

E-Sign an 8879:

Client Experience

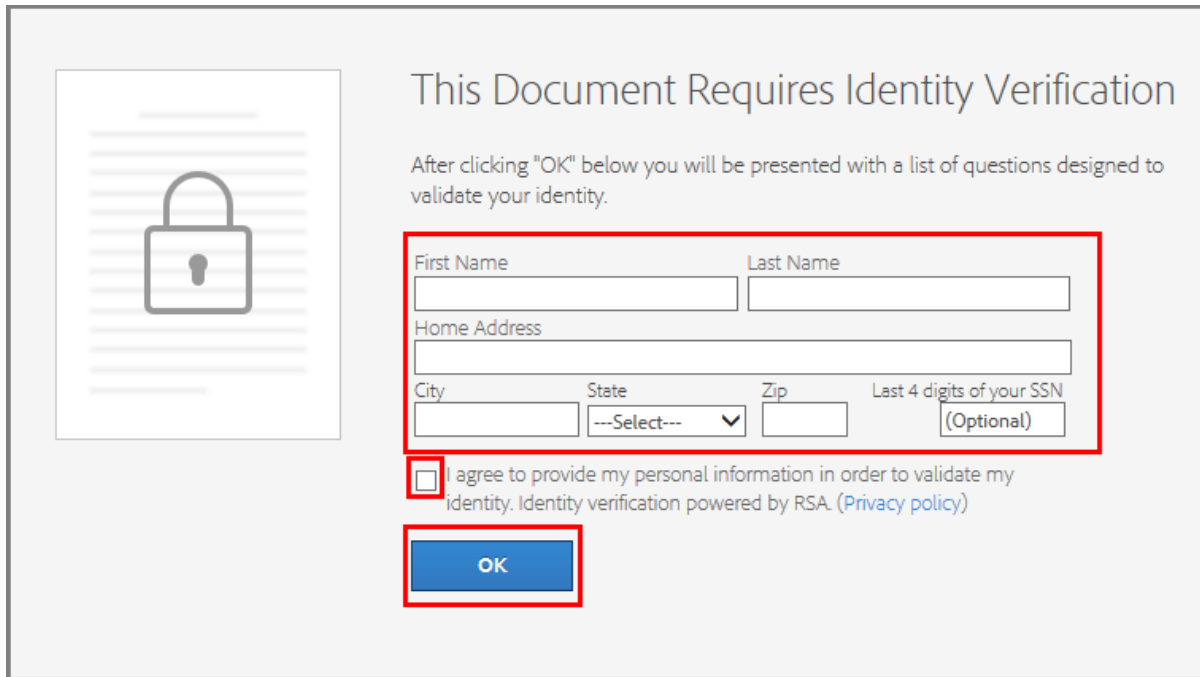
Once the document has been sent, the signer will receive an email notification. The notification will contain a link, which will open a document and request that the client electronically sign.

- A. Open notification email and click on highlighted link
- B. There will be a padlock icon in the notification, signifying that authentication is required



- C. Once the link has been clicked on, the signer will notified that this document requires identity verification and they will need to enter their First Name, Last Name and Home Address
- D. They will also need to check the agreement to use KBA box to continue through the process

E. Once all required information has been entered, the signer will click “OK”



This Document Requires Identity Verification

After clicking "OK" below you will be presented with a list of questions designed to validate your identity.

