

e-Signature

TaxWise e-Signature gives your clients the ability to electronically sign tax documents, even when they are not in your office. This makes finalizing the return more convenient for your clients, and allows you to expand your client base to include individuals who live too far away to come to your office to sign documents. Once the process is complete, your clients automatically receive a completed copy of the return, saving you another step in the process.

Electronically sign any 1040 form, including:

- 1040
- 1040A
- 1040EZ
- 1040PR
- 1040NR
- 1040NREZ
- 8878/8879

To set up, you must enter your e-Signature login and Security Key in Setup Assistant. To do this, log in as admin, and then:

1. On the **Tools** menu, click **Utilities/Setup Assistant**.
2. On the Utility window, click the **Setup** menu, then click **Setup Assistant**.
3. Click **Next** until you get to the **Office Information** tab.
4. In the e-Signature Login section, type your email address, and click **Setup/Manage Account**.



e-Signature Login (email)

megan.casey@wolterskluwer.com

Setup/Manage Account

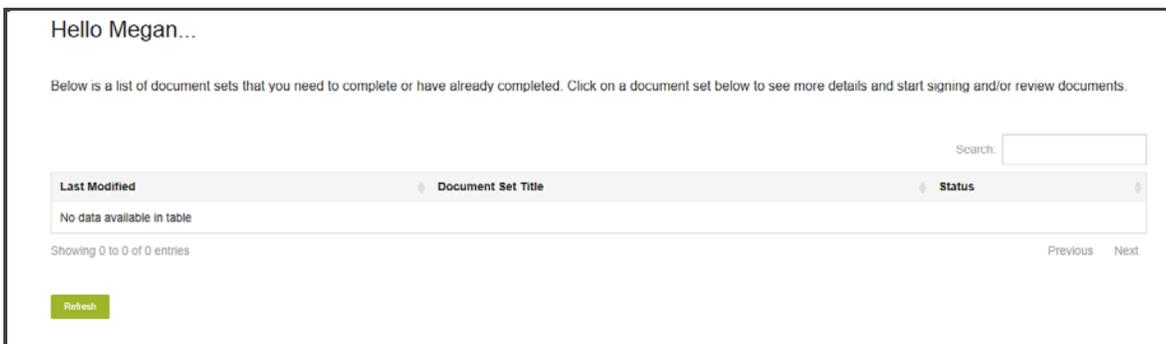
[Learn more about e-Signature...](#)

i If you need more information about e-Signature, click the **Learn more about e-Signature** link in this section.

- The web browser opens to the SIGNiX webpage. Type your information in the fields provided, including a password, and click **Next**.



- SIGNiX displays the e-Signature Document Center homepage:



- Close your browser and click **Save and Close** on the TaxWise Setup Assistant.

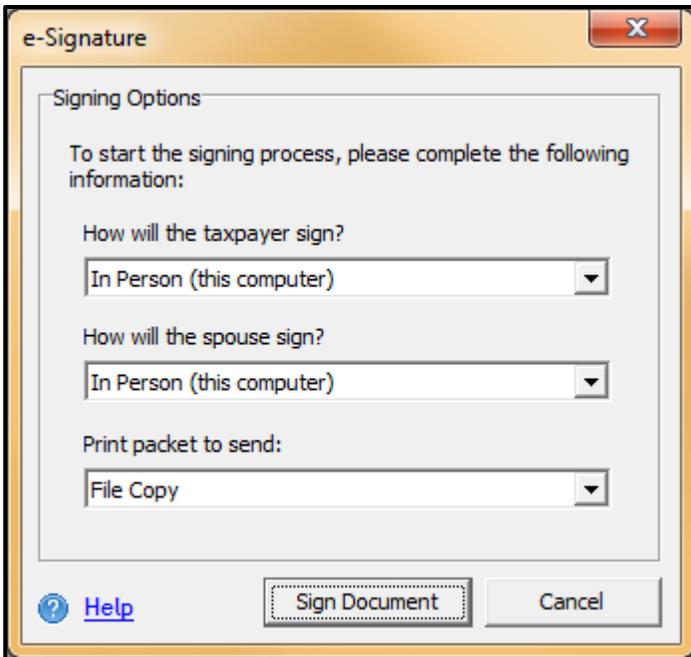
Signing Documents

To electronically sign returns, first complete the return. Then, follow these steps:

- While inside the return, click e-Signature on the toolbar.



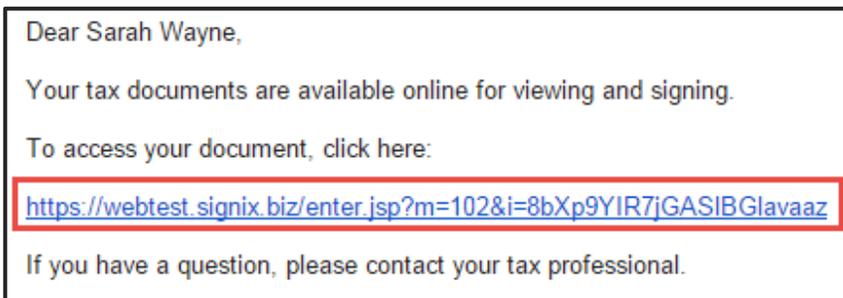
- TaxWise asks how your client, identified as the taxpayer (and spouse) in the program, would like to sign the return. Choose one of the options from the drop-down menu, as well as a print packet of forms to send.



