

Complete an eSign Request

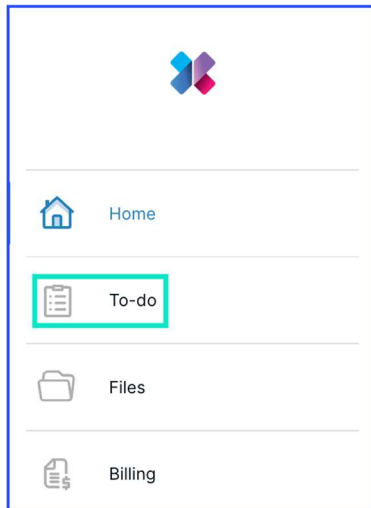
Your account may send you a request to securely sign documents electronically. You can add your signature to documents in the Client Portal by utilizing Canopy's eSign feature. eSign Requests will appear on your To-do list in the Client Portal

and are represented by a pen signing icon.

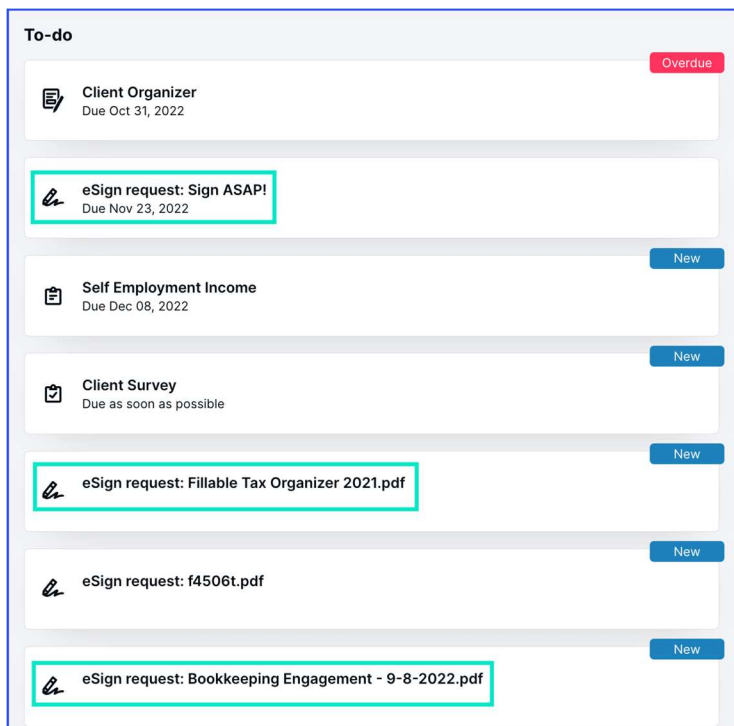


To get started, log in to your [Client Portal](#).

1. Navigate to your *To-do* list on the left-side column.

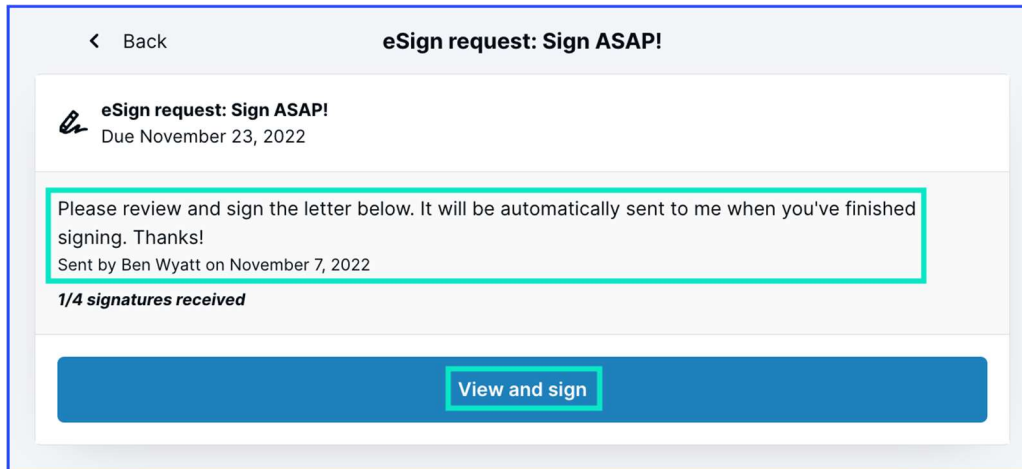


2. Select an *eSign Request* from the To-do list. eSign Requests are represented by a pen signing icon.



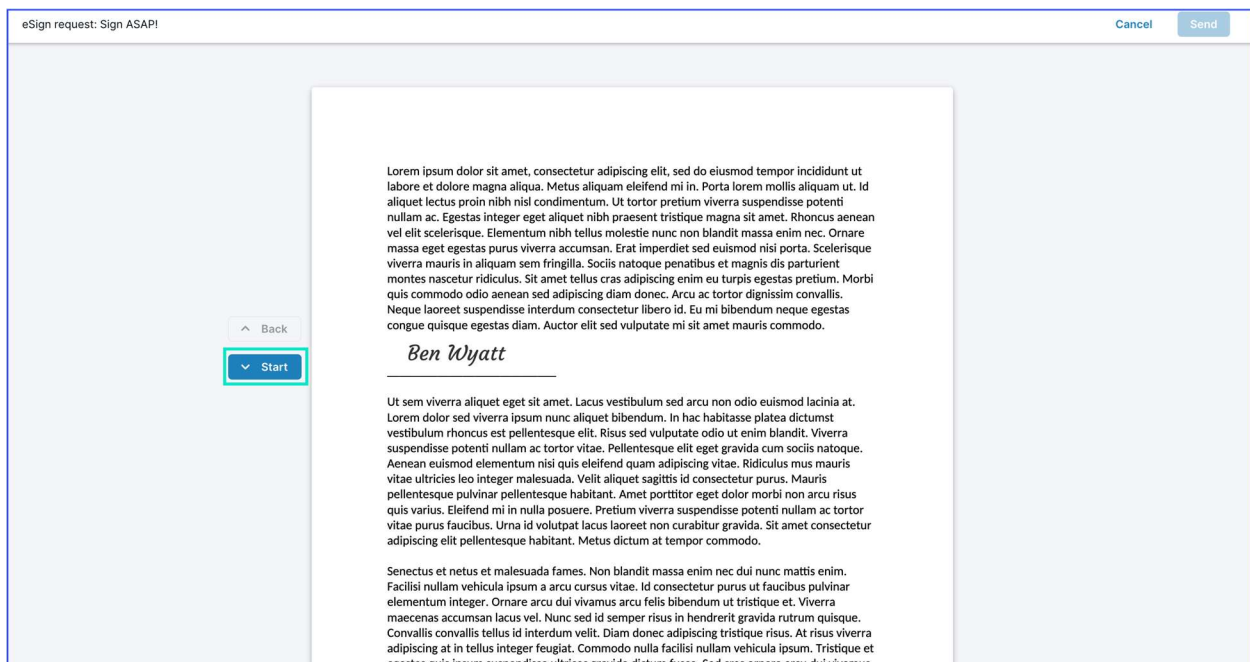
3. Review any instructions or comments provided by your accountant.

