



Detailed instructions for E-Signing & returning your Tax Return



Minert & Associates, PLLC

CERTIFIED PUBLIC ACCOUNTANTS

Relieving Your Financial Stress.

STEP 1: Receive email from Minert & Associates, PLLC

***For Couples:** each person receives an email notifying them to review & sign their tax return. Need to go through their own email address to access & sign e-file forms.

☐ ● **Minert & Associates, PLLC**

☆ **Your tax return is ready for review** Hi Tony & Stephanie Minert, We are pleased to inform you that your 2023 Tax Return is now available for y...

3:37 PM



Hi Tony & Stephanie Minert,

We are pleased to inform you that your 2023 Tax Return is now available for your review. Kindly take a moment to review and sign the return by clicking on the link below. The link will also display any outstanding balance owed to the tax authority.

The results are as follows:

Federal A balance due of \$896 to be auto withdrawn, per your instructions, on 2-19-24

State A balance due of \$640 to be auto withdrawn, per your instructions, on 2-19-24

Once we receive your signed e-file authorization form, we will proceed with e-filing the tax return.

Thank you,

Minert & Associates, PLLC

[Open Tax Return](#)

STEP 2: Open email

STEP 3: Click Open Tax Return

Note- After 1st person signs return, log out of your portal account.

Current Entity:

Minert, Tony and Stephanie

[Switch Entity](#)



Tony Minert



[Log Out](#)

For Couples-Cont: You can also login to your portal's dashboard and click on **View tax return** to review & sign Tax Return.

The screenshot shows the dashboard for Stephanie Minert. At the top right, the current entity is listed as "Minert, Tony and Stephanie" with a "Switch Entity" button and a user profile dropdown menu containing "Stephanie Minert". The main header area says "Welcome, Stephanie Minert!" and includes navigation links for "Dashboard", "Documents", and "Profile". A light blue notification bar states "You currently have no open questionnaires." Below this, a white box titled "2023 Tax Return" contains the text "To view this tax return 2023 Tax Return to Review & Sign (3).pdf, please click the button below." and a list item "• 2 forms to sign." A blue button labeled "View tax return" is circled in red. At the bottom of the page, there are links for "Terms of Service", "Privacy Policy", and "Help".

The screenshot shows the dashboard for Tony Minert. At the top right, the current entity is listed as "Minert, Tony and Stephanie" with a "Switch Entity" button and a user profile dropdown menu containing "Tony Minert" and "Log Out". The main header area says "Welcome, Tony Minert!" and includes navigation links for "Dashboard", "Documents", and "Profile".

Each individual must sign into their own portal account to sign return.

If accessing email or portal account from same computer, 1st person **MUST log out** of their portal account, so 2nd person can login. Otherwise, you'll automatically be taken to first person's portal account.

STEP 4: Review Tax Return – use arrows at top of page to flip through tax return

← 1 Review tax return 2 Sign electronically

Please review the tax return. Once you have finished reviewing it, please click the Next button.

Next →

← Page: 1 / 23 →

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Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return **2022** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying surviving spouse (QSS)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent.

Your first name and middle initial | Last name | Your social security number

STEP 5: Click Next -> to E-sign your tax return

Current Entity: **Minert, Tony and Stephanie** [Switch Entity](#) Stephanie Minert

Welcome, Stephanie Minert!

Dashboard Documents Profile

You can add files by clicking on the add icon on the right or just by dragging and dropping files to this section. Do not include slashes (/) or periods (.) when renaming files.

Current Folder: 2023 Tax Return from M&A

Search

Name	Description	Last Modified	Actions
<input type="checkbox"/> 2023 Tax Return - Client Copy.pdf	-	Feb 8, 2024 3:38 PM	

Terms of Service - Privacy Policy - Help

Note: For your records, a copy of your Tax Return is in your Portal's Documents 2023/2023 Tax Return from M&A folder

STEP 6: Review Federal & State Filing Instructions – (1st & 2nd pages)

Click **Next** -> to go to next page or click back arrow to go back

ⓘ You've signed this page. Please click **Next** to continue. 1 / 4



10077TM

MINERT & ASSOCIATES
2488 E 81st St Ste 145
TULSA, OK 74137
918-742-1616

October 23, 2023

CONFIDENTIAL

TONY R & STEPHANIE L MINERT

Dear TONY & STEPHANIE:

We have prepared the following returns from information provided by you without verification or audit:

U.S. Individual Income Tax Return (Form 1040)
Oklahoma Income Tax Return (Form 511)

We suggest that you examine these returns carefully to fully acquaint yourself with all items contained therein to ensure that there are no omissions or misstatements.

STEP 7: E-Sign your IRS e-file Signature Authorization form

Click on Sign here

← Review tax return 2 Sign electronically

Please click the Sign Here button below to sign the pages. You've signed this page. Please click Next to continue. 3 / 4

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Form **8879**
(Rev. January 2021)
Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.
▶ Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

Submission Identification Number (SID) ▶

to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize MINERT & ASSOCIATES to enter or generate my PIN 93416 as my signature on the income tax return (original or amended) I am now authorizing. ERO firm name Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this 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 ▶ _____ Date ▶ _____

Spouse's PIN: check one box only

I authorize MINERT & ASSOCIATES to enter or generate my PIN 03262 as my signature on the income tax return (original or amended) I am now authorizing. ERO firm name Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this 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 ▶ **Sign here** _____ Date ▶ _____

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.

Don't enter all zeros

Signature box pops up

Signature

Draw Type

Clear Sign Close

STEP 8: You can either Type or Draw your signature.

