Getting Started In Our Onvio Client Center from the Web!

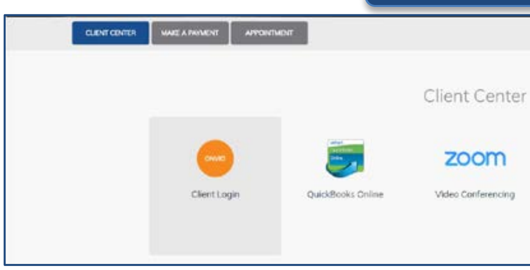
Background

Think of our Onvio Client Center secure online portal as the hub for communication with our staff. Because it's optimized for your web browser and your smartphone, you can work with Onvio Client Center anywhere you want to be! Working seamlessly with Dropbox, Google Drive, and other popular document sharing solutions, it's easy for you to exchange documents and collaborate on edits with us in real time. There's no delay!

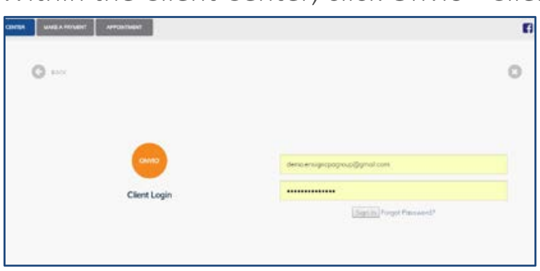
Getting Setup in Onvio Client Center

1. First, we will send you an e-mail from support@ensigncpagroup.com notifying you that our invitation to connect will be sent shortly. This will ensure that you know your invitation to connect isn't SPAM
2. Ensign CPA Group will send you an invitation to your e-mail to REGISTER NOW (check your SPAM folder!). The e-mail will come from no-reply@onvio.com. Once you click REGISTER NOW, you will be promoted to create a password for your Client Center Account

3. Access the Onvio Client Center via our website at **ensigncpagroup.com**
   a. In the top left corner, select CLIENT CENTER



   b. Within the Client Center, click Onvio - Client Login, then enter your e-mail & password



   c. It will automatically send you to Onvio. You may also access it directly at https://onvio.us/#/
4. We strongly recommend you go to your Profile – Authenticator and add **multi-factor authentication**

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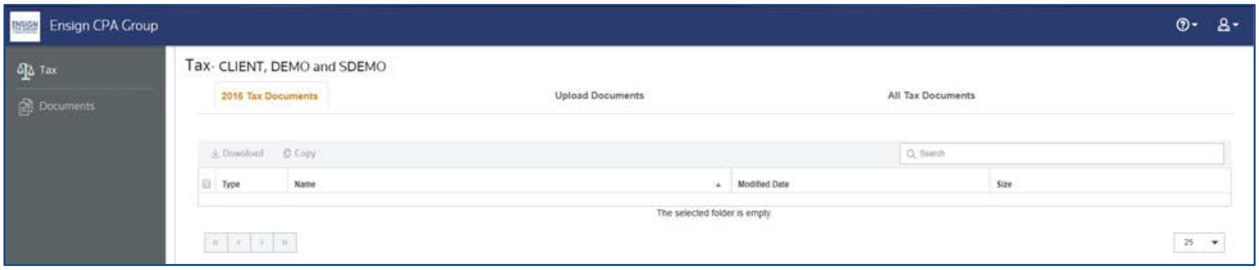
I'm In! What Now?

1. There are two sections within your Client Center: Tax and Documents – which do I use?
    a. For Individual Tax Clients, all portal activity will be done in the Tax area

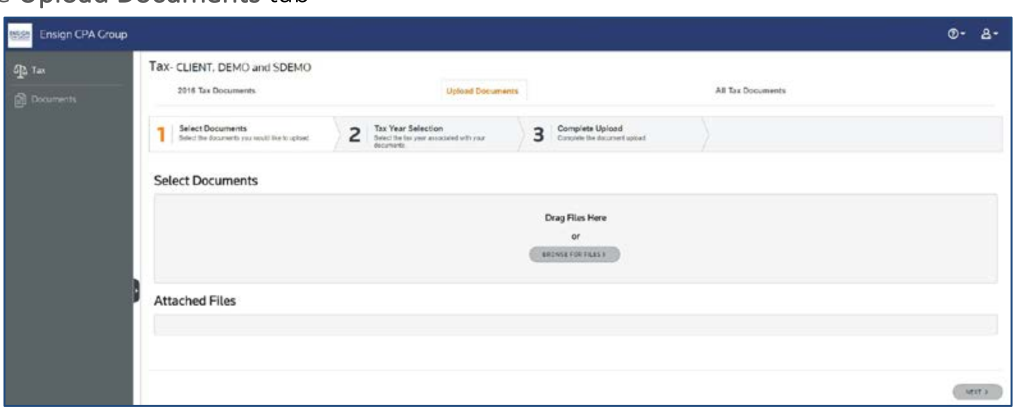


    b. For Business Clients, all exchanging of all year-end and tax related documents will be done in the tax area, but we will also have a Documents area for us to exchange various other business-related documents throughout the year. We will work together to make sure these are setup just how it makes sense to you

