

CLIENT CENTER ACCESS TO DOCUMENTS FOR

TOTAL TAX SOLUTIONS

By following these steps, you will be able to access all of your current and prior years tax returns and documents

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REGISTER YOUR ACCOUNT:

You will initially need to register your account via an email link provided to you by a Total Tax Solutions employee. Once your account has been created, you can simply login to your account at anytime with your email address and the password you created at Onvio.us or by visiting our website and clicking on "Secure Document Portal"

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TASKS & DOCUMENTS

Once logged in you will be welcomed with a screen that shows "Tasks" and "Documents" at the top of the page. If you are searching for a specific document or tax return, simply click on "documents" to find what you are searching for.

- Client documents: documents used to prepare your tax return
- Preparer documents: Your completed State & Federal Tax Returns
- Folder View: Displays documents organized by year
- List View: Displays documents associated with the selected tax year

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ADDITIONAL INFORMATION:

If you are searching for prior years information, Click on the Folders Tab to see folders listed by the year.

THANK YOU FOR YOUR TRUST IN
TOTAL TAX SOLUTIONS.
WE APPRECIATE YOUR BUSINESS AND
LOOK FORWARD TO SERVING YOU!

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TAX PREPERATION

TAX PLANNING

PAYROLL

BOOKKEEPING