4. Click on *View and sign* to see the document.

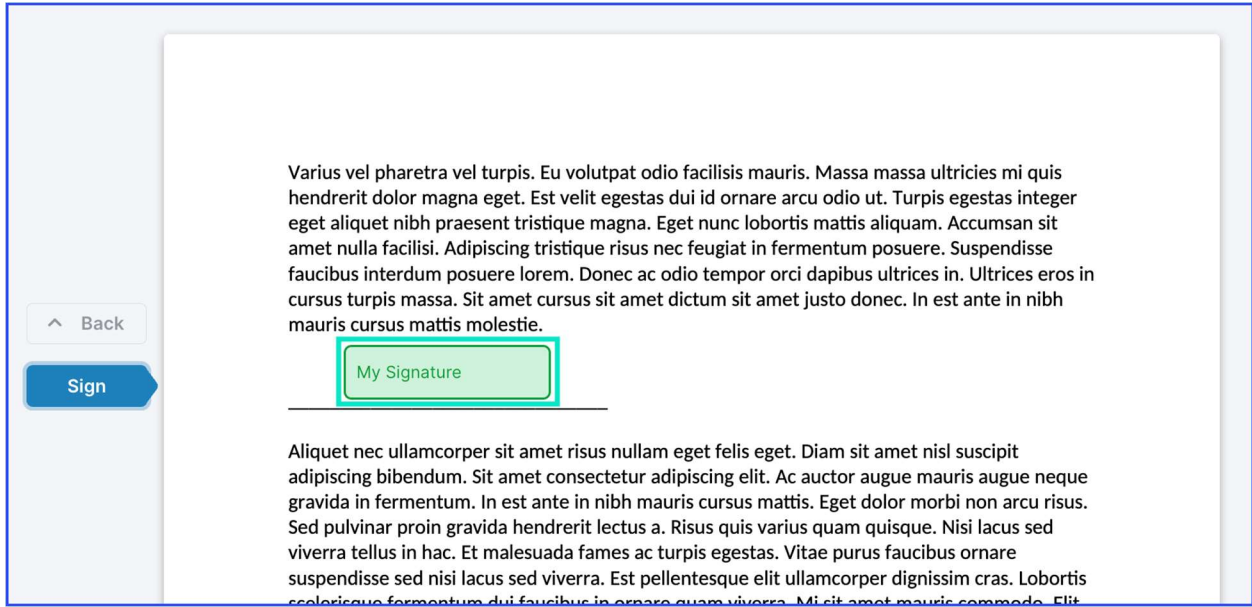


You will see a **Start** and **Back** button on the left-hand side of the document.

5. Click **Start**.



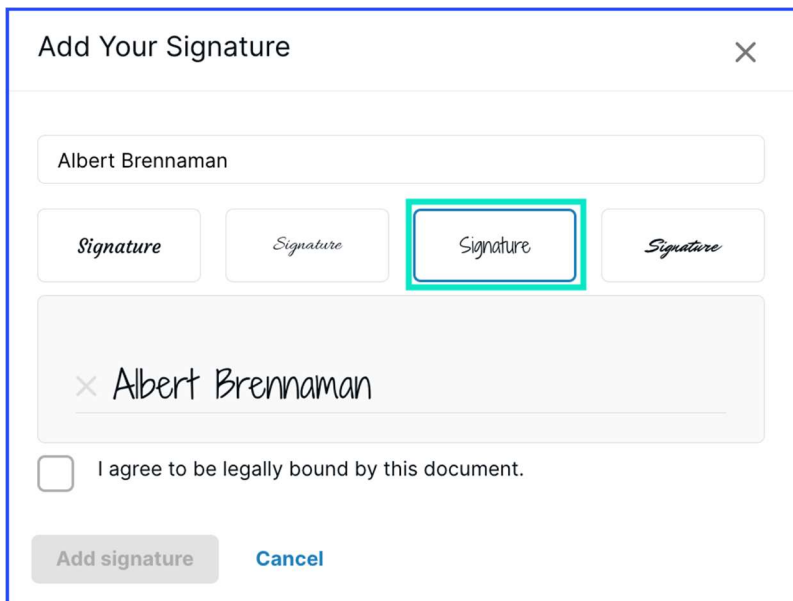
6. Click on the green *My Signature* box.



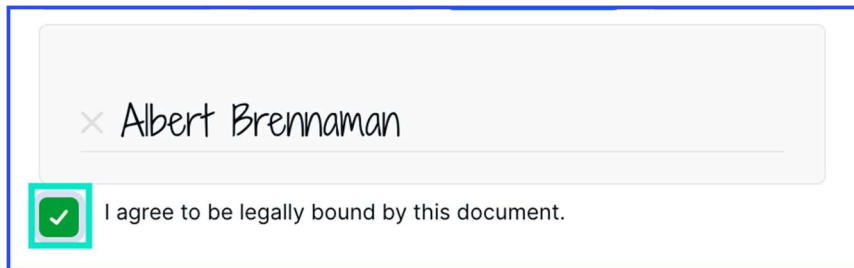
7. Enter your name in the provided text box.



