Best Practices Guide

Confidential:

This training manual has been prepared for the exclusive use of cPaperless, LLC clients. This training manual contains confidential information and is to be limited in distribution to the Board of Directors, Executive Management, Partners, Managers and Staff members of your firm. This information is being provided in good faith and is meant to provide you an understanding of the SafeSend Returns Advantage.

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I.   Our Most Successful Customers Will Tell You This

1. Keep the Partners out of the process

There are two approaches to processing returns in SafeSend Returns.

1. Admin Only (Recommended):
    The ERO/Signer of the return should perform their final review in the tax software or from a PDF file prior to being uploaded to SafeSend Returns. Only Admins will process and deliver returns. SafeSend Returns is designed to automate tax return assembly and delivery; your firm should trust that SafeSend Returns will accurately perform all the heavy lifting. The QA / QC process is well defined and easily learned. Admins adopt and embrace it quickly as it empowers them to deliver tax returns in 3 – 4 minutes.

2. Admin and Partners (Not recommended):
    Admins process the return then send it to the ERO/Signer/Partner for review. The partner can either deliver to the taxpayer or route back to the Admin with approval to deliver. This creates inefficiencies as two people are essentially performing the same tasks twice. This goes against all Lean Six Sigma process improvement principals and is not recommended.

2. Send a templated email to the taxpayer before you send them their tax return

Just before you deliver the tax return, send a templated email to the taxpayer. Your Client Success Manager will provide you with example templates to help you get started. Once your firm has developed your templates, ensure all Admin have them saved in their Drafts Folder. They can simply select"Forward" and enter the taxpayer email address and send.

For 1040s

Hello,

Your tax return is complete and will be delivered electronically via SafeSend Returns.

SafeSend Returns is a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer or smartphone.

- You will receive an email from **<FIRM NAME>** at noreply@safesendreturns.com. Add this email to your safe list to prevent it from being categorized as spam or junk.

- If you do not see an email from **<FIRM NAME>** at noreply@safesendreturns.com, please check your Spam or Junk Folder.

- For the best experience, we recommend using Google Chrome.

- Please save a copy of the email from noreply@safesendreturns.com to access your return in the future.

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The email will contain a safe link to access your tax returns. You will enter the last four digits of your SSN and "request an access code" which you will receive via email and enter in the required field.

Once you have gained access to your tax returns, you will be able to:

- Download, review and/or print your tax returns.
- See if you owe taxes, are receiving any refunds, and see your estimated tax payments (if applicable).
- Electronically sign your personal e-file authorization forms. For personal returns, the IRS requires identity verification. Please do not be alarmed by the personal questions as these are pulled from public databases.

After signing successfully, your spouse (when applicable) will then receive a similar emailed link and follow the same instructions to electronically sign the e-file authorization forms. *Please note, the IRS requires both individuals electronically sign independent of each other.*

The following short video will walk you through the review and e-signature process.

- Client Experience Tutorial

If you should have any questions, please feel free to contact me.

Thanks,

Entities

Good Afternoon,

Your tax return is complete and will be delivered electronically via SafeSend Returns.

SafeSend Returns is a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer or smartphone.

- You will receive an email from **\<FIRM NAME\>** at noreply@safesendreturns.com. Add this email to your safe list to prevent it from being categorized as spam or junk.

- If you do not see an email from **\<FIRM NAME\>** at noreply@safesendreturns.com, please check your Spam or Junk Folder.

- For the best experience, we recommend using Google Chrome.

- Please save a copy of the email from noreply@safesendreturns.com to access your return in the future.

Once you have gained access to your tax returns, you will be able to:

- Print, sign and upload your e-file authorization forms. **OR** Electronically sign your business e-file authorization forms.

- Electronically distribute your K-1s to your Partners/Shareholders. The following short video will walk you through the process.

    o K-1 Distribution Tutorial

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If you should have any questions, please feel free to contact me.

Thanks,

Individuals/Entities Combined

Hello,

Your tax return is complete and will be delivered electronically via SafeSend Returns. SafeSend Returns is a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer or smartphone.

- You will receive an email from **<FIRM NAME>** at noreply@safesendreturns.com. Add this email to your safe list to prevent it from being categorized as spam or junk.

- If you do not see an email from **<FIRM NAME>** at noreply@safesendreturns.com, please check your Spam or Junk Folder.

- For the best experience, we recommend using Google Chrome.

- Please save a copy of the email from noreply@safesendreturns.com to access your return in the future.

After signing successfully, your spouse (when applicable) will then receive a similar emailed link and follow the same instructions to electronically sign the e-file authorization forms. *Please note, the IRS requires both individuals electronically sign independent of each other.*

The following short video will walk you through the review and e-signature process.

- Client Experience Tutorial

Additional Feature for Entities:

- Print, sign and upload your e-file authorization forms. **OR** Electronically sign your e-file authorization forms.

- Electronically distribute K-1s to your Partners/Shareholders. The following short video will walk you through the process.

    o K-1 Distribution Tutorial

If you should have any questions, please feel free to contact me.

Thanks,

3. **Use for all qualified taxpayers - Age does not matter unless they are children**
   Many people believe that elderly clients will not adopt SafeSend Returns. Our customers will tell you that this is not true. In fact, some of our customer's best success stories involve elderly clients. Our most successful customers are sending 75% - 85% of their tax returns through SafeSend Returns. This is where you will get the highest ROI. You should take the position that every tax return will be delivered through SafeSend Returns unless they fall into one of the following categories.

   1. Less likely to qualify for KBA (Alternatively you can send these for manual sign and return)

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  a. Living outside the US

  b. Just moved to the US

  c. Recently married and changed name

2. PLEASE NOTE: Minors will not be able to pass the KBA process

3. Extension packages can NOT be sent for SafeSend Returns delivery

4. Use for manually filed returns, but send the manually filed return in paper or as an attachment

For returns that need to be manually filed, there are two approaches that have proven successful. The firm will deliver the entire return through SafeSend Returns and provide instructions in the "Message From Preparer". For the manually filed returns either:

1. Electronic: Upload the manually filed returns as separate PDF's in the "Attachments" section and provide instructions in addition to the "Message From Preparer" instructions.

