpayer's 2024 New York State electronic return is identical to that contained in the paper copy of the return. If I am the paid preparer, under penalty of perjury I declare that I have examined this 2024 New York State electronic personal income tax return, and, to the best of my knowledge and belief, the return is true, correct, and complete. I have based this declaration on all information available to me.

Do not mail Form TR-579-IT to the Tax Department:
EROs must keep this form for three years and present it to the Tax Department upon request.

ERO's signature: [Redacted] Date: 11/16/2023
Paid preparer's signature: [Redacted] Date: 10/14/2025

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www.tax.ny.gov

Instructions:

The State Income Declaration sheet will be prepopulated with your information, as well as your signature. ***PLEASE REVIEW CAREFULLY.*** Note on the left, you will now see a blue ✓ next to the document that has been successfully signed. Select **CONTINUE**.

Step 12: Submit Your Signatures

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To Sign

- 2024 Bank Account Verificati...
- 2024 Form 8879, IRS e-file S...
- 2024 NY Individual Income T...

SUBMIT

Department of Taxation and Finance
New York State E-File Signature Authorization for Tax Year 2024
For Forms IT-201, IT-201-X, IT-203, IT-203-X, IT-214, and NYC-210

Electronic return originator (ERO): Do not mail this form to the Tax Department. Keep it for your records.

Taxpayer's name: [Redacted] ERO's name (only filed return only): [Redacted]

Purpose:
Form 78-679-IT must be completed to authorize an ERO to e-file a personal income tax return and to transmit bank account information for the electronic funds withdrawal.

General instructions:
Taxpayers must complete Part B before the ERO transmits the taxpayer's electronically filed Form IT-201, Resident Income Tax Return, IT-201-X, Amended Resident Income Tax Return, IT-203, Nonresident and Part-Year Resident Income Tax Return, IT-203-X, Amended Nonresident and Part-Year Resident Income Tax Return, IT-214, Claim for Real Property Tax Credit, and NYC-210, Claim for New York City School Tax Credit. Note that as electronic signature can be used as described in TSB-A(201)C, (2), E-File Authorizations (78-679 forms) for Taxpayers Using a Paid Preparer for Electronically Filed Tax Returns.
For returns filed jointly, both spouses must complete and sign Form 78-679-IT.

Part A – Tax return information
1 Federal adjusted gross income (from applicable line) 1 [Redacted]
2 Refund 2 [Redacted]
3 Amount you owe 3 [Redacted]
4 Financial institution routing number 4 [Redacted]
5 Financial institution account number 5 [Redacted]
6 Account type: ☒ Personal checking ☐ Personal savings ☐ Business checking ☐ Business savings

Part B – Declaration of taxpayer and authorizations for Forms IT-201, IT-201-X, IT-203, IT-203-X, IT-214, and NYC-210
Under penalty of perjury, I declare that I have examined the information on my 2024 New York State electronic personal income tax return, including any accompanying schedules, attachments, and statements, and certify that my electronic return is true, correct, and complete. The ERO has my consent to send my 2024 New York State electronic return to New York State through the Internal Revenue Service (IRS). In addition, by using a computer system and software to prepare and transmit my form electronically, I consent to the disclosure to New York State of all information pertaining to the transmission of my tax form electronically. I understand that by executing this Form 78-679-IT, I am authorizing the ERO to sign and file this return on my behalf and agree that the ERO's submission of my personal income tax return to the IRS, together with this authorization, will serve as the electronic signature for the return and my authorized payment transaction. I am paying my New York State personal income taxes due by electronic funds withdrawal. I certify that the account holder has authorized the New York State Tax Department and its designated financial agents to initiate an electronic funds withdrawal from the financial institution account indicated on my 2024 electronic return, and authorized the financial institution to withdraw the amount from that account. For New York State does not support automatic ACH Transactions (ACT), I attest the source for these funds is within the United States. I understand and agree that I may receive this authorization for payment only by contacting the Tax Department no later than two (2) business days prior to the payment date.

Part C – Declaration of electronic return originator (ERO) and paid preparer
Under penalty of perjury, I declare that the information contained in this 2024 New York State electronic personal income tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed paper 2024 New York State return signed by a paid preparer, I declare that the information contained in the taxpayer's 2024 New York State electronic return is identical to that contained in the paper copy of the return. If I am the paid preparer, under penalty of perjury I declare that I have examined this 2024 New York State electronic personal income tax return, and, to the best of my knowledge and belief, the return is true, correct, and complete. I have based this declaration on all information available to me.

Do not mail Form 78-679-IT to the Tax Department.
EROs must keep this form for three years and present it to the Tax Department upon request.