8. Select a *Signature Style* from the available options.

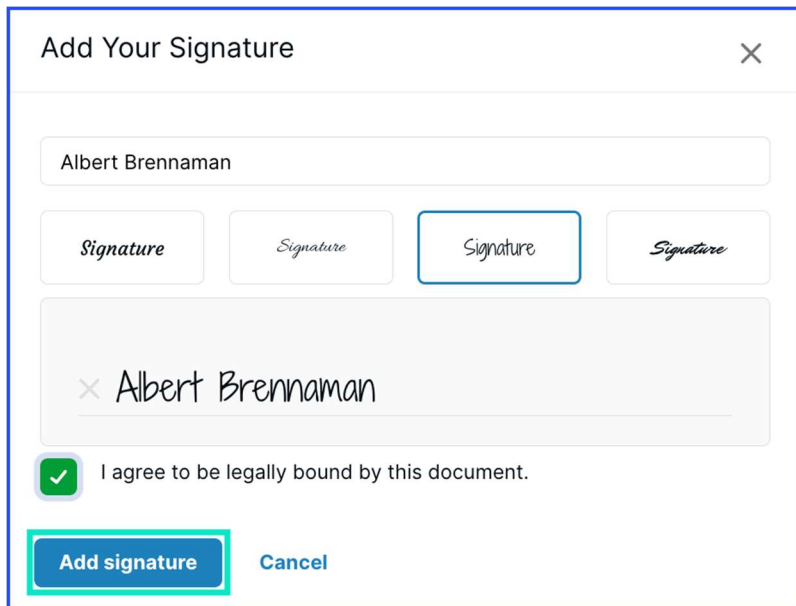


9. Check the *I agree to be legally bound by this document* box.



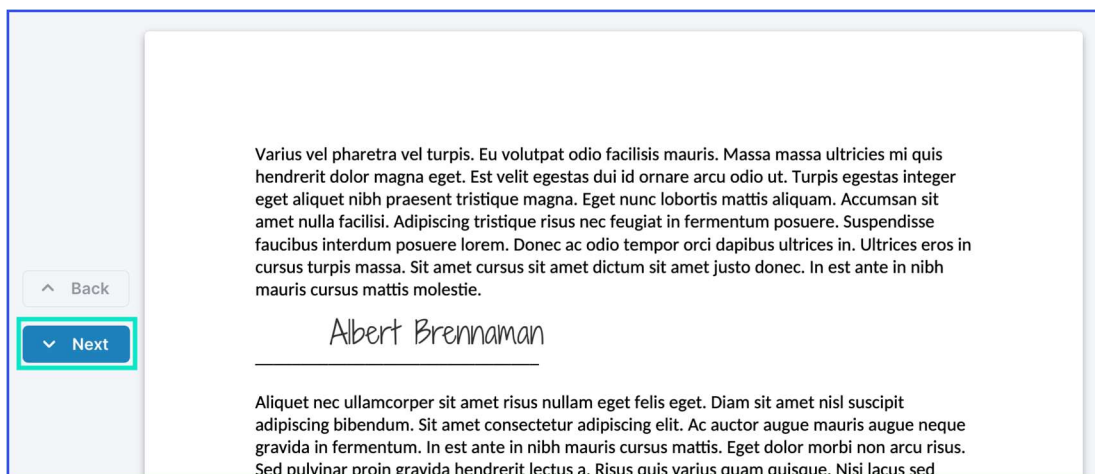
A screenshot of a signature box. At the top, there is a text input field containing the name "Albert Brennaman" with a small 'x' icon to its left. Below this, there is a checkbox that is checked, with the text "I agree to be legally bound by this document." to its right.

10. Click *Add signature*.



A screenshot of a dialog box titled "Add Your Signature" with a close button (X) in the top right corner. Inside the dialog, there is a text input field containing "Albert Brennaman". Below this, there are four buttons, each labeled "Signature" in a cursive font. The third button from the left is highlighted with a blue border. Below these buttons, there is a signature preview area showing the name "Albert Brennaman" with a small 'x' icon to its left. At the bottom left, there is a checked checkbox with the text "I agree to be legally bound by this document.". At the bottom, there are two buttons: "Add signature" (highlighted with a blue border) and "Cancel".

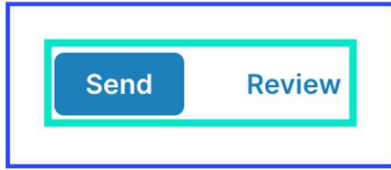
11. Select *Next*.



A screenshot of a document page. On the left side, there is a vertical sidebar with two buttons: "Back" and "Next". The "Next" button is highlighted with a blue border. The main content area of the page contains a paragraph of placeholder text: "Varius vel pharetra vel turpis. Eu volutpat odio facilisis mauris. Massa massa ultricies mi quis hendrerit dolor magna eget. Est velit egestas dui id ornare arcu odio ut. Turpis egestas integer eget aliquet nibh praesent tristique magna. Eget nunc lobortis mattis aliquam. Accumsan sit amet nulla facilisi. Adipiscing tristique risus nec feugiat in fermentum posuere. Suspendisse faucibus interdum posuere lorem. Donec ac odio tempor orci dapibus ultrices in. Ultrices eros in cursus turpis massa. Sit amet cursus sit amet dictum sit amet justo donec. In est ante in nibh mauris cursus mattis molestie." Below the text, there is a signature line with the name "Albert Brennaman" written in a cursive font. Below the signature, there is another paragraph of placeholder text: "Aliquet nec ullamcorper sit amet risus nullam eget felis eget. Diam sit amet nisl suscipit adipiscing bibendum. Sit amet consectetur adipiscing elit. Ac auctor augue mauris augue neque gravida in fermentum. In est ante in nibh mauris cursus mattis. Eget dolor morbi non arcu risus. Sed pulvinar proin gravida hendrerit lectus a. Risus quis varius quam quisque. Nisi lacus sed".

