

# Taylor Accountancy Corporation

## OfficeTools E-Signature Instructions

Things to keep in mind:

- The OfficeTools E-Signature platform that we use operates separately from the Client Portal platform. The sign-in credentials that you will use are separate and you cannot access signature documents from the client portal.
- All emails pertaining to E-Signature documents will either come from Tayloracctcorp.com or Officetools.com. Please add these to your emails 'Do Not Block' list.

### Creating your Pin

1. The first time that a document is sent to you for a signature you will receive an email to create your pin. It will come from "no-reply@officetools.com" and have the subject line "Create your signature pin". Either click on "Create my pin" or copy the given link into your browser.

Create your esignature pin



no-reply@officetools.com  
To [redacted]

Reply Reply All Forward ...

Wed 10/13/2021 3:06 PM

If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



ESignature,

We are requesting that you create a pin to electronically sign potentially sensitive documents.

Create my pin

Copy Link

<https://esign.officetoolsportal.com/Pin/B7053FE6-9302-432B-819B-4366EC739760-07F88702-1A21-46F2-8F1E-A8436810F682>

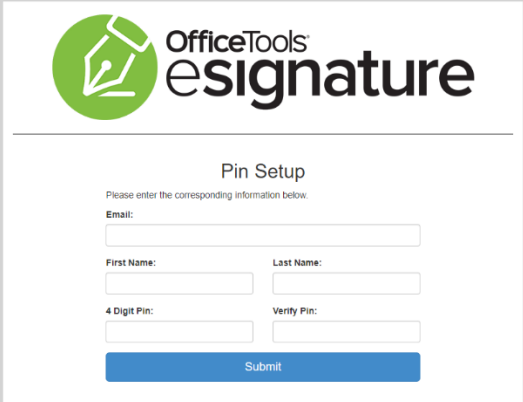
This link will expire once used or after 48 hours.

**Do Not Share This Email**

This email contains a secure link. Please do not share this email, link, or access code with others.

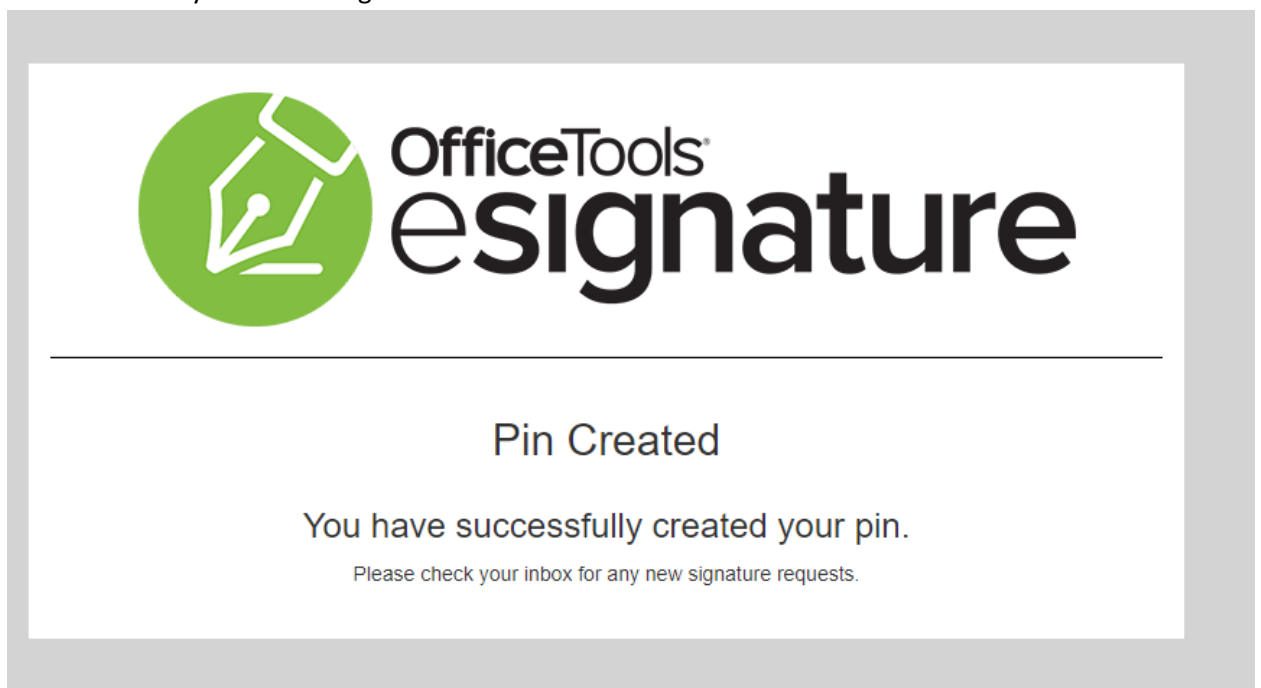
Powered By  OfficeTools eSignature

2. You should be taken to the page shown below. Here you \*need to\* enter the email address that the link was sent to and your first and last name \*exactly\* as we have them on file. If the email or name entered aren't spelled exactly how we have them on file, then the page will not advance when clicking on 'Submit'. Also enter a 4-digit pin of your choosing. Be sure to write this pin down where you can easily find it later because you will need it in order to sign any documents we send you in the future.



