

Step 1: Sign into Portal

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

Instructions:

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

THOMSON REUTERS
ONVIO™

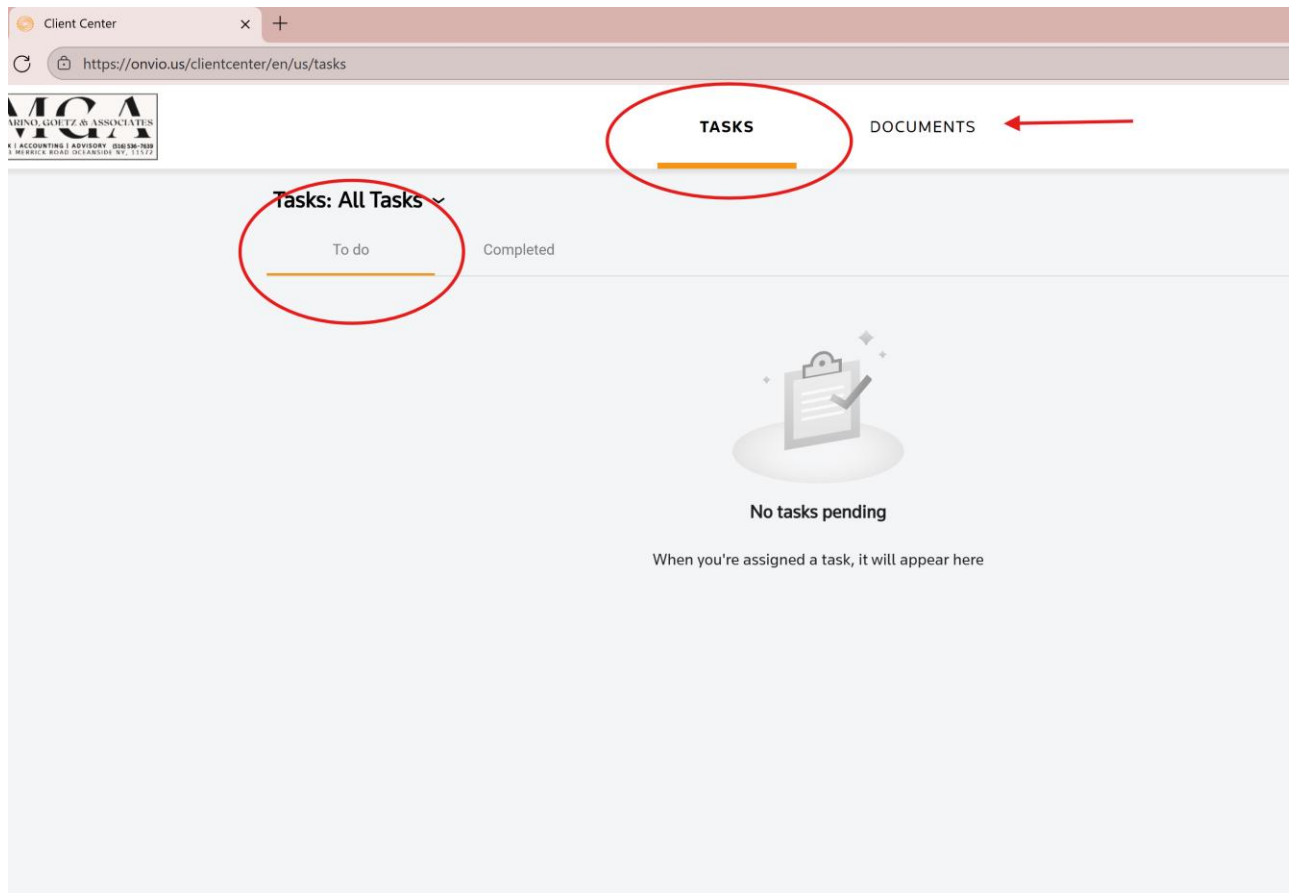
Let's get started

Sign in



[View system status](#)

