
OVERVIEW OF THE ESIGNATURE PROCESS

The eSignature process walks you through the steps required to sign your documents. This document contains information about those steps. If you have questions about the eSignature process after reading this document, please contact the person who asked you to sign the documents. (You can find his or her contact information in the Welcome step.)

Note: We support eSignatures in the newest version of Google Chrome, version 10.0 or higher of Microsoft Internet Explorer, and the newest version of Mozilla Firefox.

*Requirements: Must have a valid email address for both taxpayer & spouse. A desktop computer or laptop is also required.

Welcome

This screen displays the name and contact information for the person who requested your signature and a list of the documents that need to be signed.

You must agree to the terms of the Electronic Record & Signature Consent Disclosure before you can move forward with the eSignature process. If you don't agree to the terms, click Decline Signature to end the eSignature process and notify the requestor that you declined the signature request.

Verify identity (not required for all documents)

You will have to verify your identity before you can sign certain documents. If the identification process requires Knowledge Based Authentication (KBA), you will have five minutes to answer a series of questions about yourself. If you don't answer the KBA questions within five minutes or if you are unable to answer the questions correctly, the documents will become invalid and the eSignature process will end. We will notify the person who requested the signature that the documents are no longer valid.

For other documents, we may require you to enter the last four digits of your social security number.

Review

During this step, you must review each document. You cannot proceed with the eSignature process until you mark the **I have reviewed the requested documents** checkbox.

If you find an issue, click the **Click here to decline the signature request** link to open a dialog through which you can end the eSignature process. We will notify the person who requested the signature that you declined the request.

Sign

In this step, you will create your signature and other information that is required to sign your documents. Note that your signature must include your full name.

You can type your signature and choose a style, or you can draw your signature using your finger (mobile device) or mouse (computer).

Submit

You must review the documents and mark the **I have reviewed all documents and am satisfied with the signed copies** checkbox before you can submit them. After you submit the documents, we recommend that you download them for your records.

If you find an issue, click the **Click here to decline the signature request** link to open a dialog through which you can end the eSignature process. We will notify the person who requested the signature that you declined the request.