

**Important Reminders for DocuSign Clients,**

530 622 5546 MAIN  
530 622 8874 FAX

If you request **DocuSign**, you will *not* receive a paper copy of your tax return as it gets sent to you **electronically** along with your signature pages—you will need to download and **save a copy for your records**. If you don't do this at the time of signing, your login does expire within 90 days for security purposes and you will not be able to access it.

If you need a paper copy, ***you must request one*** when you meet with your tax preparer. If you call in and request a copy after using DocuSign, you will be charged a service fee of \$25 for having to print out, assemble and mail to you or \$10 for us to email you a copy in PDF format.

**We do not file your tax return automatically** until we receive your signed signature pages AND payment for your tax preparation. You can call in and pay with a credit/debit card over the phone.

If married and filing jointly **both you and your spouse will receive separate emails for signatures**—once both parties have signed then DocuSign generates the completed forms with both signatures and sends it to us automatically, if you have not already paid, we will then call you for payment prior to electronically filing the return.

If you have changed emails, **make sure we have your updated email address(es)**

**To Sign your Tax Return:**

- 1) You will receive an email from Efile via DocuSign that says “Action Needed: Signature Required”-**Click on the yellow box that says Review Documents**. It then asks a series of questions to verify your identity

(NOTE: Questions are generated by DocuSign **NOT** Accurate Tax, based on available info from various sources, **if you have issues with the questions asked**, you may have to have us send it to you via our encrypted email so you can print out and sign the signature pages and send those back to us)

- 2) Then click the box that says “I agree to use electronic records and signature” and click “continue”.
- 3) It will show a preview of signature pages and you will be able to scroll through and review your tax return prior to signing.
- 4) **Select “Start” to begin signing.**
- 5) Click on “Sign” box and either draw or select text for signature, generally there are two required, one for the IRS and one for State.
- 6) **Once finished select “Finished”.**
- 7) You will then be able to View Completed documents and either save or print a copy for your records. You will also receive another email saying “Completed: Action Needed Signature Required” to verify that you are all done.