

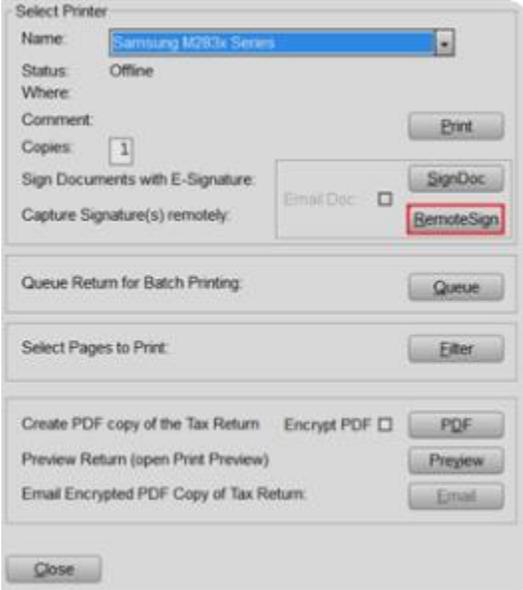


Request a Remote Signature from Your Clients

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



- 3. Click the **RemoteSign** button.



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 do not mark the Taxpayer and / or Spouse checkboxes in this dialog box.



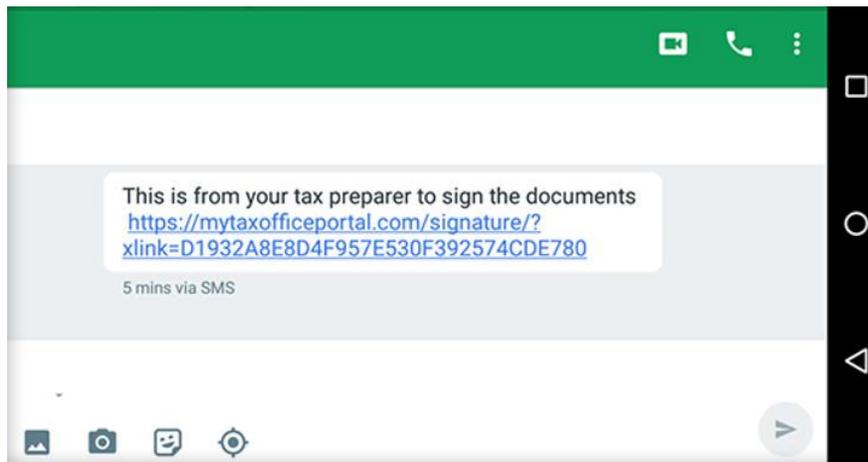
4. The **Remote Signature Options** screen will display. Check the box next to the desired delivery method. Note: Delivery methods are limited to the information collected in the Client Data screen.

Select Options to send Remote Signature Link:

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

Ok Cancel

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



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:

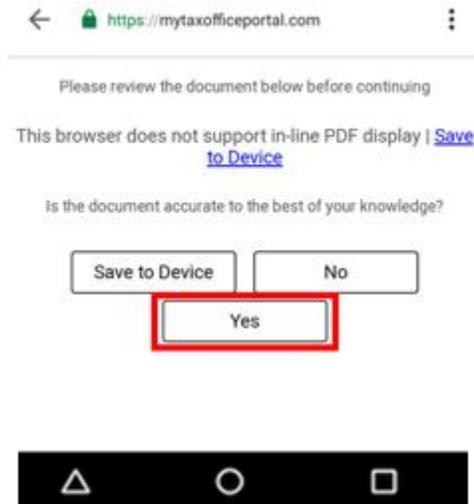
Last Name:

Date Of Birth:

Last 4 Digits of your social:

Next

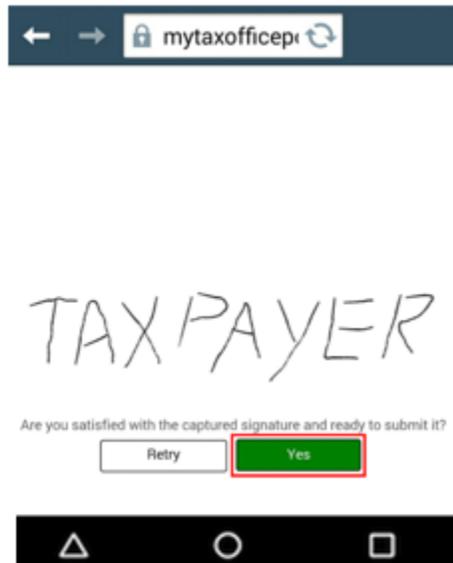
7. After validating their identity, the taxpayer clicks **Yes** to continue. The taxpayer may click **Save to Device** first to save a copy of the tax return documents and review them using a PDF Reader.



