

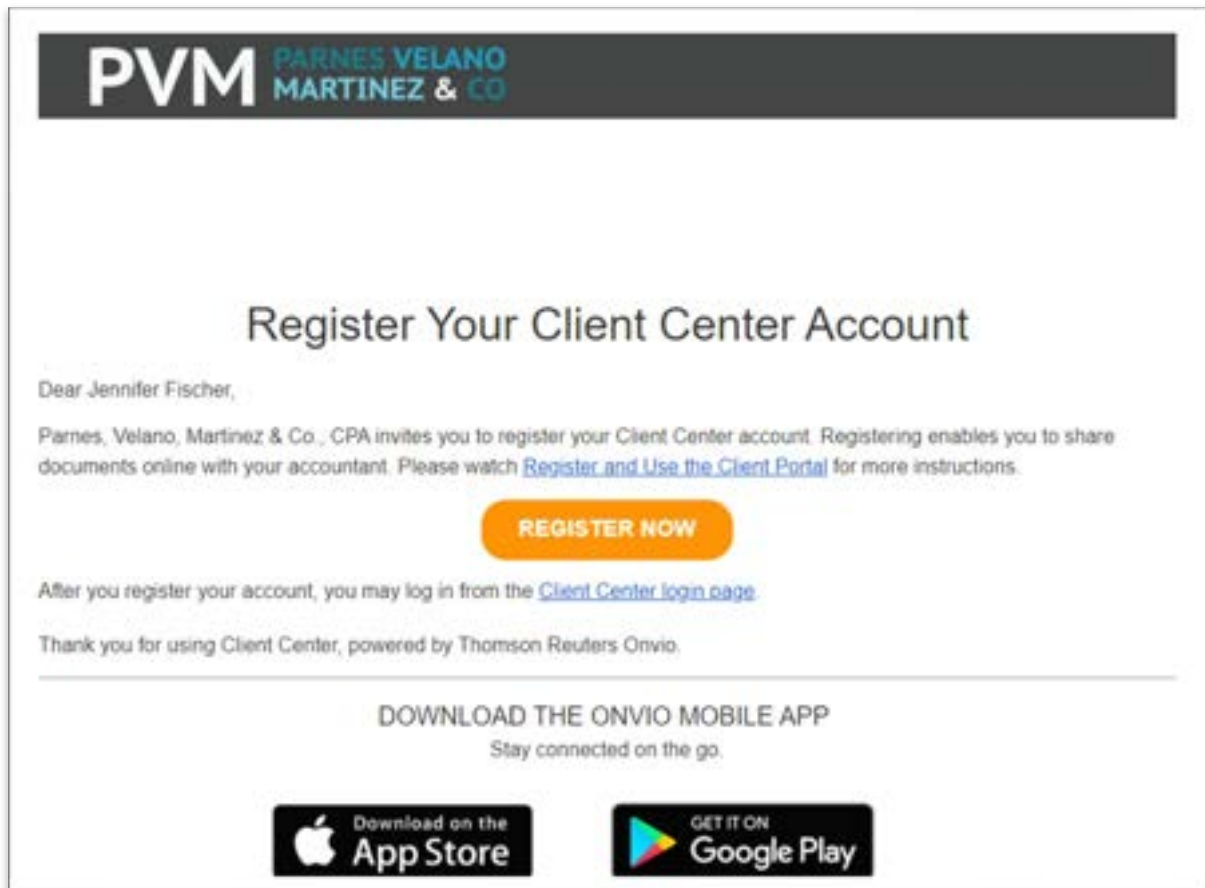
Onvio Client Center quick start guide

Within this guide, you'll learn how to set up and use Onvio Client Center.

Set up your Onvio portal

You'll get an email similar to the following.

1. Select Register Now



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

2. Make sure your account information is correct, and then create a password for your account

Register Your Account

Account Information

First Name * Jennifer Last Name * Fischer

Email (Thomson Reuters ID)

Create Password

New Password * Show typing

✓ Password is acceptable.