Continue signing until you've completed all **assigned** signature fields.

12. To complete the eSign, click *Send* on the top-right and bottom of the page or *Review* at the bottom of the document.



To review the document, simply select **Review** and click the **Next** and **Back** buttons as needed!

Complete Knowledge-Based Authentication

Knowledge-based authentication (KBA) allows your accountant to verify that the correct individual has signed a document. When your accountant sends you a KBA eSign request, you will be required to enter authentication information to verify your identity. The authentication process is timed. If the authentication process is failed twice, you will be required to manually sign the document. To get started with the KBA process, navigate to your **To-do List** in the client portal.

1. Select an *eSign Request* from the To-do list. eSign

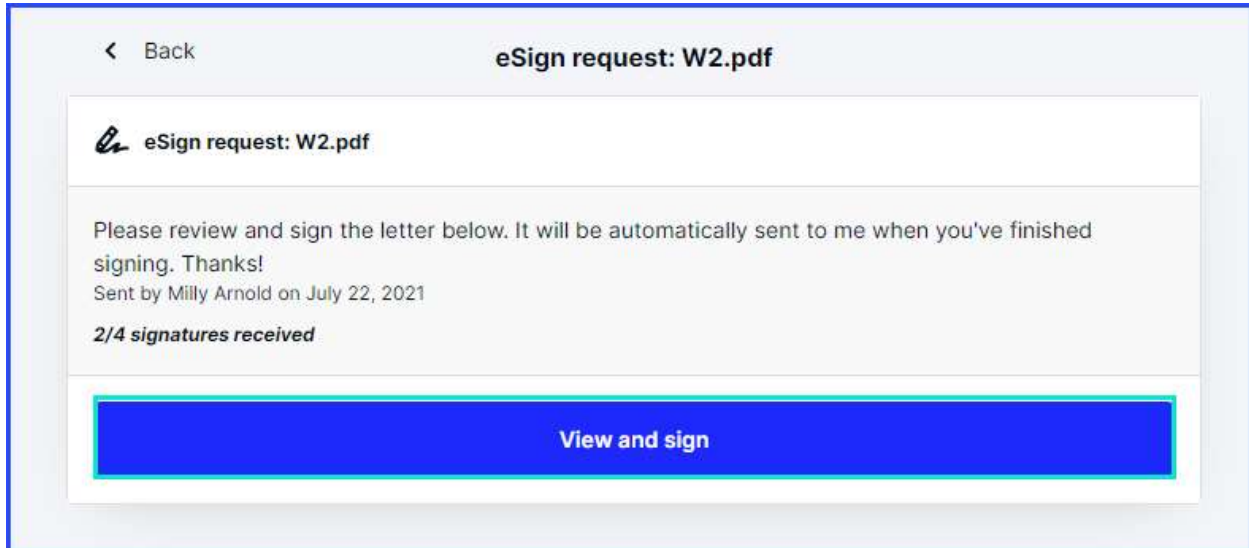
Requests are represented by a pen signing icon.



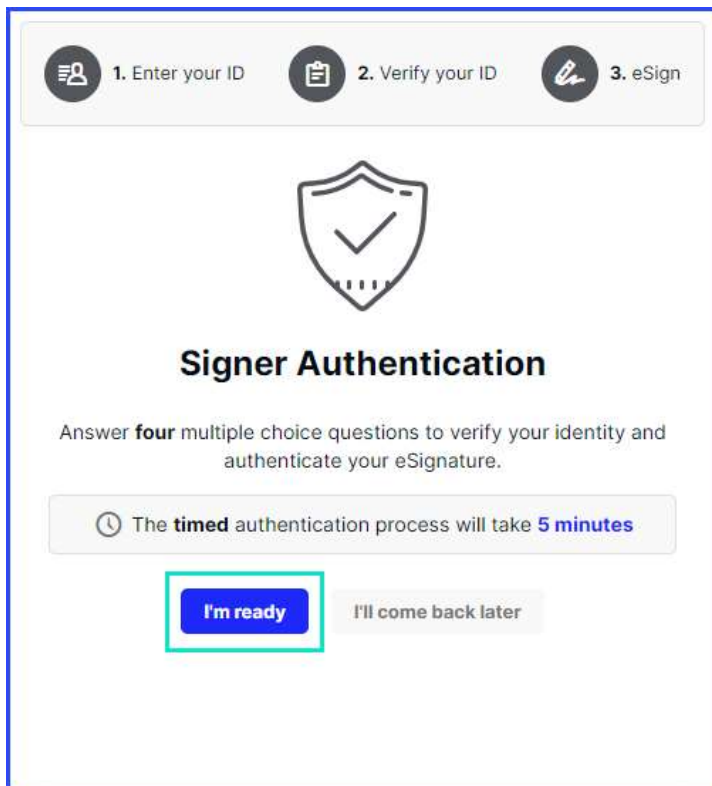
The screenshot displays a list of tasks in a client portal. The tasks are as follows:

- Client Survey** (Due Jun 04, 2025) with a "New" button.
- eSign request: Legal Agreement.docx** (highlighted with a red border and a pen icon).
- Form** (with a clipboard icon).
- Form** (with a clipboard icon).
- Client Organizer** (with a "New" button).
- eSign request: W4.pdf** (highlighted with a red border and a pen icon).
- eSign request: 2018 Return Info.pdf** (highlighted with a red border and a pen icon).