3. Click **Sign Document**.

- i If the taxpayer chooses In Person (this computer), TaxWise opens the Signix webpage to continue the process.
- i For In Person (smartphone or client device) and **Remote**, TaxWise sends the client an email to complete the signatures.

4. For either option that generates an email, the taxpayer should click the link in the email, as shown below:



To complete the signature, the taxpayer must:

1. Read the legal consent information, and select **Accept**. Enter the last four digits of the Social Security Number and the birthdate. Click **Next**.

You've been asked to review and sign documents online. It's easy!

To get started, you need to agree to receive electronic documents using the electronic signature service under the terms of the E-Sign Legal Consent by choosing **Accept** below. This will confirm that you are able to access all of the documents provided to you in electronic form and you agree to be bound by the terms and conditions of use.

To confirm your identity please enter the information below. Click **Next** to continue!

[Read Legal Consent](#) Agree to Legal Consent? Accept Decline

Last 4 digits of Social Security Number

Date of Birth (mm/dd/yyyy)

[Next](#)

2. The taxpayer will answer the Knowledge Base Authentication questions to confirm his/her identity, and click **Next**.

John, Please Answer the Questions Below

The following question(s) are designed to establish your identity and are generated based on over 30 years of public database information. Please carefully consider your choices and click Next when you've made a choice. If you successfully answer the questions, you will then be able to create a signature and complete the document(s) sent to you.

Which of the following corporations have you ever been associated with?

- Verid, Inc(correct answer for demo)
- Business, Inc
- Virtual Compliance, Inc
- Foo & Bar, Inc
- I have never been associated with any of the corporations listed

Which of the following addresses have you ever been associated with?

- 10 Union Street(correct answer for demo)
- 123 W 14th Street
- 800 Gallows Rd
- 746 Bluetooth Ave
- I have never been associated with any of these addresses

Based on your background, in what city is 123 Elm Street?

- Reston(correct answer for demo)
- Herndon
- Blacksburg
- Roanoke

3. The taxpayer will type a password and re-type to confirm.

Sarah, Let's Create Your Signature

First, choose a Signing Password. This password will protect your electronic signature and let you access your signed documents after you've finished. Then, choose the style of your signature and initial from the options below.

Please enter a signing Password of 6-12 characters with at least 1 letter and 1 number. Your signing Password should be secret to you and yet easy to remember.

Select your Signing Password

Confirm your Signing Password

Choose a signature font Draw your own signature

Signature Font

<input checked="" type="radio"/> Sarah Wayne	<input type="radio"/> Sarah Wigns	<input type="radio"/> Sarah Wayne
<input type="radio"/> Sarah Wayne	<input type="radio"/> Sarah Wayne	<input type="radio"/> Sarah Wayne

4. The taxpayer can choose to use one of 6 preset signature fonts, or draw the signature:

Choose a signature font Draw your own signature

Signature

Initials

5. Once the taxpayer chooses a signature method, he/she will click **On to View/Sign**.
6. Signix asks the taxpayer to confirm if he/she is ready to sign, and provides an option to review documents first.

Ready To Review and Sign?

Select **Go** to jump right to your first action and let us guide you through the document. If you'd rather go at your own pace, choose **Let Me Review**. Simply scroll or use the **NEXT** and **PREV** buttons at the bottom corners of the screen to jump to unfinished signatures and other tasks.

Let Me Review

Go!

7. Once the taxpayer clicks **Go!**, the webpage displays the forms that require signatures.

The screenshot shows a tax form with a 'Sign Here' section. It includes a declaration statement, a 'Your signature' field with a 'Click to sign' button, and a 'Date' field. Below this is a 'Spouse's signature' field, also with a 'Click to sign' button and a 'Date' field. A yellow highlight is under the 'Click to sign' button for the taxpayer's signature.

Sign Here Joint return? See instructions Keep a copy for your records.	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has knowledge. Your signature	Date
	Spouse's signature. If a joint return, both must sign.	Date

8. The taxpayer will click the **Click to Sign** tab to insert the signature in each location. Once all signatures have been entered, Signix confirms the process is complete, and the taxpayer can click **Finish**.

The screenshot shows a confirmation screen titled 'Finished Signing'. It contains text explaining that the document is complete and providing instructions on how to confirm or review. At the bottom right, there are two buttons: 'Stay Here' and 'Finish', with the 'Finish' button highlighted with a red border.

Finished Signing

You've completed all your document(s)! If you're finished with this document(s), tap **Finish** below to confirm your signatures and other entries on this document(s). If you want to spend more time reviewing the document(s), select **Stay Here**. Just hit **Finish Signing** when you're done.

[Stay Here](#) [Finish](#)

- i** If another taxpayer needs to sign this return, follow these same steps using the email link that the taxpayer received.