Confirm Password *

✓ Password is confirmed.

* Required Field

REGISTER ME

Password Requirements

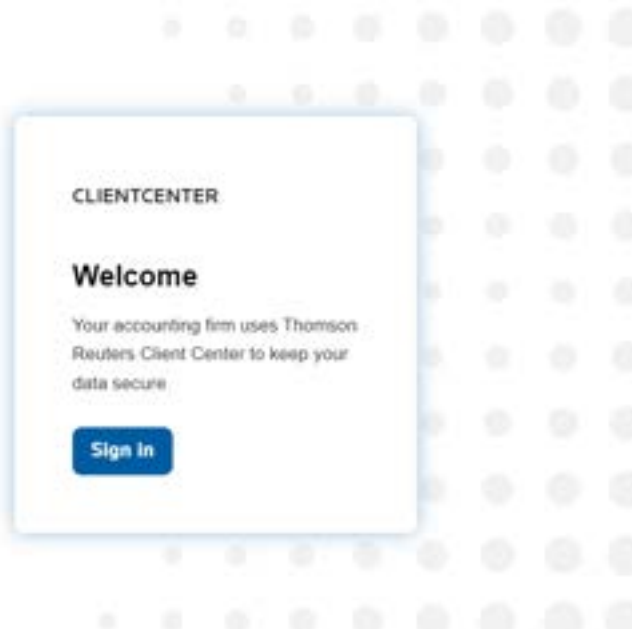
Your password **must** have at least 8 characters and 4 of the following:

- At least 1 number (0-9)
- At least 1 lowercase letter (a-z)
- At least 1 uppercase letter (A-Z)
- At least 1 special character (punctuation: ~ ! @ # \$ % ^ * & * () _ - + = { } [] \ | : ; ' , . ? /

Your password should **not** use:

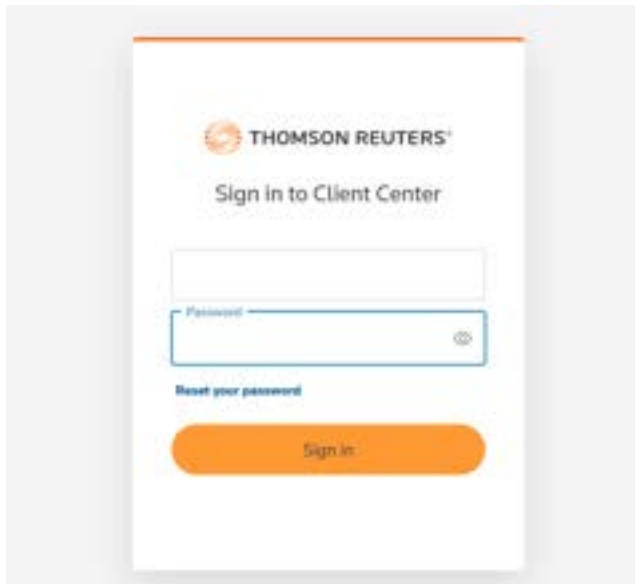
- words from the dictionary
- your user ID
- sequential letters or numbers such as "abc" or "123"