2. Paper: Mail them a paper copy of just the manually filed returns and provide them instructions.

5. Personal preferences are problems

When delivering paper-based tax returns, many firms and / or partners have developed personal preferences in how the paper tax return is assembled and delivered. Personal preferences in a paper process do not transition well to an electronic process. Try to live with the client copy of the tax return as it comes out of CCH and try to eliminate personal preferences. Lean Six Sigma studies prove that taxpayers usually don't view things the way you think they do. For example, they don't care if the ERO has manually signed the 8879. A block signature or a signature stamp is perfectly fine.

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II. Policy Decisions

IMPORTANT: This section is only necessary for NEW Customers who have not yet configured their account. Prior to your initial training for Account Set-up, please have your SafeSend Returns Champions discuss and determine how your firm will handle the following items:

1. ERO Signatures
    a. What is your current policy for ERO signatures on Form 8879? Do you use Block Signatures from the tax software, manually sign or use signature stamps?
    b. Have you considered using the SafeSend Returns signature stamps? If so, have you considered signer delegation (i.e. other people can be granted permissions to place my signature stamp)?
2. E-Signatures on 8879's
    a. KBA: Required by the IRS and we recommend keeping it enabled.
    b. 1040s: All 1040 returns qualify for e-signing
    c. Business & Trust: Will you use e-signatures on 1041, 1065, 1120 or 1120S while the IRS temporarily allows it? Will you change this setting if/when the IRS does not allow e-signing of entity returns again?
3. Delivery Permissions
    a. Who will be allowed to deliver the returns? Returns can be delivered by any user (recommended) or restricted to the Partner and System Admin roles (not recommended).
4. Voucher Reminders
    a. Will you keep enabled?
    b. What is your preferred default # of days?
5. 1040 Authentication:
    a. Use the first or last 4 of the SSN?
6. PDF Download Options
    a. Transmittals: Include with the Tax Return or create a separate PDF?
    b. K-1'S: Include with the Tax Return or create a separate PDF? (Coming Soon)
    c. Payment Vouchers: Separate by due date or group is a single PDF
7. Invoices and Payments
    a. Will you send them with the returns?
    b. If yes, what is the source (tax software, Practice Management, QuickBooks, etc.)?
    c. Will you offer online payment of Invoices? If yes, do you have an existing PayPal account or other URL?
8. Default Messages
    a. Can be added later but consider default messages to taxpayers based on return type or use case scenario
9. Delivered Returns Report
    a. Do you want a custom field in the Delivered Returns Report?
    b. If so, what is the Field Name and the related possible values / statuses?
10. Security

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a. Do you want to enable Multi-Factor Authentication for firm users and/or Taxpayers?
b. Do you want to enable Single Sign On?
    i. If your firm uses Office 365, Single Sign On is an option
    ii. This will allow users to access SafeSend Returns from their workstation without needing to enter a username and password each time, if they're logged into Office 365

III. What All Users MUST KNOW

It is very **IMPORTANT** that all users read and understand this section of this guide. Not complying with the guidelines defined in this section will lead to unnecessary customer support tickets and user frustration.

1. *Return Types*: If a user submits a non-supported return type it will be rejected, and you will receive an email stating that you have uploaded a non-supported tax return.
   a. Supported: 1040, 1040NR, 1041, 1065, 1120, 1120S
   b. Non-supported: 990, 5500, 709, 706
2. **E-Signing Form 8879**:
   a. 1040's:
      i. The IRS requires the taxpayer and spouse to separately authenticate with Knowledge Based Authentication (KBA). With this process they will be asked 5 personal questions that are obtained from their credit report and other public databases. The questions are generated by LexisNexis
   b. 1041, 1065, 1120, 1120S:
      i. The IRS is currently allowing the use of E-Signatures on the 8879's for these return types through 6/30/2021
      ii. Those e-signers DO NOT go through KBA
3. *PDF's of Tax Returns*: The PDF files printed from the tax software and uploaded to SafeSend Returns must adhere to the following rules:
   a. Must be the "Client Copy" of the return. Do not submit the Accountant or Governmental copy.
   b. DO NOT MODIFY the PDF files in any way. DO NOT:
      i. Delete pages or bookmarks
      ii. Add pages or bookmarks
      iii. Password protect the PDF file or add a digital signature that might restrict access to the file
4. **Returns Not Recommended For e-signing**: We recommend that you do not use e-signing when delivering the following:
   a. Taxpayers or Spouses that may not qualify for KBA
      i. Children
   ii. Living outside the US
      iii. Just moved to the US

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    iv. Recently married and changed name
   b. Extension packages

5. ***Electronic K-1 Distribution***:
   a. Is available and part of the system for 1041, 1065, and 1120S returns

6. ***Payment Vouchers***: Currently cannot be changed once they have been delivered. We are working on a future enhancement to allow you to modify payment vouchers

7. ***Automatic Withdrawal Payments***: For payments that are scheduled for automatic withdrawal, you will need to manually add those to the Vouchers tab

8. ***Online Payment Required***: For payments that are required to be paid online, you will need to manually add those to the Vouchers tab

9. ***Tax Payer Preview***: You must Enable Pop-ups in your preferred browser to use "Tax Payer Preview". If you click the "Tax Payer Preview" button and nothing seems to happen, it is being blocked

10. ***Need Help?:*** Customer support and training resources are as follows:
   a. Report a Problem: If there is an issue in processing a return PLEASE make sure to use the "Report a Problem" feature in SafeSend Returns. It can be accessed from either 1) the "Help" drop down in the top right portion of SafeSend Returns (while processing a return) or 2) The "Actions" drop down in the Delivered Returns Report (after a return has been delivered)
   b. Call: (855) 818-3552 Ext 1.
   c. Email: support@safesend.com
   d. Website: Product Help Center
   e. Training: Workshops, Videos and PDF Files

IV. Print Settings

It is very **IMPORTANT** that all users read and understand the print settings for the applicable tax software

1. CCH ProSystem fx & Axcess

1. ***Print Settings for 1040:*** The uploaded copy of the return must be the Client Copy with no modifications

2. ***Print Settings For 1041, 1065 1120, and 1120S***: If you do not adhere to the following print settings for business returns SafeSend Returns will reject the return and notify you via email that it is non-supported.
   a. CCH ProSystem fx Tax (2016 Version):
     i. Select the "Client" and "K-1" check boxes
     ii. Select the "Create Bookmark PDFs" check box
     iii. Select the "Produce one PDF file for all copies" radio button

