Here's How To:

Configure & Use the Remote Signature Software Feature

Capturing remote signatures is easy! This document includes easy step-by-step instructions on how to complete the following:

- Sending remote signature requests to tax return signees
- Capturing the signees signature
- Checking the status of remote signature requests

One-time Configuration

Before using the Remote Signature feature, your software program must be configured with electronic signatures for the Electronic Return Originator and preparer. Refer to the **Configuring Your EFIN** (beginning on page 15) and **Adding and Configuring Preparer Information** (page 20) in the TY2021 1040 Software <u>Quick</u> <u>Start Guide</u> for instructions.

You will also need to complete the "User Wallet" setup for remote signature payment. If you did not complete the wallet setup during the initial installation of your 2022 software program, follow the steps below to configure your wallet.

1. From the Work In Progress (WIP) screen, click Setup and then Wallet Setup.



Note: For instructions on setting up your Wallet, along with **Important Reminders and Changes for 2022**, refer to the <u>Here's How To Configure and Use the Wallet</u> document.

Sending a Remote Signature Request

It is possible to send signature requests to taxpayers and spouses by way of email, SMS (text message), or both. After the tax return is complete, error free and ready for signing, follow the instructions below as you prepare to send a remote signature request to your client.

 From the Client Data screen, type the cell number, mark the Text Message checkbox, and complete the Cell Phone Carrier, and/or the E-mail address into the fields indicated below. Note: If the spouse is signing remotely, type their information in the corresponding fields in the Spouse Information section on the Client Data screen.

Client Data									
User Status:						Transcript	t Mode:		
Client Letter:	english	Prep ID:		Site ID:	SITE1	Receipt #	1	EFIN:	
Owner:	ADMIN							Locked:	
Taxpay	er Informatio	n							
SSN:		206-16-1	234 BUSI	DO	B: 07/21/	/1988	32 DOD:	11	
Name:		ASSETS		BUSI	INESS				
Occupat	ion:	SELF EMP	LOYED		Depe	ndent:	Blind:	Disabled:	
Home Pl	hone:	213-321-	3213	Work:			Cell: 20	6-209-265	53
E-Mail:		help@ero	support.	com			_		
Text Mes	ssage:	X Cell Phon	e Carrier:	T-MOB1	LE	01	tmomail.	net	
Preferred	d Contact	_				Тахр	ayer Male/í	Female:	
Preferred	d Language								_
IP Pin									
Driver's license or State Issued ID									
ID number	3265658	ID Sta	te CA ID i	ssue date	01/01/	/2016 ID	expiration	date 01/01	1/2023 D

 Scroll down to the Remote Signature section at the end of the Client Data screen. Type the letter Y in the field(s) next to each signee who will be signing the return remotely. Type the letter N if the signee will not be signing the return remotely.

— Remote Signature	
Does the Taxpayer consent to receive and sign their documentation remotely?	Y
Does the Spouse consent to receive and sign their documentation remotely?	Y
Include Remote Signature charge(s) on the invoice?	Y

- 3. In the Include Remote Signature charge(s) on the invoice? field:
 - Type a Y to recover the remote signature fee(s) by including them in your preparation fee on the invoice for this return. Note: The charge will appear as line item in the Ancillary Products Related Services/Charges section of the invoice. The line item will read, "Remote Signature".

OR

• Type **N** to confirm your intent to NOT recover the remote signature fee(s) for this return. Important Note: Your payment method entered during *wallet setup* will still be charged.

Remote Signature
Does the Taxpayer consent to receive and sign their documentation remotely?
Does the Spouse consent to receive and sign their documentation remotely?
Include Remote Signature charge(s) on the invoice?

4. Select **Print** and then click **Final Tax Return**.



5. Click the RemoteSign button.

Print Final Return	×
Select Printer	
Name: OneNote (Desktop)	
Status: Ready Where:	
Comment:	Print
Copies: 1	
Sign Documents with E-Signature:	SignDoc
Capture Signature(s) remotely:	nail Doc
Queue Return for Batch Printing:	Queue
Select Pages to Print:	<u> </u>
Create PDE copy of the Tay Return	
Creater Dr copy of the fax return Er	
Preview Return (open Print Preview)	Preview
Email Encrypted PDF Copy of Tax Return	n: <u>E</u> mail
Close	

6. If either the taxpayer or spouse is signing electronically **in-office**, using a signature pad or on-screen capture, click the corresponding box, otherwise, simply click the **OK** button. **Important Note:** No fee is charged for **in-office** electronic signatures.