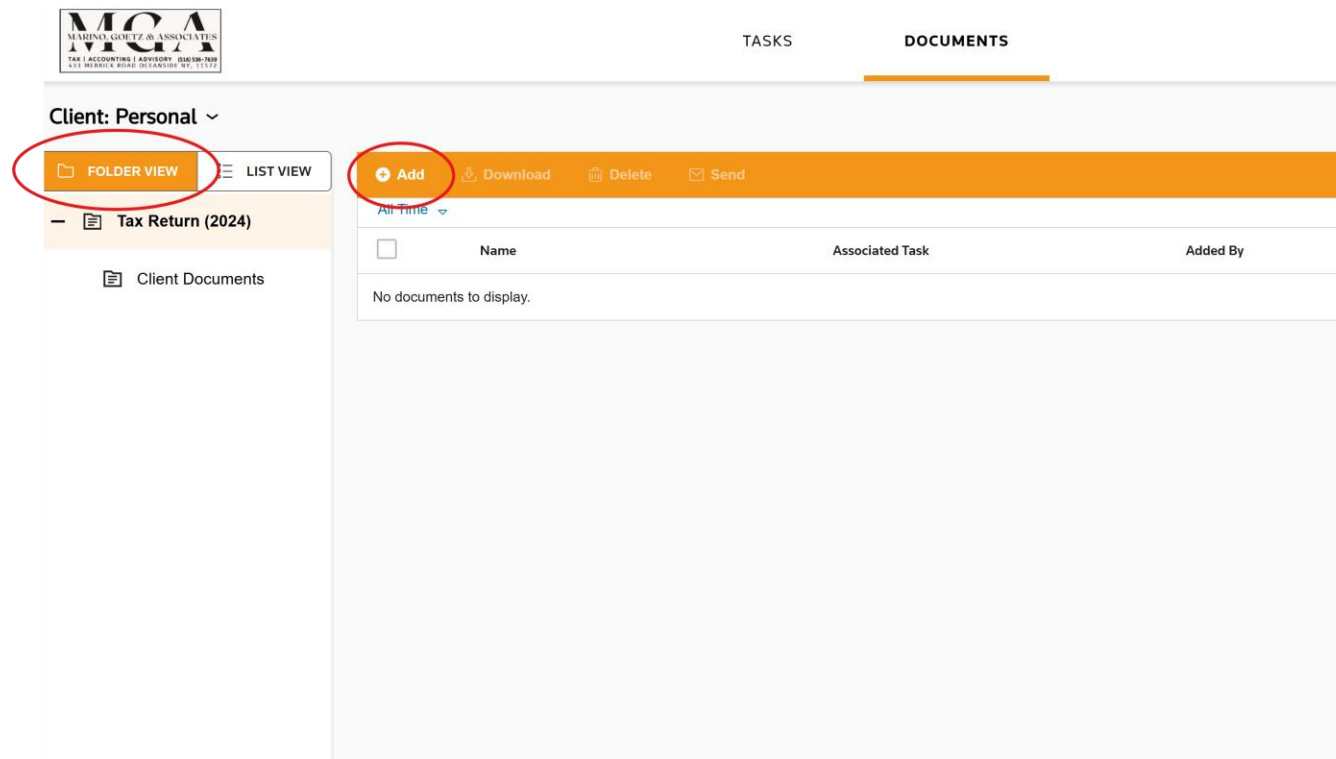
Step 2: Main Screen



Instructions:

Once you are logged in you will be on the main screen. You will be on the **TASKS** tab, and you will need to select the **DOCUMENTS** tab.

Step 3: Add Document(s)