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TR-679-IT (024) www.tax.ny.gov

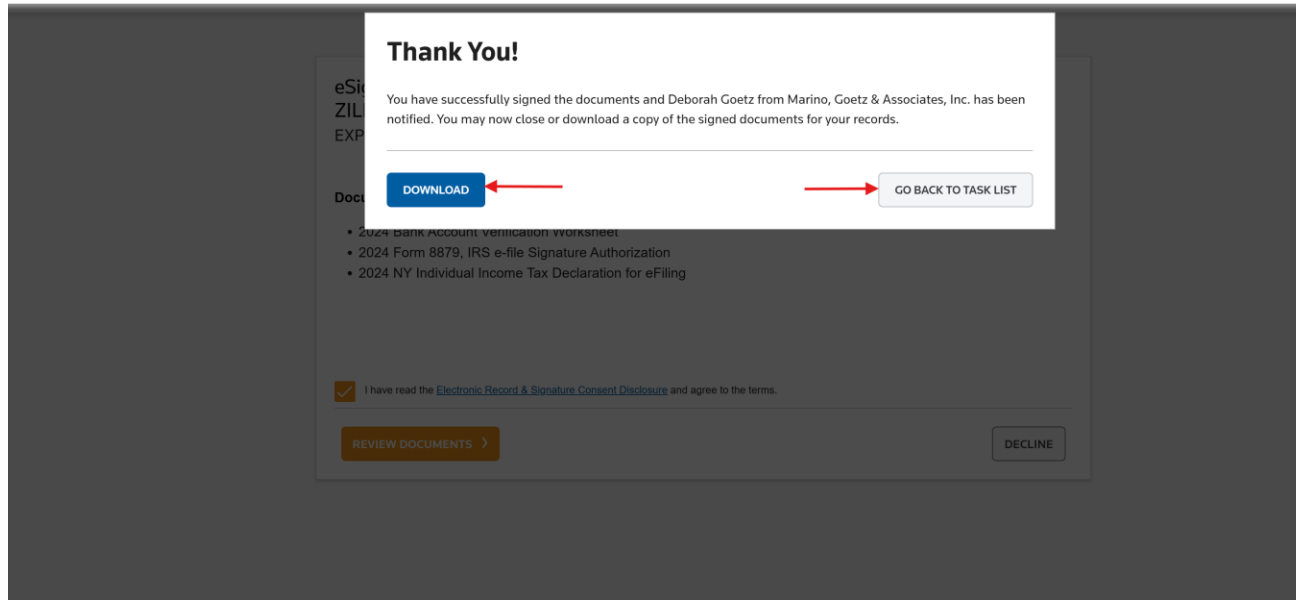
Instructions:

When you are done e-signing your documents, select **SUBMIT** to submit your signatures and complete the task..

***** Please note: If you do NOT select **SUBMIT**, the signature process won't be completed.**

Step 13: Task Completion

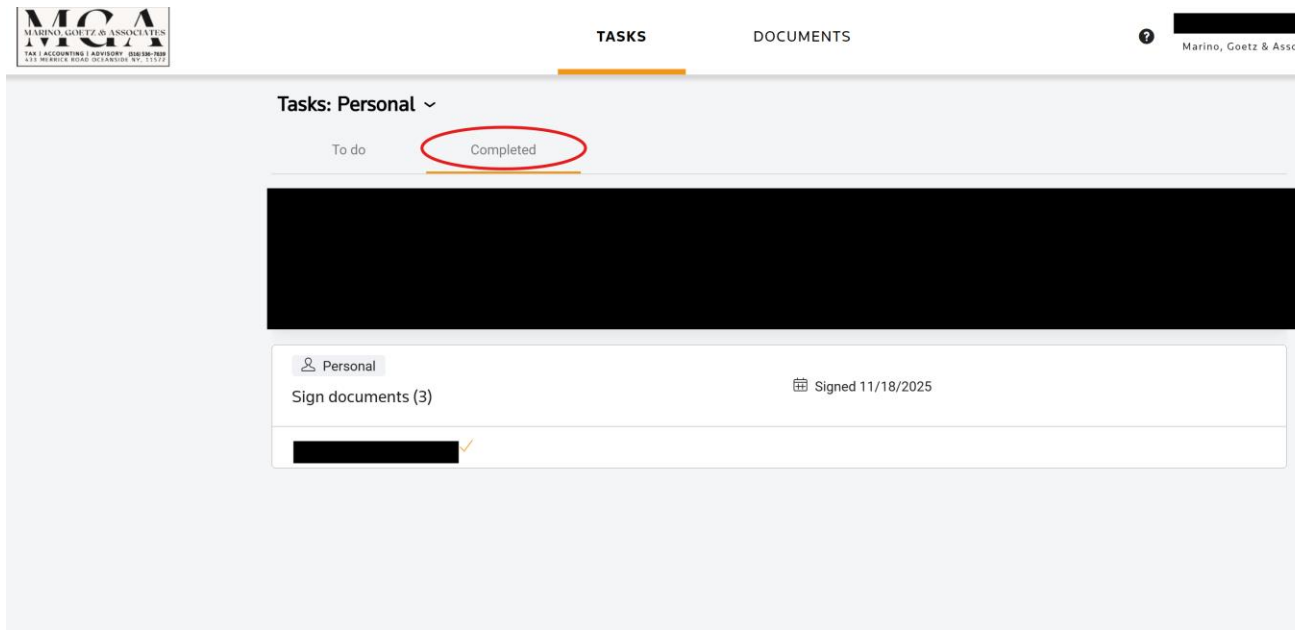
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Instructions:

After you have completed e-signing your tax documents, our office will immediately receive a notification. You will see this prompt that allows you to download a copy of the documents that you just signed for your records. Select **DOWNLOAD** to download a copy of your signed documents.

Step 14: Completed Documents



Instructions:

You will be returned to the **TASKS** screen. To verify that your task was completed, select **COMPLETED** and you will see the completed task(s) there.