

We are pleased to offer SafeSend Returns to our clients as our secure, electronic tax return delivery system.

# SAFESEND INFO GUIDE

## ARTICLE RESOURCES

- [Return Process](#)
- [Uploading Documents Process](#)

## WHAT IS SAFESEND?

Safe Sends is a secure, simple way for clients to exchange tax documents with our firm, allowing them to upload, view, sign, save, and print files electronically without complex logins.

## HOW IT WILL BE USED

SafeSend will be used to securely:

- Gather client info
- Upload client taxes
- Send clients their tax returns
- Allow clients to E-sign
- Complete payments (if applicable)

SafeSend Gather allows us to complete the tax return collection, preparation and delivery process in a completely paperless and secure manner from start to finish.

## Phase 1: Getting started - Send us your tax documents

Getting Started (1st Initial email)

- 1 Client will Receive Email
- 2 Complete Verification Process
- 3 E-sign documents (Engagement Letter)
- 4 Complete Client Questionnaire
- 5 Upload Requested Documents **as PDF's**

## Phase 2: Review, Sign & File Your Tax Return

This phase begins only after your tax return has been fully prepared by our office.

- 1 Client will Receive Email
- 2 Complete Verification Process
- 3 View Welcome Page and Message from Preparer & Get Started
- 4 View/ Pay Invoice
- 5 Review Tax Return & Sign
- 6 Pay Federal & State Taxes
- 7 Once done, clients will see an overview

# FAQ'S

Here are some answers to frequently asked questions regarding document submission, e-signatures, and troubleshooting.

## HOW DO I ACCESS DOCUMENTS SENT VIA SAFESEND?

When we send you documents through SafeSend, you will receive an email with a secure link to access your documents. Simply click the link, and you will be directed to a secure portal where you can view, download, and sign your documents.

## HOW WILL I KNOW WHEN THE DOCUMENTS ARE READY FOR ME TO SIGN?

You'll receive an email notification as soon as the documents are ready for your review and signature. We'll also notify you once the documents are signed and safely returned to our firm.

## CAN I DOWNLOAD A COPY OF THE SIGNED DOCUMENT?

Yes! After you've signed the document, you will have the option to download a PDF copy for your records. You will also receive an email with the signed document attached.

## WHAT FORMS OF PAYMENT ARE ACCEPTABLE?

Online payments and mailing payments such as check or money order are accepted for invoice and tax payments. Click payment voucher if paying by check or money order. **\*Make the check out to VL Tax and Accounting**

## DO I NEED A SAFESEND ACCOUNT TO RECEIVE DOCUMENTS?

No, you do not need an account to receive documents through SafeSend. All you need is access to the email address we've sent the documents to, and the secure link will give you temporary access to view and sign them.

## CAN I REVIEW THE DOCUMENT BEFORE SIGNING?

Yes, you can fully review the document before you sign it. If you need more time to go through the details, you can close the document and return to it later using the same secure link.

## DO YOU STILL USE SHAREFILE?

Yes. Your finalized tax return and completed tax documents will continue to be available in your ShareFile portal for recordkeeping.

However, all tax document collection, review, signatures, and payments are now completed through SafeSend. We will no longer request or upload tax documents through ShareFile during the tax preparation process.