3. Select **Register Me**, and then **Sign in**.

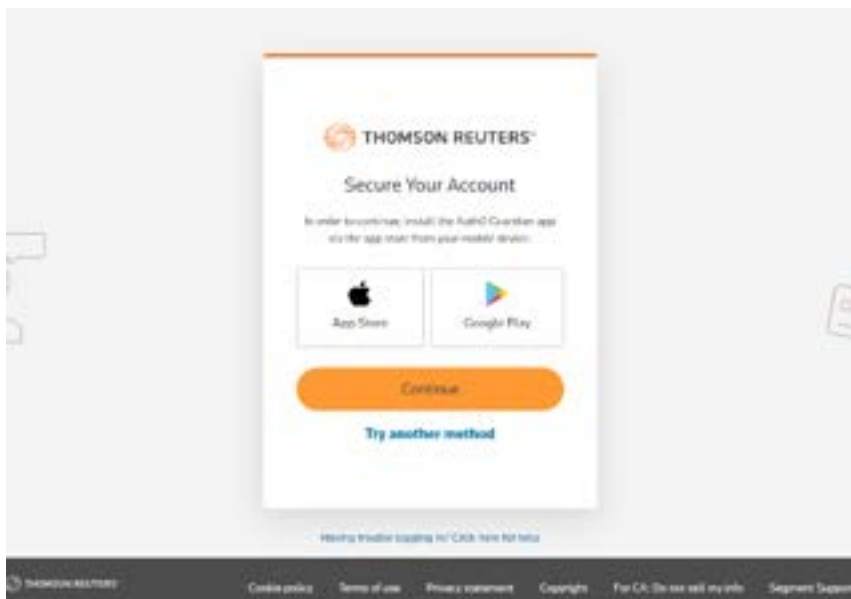


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4. Enter the email you used to register with and the password you chose.



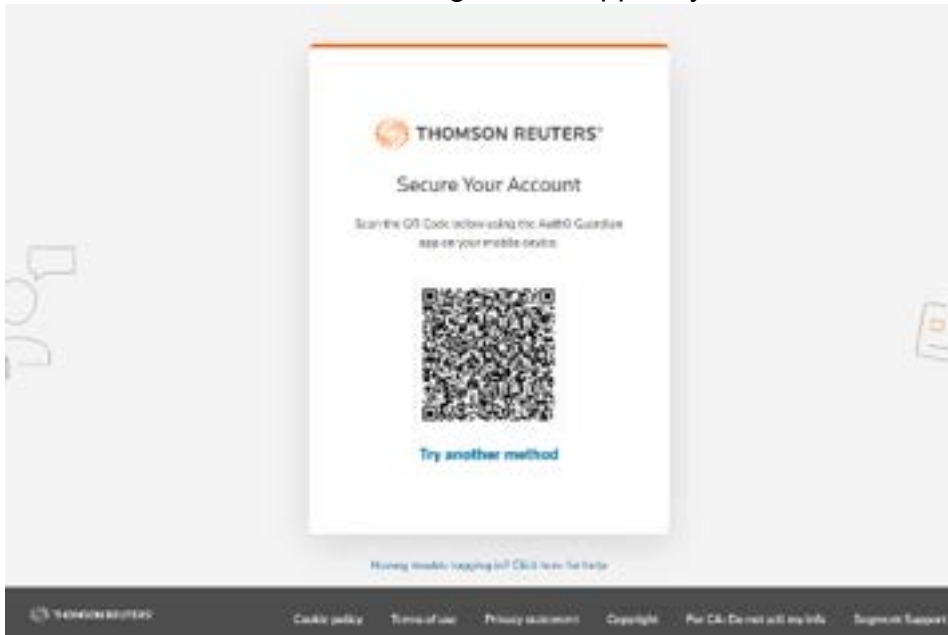
5. You're required to set up 2SV to use your Client Center portal. First, install the Auth0 Guardian app from the App Store (iOS devices) or Google Play Store (Android devices).



