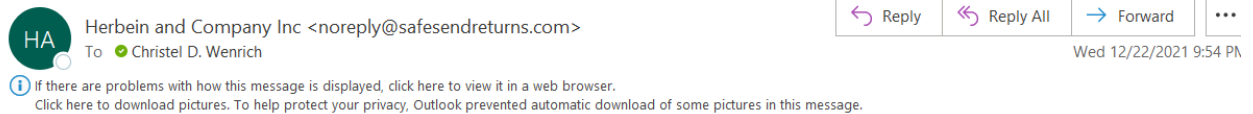


SafeSend Organizer Process - CLIENT SIDE

1. Welcome email received from “Herbein and Company Inc noreply@safesendreturns.com”

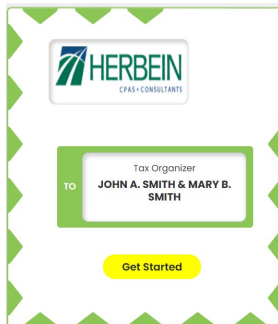
Please sign your Engagement Letter and Review and Complete your Tax Organizer for Herbein and Company, Inc



a. Click on link to enter SafeSend Organizer

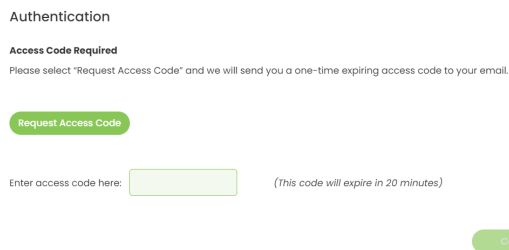
- i. Mobile use – Can only Sign EL and upload documents – The organizer cannot be completed on a mobile device.

2. Internet browser window will open



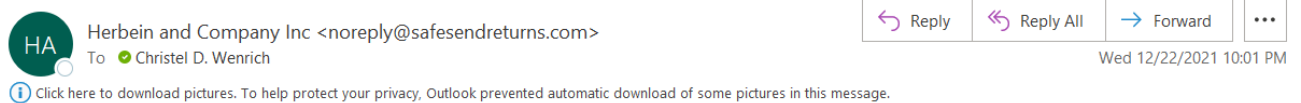
a. - click “Get Started”

3. Authentication window opens –select “Request Access Code” – an access code will be emailed



a. Access Code email

Code for JOHN A. SMITH



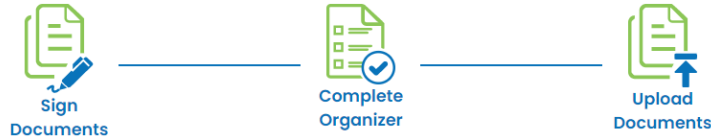
b. Client then needs to enter access code and click “Continue”

4. Welcome Screen

Welcome JOHN A. SMITH

Herbein and Company, Inc has sent your 2021 Tax Organizer to be Completed Electronically

Please follow these easy steps




Click Here to Continue


- a. Click on “Click Here to Continue” or can click on anyone of the three icons if coming back for another session

5. Sign Engagement Letter

- a. If Spouse’s email address is provided originally, the spouse will receive an email from SafeSend Organizer at the same time as the taxpayer. However, the Spouse cannot sign until the Taxpayer signs.



- b. Click on  in upper left-hand corner of engagement letter and it will go directly to signature page or you can page through engagement letter to the end

- i. Click on  to sign - Select “Type” and type your name or “Draw” and sign your name
 1. Click “Apply”





c. Click “Finish”

- i. If requested, enter Spouse’s Email address – Click “Save & Continue” – Your spouse will then get an email to sign the engagement letter


SafeSend Organizers - Engagement letter has Been E-signed by JOHN A. SMITH



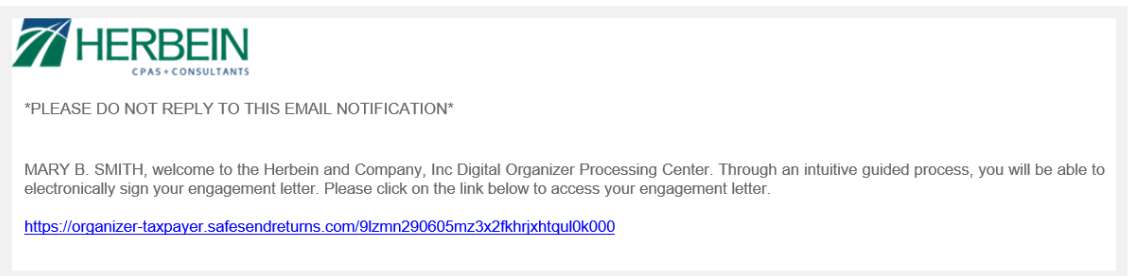
Herbein and Company Inc <noreply@safesendreturns.com>
To: Christel D. Wenrich