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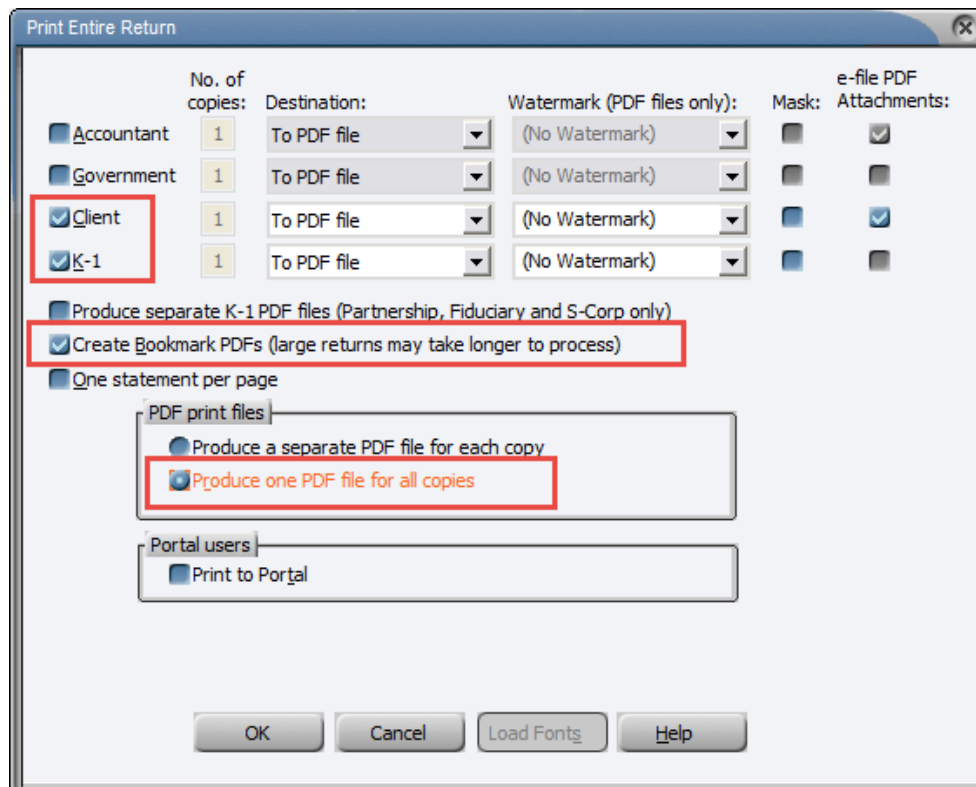
b. CCH ProSystem fx Tax (2017 Version):
   i. Select the "Client" and "K-1" check boxes
   ii. Select the "Create Bookmark PDFs" check box
   iii. DESELECT the "Produce separate PDF files"

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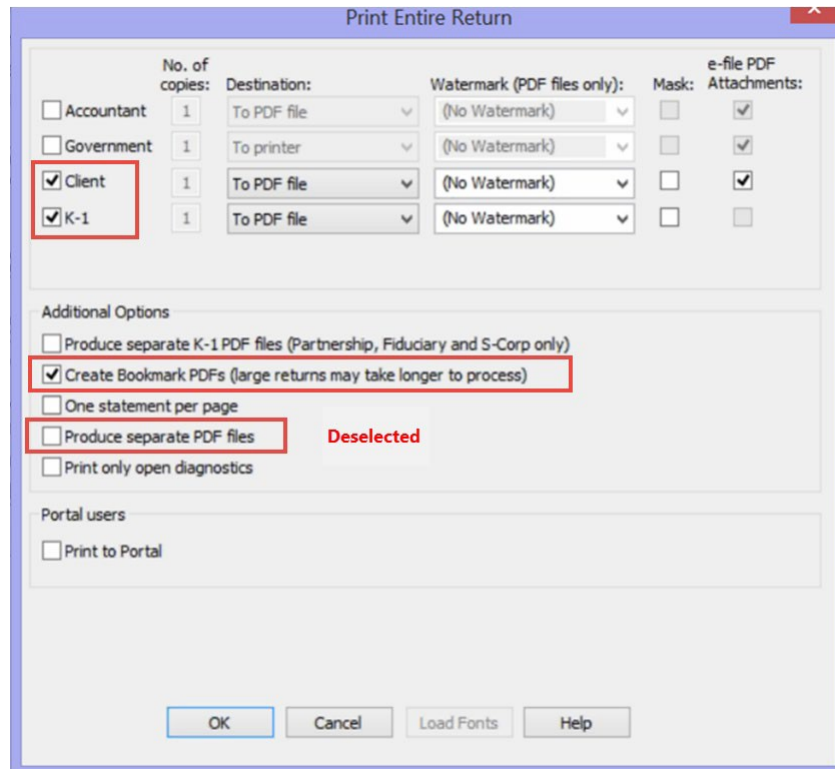
c. CCH Axcess Tax:
   i. In Print destination and formatting options: Select the 1) Client and 2) K-1 check boxes
   ii. In Additional Options: 1) Deselect "Create separate PDF / TIFF files" and 2) select "Create bookmark PDF's"

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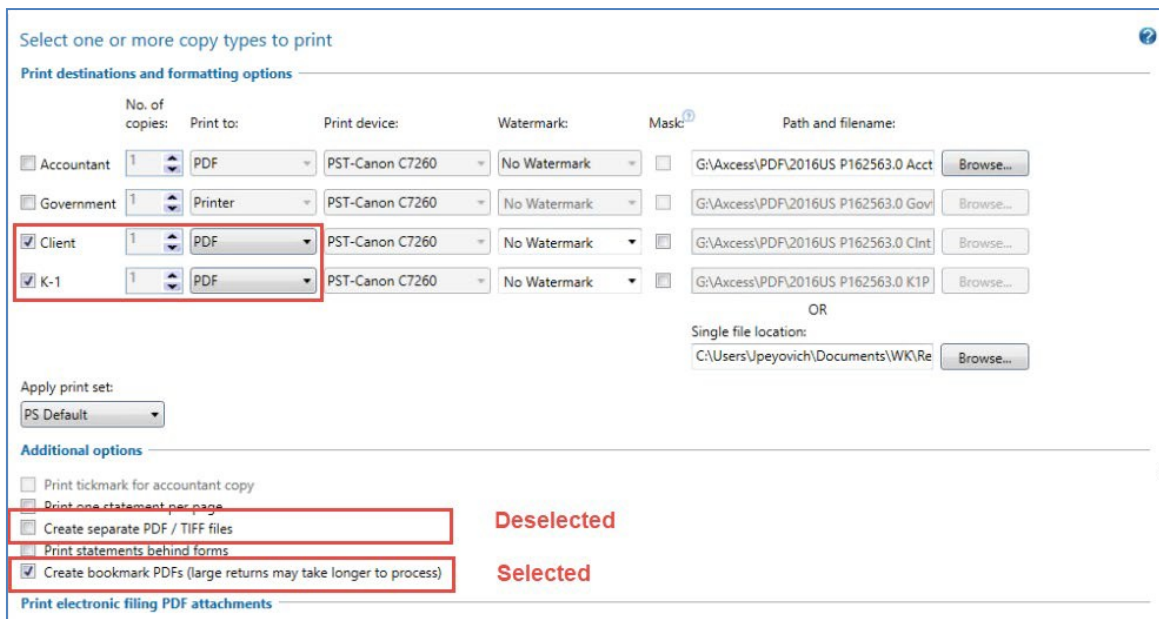
2. **UltraTax**

