

Many of you have successfully used the SafeSend returns e-sign feature as part of our tax return delivery process; however, we would like to take this opportunity to provide additional information and provide some extra incentive to give the program a try if you haven't yet had the opportunity.

## SafeSend FAQs

### What are the benefits to you, the client?

- Electronically view, sign, save and print your tax documents.
- Access to your tax return for seven years.
- Receive estimated tax payment reminders at a schedule of your choosing.
- Securely forward your tax documents to anyone you choose, such as a bank.

### How will it work?

- **Shortly before your return is sent to you**, you will receive an e-mail from a team member at Dent Moses advising to expect your tax return via SafeSend Returns. This e-mail will include a short, 3-minute video explaining the simple process of signing the tax return and, if applicable, the distribution of K-1s.
  - TaxPayer Help – 1040 Recipient – for personal tax returns
  - Entity Taxpayer Experience – for business and fiduciary returns
- There is also a new feature included in the delivery called SafeSend Steve. He is the owl icon that will be located in the top left of the screen and you can click on him at any time for instructions on how to proceed.

### Will it work with any internet browser?

We recommend using Google Chrome. It will also work with Safari and Firefox, however, Internet Explorer is strongly discouraged as SafeSend does not work well within Explorer.

Apple users may also have to download Adobe Reader instead of using the default reader on your Mac or other apple product.

### Can I use my phone or tablet?

Yes, however, for easier viewing a laptop or desktop is recommended.

### How will I securely access the software?

Once you click on the link in your e-mail from SafeSend, you will be required to enter the last four digits of your Social Security Number. You will then request an Access Code which will be e-mailed to you by SafeSend. Copy and paste the code on the next screen within 20 minutes.

### What if I can't remember the Access Code or it expires?

You can click on any link in any e-mail from SafeSend Returns and you will be re-sent the link for a new Access Code by [noreply@safesendreturns.com](mailto:noreply@safesendreturns.com).

## **How will I verify or confirm my identity to sign my personal tax return?**

You will be required to answer knowledge-based authentication questions before being allowed to review and sign. This is an IRS requirement. If you are unable to answer the questions after three attempts, you will be given the opportunity to print your e-file forms and securely upload them to us after signing.

## **How will my spouse and I sign a joint return?**

One taxpayer at a time will go through the signing process. After the first taxpayer signs, the 2<sup>nd</sup> will receive an e-mail from SafeSend to sign the returns. Both taxpayer and spouse can use the same e-mail address.

## **I received a message saying I couldn't e-sign my return and need to download the paper e-file forms, why?**

If an individual has not established a significant history in the U.S., perhaps because they are younger than 18 years of age or live outside the U.S., there will not be enough government and financial information available to construct KBA questions.

## **Will I get reminders about estimated payments?**

During the signing process, you will be given the opportunity to set a reminder schedule for estimated payments. Choose the timing that works best for you.

## **What is Signer Delegation?**

Signer Delegation allows someone other than the signer to review a tax return, then delegate signature to the person authorized to sign the e-file authorization forms. This is most commonly used with business returns where a CFO or Controller reviews a return but the signer is a different person, such as the CEO.

## **What are Grouped Returns?**

Returns within the same family or business group can now be housed under one Group name and sent to a single Controller or family member in charge. This will allow parents with minor children to have those child returns received and signed SSR, and will also allow an entity with multiple businesses or locations to have one Controller receive all of the returns. The Controller can then delegate signing of the return to another individual if needed as noted above.

## **Can I send my return to my bank?**

You are given the opportunity to forward your return or portions of it to anyone you choose. To prevent the result of errors in e-mail addresses, the recipient will need to verify their identity.

## **If I need a copy of my return in a couple of years, how can I access it?**

We recommend that you download a PDF of your return and save in a secure location; however, your return is available within SafeSend Returns for seven years. You can click on any e-mail from SafeSend Returns no matter how old and receive a new link with an Access Code.

## **Is my information secure?**

Client data is encrypted by SafeSend and stored on secure servers managed by their parent company, cPaperless. Data access is restricted to authorized accounts. Decryption is inaccessible to unauthorized accounts.