
Tax Teams Count on DocuSign to Meet Client Expectations

Client expectations have never been higher. In addition to tax and accounting assistance, clients increasingly expect – and should have – the ability to conduct business securely through mobile-friendly, digital tools at the place and time that works best for them. At the same time, the IRS continues to adopt electronic filing and digital solutions, compelling accounting firms to comply with submission and reporting regulations for tax e-file signature and client agreements. With the DocuSign Agreement Cloud, tax and accounting firms can increase productivity and reduce risk while continuing to expand the practice.

Streamline compliance management

DocuSign is an IRS-approved provider that empowers tax accountants to quickly attain signature authorization for e-filing tax forms on behalf of their clients. This accelerates contract turnaround and provides better visibility into the status of documents during tax season to other critical submission deadlines. DocuSign eSignature integrates with key IRS-compliant systems such as Intuit, Sage and Xero.

Grow the practice

Streamline and scale client onboarding and management across the organization – tax, advisory and assurance. Transitioning to digital agreements offers a competitive advantage by improving the client experience with modern technology. DocuSign standardizes complex client onboarding documents, accelerates the signature process and allows tax professionals to spend more time with clients and less on administration.

Increase operational efficiency

As more firms are shifting from hourly to value-based billing, efficiency is critical. Clients now pay flat fees for various services, forcing firms to accelerate processes in order to realize greater profitability. Digitization reduces nonbillable time chasing clients down to sign key documents, eliminates paper waste, automates client onboarding processes and reduces administrative costs.

Simplify seasonal hiring and onboarding

Take the headache out of hiring seasonal staff and ensure you are hiring staff you can trust with your clients' financial data. DocuSign helps accounting firms provide a digital onboarding experience while alleviating the need for follow-up and rework.

Texas Tax Protest

Reduced transaction
time by

75%

from 12 days to 3 days

“DocuSign virtually eliminated the possibility of the wrong contract, wrong or missing signature and lost documents. We went from a 20% error rate to basically zero.”

Craig Petz
Vice President
Petz Enterprises

The DocuSign Agreement Cloud for tax and accounting addresses the critical document management bottlenecks across the client engagement process. By automating and tracking the end-to-end process of complying with tax e-file signatures and client agreement regulations, DocuSign provides a great experience for all parties.

eSignature

Securely send tax forms and agreements for electronic signature and maintain a complete audit trail.

Identify

Choose from a suite of proven authentication and ID verification options to securely access tax forms and documents.

DocuSign CLM

Automate the contract lifecycle with document generation, collaboration, execution, analytics and a searchable agreement repository.

Integrations

Easily embed DocuSign into your existing tools with 350+ prebuilt integrations with leading tax and accounting platforms and other critical business systems including Intuit, Sage, LaCerte, Thomson Reuters, Salesforce, Oracle NetSuite, Workday and more.

Use case examples

Electronic Tax Filing

IRS Forms 8878 and 8879

Client Engagement

Engagement letters
Practice continuation agreements
NDA
Rate cards

Client Services

Final reports
Audit acceptance
Power of attorney agreements
LLC formation
Invoicing and payments

Hiring / Staff Onboarding

Offer letters
Independent contractor agreements
Consent for background check
Tax forms (W4, I9)
Employee handbook

Learn more about [taxes and accounting with DocuSign](#)

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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