2. Click on *View and sign* to see the document.



3. Click *I'm ready* to begin the Signer Authentication process.



4. Enter your *ID* information and click *Begin*.

The screenshot shows a progress bar at the top with three steps: '1. Enter your ID' (active, green), '2. Verify your ID' (inactive, grey), and '3. eSign' (inactive, grey). Below the progress bar is a blue header with a checkmark icon and the text 'Signer Authentication'. The form contains several input fields: '*Legal name' with two sub-fields containing 'Luna' and 'Lovewell'; '*Address' with two sub-fields containing '123 Road rd' and 'Street 2'; a location field with 'Lehi', a state dropdown menu set to 'Utah', and a ZIP code field with '12345'; '*Birthdate' with '10/10/1990'; and '*Social Security number' with '000-00-0000'. At the bottom left, a blue 'Begin' button is highlighted with a green border.

5. Select an answer for the authentication questions and click *Next*.

The screenshot shows the same progress bar as in step 1, but now '1. Enter your ID' is marked with a green checkmark, and '2. Verify your ID' is active, marked with a green checkmark and a clipboard icon. A blue banner below the progress bar reads 'Question 1 of 4'. The 'Signer Authentication' header is present. The question text is 'In which of the following cities does 'Teo Luna' currently live or own property?'. Below the question are five radio button options: 'Corona, California', 'Fresno, California', 'Oakland, California', 'Stockton, California', and 'None of the above or I am not familiar with this person'. At the bottom left, a grey 'Next' button is highlighted with a green border.

6. Select an answer for the final section and click **Submit answers**.

1. Enter your ID 2. Verify your ID 3. eSign

Question 4 of 4

Signer Authentication

Which of the following boats or watercrafts have you owned?

14 ft. Leisure Life Rogue River

14 ft. Panther Boat Bass

18 ft. Boston Whaler Boston

24 ft. Tracker Marine L.p. 2005

None of the above

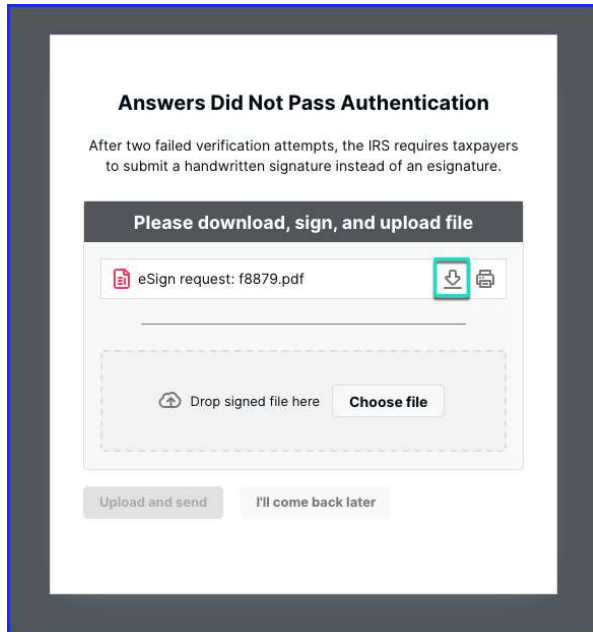
Submit answers

7. Follow the eSign instructions [above](#).

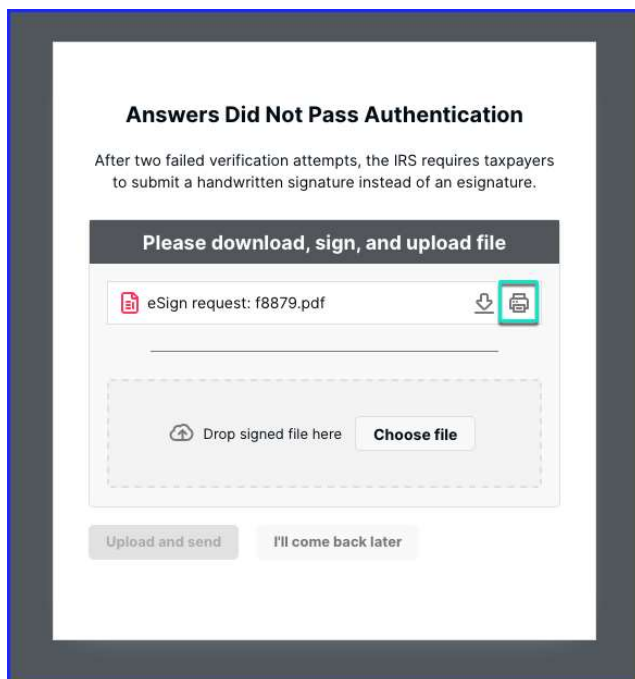
Complete eSign After a Failed KBA

If you fail the KBA process twice, you will be unable to use the online eSign function. Instead, you will need to download, print, and manually sign the document. Once manually signed, you can upload the document to the eSign request.

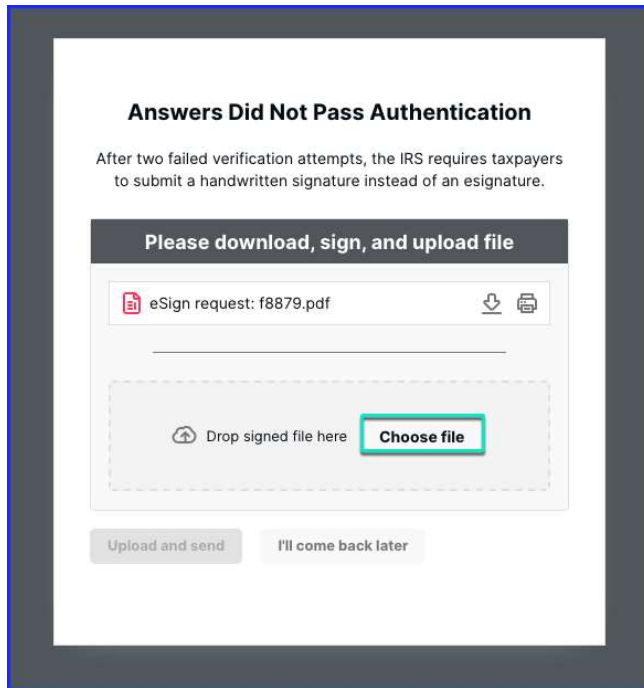
1. Click the *Download* icon to download the eSign document.