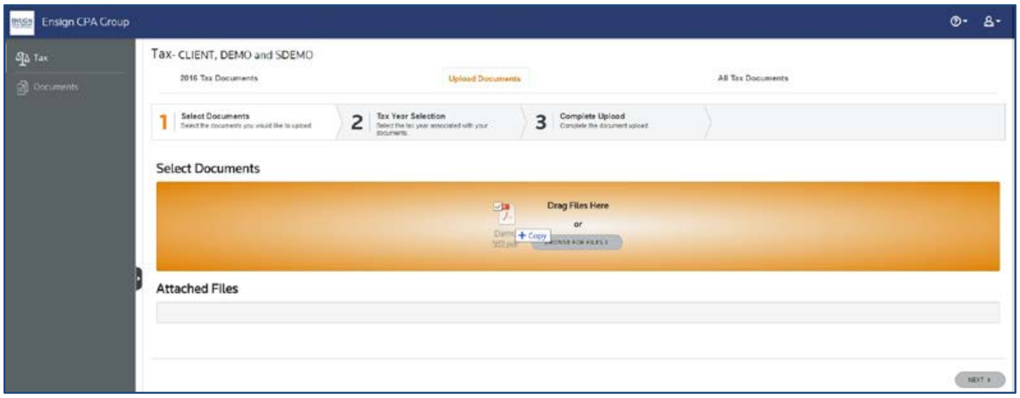
2. Whether you're in the tax or documents area, the functionality is the same. Let's get into how it's done

Uploading & Exchanging Documents

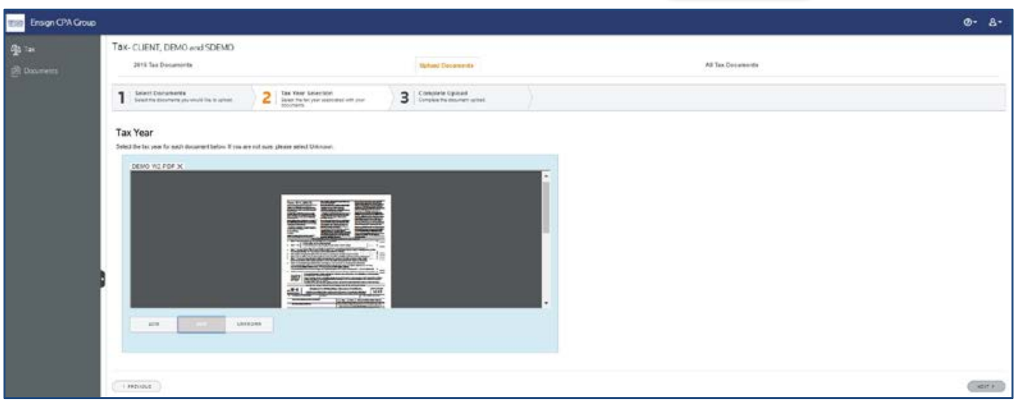
1. Select the **Tax Center**
2. Select the **Upload Documents tab**



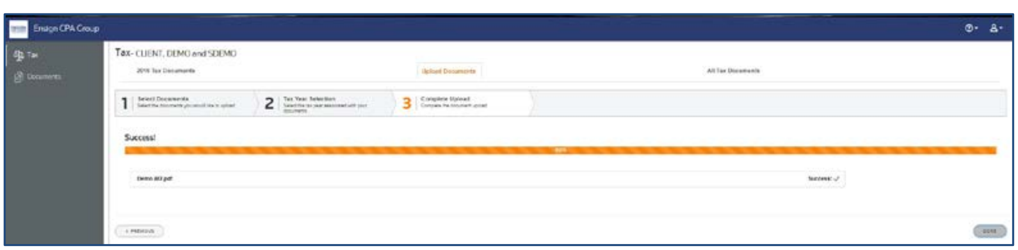
3. Either **drag files** directly from your desktop or other storage solution <u>OR</u> select **browse for files** and choose the appropriate files for upload



