



SafeSend
Returns

Quick Reference Guide
Processing & Delivery

safesend.com



All Assignments

Assign Delete Set Access

Search

Click Upload:
Based on your
firm's tax
software

LT GS UT CCH

<input type="checkbox"/>	Name ▾▲	Client ID ▾▲	ERO / Signer ▾▲	Assigned To ▾▲	Status ▾▲	Date ▾▲	Type ▾▲	Tax Year ▾▲	Action
	<input type="text" value="Name"/>	<input type="text" value="Client ID"/>	<input type="text" value="ERO / Signer"/>	<input type="text" value="Assigned To"/>	<input type="text" value="Select Status..."/>	<input type="text" value="Select Uploaded Date Limit"/>	<input type="text" value="Select Type..."/>	<input type="text" value="Select Tax Year..."/>	
<input type="checkbox"/>	Bishop, Elizabeth	NY_CA_01-01-1953_9984	Henry Darger	John Darnielle	PROCESSING	11/18/2020	1040	2019	<input type="button" value="🔍"/> <input type="button" value="📄"/> <input type="button" value="✖"/> <input type="button" value="⋮"/>
<input type="checkbox"/>	Coltrane, Betty	MA_CA_01-01-1955_6504	Jonathan Richman		READY	11/18/2020	1040	2019	<input type="button" value="🔍"/> <input type="button" value="📄"/> <input type="button" value="✖"/> <input type="button" value="⋮"/>
<input type="checkbox"/>	Lomax, Alan	AZ_CA_01-01-1970_3215_CA_NR	Betty Davis		READY	11/18/2020	1040	2019	<input type="button" value="🔍"/> <input type="button" value="📄"/> <input type="button" value="✖"/> <input type="button" value="⋮"/>

Showing 1 to 3 of 3 entries

Upload Document

Drag files here
(or click to upload)

1

#	Name	Upload Progress	Size	Status	Client ID *	ERO / Signer *	Set Access	Remove
1	2019 TA HA 1040 0535 9984.pdf	<div style="width: 100%; height: 10px; background-color: green;"></div>	662 KB	Uploaded	2019 TA HA 1040 0535 9984	<div data-bbox="1709 372 2015 654"><p>Select...</p><p>Betty Davis</p><p>Henry Darger</p><p>Jason Molina</p><p>Joe Wroblewski</p></div>	Everyone	

3

Close Submit

1. Drag return into box
2. Select ERO/Signer
3. Click Submit

Assign Delete Set Access

LT GS UT CCH

Search [C]

<input type="checkbox"/>	Name <small>▼▲</small>	Client ID <small>▼▲</small>	ERO / Signer <small>▼▲</small>	Assigned To <small>▼▲</small>	Status <small>▼▲</small>	Date <small>▼▲</small>	Type <small>▼▲</small>	Tax Year <small>▼▲</small>	Action
	<input type="text" value="Name"/>	<input type="text" value="Client ID"/>	<input type="text" value="ERO / Signer"/>	<input type="text" value="Assigned To"/>	<input type="text" value="Select Status..."/>	<input type="text" value="Select Uploaded Date Limit"/>	<input type="text" value="Select Type..."/>	<input type="text" value="Select Tax Year..."/>	
<input type="checkbox"/>	AASTER, TROY	2019 TA HA 1040 0535 9984	Henry Darger		READY	12/03/2020	1040	2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Bishop, Elizabeth	NY_CA_01-01-1953_9984	Henry Darger	John Darnielle	PROCESSING	11/18/2020	1040	2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Coltrane, Betty	MA_CA_01-01-1955_6504	Jonathan Richman		READY	11/18/2020	1040	2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Lomax, Alan	AZ_CA_01-01-1970_3215_CA_NR	Betty Davis		READY	11/18/2020	1040	2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 4 of 4 entries

1

1. Click to Process return

Client Details

Form 1040 - U.S. Individual Income T...

Refunds & Payments Due

California (\$800.00) ✕

District of Columbia (\$1740.00) ✕

Federal (\$52820.00) ✕

Arizona \$3646.00 ✕

Added Refunds



No Content

1

1. Confirm that Refunds & Payments Due are accurate
2. Enter and confirm email address (mobile number can be entered here if firm is using MFA)

60057874 999003 KBA14 23

Form **1040** Department of the Treasury - Internal Revenue Service (99) **2019** U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only - Do not write or staple in this space.