The image shows a web form titled "Pin Setup" for OfficeTools eSignature. The form is set against a light gray background. At the top left is the OfficeTools eSignature logo, which consists of a green circle containing a white stylized pen icon, followed by the text "OfficeTools" in a small font and "eSignature" in a large, bold, black font. Below the logo, the title "Pin Setup" is centered. Underneath the title is a small instruction: "Please enter the corresponding information below:". The form contains several input fields: a single-line "Email:" field, two single-line fields for "First Name:" and "Last Name:", and two single-line fields for "4 Digit Pin:" and "Verify Pin:". At the bottom of the form is a blue rectangular button with the word "Submit" in white text.

3. If your pin was created successfully, then you will receive the following message. You can shut this window. You should shortly be receiving the next email which contains a link to the actual document that you need to sign.



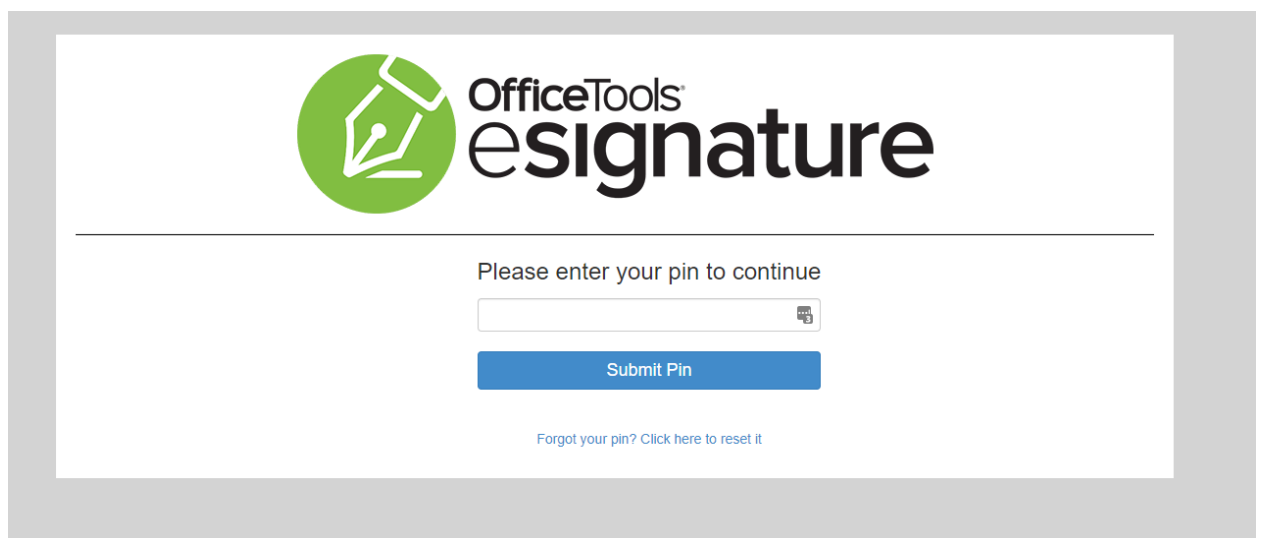
## Accessing and signing your document

1. If we send a document for you to E-Sign it will show up under your email that we have on file. It will come from the email of one of the employees of Taylor Accountancy (e.g. [ken@tayloracctcorp.com](mailto:ken@tayloracctcorp.com)) and have the subject line 'Please Sign [Name of document]'. Either click on "Click here to sign this document" or copy the given link into your browser.

