



<http://www.nystap.org/>
apri5@nyc.rr.com

February 1, 2023

Dear Colleagues,

Thank you for attending our Verifyle Meeting.

I would like to share some of the comments with you.

iberg715@gmail.com

Going to give it a try. I do plan on going to you tube. Good presentation

ADRIANAJACKSON@ME.COM

Great job guys! Thank you so much for introducing us to Verifyle!

MSHELLEY2004@AOL.COM

Great job guys! Thank you so much for introducing us to Verifyle!

DValane@gmail.com

I used the program for a while, but I leave some new features tonight.

silviafeldman@nyc.rr.com

You guys were great. I learned a lot tonight to do a better job. Thanks for your input, knowledge, and hard work. Great webinar!

Larry@Kessler-Tax.com

great meeting

MSHELLEY2004@AOL.COM

Thank You! Great session

gell3334@aol.com

thanks- great job

Answers to some of the questions

eajotaxpro@gmail.com

Drag (Cut and Paste) a PDF copy of the tax return into Verifyle

Larry@Kessler-Tax.com

Will the IRS accept a Verifyle signature on a Power of attorney?

YES they will accept the electronic signature

lmillard@precisetaxservices.com

Is there a limit to the number of documents that Verifyle will hold?

You can have 1500 workspaces and you can take up 250 gigabytes of space.

ADRIANAJACKSON@ME.COM

Import your contact into Verifyle and then start your workspaces. You can do an export and import by backing up your contacts into a CSV file and then upload the CSV file into Verifyle. You can accomplish this in less than 5 minutes!

gell3334@aol.com

when you export contacts into Verifyle do you have to do a workspace for each contact?

You want a workspace for each client.

millard@precisetaxservices.com

How do you move the documents from the right to the workspace??

The documents listed on the right side are already in the folder(workspace) that you established. You can move a document from folder to folder by clicking on the gear, select send to and in the thread you will see a drop down menu and then select which folder that you want the document to appear in.

Larry@Kessler-Tax.com

Are we required to sign the 8879 and the NY form (I saw your signature. Was that a "wet" (pen and ink) signature or a Verifyle generated signature?

Rick was a wet signature. Some of the software packages will place your name in the signature area and that is considered a digital signature that is acceptable.

gell3334@aol.com

can we just go over adding client to Verifyle?

You can do it individually or transfer your contact via a CSV export and import.

Larry@Kessler-Tax.com

Rick, on your computer, if you want someone from your office working on Lenny's stuff, can you include your employee AND will Lenny see your employee looking at his stuff?

The recipient will not know who is working on his or her tax information.

Larry@Kessler-Tax.com

I have had MULTIPLE clients unable to find their portal, so they end up "Hosting" their own workspace, but they don't know how to label them, so it creates problems. How do we advise them to stay withing the workspace we provided for them?

They should click on the e-mail from Verifyle and that will take them to the workspace.

Lenny

Leonard E. Mandel

Leonard E. Mandel
Acting President NYSTAP