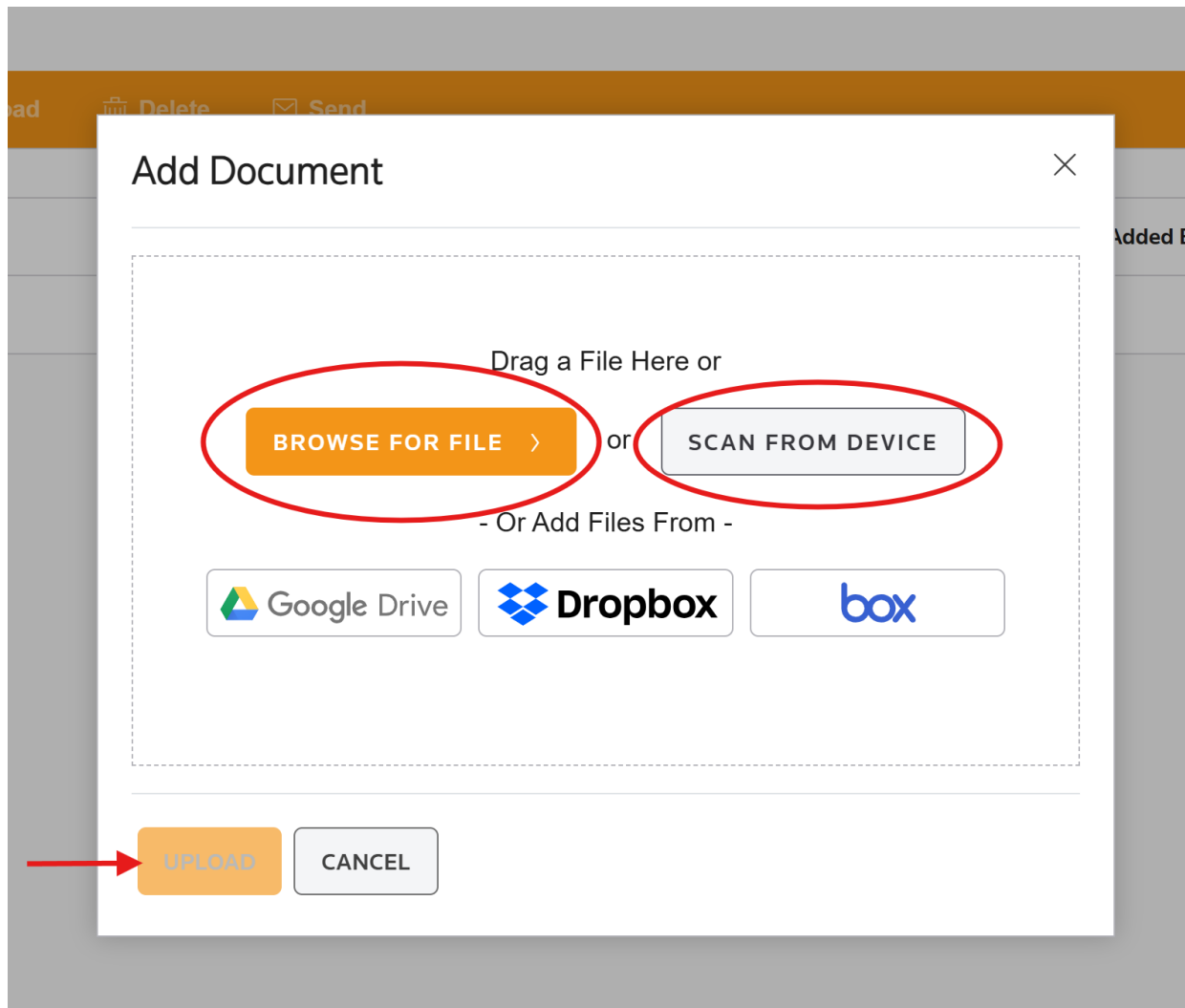


Instructions:

After you have selected the **DOCUMENTS** tab, you will be in the folder view. Simply select **ADD** to add a document.

***** PLEASE NOTE:**
THERE WILL NOT BE A FOLDER FOR THE UPCOMING TAX SEASON. DO NOT ADD DOCUMENTS TO FOLDERS FROM PREVIOUS YEARS. SIMPLY SELECT ADD AND ADD YOUR DOCUMENTS.***

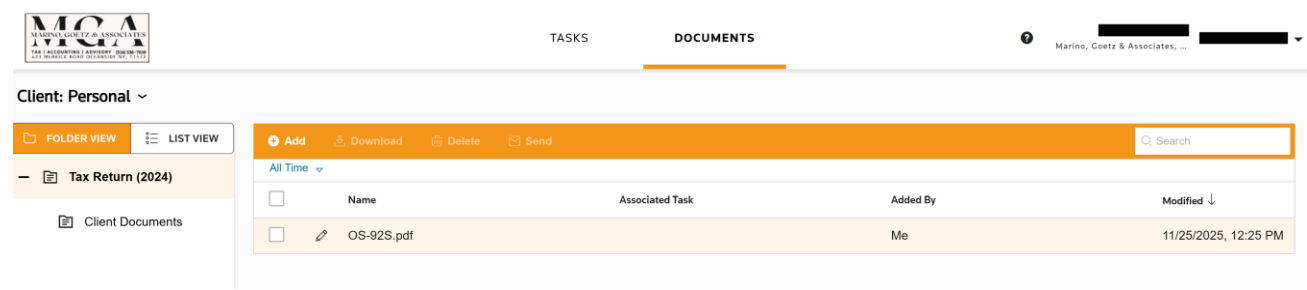
Step 4: Select File(s) for Upload



Instructions:

Select **BROWSE FOR FILE** to upload from your device. Select **SCAN FROM DEVICE** to scan from a device. Once you have selected the document you want to upload, select **UPLOAD**