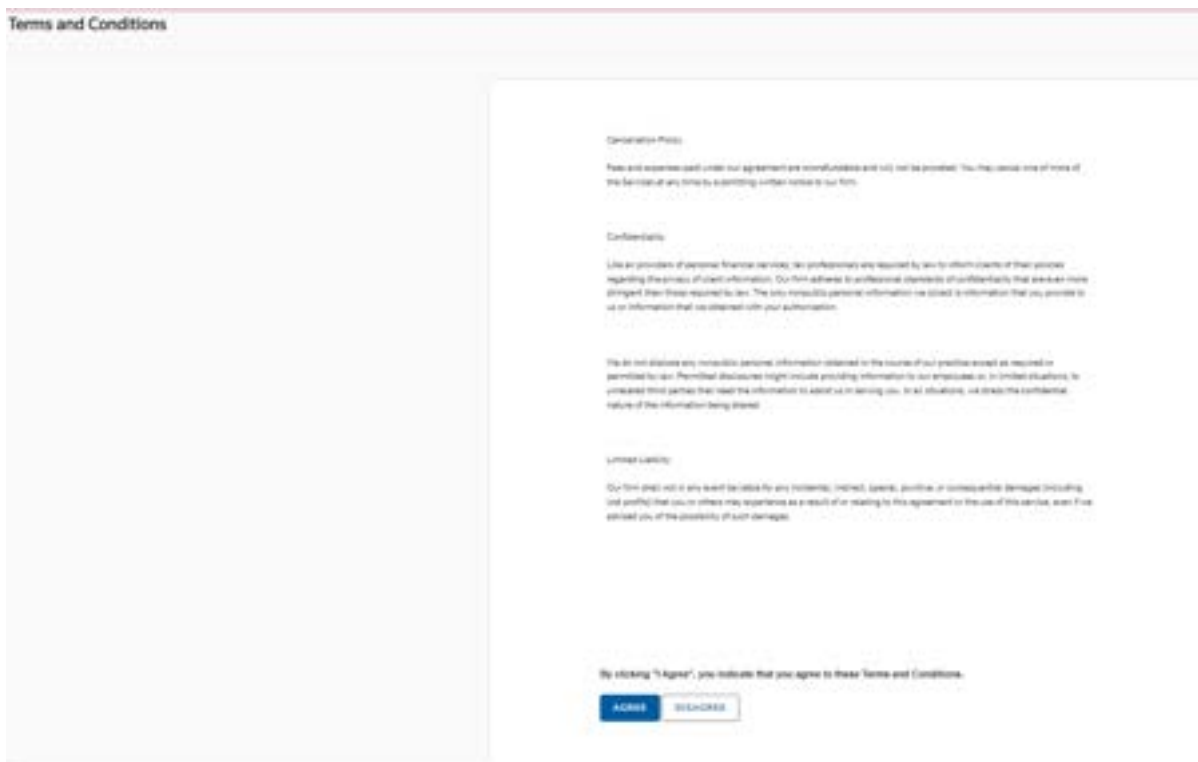
If you already have an authenticator app and would rather use that, select **Try Another Method**, choose a supported option, and continue the setup. The steps in this guide are for the Auth0 Guardian app method.

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6. Scan the QR code displayed in your computer screen to pair your new Client Center account with the Auth0 guardian app on your mobile device.



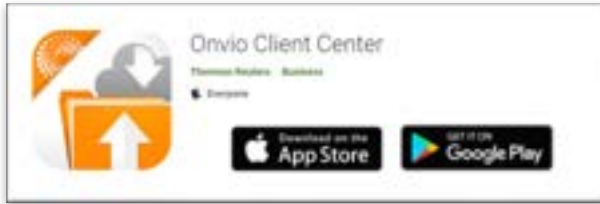
7. Accept the Terms and Conditions for using Client Center.



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Set up your mobile device

You can download the **Onvio Client Center app**, to use your portal on your mobile device instead of needing to sign in on a computer.

