



SmartVault Guidelines

- **All documents must be uploaded in .pdf format**
 - We cannot accept .jpegs, photos or any other file type. Printing of these file types is too time-consuming and legibility is often questionable.
- **All documents must be labeled, so that we can identify what they are.**
 - W-2, 1099R, are examples of what we are looking for. Document 1, Document 2, 2025_1, 2025_2 and those types of generic labels are not helpful to us, as we have to open every document to identify and locate what we need.
- **When your uploads are complete, you must notify us.**
 - We have no way of knowing when your uploads are done and ready for us to begin work on your returns. It is imperative that you notify us, so that we begin work in a timely manner.

If you log on to SmartVault on your iPhone or iPad, you can upload your documents by taking a picture of them through SmartVault. It will automatically scan your document and convert it to a .pdf. Here's how:

1. Go to smartvault.com and log in.
2. Select **Upload Documents**
3. Select **Client Source Documents (Your Name) 2025**
4. Select the blue **Upload File** box
5. Select the blue **Take a Photo** box
6. Allow it to access your camera
7. Select **"Start Scanning"** in the top right corner
8. You can manually hit the white circle or hold your phone over the docs and it will take the pic automatically. For pics taken automatically, they will auto save. If you are manually pushing the button, it will give you the option to use the scan or retake, depending on the quality.
9. After taking pics of your documents, they will show in small window with the number of pics taken. Select **the window showing the pics**.
10. Select **Submit** – a pop up box with **Take Photo**, **Select a File** and the **.pdf** you just scanned, and **Cancel and Save options** will appear.
11. Select **Save**
12. Select the **3 blue dots to the right** of the saved file, select **Rename**, and rename the document.
13. If you are taking individual pics/scans, name each document for what it is. If you are taking several photos at once that will go into one upload, name it accordingly.

When Uploading Saved Files: Follow steps 1-4, then select **Select a File** in the light blue box, then select **Choose File**. Then go back to step 11 above.