   1. *UltraTax Integration with SafeSend Returns:* Integration works with 2020 tax season and future year returns only
        a. Help Center Guide can be found by clicking here
   2. *Print Requirements for UltraTax:* UltraTax has the ability to print two different page sizes. UltraTax mimics the driver settings of the selected printer without using the printer itself. For this reason, you must follow the below guidelines
   3. *Print Requirements for UltraTax 1040 Returns:*
        a. "Print Options":
        b. Check the boxes for all "returns to print"

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c. "Print Returns"
  i. You MUST select a physical office printer. If you do not your returns may be printed incorrectly and rejected. (See More Information)
  ii. Select the "Client Copy", "Electronic Delivery", and "PDF to File" check boxes
 iii. Select "Assemble" to create the PDF
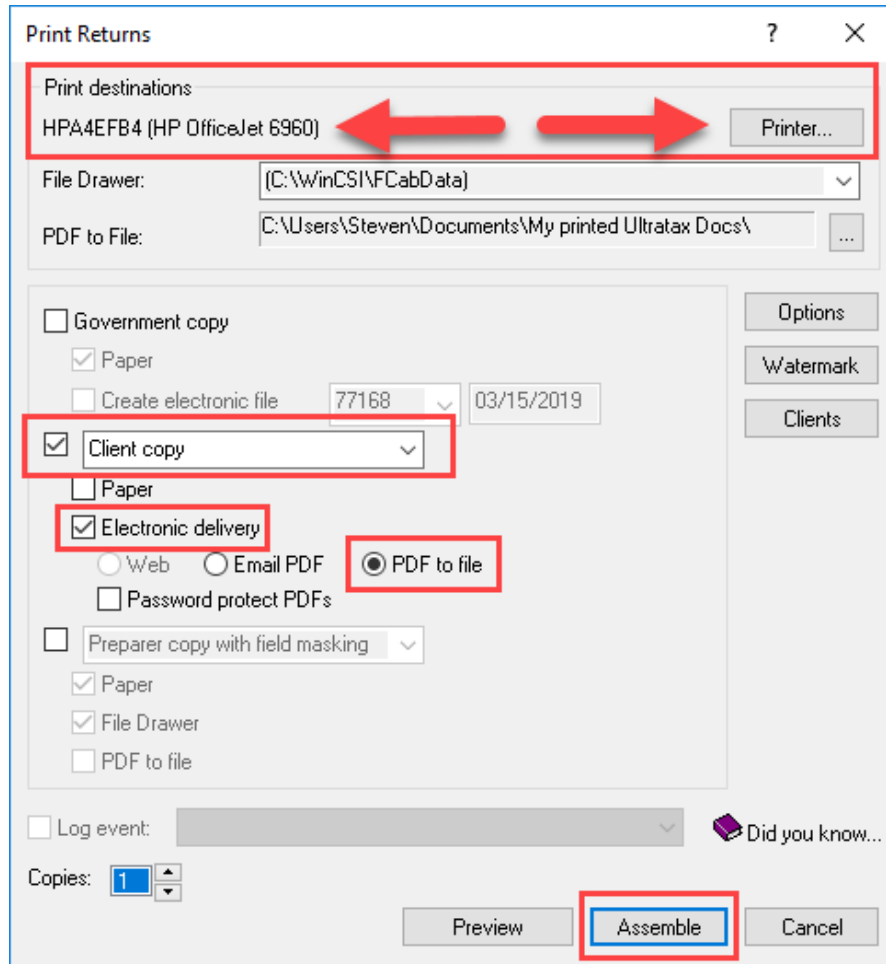
4. **Print Requirements for UltraTax Entity Returns: 1065, 1120S, 1120, & 1041**
 a. "Print Options":
  b. Check the boxes for all "returns to print"