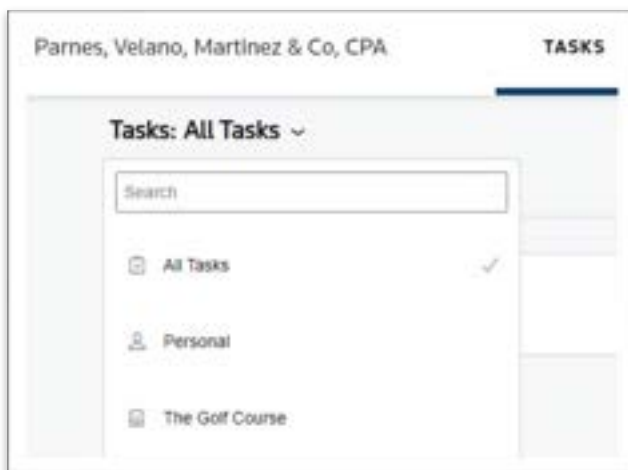


How to use Onvio Client Center

On a computer

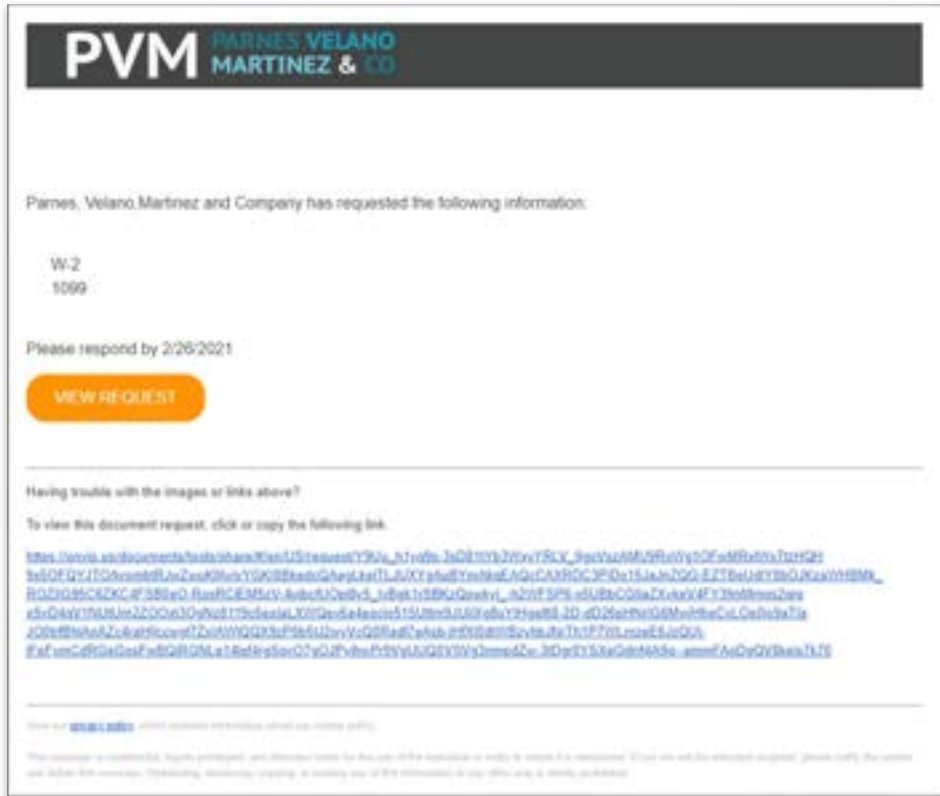
To access your portal, visit our firm's website [Parnes, Velano, Martinez & Co, CPA](#) and select [Onvio Client Center](#). Here you can upload documents to submit to us, or reply to our request for specific documents.

If you have multiple accounts, make sure to select the correct individual or company for the document you're uploading.

