



## Guidelines for uploading documents

Thanks for using the secure portal. It's so much safer for you than email!

PDFs are preferred. If you're working from your phone, see if you have a PDF app rather than using the camera.

Please don't create multiple folders. It actually makes it harder for me!

I don't need documents separately scanned & titled. Honestly, I'll figure out what they are!

- One PDF of multiple scanned documents is fine.
- One PDF of IRS-numbered documents and one of miscellaneous others is ideal.
- If you download a document as a separate PDF (a W-2 or brokerage 1099) keeping that separate is great.

Pictures are OK if you can't scan to PDF. Make sure they include everything and are legible and well-lit.

If you have a spreadsheet, don't convert it to PDF. The spreadsheet is easier for me to work with.

A Word doc is fine. It doesn't need to be converted to PDF. But I can't read .NUMBERS or .PAGES files.