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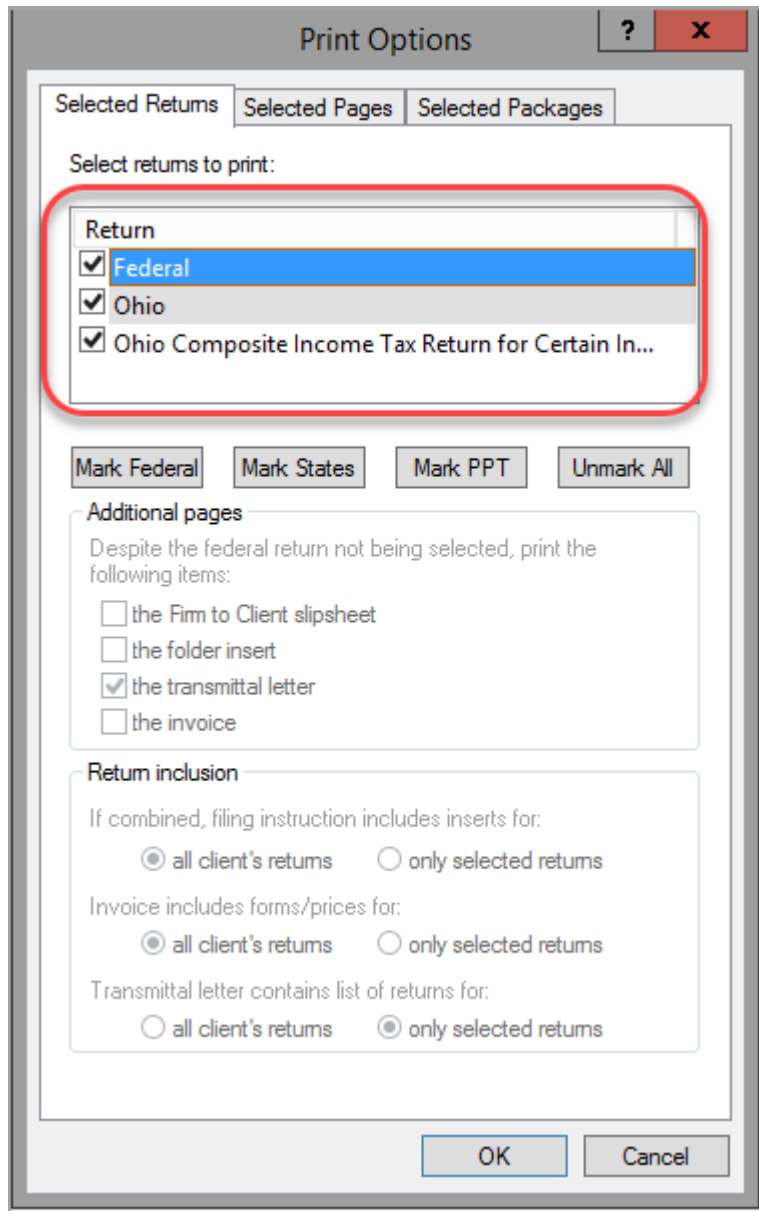
c. Selected Packages - K1s (1065, 1120S, 1041)
    i.   K1 packages must be printed separately
    ii. You must select the K1 packages you want to be printed
    iii. For 1041 returns, if the return has K1s, the packages must be printed
    iv. If the return does not have K1s to print, you may upload without
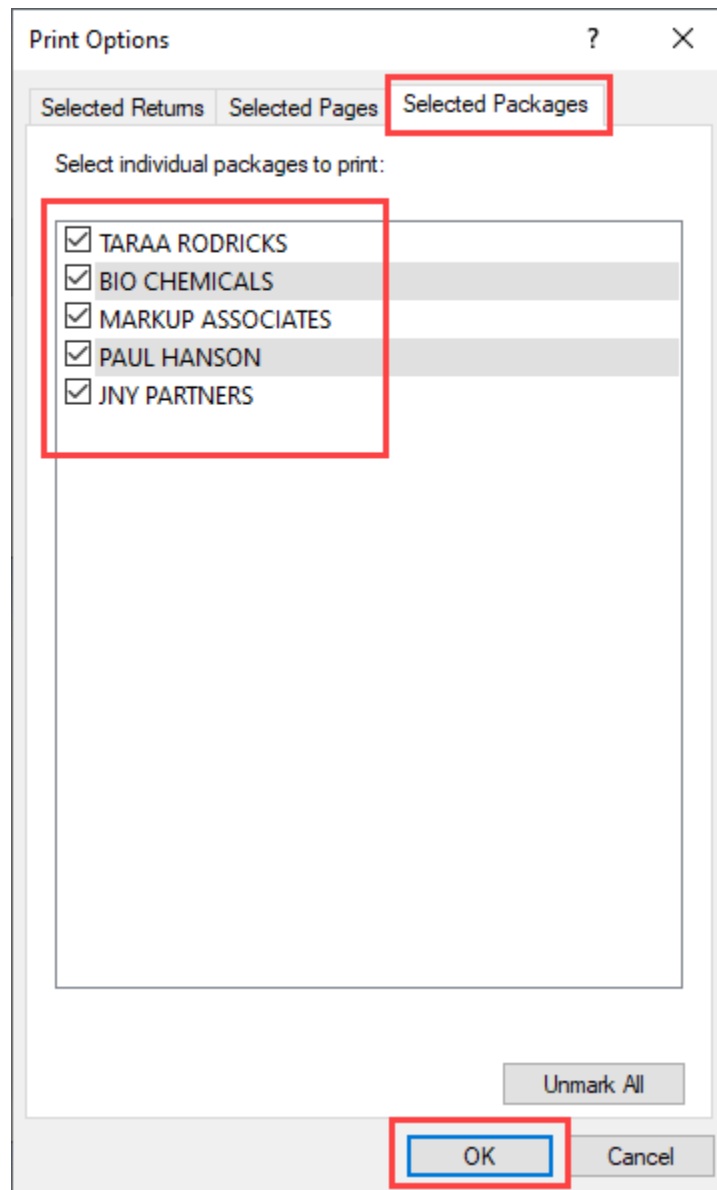
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d. "Print Returns"
    i. You MUST select a physical office printer. If you do not your returns may be printed incorrectly and rejected. (See More Information)
    ii. Select the "Client Copy", "Electronic Delivery", and "PDF to File" checkboxes
    iii. Select "Assemble"