Filing Status Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)
 Check only one box. If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial TROY	Last name AASTER	Your social security number 574 07 0535
If joint return, spouse's first name and middle initial HOLLY	Last name ANDERSON	Spouse's social security number 307 52 9984

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Presidential Election Campaign
 Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. You Spouse

785 SPITZ BLVD

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).
BRISBANE, CA 94005

Foreign country name Foreign province/state/county Foreign postal code If more than four dependents, see instructions and ✓ here ▶

Standard Deduction Someone can claim: You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1955 Are blind Spouse: Was born before January 2, 1955 Is blind

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see instructions):	
(1) First name	Last name			Child tax credit	Credit for other dependents

1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	130000.
2a	Tax-exempt interest	2a	214.
3a	Qualified dividends	3a	50000.

Standard Deduction

+ Return Information

- Taxpayer

Name TROY AASTER

SSN 574-07-0535

Address 785 SPITZ BLVD

City BRISBANE

State CA

Zip 94005

DOB MM/DD/YYYY

Mobile Select... () -

Email safesenddemo1@gmail.com

Deceased

- Spouse

Name HOLLY ANDERSON

< Previous

> Next

H Save & Close

✓ Finish

Client Info Group **Transmittals** Tax Returns E-File Additional E-Sign Documents Vouchers Attachments Delivery Options

Transmittals

- Transmittal [6]
- Transmittal [7]
- Transmittal [8]
- Transmittal [9]
- Transmittal [10]
- Transmittal [11]
- Transmittal [12]

Manually Added Vouchers +

- P District of Columbi... (\$1740.00) ✕
- ES Virginia 4Q ES (\$20000.00) ✕

Recognized Vouchers

- P US 1040-V (\$52820.00)
- P California 3522 (\$800.00)
- ES US 1040-ES (\$14070.00)
- ES 140 ES (\$912.00)

1

1 / 7 Move To

January 6, 2020

Holly Anderson
785 Spitz Blvd
Brisbane, CA 94005

Dear Holly:

Enclosed are your 2019 income tax returns and 2020 estimated tax vouchers.

Specific filing instructions are as follows.

FEDERAL INCOME TAX RETURN:

This return has qualified for electronic filing and the practitioner PIN program has been elected. After reviewing the return for completeness and accuracy, please sign and

Signature Stamp

Henry Darger

+ Add Signature Stamp ?

Previous Next Save & Close Finish

1. If any payments do not produce vouchers, add them in them here

Client Info Group Transmittals Tax Returns E-File **Additional E-Sign Documents** Vouchers Attachments Delivery Options

Added Documents +

Engagement Letter >

1

2

5 / 7

to enforce US laws that protect the privacy of your tax return information against a tax return preparer located outside of the US to which the information is disclosed. If you agree to allow Callen & Hunt CPAs, LLP to disclose your tax return information, including your SS, to Outsourcing Partner, Inc. for purposes of providing assistance in the preparation of your 2011 individual income tax return, please check the box below, provide the information requested below, and sign and date your consent to the disclosure of your tax return information. '

Opt-OUT By selecting this check box, we DO NOT authorize Callen & Hunt CPAs, LLP to disclose to Outsource Partner, Inc. my/(our) tax return information including my/(our) SSN to allow Outsource Partner, Inc. to assist in the preparation of my/(our) 2012 individual tax return. I

Taxpayer: Date:

Spouse: Date:

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

e-Signatures

TROY AASTER

- Add Signature Field ?
- Add Date Signed Field ?
- Add Initials Field ?
- Add Company Field ?
- Text ?

ERO Signature Stamp

Henry Darger

- Add Signature Stamp ?

