

DOCUMENT UPLOAD BEST PRACTICES

CLARITY, EFFICIENCY & ACCURACY—THE INFINITY WAY

To give you the smoothest possible tax season experience, we ask that all documents be uploaded cleanly, clearly, and completely. Proper uploads help us prepare your return faster, reduce follow-up questions, and ensure your return moves through the Infinity process with accuracy and confidence.

✓ **Best Practices (Please Follow These for Every Document)**

✓ **Upload clear, legible PDFs**

Avoid photos whenever possible. PDFs are easier to process, more secure, and reduce the risk of missing or unreadable information.

✓ **Name documents using this format:**

Year + Document Type + Description

Example: 2024_W2_CompanyName or 2024_1099_INT_AllyBank

✓ **Combine multi-page statements into a single file**

This keeps your portal organized and prevents confusion during review.

✓ **Include all forms, pages, and summaries**

Even blank pages or instruction sheets can contain important IRS codes or data markers.

✓ **Upload documents as soon as you receive them**

Earlier is always better. This allows us to begin validating information and reduces delays during peak season.

⊘ **Please Avoid These Common Issues**

X Screenshots

These are often blurry, cropped, or missing critical data fields the IRS requires.

X Duplicate uploads

Duplicates cause confusion and slow down your return review.

X Partial or incomplete statements

Missing pages can result in incorrect reporting or IRS notices later.

X Zipped or compressed folders

These cannot be reviewed inside the portal and must be opened and re-uploaded, delaying processing.

💡 **Infinity Pro Tip**

Use your Infinity Tax Intake Checklist as you gather your documents.

It's designed to ensure nothing is overlooked and that everything is uploaded in the correct format, giving you clarity and helping our team work efficiently on your behalf.