In-Office Sign Options	×
Select Options for	
□ Taxpayer □ Spouse	
Ok <u>C</u> ancel	

7. Select the delivery method(s) for each remote signee and then click the OK button.



8. A pop-up *successful* status message should appear. **Click** the **OK** button.



Signing Remotely

1. Each remote signee will receive a text message, an email, or both, based on your prior selections, with a link to a secure page where they are required to provide information to validate their identity.

	L	8	
This is from your tax preparer to sign the documents https://mytaxofficeportal.com/signature/? xlink=D1932A8E8D4F957E530F392574CDE780			0
5 mins via SMS			
			<
D D O		>	

2. After clicking on the link, the signee must type their last name, DOB, the last four digits of their SSN, and their Zip Code, and then press the **Next** button.

Important Note: The signee **must** enter their **last name** exactly as shown on the return in the software.

ΑА	mytaxofficeport	tal.com さ
V		- 4
Please log	reparer requires a sign j in:	lature.
Last Name	(No non-English charac	ters allowed):
Date Of Bi	rth:	MMDDYYYY
Last 4 Digi	ts of your SSN:	
Zip Code:		
	Next	

3. After successful validation, the signee can review the tax return by pressing the **document** link.

Important Note: After remote signature request has been sent, the client has **24 hours** to review and sign the tax return.



4. When the review is complete, the signee must select the **I have read the document** check box and then sign the document using their finger, or mouse if on a desktop computer.

https://mytaxofficeportal.com	:
Clear Ve read the <u>document</u> Cancel	Submit
Tana	
axpay	Ľ
Signature not stored on device.	

5. The taxpayer must confirm that they are satisfied with the captured signature by pressing Yes



- 6. To access the signed return:
 - a. Click Remote Signature in the Attached Forms pane and then click the **Open** button

Attached Forms (Ctrl+F)	Remote Signature	Linng				-
Client Data Client Data Information and Status Tax Summary Invoice - Billing & Pints File Options - Filing Options	SSN	Document	RequestTime 104/09/2019 15:24	Status 18 Completed/Archived (94/09/2019 15:26:50	F
Rejects Document Archive Remote Signature Depreciation Event Log Scan Barcode Forms	Party	Name		Samed		
FEDERAL [RFND 5395, AG: \$10.167] V RET 1040 - FEDERAL RETURN Line 1 - Income Wis V FRM W-2 [T - WAYNE FARMS LLC] V FRM W-2 [T - BESTWAY RENTAL INC V FRM W-2 [T - KENT SECURITY OF PF	ID Taxpayer Paid Preparer ERO	130A031E9001E242 NANCY BROWN 001	807801A26D735980	04/09/2019 15:26:55 04/09/2019 15:24:22 04/09/2019 15:24:22		
✓ FRM 8879 [TPG TESTING] PROFORMA FORMS ✓ 1040 INCOME - OTHER INCOME	Print Incomplet	te Delete	Besend		<u>Qpen</u> <u>Close</u>	e

b. Select the Signed Full Tax Return as noted in the Document column and then click the **Open** button. This signed document resides in the Document Archive.

SSN	Name	Document	TimeStamp	Description
767-66-1234	BROWN, NANCY	Full Tax Return	04/09/2019 15:24:18	Initial Remo
767-66-1234	BROWN, NANCY	Signed Full Tax Return	04/09/2019 15:24:18	Final Remot
4				•
Scan (m	port Attach Delete Ema	uil	<u>O</u> pen	Close

Checking the Status of Remote Signature Requests

You can view a list of pending and completed signature requests by clicking on the applicable option on the Work in Progress Summary (WIP) screen under Exceptions/Rejects.

Exceptions/Rejects	
Fed Rejects	
State Refused and Rejects	
Fed Refused	
Fed/State Alerts	
Verify Retrieved / Feeder Returns	
Bank Rejected	
Pending Remote Signatures	2
Completed Remote Signatures	18

If you have additional questions about this information, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at <u>help@erosupport.com</u>.