Then click Sign



Note: If you pick draw, and is illegible, click clear and start again.

*Make sure there is a legible signature before clicking Sign.

Signature and date will appear. Click next if you have a state e-file authorization form

← Review tax return 2 Sign electronically

ⓘ You've signed this page. Please click **Next** to continue. 3 / 4

← **Next** →

to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This

Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

- I authorize MINERT & ASSOCIATES to enter or generate my PIN _____ as my signature on the income tax return (original or amended) I am now authorizing. ERO firm name Enter five digits, but don't enter all zeros
- I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. 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 ▶ _____ Date ▶ _____

Spouse's PIN: check one box only

- I authorize MINERT & ASSOCIATES to enter or generate my PIN _____ as my signature on the income tax return (original or amended) I am now authorizing. ERO firm name Enter five digits, but don't enter all zeros
- I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. 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 ▶ Stephanie Minert Date ▶ 02/13/2024



Practitioner PIN Method Returns Only—continue below

Part III Certification and Authentication — Practitioner PIN Method Only

Click sign here.

Please click the Sign Here button below to sign the pages. You've signed this page. Please click Next to continue. 4 / 4

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Oklahoma Individual Income Tax Declaration for Electronic Filing

NOTE: Do not mail Oklahoma Tax Return - Form 511 or Form 511-NR.
See instructions on Page 2 to determine if you are required to send Form 511-EF to the OTC.

2022
Form 511-EF

If I have filed a balance due return, I understand that if the Oklahoma Tax Commission (OTC) does not receive full and timely payment of my tax liability, I will remain liable for the tax liability and all applicable interest and penalties.

Under penalties of perjury, I declare I have compared the information contained on my return, with information I have provided to my Electronic Return Originator (ERO), and the amounts described in Part One above, agree with the amounts shown on the corresponding lines of my 2022 Oklahoma income tax return. To the best of my knowledge and belief, my return is true, correct, and complete. I consent that my return, including this declaration & accompanying schedules and statements, be sent to the OTC by my ERO.

In addition, by using a computer system and software to prepare and transmit my return electronically, I consent to the disclosure to the Oklahoma Tax Commission of all information pertaining to my use of the system and software and to the transmission of my tax return electronically.

Sign Here:

Your Signature

Date

Spouse

Stephanie Minert

Sign here

(joint return, both must sign)

Date

- Sign form and box appears saying **Well Done!** You've signed all pages.
- **For Couples**, second person still needs to sign- through their own email or their own portal account. Signer will not see the other person's signature, although all signatures are being collected.

The screenshot shows a tax return signing interface. At the top, there are navigation buttons: a back arrow, a checkmark labeled 'Review tax return', and a '2' labeled 'Sign electronically'. A green banner at the top left says 'You've signed all the pages.' and a 'Back to Dashboard' button is on the right. The main form area is partially obscured by a white pop-up window. The pop-up features a green thumbs-up icon, the text 'Well Done!', a red arrow pointing down, and the message 'You've signed all pages. Please remind Tony Minert to sign the tax return, which has been sent to his/her email address.' Below this is a 'Go to Dashboard' button. The background form includes fields for address (1098 E 133RD ST, GLENPOOL, OK 74033), 'Total number of exemptions: 3', and 'PART ONE - TAX RETURN INFORMATION (WHOLE DOLLARS ONLY)' with a table of line items. 'PART TWO - DEC' is also visible with checkboxes for 6a and 6b.

PART ONE - TAX RETURN INFORMATION (WHOLE DOLLARS ONLY)		
1	Oklahoma Adjusted Gross Income (511, Line 7) or Adjusted Gross Income: All Sources (511-NR, Line 8)	1
2	Oklahoma Income Tax and Use Tax (511, Line 20 or 511-NR, Line 24)	2
3	Oklahoma Income Tax Payments and Credits (511, Line 32 or 511-NR, Line 33)	3
4	Refund (511, Line 34)	
5	Balance Due (511, Line 35)	

Please remind Tony Minert to sign the tax return, which has been sent to his/her email address.

- When second person signs through his/her email or portal account, it will say **Well Done!** You've signed all pages.

The screenshot displays a tax return filing interface. At the top, there are navigation buttons: a back arrow, a checkmark labeled 'Review tax return', and a '2 Sign electronically' button. A green banner at the top left contains the text 'You've signed all the pages.' and a 'Back to Dashboard' button on the right. The main content area shows a tax form with lines 4 and 5. Line 4 is 'Refund (511, Line 37 or 511-NR, Line 38)' with a value of 00. Line 5 is 'Balance Due (511, Line 42 or 511-NR, Line 43)' with a value of 85.00. Below the lines is a paragraph of instructions regarding electronic payments. The section 'PART TWO - DECLARATION OF TAXPAYER' contains two options: 6a (unchecked) for direct deposit and 6b (checked) for ACH electronic funds withdrawal. A central white modal box with a green thumbs-up icon and the text 'Well Done!' is overlaid on the form. Below the modal, the text 'You've signed all pages.' is visible, along with a 'Go to Dashboard' button. The bottom of the form shows 'PART THREE - DECLARATION OF PREPARED TAXPAYER' and a signature line with the name 'Tommy'.

- E-file authorization form(s) will automatically be sent to Minert & Associates.

- Minert & Associates will receive an email notification saying you have finished signing your Tax Return.
- Please give us several days to process & send a confirmation email that we received your signed documents.
- We can always be contacted at admin@minertcpas.com or 918-742-1616.



Minert & Associates, PLLC

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Relieving Your Financial Stress.

www.RelieveFinancialStress.com