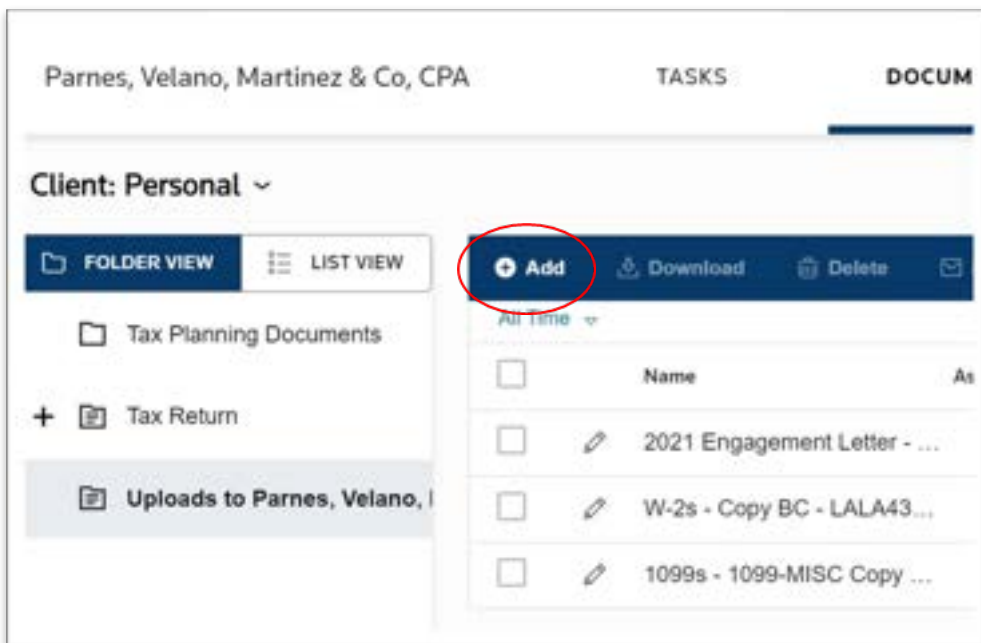


If you have any questions or need help, call and ask for our portal administrator or e-mail us at [portal@pvmcpa.com](#)

If we requested a document from you, you'll get an email similar to this:



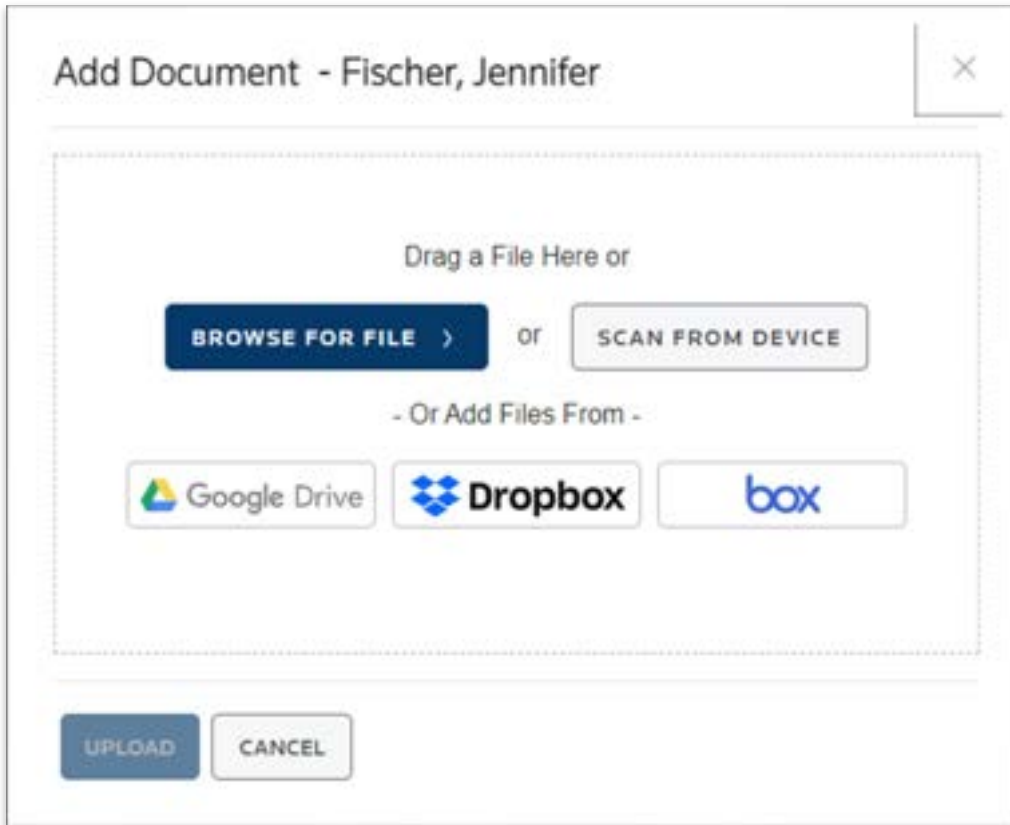
Select **View Request**, and then select **Add** in Onvio Client Center to upload your documents.