Previous Next Save & Close Finish

- 1. If additional documents need to be e-signed upload them
- 2. Add Signature Fields

Client Info Group Transmittals Tax Returns E-File Additional E-Sign Documents **Vouchers** Attachments Delivery Options

Vouchers

- US 1040-V
- ES US 1040-ES
- ES US 1040-ES
- ES US 1040-ES
- ES US 1040-ES
- ES 140 ES
- ES 140 ES
- ES 140 ES \$0.00
- ES 140 ES \$0.00
- P California 3522
- P District of Columbia D-40E
- ES Virginia 4Q ES

1 2 3 4 5 > >> 1 / 12 Move To [Print] [Search]

2019 Form 1040-V

Department of the Treasury
Internal Revenue Service

Paperwork Reduction Act Notice.
We ask for the information on Form 1040-V to help us carry out the Internal Revenue laws of the United States. If you use Form 1040-V, you must provide the requested information. Your cooperation will help us ensure that we are collecting the right amount of tax.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Internal Revenue Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For the estimated averages, see the instructions for your income tax return. If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

Voucher Details

Authority: Federal

Payment Type: Payment Voucher

DueDate: 10/15/2020

Voucher Amount: \$ 52820.00

Form Name: US 1040-V

Select

Cancel Update

1 2

1. Verify Voucher Details
2. Remove \$0 vouchers if needed

< Previous > Next Save & Close Finish

Client Info Group Transmittals Tax Returns E-File Additional E-Sign Documents Vouchers **Invoices** Attachments Delivery Options

Invoices

Billing [1]

Billing [2]

1 / 2 Move To [Print] [Search]

1

Invoice Amount \$ 1740.00

Do not send an invoice with this return

2 Replace Invoice

Signature Stamp

Henry Darger

Add Signature Stamp

JANUARY 6, 2020

HOLLY ANDERSON
785 SPITZ BLVD
BRISBANE, CA 94005

PROFESSIONAL SERVICES RENDERED IN THE PREPARATION OF YOUR 2019
INDIVIDUAL INCOME TAX RETURNS, INCLUDING:

FORM 1040, U.S. INDIVIDUAL INCOME TAX RETURN
SCHEDULE B, INTEREST AND ORDINARY DIVIDENDS
SCHEDULE C, PROFIT OR LOSS FROM BUSINESS
SCHEDULE E, SUPPLEMENTAL INCOME AND LOSS PAGE 2
SCHEDULE SE, SELF-EMPLOYMENT TAX (SHORT)
FORM 1040-ES, ESTIMATED TAX FOR INDIVIDUALS
FORM 1040-V, PAYMENT VOUCHER
FORM 114, REPORT OF FOREIGN BANK & FINANCIAL ACCTS
FORM 114A, AUTHORIZATION TO ELECTRONICALLY FILE FBARS

Previous Next Save & Close Finish

1. If an invoice is included with the return, enter the amount
2. If an invoice needs to be uploaded from another program, select "Replace Invoice" and upload

Client Info

Group

Transmittals

Tax Returns

E-File

Additional E-Sign Documents

Vouchers

Invoices

Attachments

Delivery Options

Add Attachments



Drag files here
(or click to upload)

1

Uploaded Files



Local Return.pdf

876 KB

12/03/2020

Henry Darger

[View Instruction](#)



Source Documents.pdf

292 KB

12/03/2020

Henry Darger

[View Instruction](#)



1. Add additional documents to the return package as needed

< Previous

> Next

Save & Close

Finish

Client Info Group Transmittals Tax Returns E-File Additional E-Sign Documents Vouchers Invoices Attachments **Delivery Options**

Taxpayer Dashboard Taxpayer Preview

Contact Person: Dean Wareham

Message From Preparer: Paper-Filed Returns + New Edit

1 **IMPORTANT: Your Return has documents that are required to be paper-filed.**
Those documents and instructions for filing them are located in the Download section as Attachments.

Tax Return Watermarks

Watermark Name: None

Taxpayer Spouse

JHW Accountancy LLC

E-File Notifications

Reminders

2

< Previous > Next Save & Close Finish

1. Verify messaging is correct and review options through tab
2. Click "Finish"

Finish Return Processing

Internal Routing ▼ Please select an option to finish

-  Send for Review
-  Send to ERO / Signer **1**
-  Approve for Delivery

Delivery ▼

-  Deliver to Client **2**

Taxpayer Spouse

Name TROY AASTER

SSN 574070535

Address 785 SPITZ BLVD

Email safesenddemo1@gmail.com

 Cancel  Send

 Previous  Next  Save & Close  Finish

1. Send for review if needed
2. Select "Deliver to Client" to send return

Questions?

Contact our Support team at
support@safesend.com or 855-818-3552.