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.

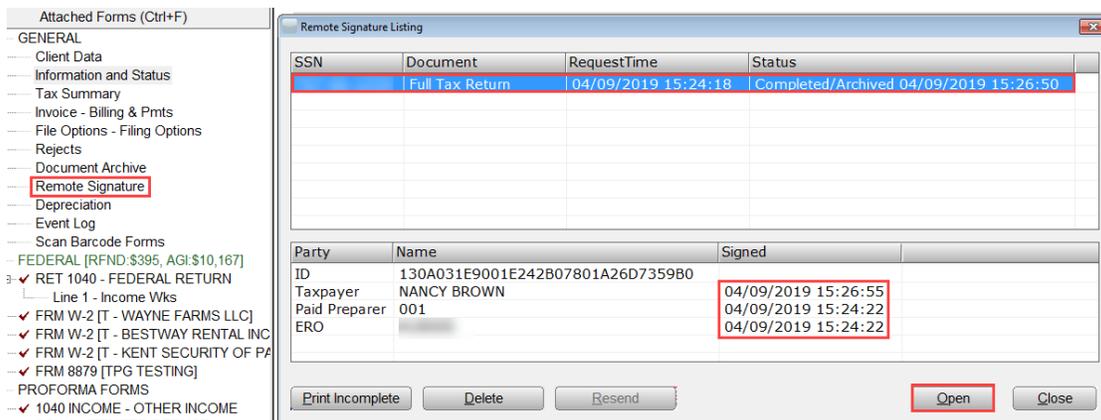


9. The taxpayer must confirm that they are satisfied with the captured signature by pressing **Yes**.

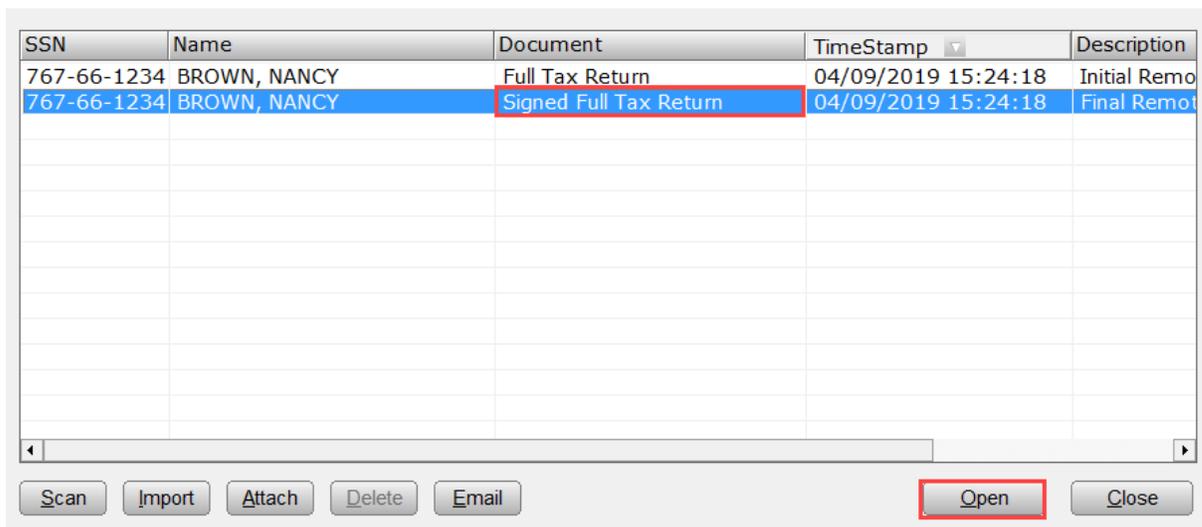


10. To access the signed return:

- a. Click **Remote Signature** in the Attached Forms pane and then click the **Open** button.



- 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.



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 support@utaxsoftware.com.