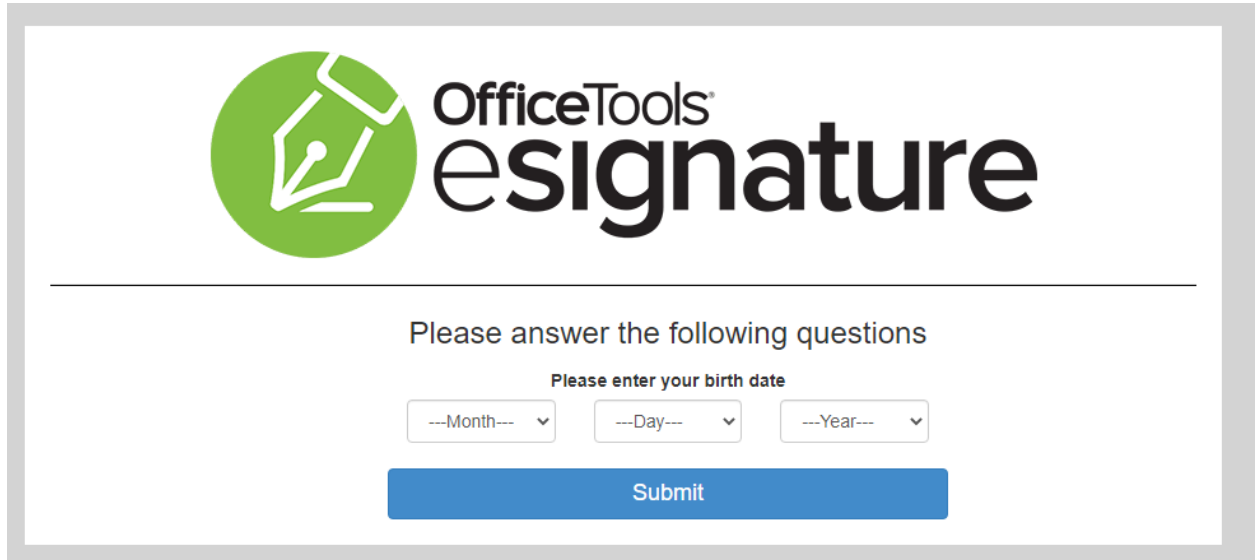


*The following two steps will only be present if necessary for legal verification requirements; otherwise, skip to step 4.*

2. The following page should pop up. Input the pin that you created the first time that you E-Signed a document with us. If you have forgotten the pin, then click on the bottom link to reset it.

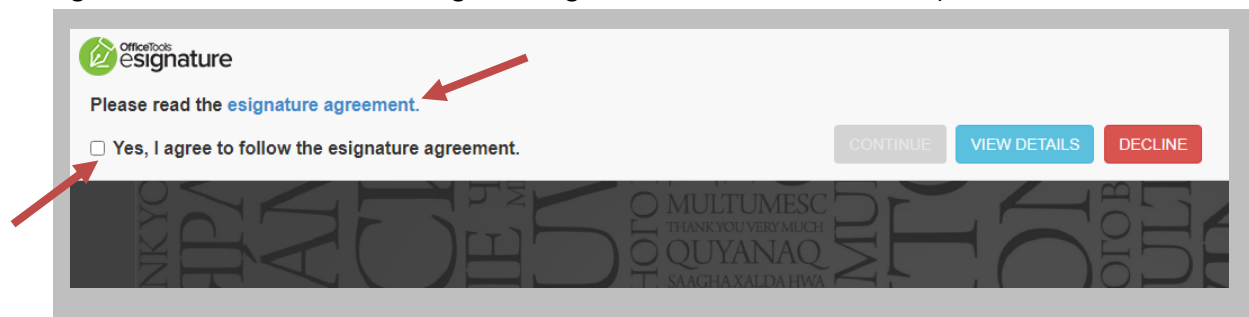


3. The next page will ask you to verify your date of birth.



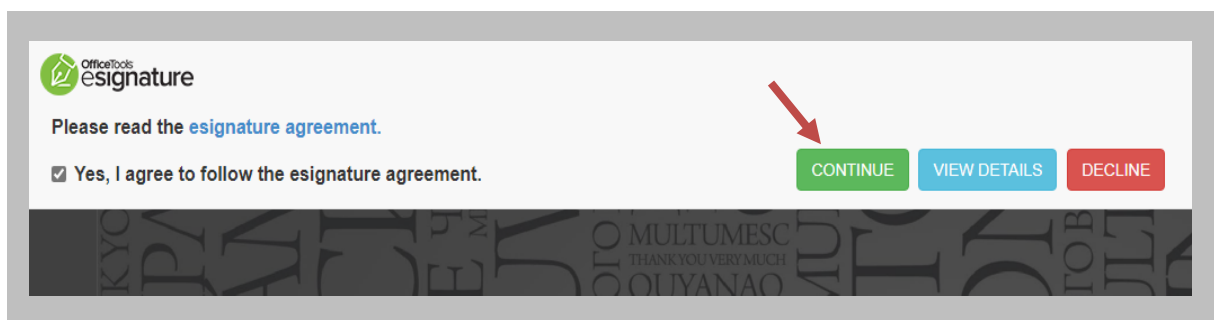
The screenshot shows the OfficeTools eSignature interface. At the top is the logo, which consists of a green circle containing a white stylized pen icon, followed by the text "OfficeTools eSignature". Below the logo is a horizontal line. Underneath the line, the text "Please answer the following questions" is centered. Below this, the instruction "Please enter your birth date" is centered. There are three dropdown menus for birth date: "Month", "Day", and "Year", each with a downward arrow. Below these is a blue "Submit" button.