2. Click *Print* icon to print the document.

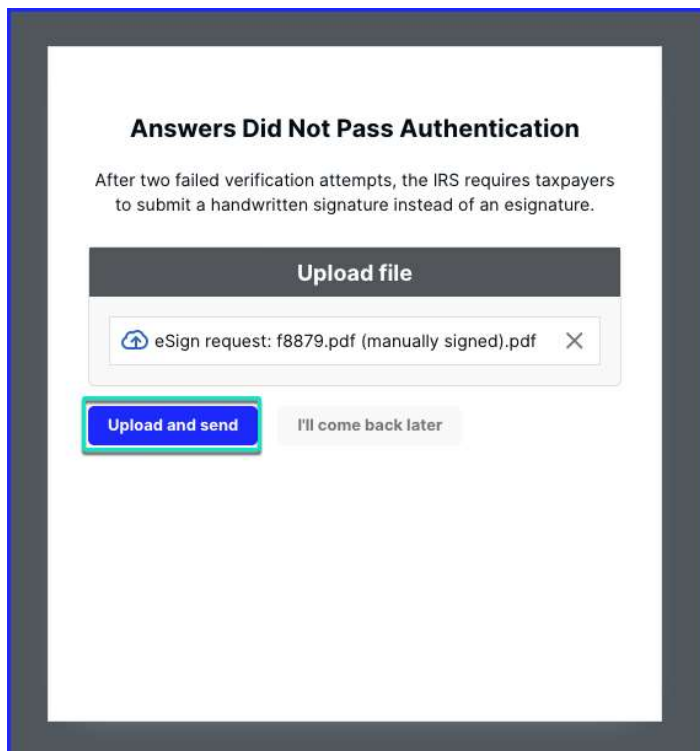


3. Sign the document and scan it to your computer.
4. Click ***Choose file*** and select the signed file from your computer.



5. Click ***Upload and send***.

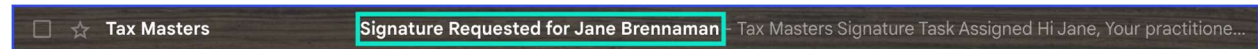
The signed file will be sent to your accountant for review.



Complete an eSign Request with Secure Links

Alternatively, you do not have to be invited to the client portal in order to sign documents. Your practitioner may choose to send an eSign request through email, using secure links.

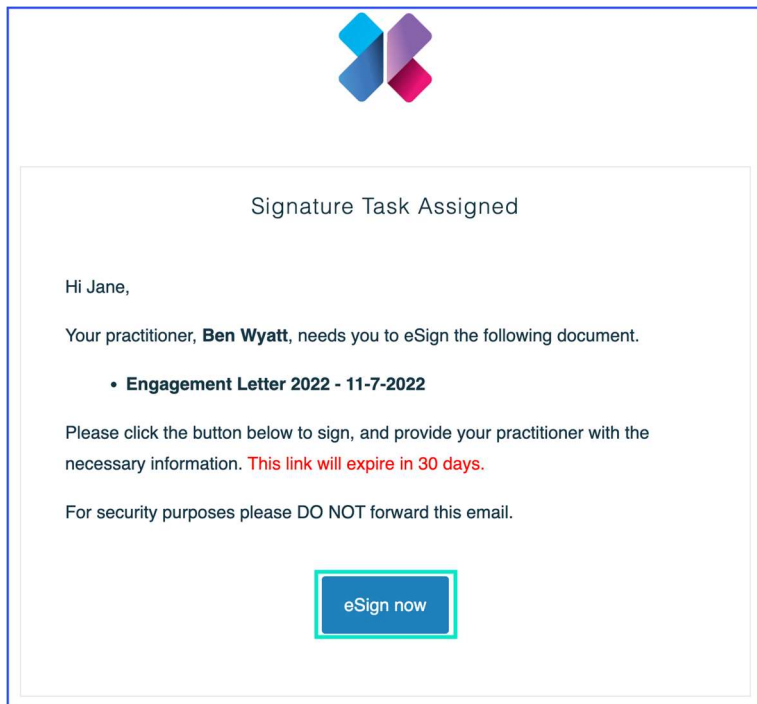
1. Navigate to the eSign request email from your practitioner.



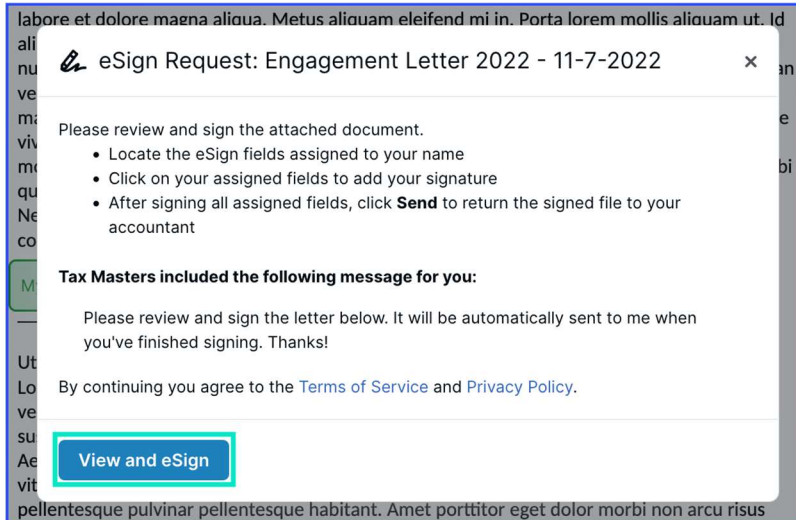
2. Click eSign now

Please Note: The link to the eSign will expire 30 days from the opening link.

Warning: Under no circumstances should you forward this email!