 Reply  Reply All  Forward 

Wed 12/22/2021 10:22 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



- ii. Spouse will repeat steps 2 thru 5b
- iii. Both Taxpayer and Spouse will receive an email to download the signed engagement letter



Herbein and Company Inc <noreply@safesendreturns.com>
To: Christel D. Wenrich

Reply Reply All Forward

Wed 12/22/2021 10:25 PM

If there are problems with how this message is displayed, click here to view it in a web browser.



PLEASE DO NOT REPLY TO THIS EMAIL NOTIFICATION

JOHN A. SMITH,

Congratulations! You have successfully completed the E-signing of your engagement letter. We have received your documents and will add it to our files.




Your final and signed engagement letter is available for download by clicking the link below.

<https://organizer-taxpayer.safesendreturns.com/0j9am0nkn4771xep990fv8a6l0k000>



6. Complete Organizer - Click on "Click Here to Continue" or click on

- Taxpayer and Spouse cannot be working on the organizer at the same time. There is a warning message that appears.
- Page through organizer and answers questions, update information, mark information provided, or enter any new information

- Use   at bottom to move through pages or can click on bookmarks to the left
- On the right-hand side of the page
 - "Notes to Tax Preparer" – add any notes to tax prepare - make sure to click "Save" after leaving a note
 - "Provide Source Documents" – Can upload documents related to that organizer page – PDF, word, excel, PNG, JPG
 -  will also show next to the bookmark for organizer pages that have that option

b. To upload documents – "Click Here to Upload"

Add Source Documents

Drag documents here

Or

[Click to Upload](#)

Documents uploaded can be viewed/downloaded from Summary -> Source document page

Done

- Document upload will show on box to the right
- Click "Done" when finished
 - Document will not show on the page but on the Summary when



selecting **Upload Documents** on the Welcome page

- c. Any documents that need to be uploaded where there was not a “provide source documents” upload area on



the right-hand side of the organizer page can be uploaded by clicking on

- d. If you need to finish later click “Save and Continue Later”

- i. Go back to original email received in step 1 - click on the link in the email and repeat steps 2 thru 3b



- ii. On the Welcome screen select and search for page where you left off

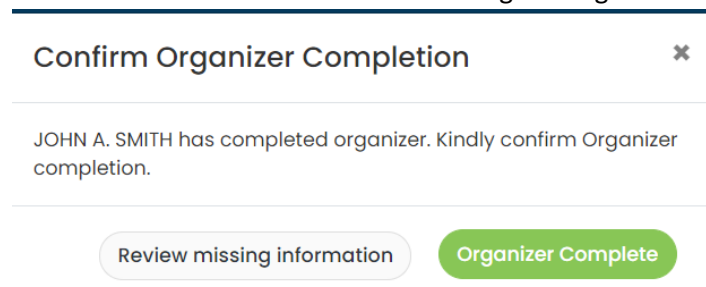
- e. **If you have completed filing out the organizer – Click “Finish”** – Documents can still be uploaded by clicking on



on the Welcome page, however, you **will not** be able to make any changes/updates to the organizer pages

- i. Select “Send for Review” to notify your spouse to review the organizer and make any updates/changes on their end

1. Spouse will receive an email and see the following message when they log into the organizer



- a. Click “Review missing information” to review organizer and make updates

- i. Follow steps 6a – 6c

- ii. When truly finished click “Finish” and select “Organizer Complete”

- b. **IMPORTANT - Click “Organizer Complete” to send to accountant or your accountant will not receive a copy of your organizer or know what it is complete – if this is selected no changes will allow to be made to the organizer, however, will still be able to upload documents**

- c. If you need to finish later - Follow steps 6c

- ii. **IMPORTANT** - Select “Organizer Complete” If the organizer is complete and Spouse will NOT be making any changes

1. Spouse can still upload documents if needed



7. Upload Documents – Click on to upload documents or see a summary of documents already uploaded

- a. Documents can be dragged into the window or click “Click to upload” to browse your computer to upload

- b. When all documents have been uploaded – Click “Notify Tax Professional”

- c. Documents can continue to be uploaded at any time – make sure to Click “Notify Tax Professional” if additional documents are uploaded or tax preparer will not know