

## Thomson Reuters UltraTax CS® eSignature Fact Sheet

### How do You Stop Missing Signatures From Slowing You Down?

#### Get Speedy and Secure Online Signatures

Speed up your processing and minimize hassle during tax season by using UltraTax CS eSignature from Thomson Reuters. Your clients will appreciate the ease and convenience of signing documents using any mobile device and desktop browser, and you'll enjoy the streamlined process, customized client reminder options and reduced paper use that comes with using UltraTax CS eSignature.

#### Form 8879 IRS e-File Signature Authorization (1040 returns)

UltraTax CS eSignature makes it fast and easy to manage your clients' 8879 forms, with the ability to:

- **Save time generating and tracking manually issued copies of Form 8879.** UltraTax CS tracks your eSignature statuses for you alongside your e-file statuses.
- **Get signed 8879s back faster.** When clients can answer a few questions and indicate their acceptance of the return — rather than having to print, sign and scan or fax the copy back to your office — they respond much faster.
- **Minimize your risk in an IRS audit.** UltraTax CS eSignature tracks all eSignature activity in reports, providing electronic versions of all signed copies of Form 8879. eSignature is also one of the few electronic signature solutions which adheres to the strict IRS requirements for valid Form 8879 electronic signatures.

Form <b>8879</b>	<b>IRS e-file Signature Authorization</b>	OMB No. 1545-0074
Department of the Treasury Internal Revenue Service	▶ Don't send to the IRS. This isn't a tax return. ▶ Keep this form for your records. ▶ Information about Form 8879 and its instructions is at <a href="http://www.irs.gov/form8879">www.irs.gov/form8879</a> .	<b>2016</b>

#### TO GET SPEEDY AND SECURE ONLINE SIGNATURES

Or to learn more about eSignature or UltraTax CS, visit [tax.tr.com/ultrataxcs](http://tax.tr.com/ultrataxcs), call **800.968.0600** to speak with a representative or email [cs.service@tr.com](mailto:cs.service@tr.com).

#### Tax Engagement Letters (all return types\*)

- **Reduce your liability.** UltraTax CS eSignature provides a quick and easy way to safeguard your firm from any possible client disputes.
- **Reduce your preseason preparation time.** Save time by obtaining your engagement letters electronically and in batch.

#### Consent to Disclose & Use Tax Info (all return types\*)

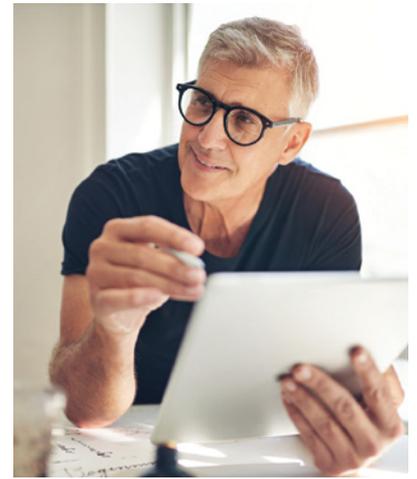
- **Reduce your hassle when sending returns to third parties.** Under IRC Section 7216, the IRS requires written consent from a taxpayer to disclose the return to a third party, such as prospective lenders. Obtain these disclosures quickly, with less back-and-forth between your clients and third parties.

\* Excludes Form 5550

# CS PROFESSIONAL SUITE®

## TO GET SPEEDY AND SECURE ONLINE SIGNATURES

Or to learn more about eSignature or UltraTax CS, visit [tax.tr.com/ultrataxcs](http://tax.tr.com/ultrataxcs), call **800.968.0600** to speak with a representative or email [cs.service@tr.com](mailto:cs.service@tr.com).



## ■ FAQs

### Which states allow eSignature for their own e-file authorizations on 1040 tax returns?

Not all states have adopted the IRS eSignature guidelines. DE, MD, NY and WV require an e-file authorization form similar to IRS Form 8879, but they do not allow eSignature. All other states either allow eSignature on their e-file authorization form or do not require a separate e-file authorization form.

### Can I collect eSignatures on e-file authorizations for non-1040 tax returns?

The IRS does not yet allow eSignature for non-1040 return e-file authorization forms. Thomson Reuters is prepared, however, to provide this capability once the IRS expands eSignature acceptance to include other tax return types. Today, UltraTax CS does support eSignature for the Bank Account Verification Worksheet, and engagement letters and consent documents for 114a, 1120, 1065, 1041, 706, 709, 8878 and 990 returns in addition to 1040.

### Is there an added fee for eSignature on State e-file authorization forms?

No, not as long as you send it to your client with the Federal e-file authorization. Fees are assessed on a per-signing-event basis — meaning you will only incur a second charge if you send a separate eSignature request for one or more states after already sending a first request which contained the Federal authorization.

### If I send a client a request for an eSignature and he or she does not attempt to sign or fails at signing, am I still charged?

No. You only incur fees when your clients successfully sign the document(s) you send them for eSignature. As an example, if you sent an engagement letter eSignature request to all your clients during preseason, you'd only incur a fee for those who successfully signed.

### Do my Married Filing Joint 1040 clients incur a double fee since there are two taxpayers signing?

No. Married Filing Joint clients incur eSignature fees on a per-return basis, not on a per-taxpayer basis.

### How do I activate and use eSignature in UltraTax CS?

Visit Setup > Office Configuration and access the eSignature tab. Once there, mark the box at the top to enable electronic signatures (eSignature), and accept the dialog box that appears. All returns containing (and eligible for eSignature on) Form 8879, the engagement letter and/or consent document will default to eSignature as the signature method. To disable eSignature for a specific return, access the eSign input screen located in the Electronic Filing folder for most return types (in the General Information folder for 706 and 709 returns).

Visit [tax.tr.com/ultrataxcs](http://tax.tr.com/ultrataxcs)

The intelligence, technology  
and human expertise you need  
to find trusted answers.



the answer company™  
**THOMSON REUTERS®**