4. You can upload as many individual documents as you would like at one time. If you want to consolidate all your tax documents into one centralized .PDF file, you can do that too. We will separate them
5. Once you have attached all the files, click the NEXT > button on the bottom right corner
6. Then, select the appropriate **Tax Year** for the files, then click NEXT >



7. You will then receive notification that the files were successfully uploaded: **Success!**



8. If you need to modify, deleted, or update specific documents, just navigate with the **Tax Center** to All Tax Documents – then the file year
9. If you have questions or just can't seem to get it to work, <u>call us at 317.832.6794 (Ext. 2)</u>

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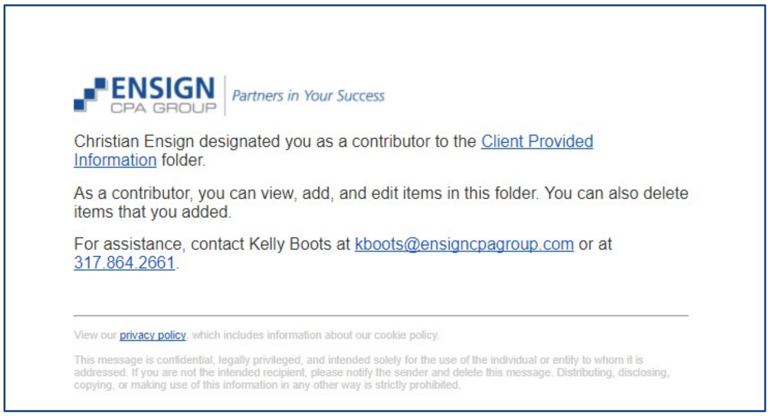
What Accountant to Client Interface Will Look Like

1. Within Onvio Client Center, there are several different options for communicating with you. Although there are several, a few of the primary interfaces will be:
    a. Ensign CPA Group **designating you** as a contributor, editor, or reviewer of information



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Christian Ensign designated you as a contributor to the Client Provided Information folder.

As a contributor, you can view, add, and edit items in this folder. You can also delete items that you added.

For assistance, contact Kelly Boots at kboots@ensigncpagroup.com or at 317.864.2661.

View our privacy policy, which includes information about our cookie policy.

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    b. Ensign CPA Group **requests additional information** from you

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Christian Ensign has requested the following information:

W2 for 2017

Please respond by 11/7/2017.

VIEW REQUEST

View our privacy policy, which includes information about our cookie policy.

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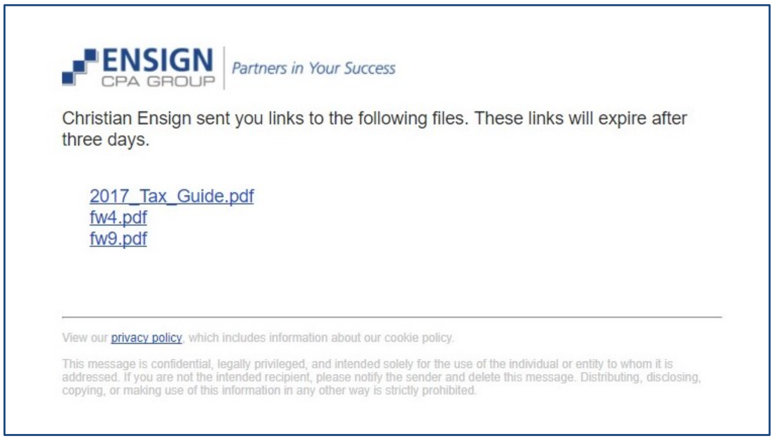
c. Ensign CPA Group sends you **specific links to files**. Often, we will put expiration dates on it to ensure that the information you are reviewing is current and accurate. Additionally, it will also allow us to securely transmit documents to you without compromising your information by e-mailing documents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Christian Ensign sent you links to the following files. These links will expire after three days.

2017_Tax_Guide.pdf
fw4.pdf
fw9.pdf

View our privacy policy, which includes information about our cookie policy.

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d. There may be other forms of communication; however, these three examples are a great demonstration of what you can expect. On our end, when you provide documents to share or review, we will have the same thing happen on our end

We want this to be effortless for you – call us at 317.832.6794 (Ext 2) for any questions in the process! We have great times for how to communicate with your brokers, investors, financial advisors, and lawyers to make doing your taxes easier than ever.

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