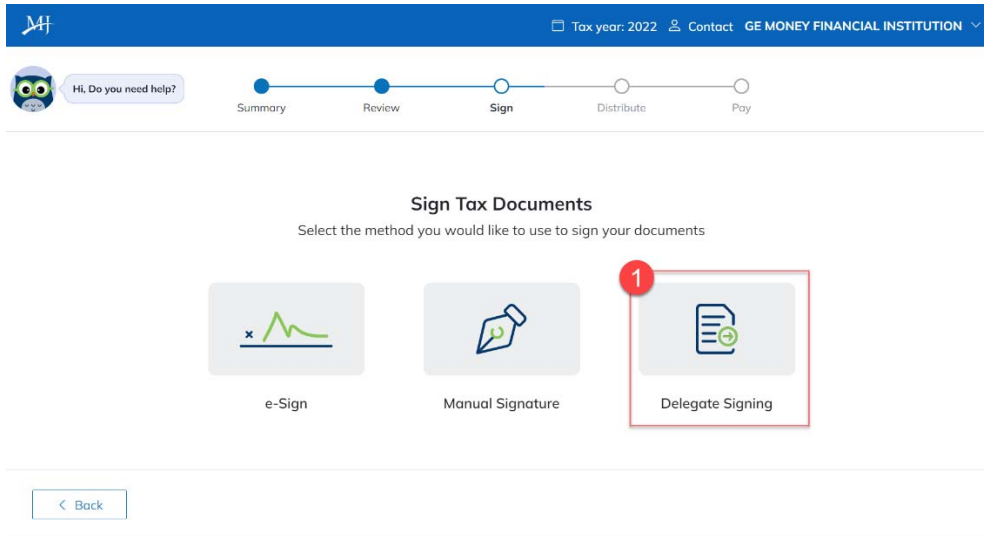


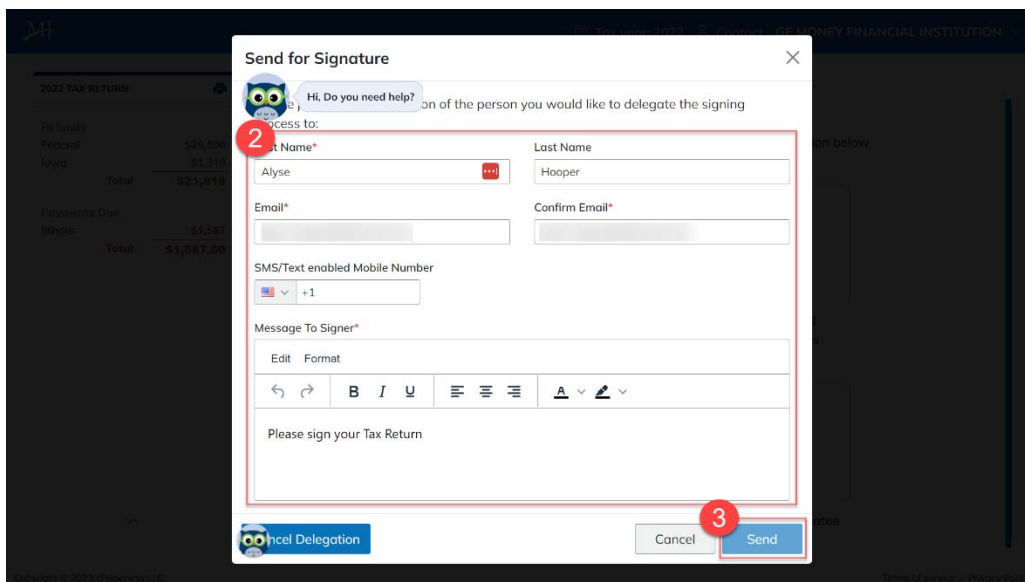
Delegate Signing

When the controller of a group of returns or a taxpayer reaches the signing section of the [Client Experience](#), they can e-Sign the return or delegate the signing of the tax return to another user.

1. Click **Delegate Signing**.



2. Complete fields in the **Send for Signature** dialog box as noted below.
 - o Required Fields:
 - First Name
 - Last Name
 - Email
 - Confirm Email
 - Message to Signer
3. Click **Send**.



After the return is sent for **Signer Delegation** and the delegate completes e-signing, the controller or client receives an email notification that e-signing has been completed and the e-file forms are ready for download.

Update Delegation

After a return is sent for **Signer Delegation**, the controller or client can update or cancel the delegation. To update these details, they must click on their access link and authenticate to access the Summary Page.