4. The next page will initially have the document grayed out. In order to review and sign the document you need to check the box at the top of the page that says "Yes, I agree to follow the signature agreement (If you wish to view the agreement, click on the words 'signature agreement' in "Please read the signature agreement" above the checkbox).



The screenshot shows the OfficeTools eSignature interface. At the top is the logo. Below it is the text "Please read the signature agreement." with a red arrow pointing to the words "signature agreement". Below this is a checkbox labeled "Yes, I agree to follow the signature agreement." with a red arrow pointing to the checkbox. To the right of the checkbox are three buttons: "CONTINUE" (grayed out), "VIEW DETAILS" (blue), and "DECLINE" (red). Below the buttons is a grayed-out document preview with various text elements like "MULTUMESC", "THANK YOU VERY MUCH", "QUYANAQ", and "SAAGHAXALDAHWA".

5. Then click on "Continue".



The screenshot shows the OfficeTools eSignature interface. At the top is the logo. Below it is the text "Please read the signature agreement." Below this is a checkbox labeled "Yes, I agree to follow the signature agreement." which is now checked. To the right of the checkbox are three buttons: "CONTINUE" (green, highlighted with a red arrow), "VIEW DETAILS" (blue), and "DECLINE" (red). Below the buttons is a grayed-out document preview with various text elements like "MULTUMESC", "THANK YOU VERY MUCH", "QUYANAQ", and "SAAGHAXALDAHWA".

6. A popup will appear giving you the chance to adjust your name as you would like it signed or initialed. *Please do not alter the last name that is listed. If your last name has changed, please Decline the form and contact us so that we can find out the reason for the change, update our records and send you a new form.* Adding/subtracting a middle name/initial or changing the first name to a preferred name (e.g. Michael to Mike) if this is standard for your signature is fine. (The style of the signature/initial cannot be changed) Click the “OK” button when done.

**ENTER DETAILS**X

Enter full name:  
  
Preview : *ESignature Client*

Enter initials:  
  
Preview : *EC*

OK

7. The bottom of the page now has a button showing “INCOMPLETE” and also shows how many fields still need to be signed/initialed. There is also a “Decline” button. In the event that there is something wrong with the document, please click the “Decline” button and indicate the reason for declining in the window that pops up.

Form **8879**  
(Rev. January 2021)  
Department of the Treasury  
Internal Revenue Service

**IRS e-file Signature Authorization**  
► ERO must obtain and retain completed Form 8879.  
► Go to [www.irs.gov/Form8879](http://www.irs.gov/Form8879) for the latest information.

INCOMPLETEVIEW DETAILSDECLINE

You have **1 item** that require your attention.

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8. Review the document. If everything is acceptable, click in all the blue highlighted fields that say “Sign” or “Initial”. To locate them easily, scroll and look for the yellow tabs on the left side of the document. Be sure to click on the blue highlighted field to sign, not on the yellow tab. (Note: the program will only allow one person at a time to sign the document. When the signing has been completed by that person, then an email will be sent to the next additional signer)

The screenshot shows the eSignature software interface for Form 1040 (2020). The 'Sign Here' section is highlighted in blue. A yellow tab on the left side of the document indicates the current step. The 'INCOMPLETE' button is highlighted in yellow at the bottom. The 'Sign Here' section contains a blue highlighted field with the text 'Sign'.

9. As each blue highlighted field is clicked, they will be replaced by the signature/initial, the yellow tab will disappear and the counter at the bottom of the page will update. When you are all done filling in all the fields the “INCOMPLETE” button will change to “Sign Document”.

The screenshot shows the eSignature software interface for Form 1040 (2020). The 'Sign Here' section is highlighted in blue. A yellow tab on the left side of the document indicates the current step. The 'SIGN DOCUMENT' button is highlighted in yellow at the bottom. The 'Sign Here' section contains a blue highlighted field with the text 'Signature Client'.

10. After the "Sign Document" button on the bottom of the screen is clicked, a confirmation page will come up and an email will be sent to the next person that needs to sign. Note: If the same email is listed for the spouse or other person that needs to sign, then the next email will send to the same email address giving the next person the ability to sign. If there are no additional people that need to sign, then emails will be sent to each signer with a final copy of the signed document and a digital transcript of the signing for your records. We will also receive a notification that it has been complete.

