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How to do e-signature or send a printable return(pdf file) to tax payer's email?

We integrate myTaxExpress/T2Express software with www.docsign.ca to allow you to get e-signature (T183/T1013 etc) from tax payer online; or deliver printable tax return file (pdf file) to tax payer using a simple password. All you need to do is clicking some buttons inside myTaxExpress/T2Express software.

A paid points system to control is utilized to control these new features. You need to set up an email/password account through mytaxexpress ticket support portal first. We can give you some free points to try this new feature, ask us for details.

<https://www.mytaxexpress.com/support/account.php?do=create>

Next you need to pay for the points for your account created above. Right now, every \$1 is 10 points. To deliver a document for one S.I.N. costs 2 points; and 10 points for asking e-signature per form type and per S.I.N.

The points are paid from this link:

<https://www.mytaxexpress.com/otherpay.html>

To send a T183 or E-Auth for e-signature, please follow these steps:

Step 1. Enter support ticket account email/password in preference for Doc-Sign/Doc-Delivery

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Step 2: Enter tax payer's contact email on page 1 of T1. Note there are two email fields, the other is specifically for CRA online mail.

Step 3: Fill form T183 or E-Auth (T1013) into tax return. Then choose menu "Start | Submit Document for E-Signature"

Step 4: Software will generate a print for the chosen tax form. You can review the print before sending the document for delivery or e-signature.

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Step 5: Confirm to send document for Doc-Signature or Doc-Delivery by click "OK" button.

Step 6: Both you and tax payer will get emails about E-Signature request. After tax payer signs the document online, you will get email notification and a download link for the signed document.

Note: By default, the **last 4 digits** of client's SIN are used as password for client to login e-sign/e-delivery web pages.

To send printable return files (pdf) to tax payers, do the following:

1. Do tax return print as usual for client copy option
2. Review the printable pdf file
3. Software will ask you if you want to send pdf file for Doc-Delivery and follow the step 3 in E-Signature process

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