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

You have the option of submitting saved documents via PDF or scanning from a device.

- Please note we need all documents in **PDF format only. NO JPEGS OR IMAGE FILES OF ANY TYPE**



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

If you are uploading a document from an email request, make sure to select the **Next** or **Submit** button. If you don't, your document won't be sent to us.

The screenshot shows a web interface for uploading documents. At the top, there are three tabs: 'Request 1' (active), 'Request 2', and 'Request 3'. Below the tabs, the text 'IRS Notice' is displayed. The main section is titled 'Upload Document' and contains a large white box with the text 'Drag a File Here or'. Below this text are two buttons: 'BROWSE FOR FILE' and 'SCAN FROM DEVICE', separated by the word 'OR'. Underneath these buttons is the text '- Or Add Files From -' followed by three icons: Google Drive, Dropbox, and box. Below the upload area, there is a section titled '0 DOCUMENTS ATTACHED' with the text 'No documents to display'. Below that is a section titled 'Additional Comments' with a text input field containing the placeholder text 'Leave a comment for your accountant...'. At the bottom left of the form, there is a checkbox labeled 'All Documents Uploaded' and a blue button labeled 'NEXT' with a right-pointing arrow, which is circled in red.

Our office automatically receives an email when you upload documents to your portal or if you marked the document request as complete.

You don't need to call or email us to ask if we received your upload.

If you have any questions or need help, call and ask for our portal administrator or e-mail us at

On a mobile device

You can upload documents to submit to us or reply to our request for specific documents.

If you have multiple accounts, make sure to select the correct individual or company for the document you're uploading.

Select **Documents** to upload your documents.



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If we requested a document, you'll get a push notification similar to this:

