

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:

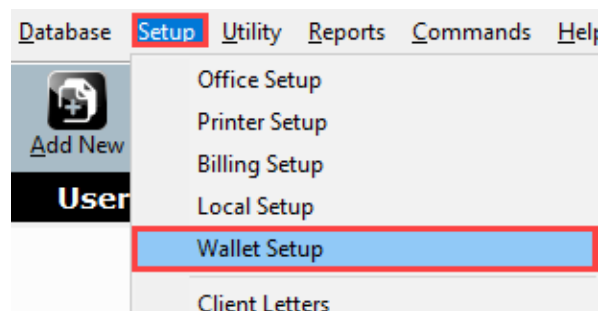
- Sending remote signature requests to tax return signees
- Capturing the signees signature
- Checking the status of remote signature requests

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 [Quick Start Guide](#) 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 [Here's How To Configure and Use the Wallet](#) 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.

1. 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 Mode:
Client Letter: english	Prep ID:
Owner: ADMIN	Site ID: SITE1
	Receipt #:
	EFIN:
	Locked:
Taxpayer Information	
SSN:	206-16-1234 BUSI
Name:	ASSETS BUSINESS
Occupation:	SELF EMPLOYED
Home Phone:	213-321-3213
E-Mail:	help@erosupport.com
Text Message:	<input checked="" type="checkbox"/>
Cell Phone Carrier:	T-MOBILE
Cell:	206-209-2653
Preferred Contact	
Preferred Language	
IP Pin	
Driver's license or State Issued ID	
ID number	326565S
ID State	CA
ID issue date	01/01/2016
ID expiration date	01/01/2023

2. 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:

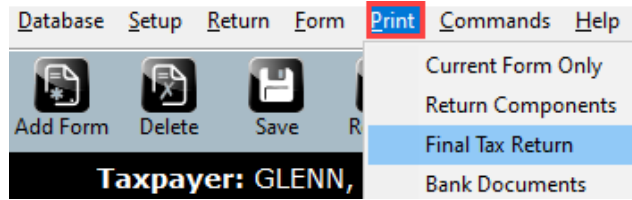
- Type a **Y** to recover the remote signature fee(s) by including them in your preparation fee on the invoice for this return. **Note:** The charge will appear as line item in the **Ancillary Products Related Services/Charges** section of the invoice. The line item will read, "Remote Signature".

OR

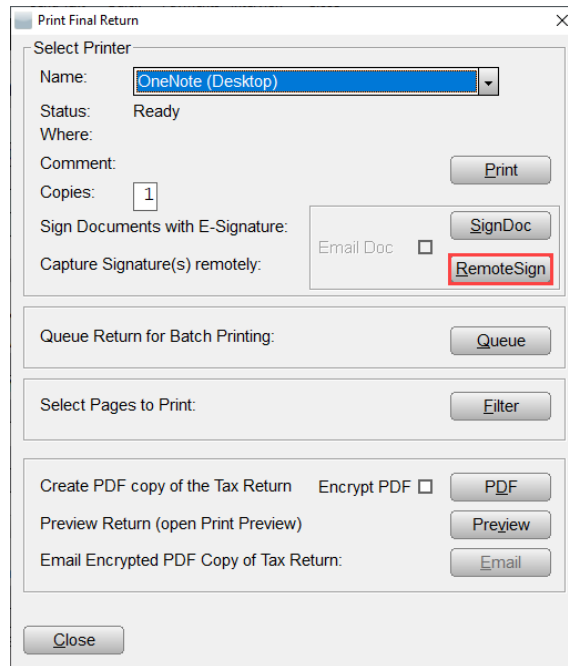
- Type **N** to confirm your intent to NOT recover the remote signature fee(s) for this return.
Important Note: Your payment method entered during *wallet setup* will still be charged.

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

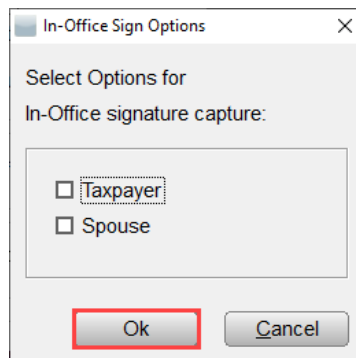
4. Select **Print** and then click **Final Tax Return**.



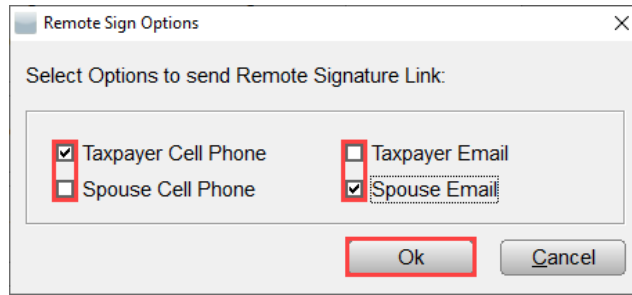
5. Click the **RemoteSign** button.



