

Thomson Reuters eSignature

Expand your workflow capabilities with eSignature for UltraTax CS and Onvio Firm Management

Secure signatures online quickly and confidently

Throughout a tax and accounting engagement process clients need to approve or sign a variety of documents. You can help to speed up this requirement and minimize hassle during tax season by using eSignature from Thomson Reuters® with **UltraTax CS** and **Onvio Firm Management**.

Your firm and clients will appreciate the time savings, ease, and convenience of signing documents using any desktop browser or mobile device, along with these other benefits to streamline and complete the process.

- **Knowledge based authentication (KBA).** Feel assured with an added layer of security for client identification purposes and capturing valid signatures.

- **Customer portals.** Conveniently utilize Thomson Reuters portals for the delivery of documents.
- **Engagement letters.**
 - Reduce your liability. eSignature provides a quick and easy way to safeguard your firm from any possible client disputes.
 - Preseason preparation time. Save time by obtaining your engagement letters electronically.
- **Preserve time and resources.** Reduce the use of paper that comes with printing documents that need in-person or snail mail signature.

What are the differences between eSignature with UltraTax CS and Onvio Firm Management?

IRS e-File Signature Authorization for individual and business returns with UltraTax CS

Using eSignature with UltraTax CS helps you quickly 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.

- **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.

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 for the latest information.	OMB No. 1545-0074
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Provide eSignature for any document with Onvio Firm Management

Pairing eSignature with Onvio Firm Management strengthens your ability to collaborate with clients in a secure environment, plus:

- **Form options.** Enjoy the range of forms, including engagement letters, power of attorney, and other tax documents that can be set-up for eSignature.
- **Approve and sign.** Clients can expediently send any PDF file for approval or signature from the documents area.
- **Communication tracking.** After an eSignature document request is submitted, it can be tracked on the communications screen offering you visibility into the document status.

To learn more about eSignature with UltraTax CS or Onvio Firm Management, contact us at **800-968-8900**