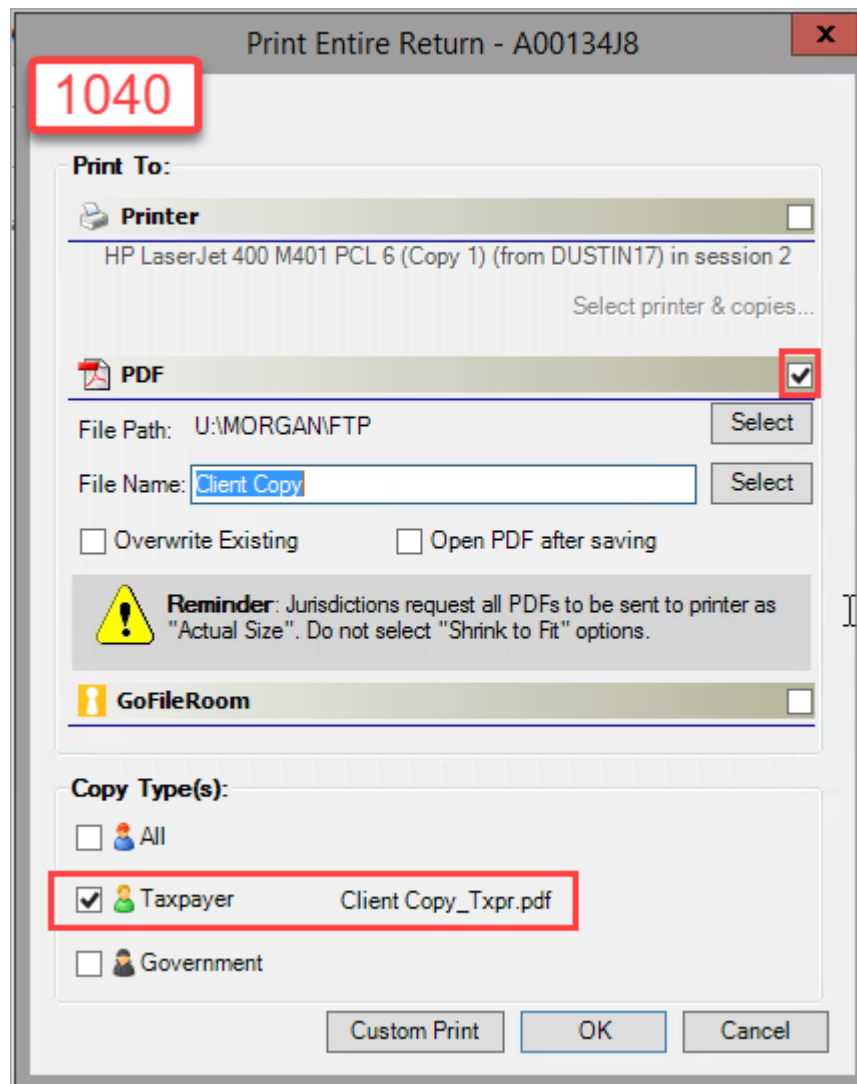(855) 818-3552
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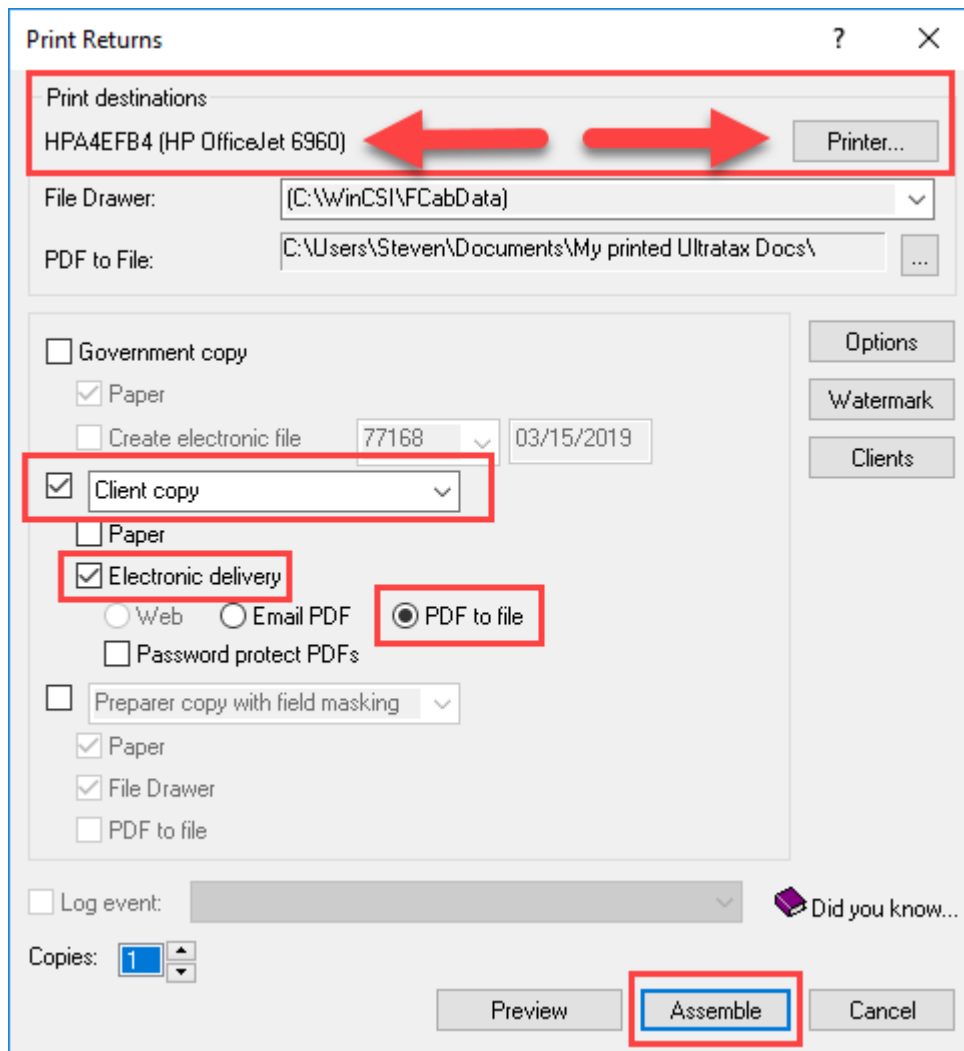
3. GoSystem

1. *Print Settings for 1040*
  a. Print Entire Return
     i. Select PDF checkbox
     ii. Select "Taxpayer" checkbox

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2. ***Print Settings For 1041, 1065, 1120 and 1120S***: If you do not adhere to the following print settings for business returns SafeSend Returns will reject the return and notify you via email that it is non-supported.
   a. Select return "Type"
   b. Select "All" under "Copy Types"
   c. Select "e-File Attachments" under "Options"
   d. When choosing K-1Packages, the check box next to "create a separate file for each partner/shareholder" needs to be selected

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4. Lacerte

1. ***Print Settings for 1040***
   a. Print Client Copy
      i. Select "Client Copy" radio button
      ii. Select "File (PDF)" radio button
      iii. Do **NOT** Mask Social Security #
      iv. Do **NOT** Password Protect PDF

1. ***Print Settings for 1041, 1065, 1120, and 1120S:*** If you do not adhere to the following print settings for business returns SafeSend Returns will reject the return and notify you via email that it is non-supported.
   a. Print Client Copy
      i. Select "Client Copy" radio button
      ii. Select "File (PDF)" radio button
      iii. Print Client Copy
      iv. Select "K-1 Package Only" radio button