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.



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

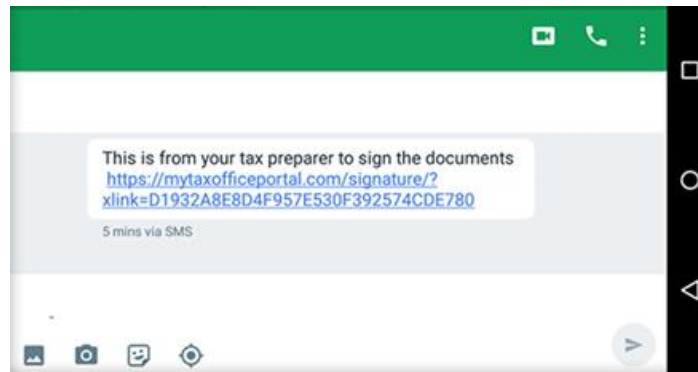


8. A pop-up *successful* status message should appear. Click the **OK** button.



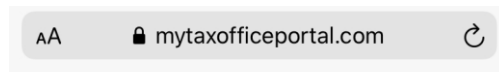
Signing Remotely

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.



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.



Your tax preparer requires a signature.
Please log in:

Last Name (No non-English characters allowed):

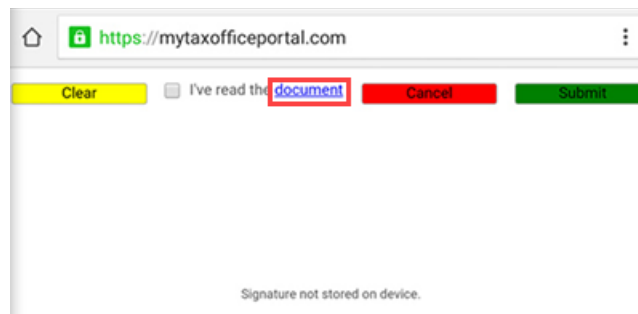
Date Of Birth:

Last 4 Digits of your SSN:

Zip Code:

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.

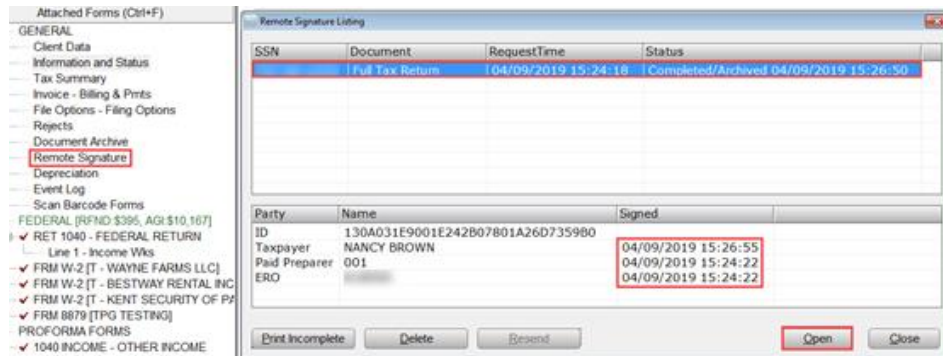


5. The taxpayer must confirm that they are satisfied with the captured signature by pressing **Yes**

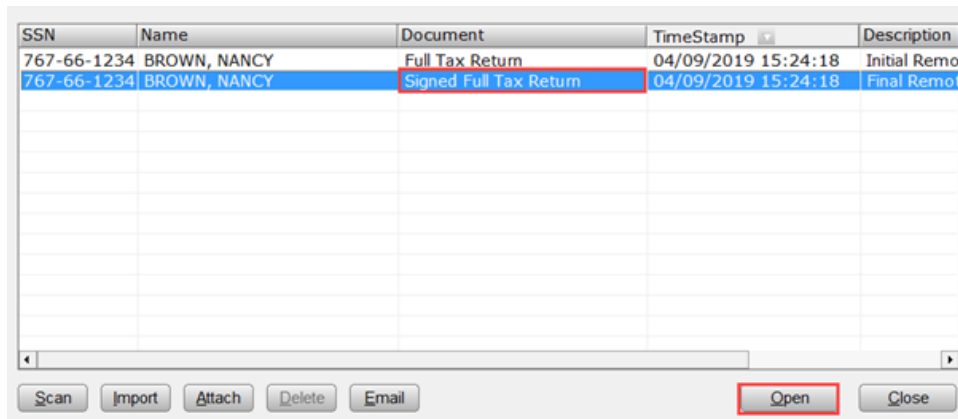


6. To access the signed return:

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



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.



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 support@utaxsoftware.com.