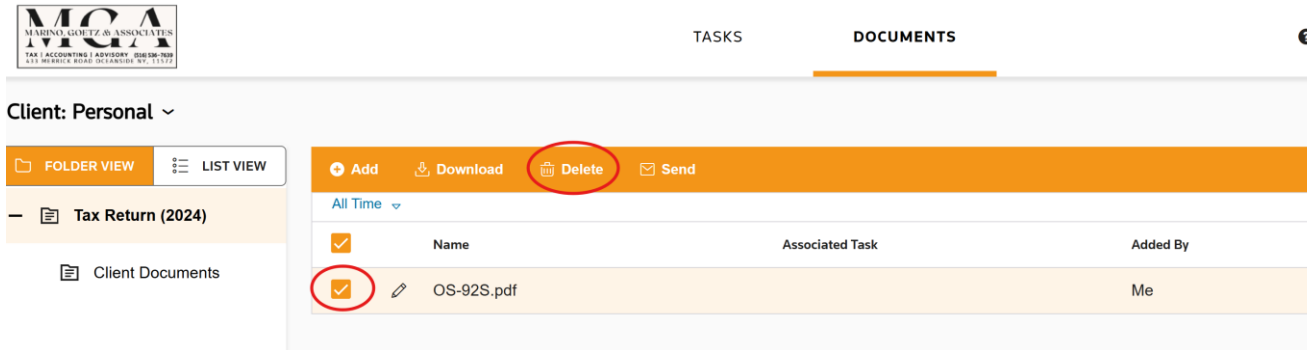
Step 5: Documents Have Been Uploaded



Instructions:

Once you have uploaded a document, you will see it listed under the documents tab. Repeat steps 3 & 4 as many times as necessary until you have uploaded all of your documents.

Step 6: Deleting a Document



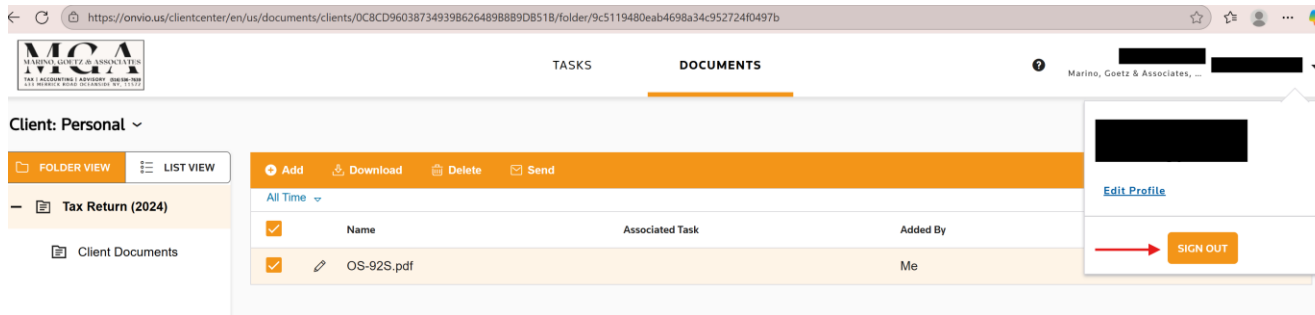
The screenshot shows the MGA (Marino, Goulet & Associates) software interface. The top navigation bar has 'TASKS' and 'DOCUMENTS' tabs, with 'DOCUMENTS' being the active tab. Below the navigation bar, the client is identified as 'Personal'. On the left sidebar, there are options for 'FOLDER VIEW' and 'LIST VIEW', and a section for 'Tax Return (2024)' containing 'Client Documents'. The main area displays a table of documents. The top bar of the table has action buttons: 'Add', 'Download', 'Delete' (circled in red), and 'Send'. Below this, a filter dropdown is set to 'All Time'. The table has columns for 'Name', 'Associated Task', and 'Added By'. One document is listed: 'OS-92S.pdf', with a checkbox to its left that is circled in red.

	Name	Associated Task	Added By
☒	OS-92S.pdf		Me

Instructions:

If for any reason you need to delete a document, select the check box to the left of the document you want to delete and select **DELETE. *** WE ASK THAT YOU DO NOT DELETE ANY DOCUMENTS FROM PREVIOUS TAX YEARS AT ANY TIME *****

Step 7: Log Out



Instructions:

When you are done uploading your tax documents simply **SIGN OUT**. There is no need to contact the office, we will get an immediate notification once a document has been uploaded.