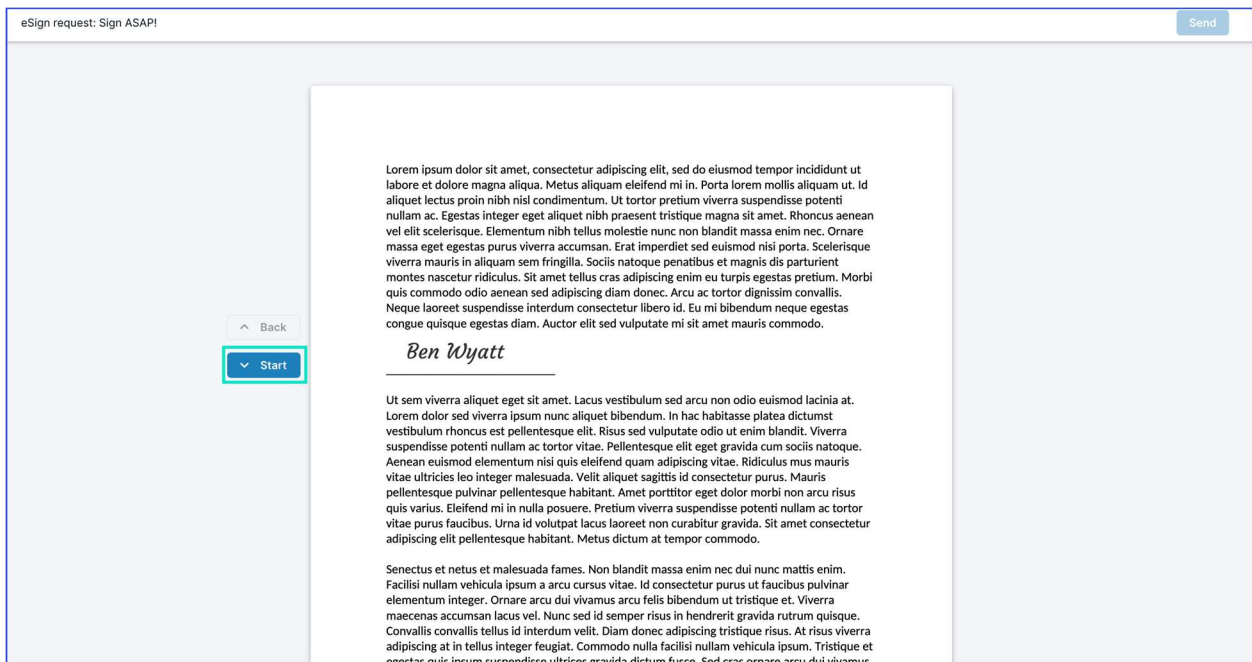


3. Once the page opens, click **View and eSign**.

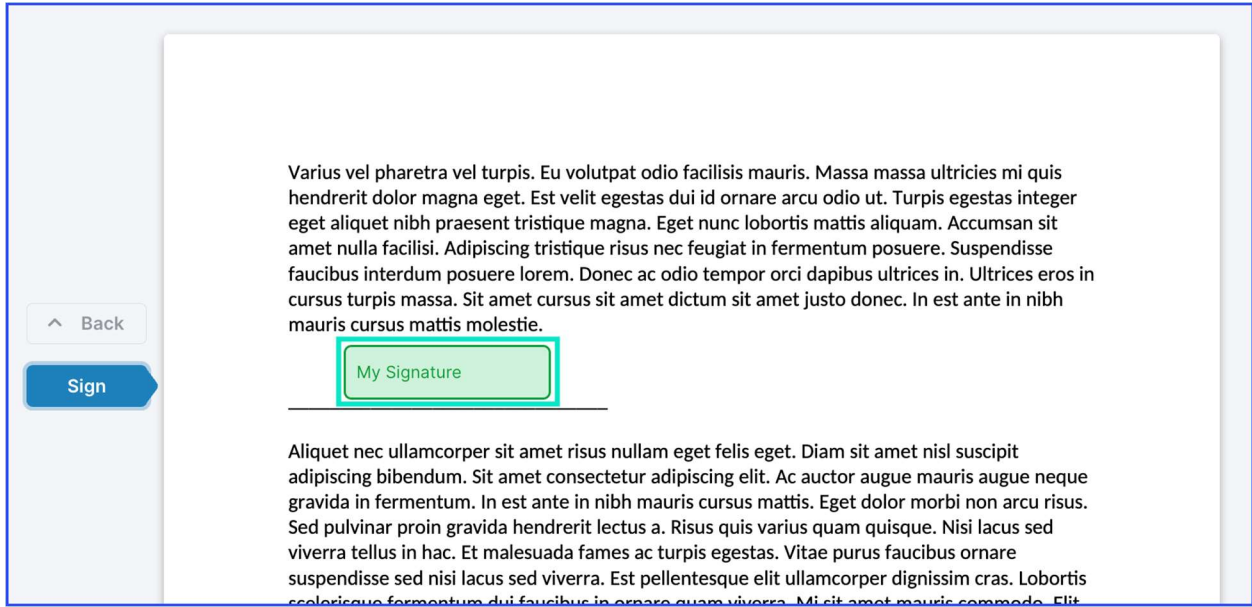


You will see a **Start** and **Back** button on the left-hand side of the document.

4. Click **Start**.



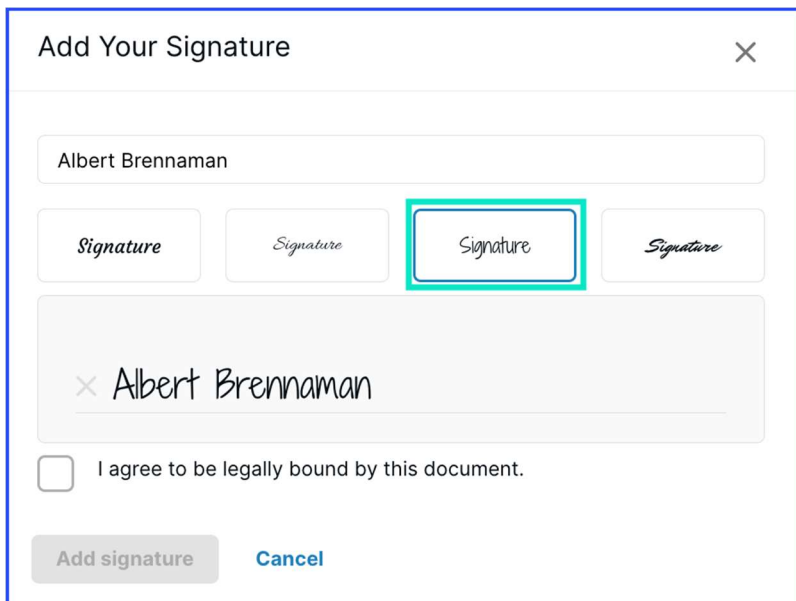
5. Click on the green *My Signature* box.



