

Request a Remote Signature from Your Clients

- 1. Complete the tax return as usual.
- 2. Click the **Print** button to begin the remote signing process.



3. Click the **RemoteSign** button.

Select Printer		
Name: Samsung M283x Server		
Status Offine		
Where:		
Comment:		Erint
Copers: 1	(C)	
Sign Documents with E-Signature:	Penal Doc - D	SignDoc
Capture Signature(s) remotely:	Comprove. L	BemoteSign
Queue Return for Batch Printing.		Queue
Select Pages to Print:		Efter
Create PDF copy of the Tax Return	Encrypt PDF	POF
Preview Return (open Print Preview)	1	Pregiew
Email Encrypted PDF Copy of Tax R	ietum:	Emai
Close		

Important Note: After selecting **RemoteSign**, a pop-up dialog box will appear. This option is **ONLY** for capturing **In-Office** taxpayer signatures using a **Signature Pad** device. **Select OK** to proceed with **RemoteSign** and <u>do not mark</u> the Taxpayer and / or Spouse checkboxes in this dialog box.

Copies. 1		
Sign Documents	ኛ In-Office Sign Options 🛛 🗙 🗙	SignDoc
Capture Signati	Select Options for In-Office signature capture:	RemoteSign
Queue Return fo	□ Taxpayer	Queue
Select Pages to	□ Spouse	Eilter
Create PDF cor	Ok <u>C</u> ancel	PDF

4. The **Remote Signature Options** screen will display. Check the box next to the desired delivery method. Note: Delivery methods are limited to the information collected in the Client Data screen.

Tax Payer Cell Phone	Tax Payer Email	
Spouse Cell Phone	Spouse Email	

5. The taxpayer will receive a text message or email, based on the above selection, with a link to validate their identity.

	بر	1	
This is from your tax preparer to sign the documents https://mytaxofficeportal.com/signature/? xlink=D1932A8E8D4F957E530F392574CDE780			0
5 mins via SMS			
			\bigtriangledown
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- 6. The taxpayer must validate their identity and then press the Next button:
 - Last 4 digits of SSN
 - Date of Birth
 - Last Name

https://mytaxofficeportal.com	:	
Your tax preparer requires a signature. Please log in:		
Last Name:		
Date Of Birth:	MMDDYY	0
Last 4 Digits of your social:		
Next		
		\triangleleft

7. After validating their identity, the taxpayer clicks **Yes** to continue. The taxpayer may click **Save to Device** first to save a copy of the tax return documents and review them using a PDF Reader.

1150001511011 012 00	cument belov	v before continu	uing
This browser does not	support in-l	ine PDF displ	ay <u>Sav</u>
	to Device		
is the document accur	ate to the bes	t of your knowl	edge?
Save to Devic		No	Î.
	<u> </u>		
	Yes		

8. Once the tax return documents have been reviewed, the taxpayer must set their mobile device to landscape mode, sign with their finger, and press the green **Submit** button.

nytaxofficeportal.com	
Clear Cancel Submit	0
TAXPAVER	
	\triangleleft

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



- 10. 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 l	Listing				×
Client Data Client Data Information and Status Tax Summary Invoice - Billing & Pmts File Options - Filing Options Rejects Document Archive Remote Signature Depreciation	SSN	Document Full Tax Return	RequestTime 04/09/2019 15:24:1	Status 8 Completed/Archived	04/09/2019 15:26:50	
Event Log Scan Barcode Forms FEDERAL [RFND:\$395, AGI:\$10,167] ✓ RET 1040 - FEDERAL RETURN Line 1 - Income Wks	Party ID Taxpayer Paid Preparer ERO <u>Print Incomplet</u>	Name 130A031E9001E242B0 NANCY BROWN 001 e Delete	7801A26D7359B0	Signed 04/09/2019 15:26:55 04/09/2019 15:24:22 04/09/2019 15:24:22	<u>Open</u> <u>Close</u>	

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
•				Þ
Scan Imp	oort <u>A</u> ttach <u>D</u> elete <u>E</u> ma	il	<u>O</u> pen	Close

NOTE: Tax preparers can also view a list of pending and completed signature requests by clicking on the applicable option on the **Work in Progress Summary** 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>support@utaxsoftware.com</u>.