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v.   Print

vi.   When uploading into SafeSend Returns, the Client Copy and Each K-1 Package will need to be uploaded, all at one time
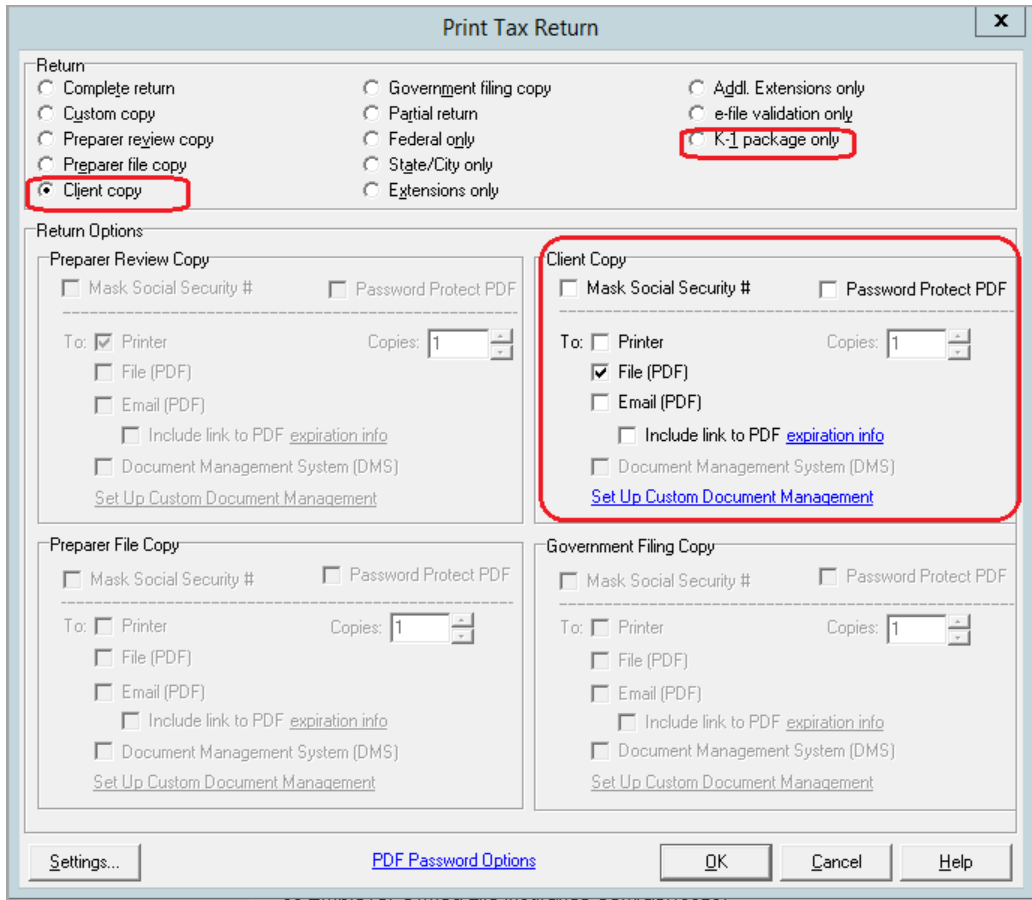
V.   Processing Returns

Important Reminders:

1.   If this is the first time a client is using SafeSend Returns, send your firms agreed upon templated email as discussed in Section I.2 of this Best Practices Guide

2.   Follow the normal steps at the end of the preparation process that might include: locking the return, setting the status to Complete, exporting for e-filing and printing the PDF copies to your firms standard document storage location (Document Management System, Windows Shared Folder, etc.)

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Processing:

Login to the SafeSend Returns site at https://www.safesendreturns.com and perform the following:

1. Upload the tax return PDF file and submit it for processing
    a. Click the **LT, GS, UT,** or **CCH** button on the right, depending on your tax software
    b. Click inside the ***Drag files here*** area and browse to the PDF file being delivered
    c. Locate the correct client file (be sure to select the **CLIENT** copy) and double-click on it to import the tax return. For Business returns be sure to adhere to the PDF printer settings as defined in Section III.4 of this Best Practices Guide
    d. The file will be imported
    e. Confirm the correct client ID is in the file name field (if not, click the red X to the right to remove it and add the correct file)
    f. Select the appropriate ***ERO/Signer*** from the list
    g. If this return needs to be secured, click on the ***Everyone*** link to change the security access for this return, otherwise leave it as is
    h. Click **Submit**
    i. A confirmation screen will appear – click **OK**

2. Click the ***All Assignments*** tab

3. Open the desired return
    a. Use the Client ID or Name field to search for the client
    b. Confirm the client name, ID and partner to be sure you're selecting the correct client
    c. You can open the return by either 1) Double-clicking on the entry/row to open it or 2) on the far-right hand side of the screen select "Actions | Process Return"

4. Review and update the items on the **Client Info** tab
    a. In the Right-Hand "Actions" panel, confirm the information that was extracted by SafeSend Returns
    b. Scroll down to the ***Taxpayer*** fields
        i. Do not populate or adjust the taxpayer ***DOB*** (taxpayer will enter this information the first time he/she reviews the tax return through SafeSend Returns)
        ii. Enter the taxpayer mobile phone number if the firm has enabled multi-factor authentication for taxpayers (refer to Section II. Security above)
        iii. Enter the taxpayer ***Email*** address if it's blank, or confirm if it's pre-populated (you can change it, if necessary)
        iv. Do not populate or adjust the spouse ***DOB*** (spouse will enter this information the first time he/she reviews the tax return through SafeSend Returns)
        v. Only if you are delivering the return to the spouse first, then enter the spouse ***Email*** address if it is blank, or confirm if it is pre-populated (you can change it, if necessary)
    c. In the left hand "Refunds and Payments Due" panel:
        i. Click on each item and confirm the amount in the image that will display in the Page View
        ii. Delete all Zero-dollar items by selecting the red "X" to the right of the amount
    d. If you need to add a refund or an overpayment, select the authority from the Refunds & Payments Due area on the left of the screen. Editing will then be available on the right of the screen in the ***Refunds and Payments Due*** section:
        i. Enter the "Overpayment" amount

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       ii.   Enter the "Applied" amount

      iii.   The net refund will auto calculate

5.   Click the **Group** tab to review the page groupings
   - a.   There is really nothing to do in this tab unless you want to delete a page. But for maximum efficiency we recommend that you configure your tax software to suppress any unwanted pages.