First Name: Last Name:

Home Address:

City: State: Zip: Last 4 digits of your SSN:

I agree to provide my personal information in order to validate my identity. Identity verification powered by RSA. ([Privacy policy](#))

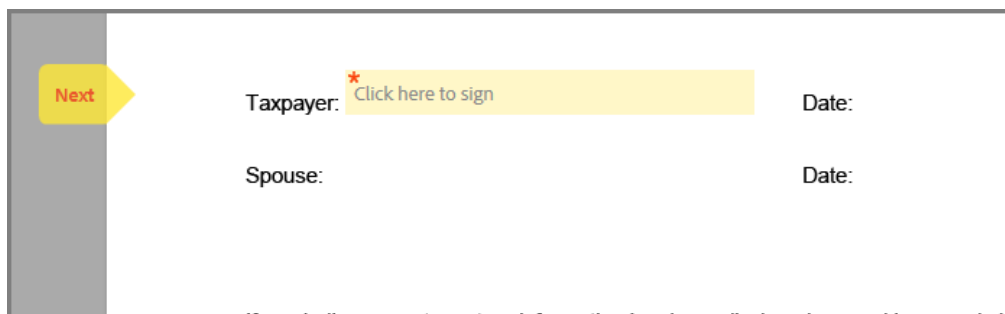
OK

F. Signers must verify their identity by providing some personal information and answering a series of personal questions. LexisNexis queries the credit reporting and other agencies for questions such as:

1. Which of the following vehicles have you owned or leased?
2. Which of the following corporations have you ever been associated with?
3. Based on your background, in which city is 123 Main Street?
4. Which of the following banks do you have a home mortgage with?

G. There are usually 3 – 5 questions and an unidentified percentage of them must be answered correctly. Once completed, the document will display and the E-Signing process will continue as with any other document.

H. Follow the onscreen instructions – “Click to Sign”

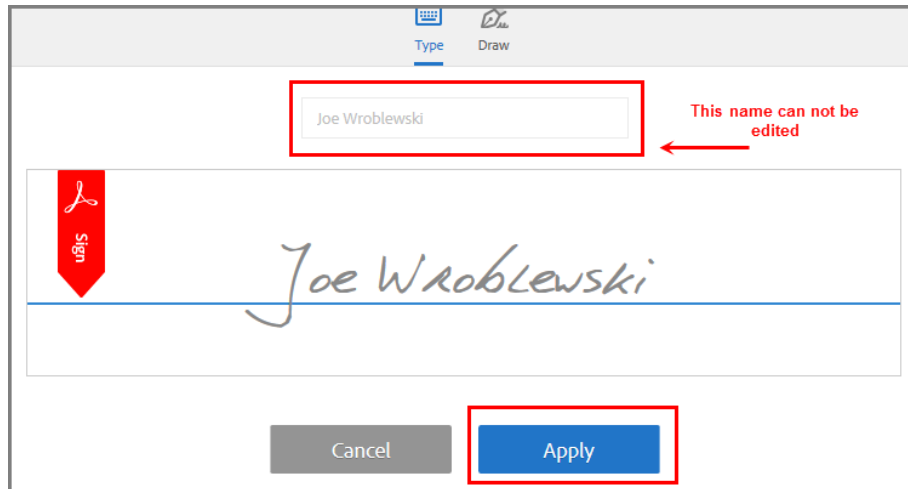


Next

Taxpayer: * Date:

Spouse: Date:

- I. Because identity verification was used, the signer will not be able to edit their name when signing
- J. Once signed, click “Apply”



- K. Once the client has finished applying their signature in all required locations, they simply “Click to Sign”

I will enter my PIN as my signature on my tax year 2011 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► (Apr 23, 2015) Date ► _____

Spouse's PIN: check one box only

I authorize **CERTIFIED PUBLIC ACCOUNTANTS LLP** to enter or generate my PIN as my signature on my tax year 2011 electronically filed income tax return. **ERO firm name** Enter five numbers, but do not enter all zeros

I will enter my PIN as my signature on my tax year 2011 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► _____ Date ► _____

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2011 electronically filed income tax return for payer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Regulation 1345.

I agree to the Terms of Use and Consumer Disclosure of this document

- L. Once the document is completely signed, the signer will receive a final copy. This copy can be accessed by clicking on the "Download Link" in their email notification.



- M. In keeping with IRS compliance, the signer will be required to enter the last 4 digits of their SSN to have access to their final signed copy of the document.