6. Enter your name in the provided text box.



7. Select a *Signature Style* from the available options.



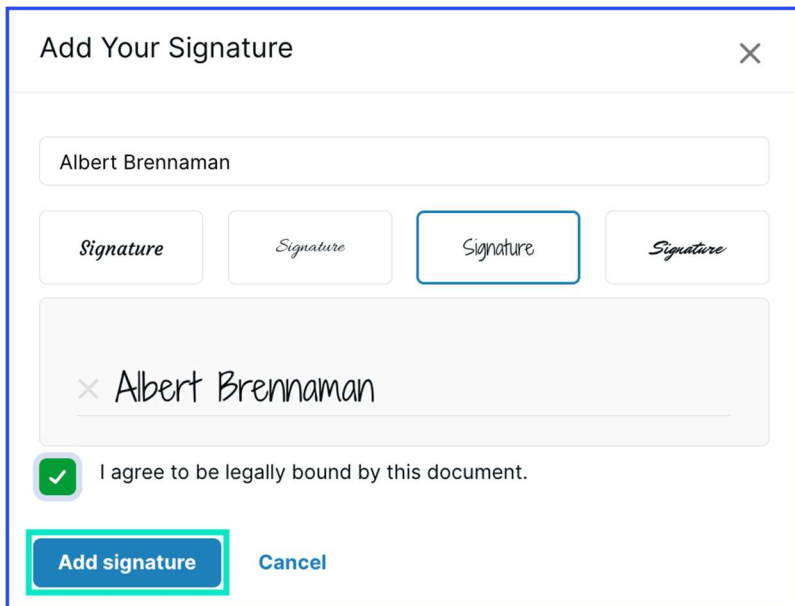
8. Check the *I agree to be legally bound by this document box.*



Albert Brennaman

I agree to be legally bound by this document.

9. Click *Add signature.*



Add Your Signature

Albert Brennaman

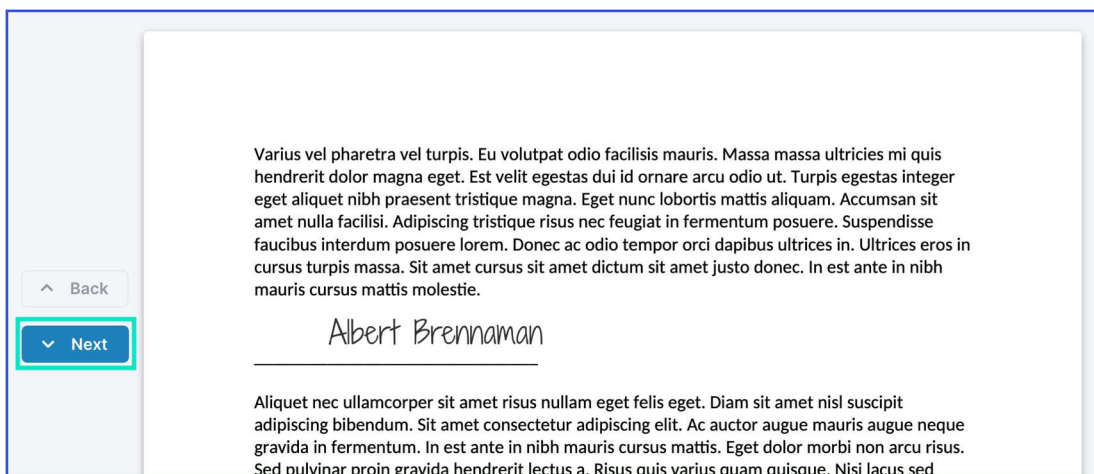
Signature Signature Signature Signature

Albert Brennaman

I agree to be legally bound by this document.

Add signature Cancel

10. Select *Next.*



Varius vel pharetra vel turpis. Eu volutpat odio facilisis mauris. Massa massa ultricies mi quis hendrerit dolor magna eget. Est velit egestas dui id ornare arcu odio ut. Turpis egestas integer eget aliquet nibh praesent tristique magna. Eget nunc lobortis mattis aliquam. Accumsan sit amet nulla facilisi. Adipiscing tristique risus nec feugiat in fermentum posuere. Suspendisse faucibus interdum posuere lorem. Donec ac odio tempor orci dapibus ultrices in. Ultrices eros in cursus turpis massa. Sit amet cursus sit amet dictum sit amet justo donec. In est ante in nibh mauris cursus mattis molestie.

Albert Brennaman

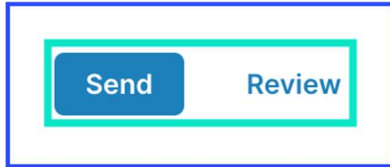
Aliquet nec ullamcorper sit amet risus nullam eget felis eget. Diam sit amet nisl suscipit adipiscing bibendum. Sit amet consectetur adipiscing elit. Ac auctor augue mauris augue neque gravida in fermentum. In est ante in nibh mauris cursus mattis. Eget dolor morbi non arcu risus. Sed pulvinar proin gravida hendrerit lectus a. Risus quis varius quam quisque. Nisi lacus sed

Back

Next

Continue signing until you've completed all **assigned** signature fields.

11. To complete the eSign, click *Send* on the top-right and bottom of the page or *Review* at the bottom of the document.



To review the document, simply select **Review** and click the **Next** and **Back** buttons as needed!

12. Once the file is successfully sent, you are done!