6.   Click the **Transmittals** tab to review the filing instructions
   -     i.   Review the Transmittals listed in the left-hand panel and ensure all Transmittals have been properly identified for each taxing authority
   -     ii.   **If something is missing**, locate the Transmittals in the tax return and move them to the **Transmittals** tab
     1. Click the **Tax Returns** tab
     2. Locate the appropriate Transmittal on the left panel and single-click on the bookmark
     3. Expand the Expand the *Move To* button in the center panel, click the drop-down and select *Transmittals*
   -     iii. Click on the **Transmittals** tab to return to that screen
   - b.   Read each set of filing instructions, looking for items that require attention (**you should read through items 6(c) and 6(d) below first so you know what to look for**)
   - c.   Do any instructions state there's a tax overpayment applied to the next year's estimated tax? If yes, determine if it's a partial overpayment or the full overpayment that is applied and follow the appropriate directions below:
     -     i.   <u>Partial overpayment applied to next year</u>
       1. Note the tax authority
       2. Click on the **Client Info** tab
       3. Locate the appropriate refund in the left panel and single-click on the amount
       4. The corresponding document will be presented on the screen, so you can reference the amounts needed to complete the steps below
       5. In the *Refunds and Payments Due* section on the right, make the following adjustments:
          - a. **Authority** – confirm the appropriate tax authority was selected
          - b. **Amount** – Change the amount to the entire overpayment
          - c. **Applied** – enter the amount of overpayment applied to next year's estimated tax
          - d. **Refund** – this defaults to the net refund (confirm by reviewing the amount on the document)
     -     ii.   <u>Full overpayment applied to next year</u>
       1. Note the tax authority
       2. Click on the **Client Info** tab
       3. There will not be a document displayed, because there is not a refund or payment due (the full amount of prior year overpayment is being applied to the next year)
       4. In the *Refunds and Payments Due* section on the left, click the **Add** button
       5. Enter the following:
          - a. **Authority** – select the appropriate tax authority

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b. **Amount** –enter the total amount of the overpayment
c. **Applied** – enter the total amount of overpayment applied to next year's estimated tax
d. **Refund** – this defaults to the net refund (it should be zero)

d. Do any instructions state there is a balance due that will be automatically withdrawn, or that online payment is required?

   i. If a payment is due (for a tax return or estimates), read the ***Special instructions*** area at the bottom of the filing instructions to look for any amounts to be automatically withdrawn or where online payment is required
   ii. If so, note the taxing authority, date of withdrawal or payment due and amount
   iii. Click on the **Vouchers** tab
   iv. Click the **Add Payment** button and enter the following:
      1. **Authority** – select the appropriate tax authority
      2. **Payment Type** – select the appropriate payment type
      3. **Due date** - enter withdrawal or due date
      4. **Voucher amount** - enter amount to be automatically withdrawn or amount to be paid online
      5. **Form Name** – enter the form name
      6. Select either:
         a. ***DO NOT PAY: Scheduled for automatic withdrawal***
         b. ***Online Payment Required***
      7. Click **Save Changes**
   v. Repeat for any other automatic withdrawals or online payments required

7. Click the **Tax Returns** tab
   There is really nothing to do here unless you want to delete the cover sheet page
   a. Make sure the cover sheet is the page you're viewing
   b. Click on the bookmark on the left for the page to be deleted.
   c. Click the drop-down on the ***Move To*** button and select ***Deleted***
   d. Confirm the deletion by clicking ***Yes***

8. Click the **E-File** Tab
   a. Confirm the signature location for taxpayer, spouse and ERO for all E-File forms
   b. If using Signature Stamps without automatic placement, select the ERO and manually place their signature stamp

9. Click the **Additional E-Sign Documents** tab
   a. Any documents that need to be e-signed but are not already in the E-File tab can be added here
   b. Signature Fields will need to be manually added to each document
   c. Both Word docs and PDFs can be added; the taxpayer will not have the ability to manipulate these documents beyond applying requested information

10. Click the **Vouchers** tab and look for zero-dollar estimate vouchers to be removed
    a. Confirm you're viewing the first voucher (if not, click the first voucher on the left panel or the first page icon listed at the top)

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        b. If the dollar amount is <u>not</u> zero, confirm the Voucher Amount and Due Date in the right-handpanel and move to the next voucher

        c. Continue reviewing each voucher until all of them have been addressed

11. If applicable, click the **Invoice** tab and enter the dollar amount of the invoice and replace if needed

12. If applicable, click the **Attachments** tab and add attachments for paper-filed returns or other informationto be sent to the client

        a. Make sure the appropriate attachments have been saved from your document storage location

        b. Click the **Attachments** tab

        c. Click inside the ***Drag Files Here*** area and browse to the location of the files to be attached

        d. If you wish to add instructions you can do so, but it is <u>not required</u>

13. Finalize the return for delivery

        a. Click the **Delivery Options** tab

        b. Select the appropriate name in the **Contact Person** field

        c. Select the e-file administrator name in the **Notify About Signing Events** field

        d. The **Send Voucher Reminders** option has been set to our firm's default

        e. Confirm the **Mailing Address** field is the firm's office

        f. Enter any note to be shared with the client, if applicable

            i. Select a templated message from the drop-down menu (if applicable)

            ii. Click the **Edit** button

            iii. List paper-filed returns that will be mailed separately to clients with envelopes

            iv. List any vouchers that will be mailed separately to client (because we cannot add themthrough SafeSend Returns)

            v. Remind client to make any necessary payments for tax authorities that do not providevouchers and thus are not included with the SafeSend Returns or paper delivery)

            vi. Include anything special to share with the client regarding the return delivery

        g. Click the **Taxpayer Preview** button to confirm the client presentation is correct

            i. Proper Contact Person is listed

            ii. All refunds and payments due are correct

            iii. Click the **Click Here To Get Started** button to preview the documents

            iv. Click the Generate button to generate the preview

            v. Review the vouchers to ensure they're correct (including any automatic payments)

        h. Close the ***Taxpayer Preview*** window

14. Click the **Finished** button in the lower-right corner to complete the process

15. Click the **Deliver to Client** button to send the return to the client

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16. Send the client our templated email as defined in Section I.2

17. Monitor for returned/signed 8879s (under **Reports** - **Delivered Returns**)
    a. Print a copy of the signed 8879(s) to the appropriate Document Storage Location
    b. Proceed with the normal e-filing procedures in the tax software

18. Archive the return (optional)
    a. Check the box to the left of the return that has been completed/processed for e-filing
    b. Click the Archive button at the top

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