1. Click **Update Delegatee**.
2. Update delegatee details.
3. Click **Send**.

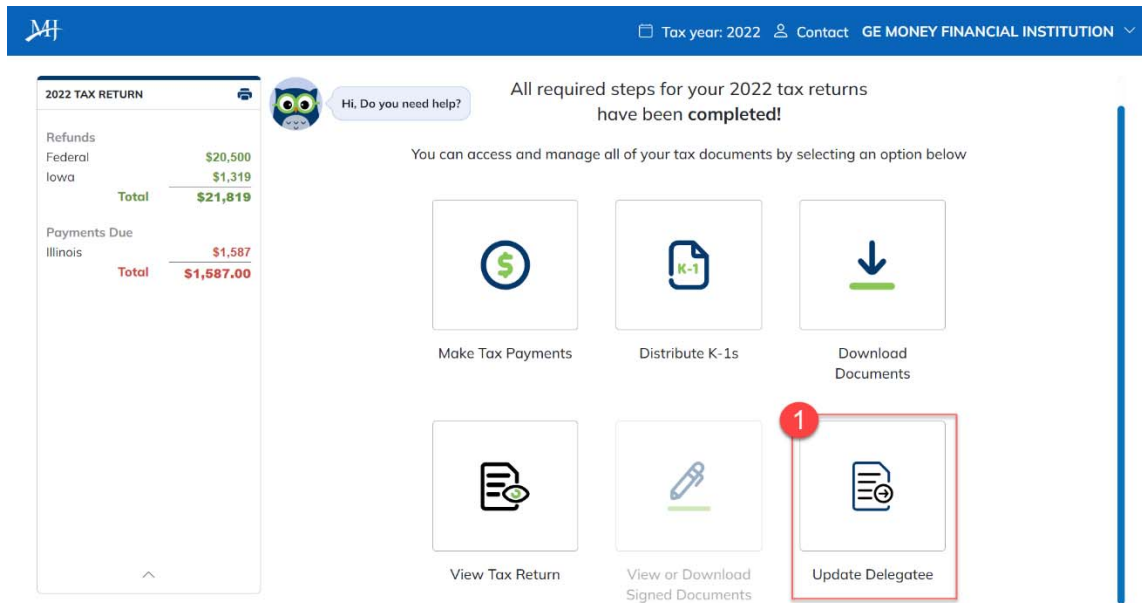
The screenshot shows the '2022 TAX RETURN' summary page. On the left, there is a table of Refunds and Payments Due. The main area displays a message: 'All required steps for your 2022 tax returns have been completed!' and 'You can access and manage all of your tax documents by selecting an option below'. Five options are shown as cards: 'Make Tax Payments', 'Distribute K-1s', 'Download Documents', 'View Tax Return', and 'Update Delegatee'. The 'Update Delegatee' card is highlighted with a red box and a red circle containing the number '1'.

2022 TAX RETURN	
Refunds	
Federal	\$20,500
Iowa	\$1,319
Total	\$21,819
Payments Due	
Illinois	\$1,587
Total	\$1,587.00

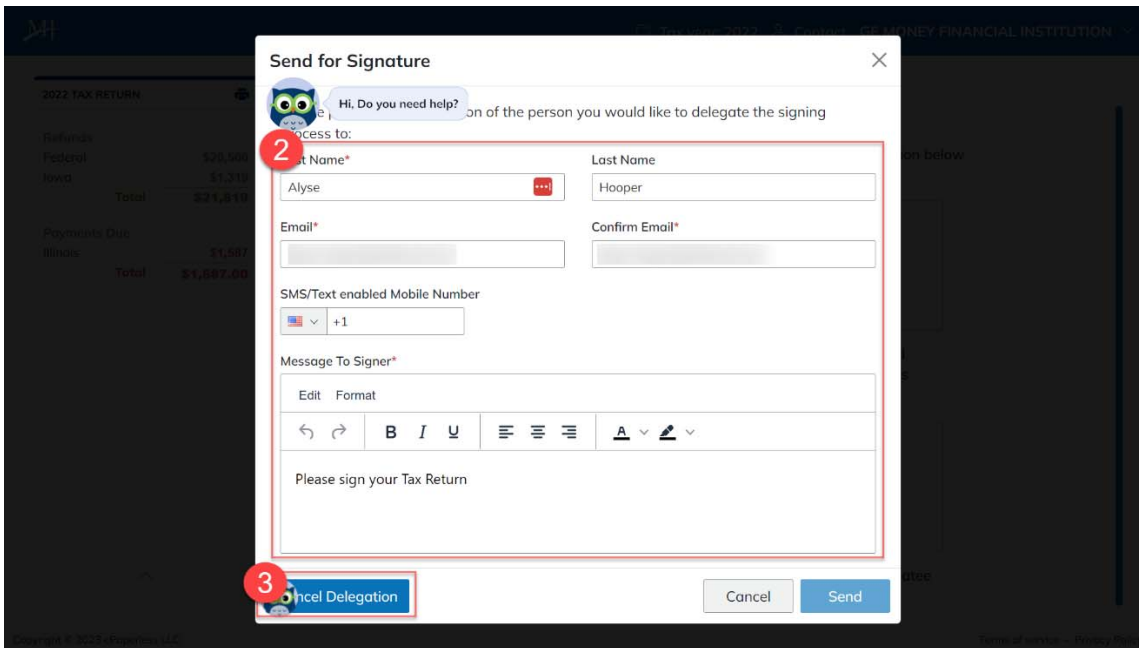
The screenshot shows a 'Send for Signature' modal form. It includes a header with a help icon and the text 'Hi, Do you need help?'. Below the header, it says 'Access to: [Name] on the person you would like to delegate the signing'. The form contains several input fields: 'First Name*' (Alyse), 'Last Name' (Hooper), 'Email*', 'Confirm Email*', and 'SMS/Text enabled Mobile Number' (+1). There is a 'Message To Signer*' section with a rich text editor containing the text 'Please sign your Tax Return'. At the bottom, there are 'Cancel' and 'Send' buttons. A red box highlights the form fields, and a red circle with the number '2' is next to the 'First Name' field. Another red circle with the number '3' is next to the 'Send' button.

Cancel Delegation

1. Click **Update Delegatee**.



2. Click **Cancel Delegation**.
3. Enter the **Reason for the cancellation** (required field).



4. Click **Submit**.
5. Click **Resume** to complete signing.

Reason for Cancellation



Cancel

4

Submit

The screenshot shows a document signing workflow with steps: Summary, Review, Sign, Distribute, and Pay. A dialog box titled "Sign Process Recovery Confirmation" is overlaid, asking "Would like to resume where you left off or start over?". The dialog has two buttons: "Start over" and "Resume". A red circle with the number "5" is positioned over the "Resume" button. The background shows a document with a signature line and a "K-3" icon.

Sign Process Recovery Confirmation



Would like to resume where you left off or start over ?

Start over

5

Resume