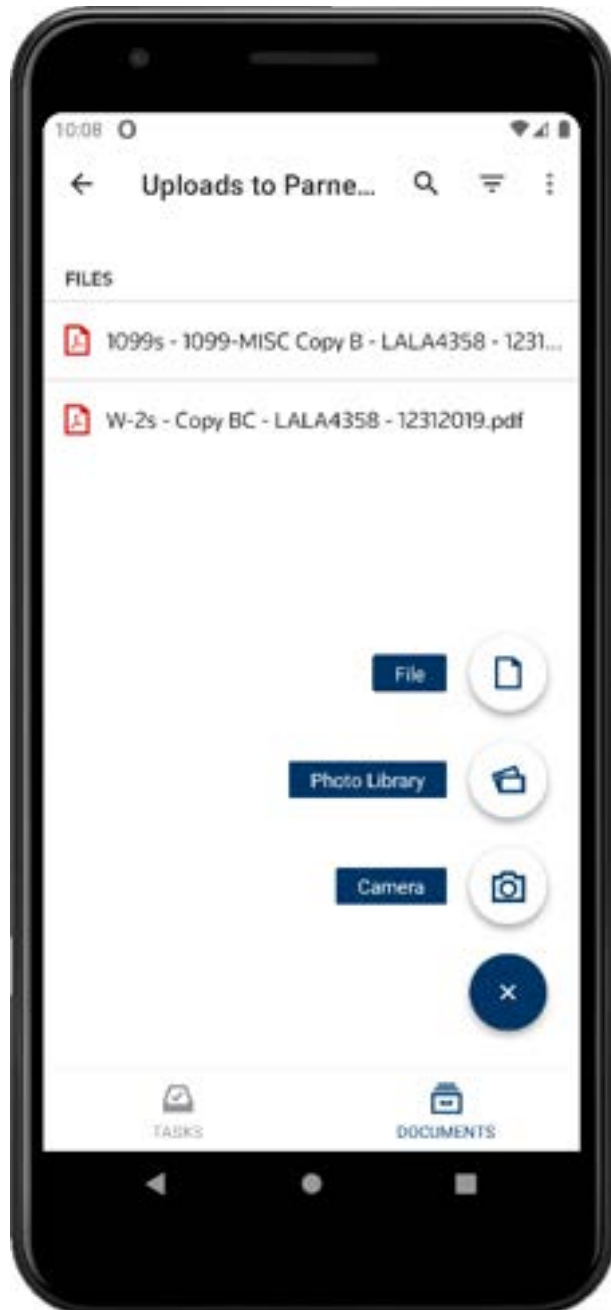


If you have any questions or need help, call and ask for our portal administrator or e-mail us at

You can submit a document if its already saved on your device. Or you can take a picture of the document.

When you use the **Camera** option, the Onvio Client Center app will convert the picture into a PDF for you.

Please note we need all documents in **PDF format only. NO JPEGS OR IMAGE FILES OF ANY TYPE**



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We recommend you use the Automatic option when taking a picture of your document to make sure your document is in focus and readable.

Tip: Take pictures using as much light as possible

You can take multiple pictures and upload them all at once.

When you're finished taking pictures, select the checkmark icon.



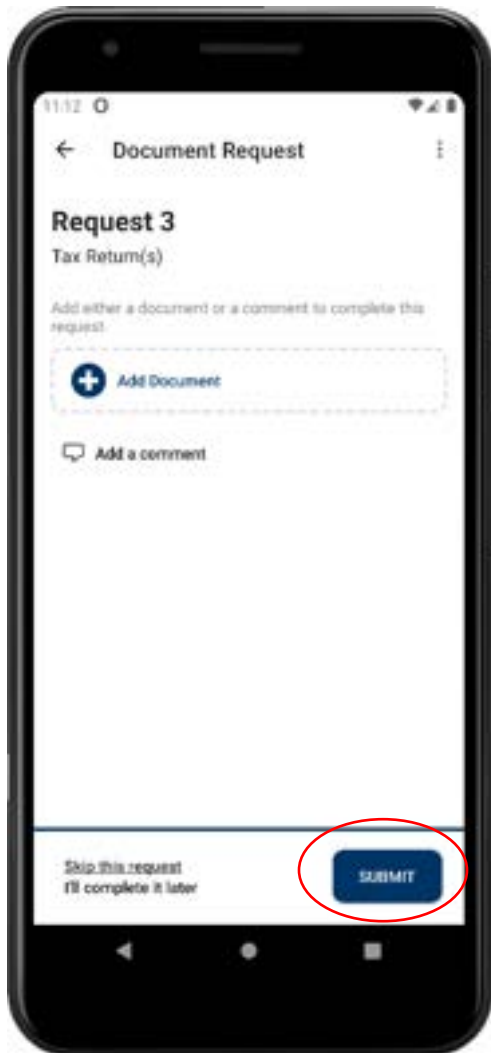
If you have any questions or need help, call and ask for our portal administrator or e-mail us at

Edit the name of the document and location to save it. Select the checkmark icon.



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

If you are uploading a document from an email request, make sure to select the **Next** or **Submit** button. If you don't, your document won't be sent to us.



Our office automatically receives an email when you upload documents to your portal or if you marked the document request as complete.

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If you have any questions or need help, call and ask for our portal administrator or e-mail us at