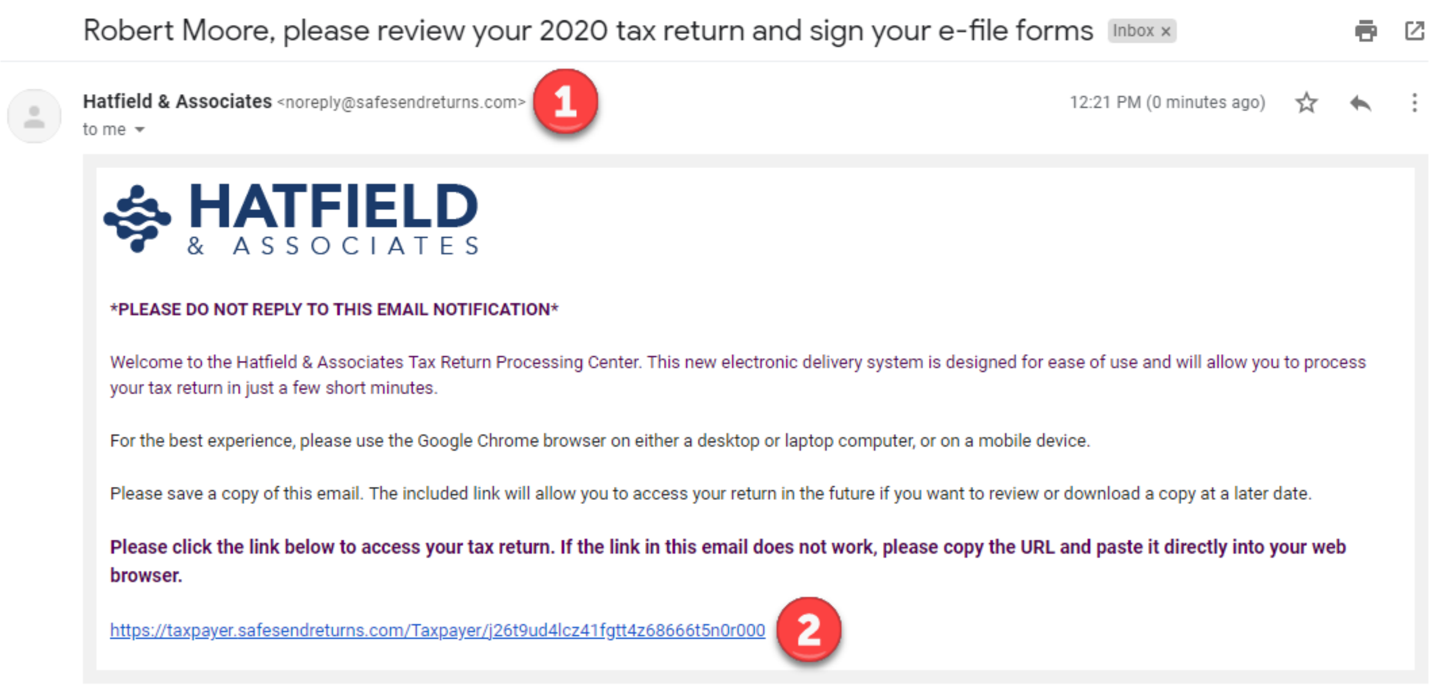
1040 Quick Reference Guide

1. Your tax firm will send you an email from noreply@safesendreturns.com.
    a. We recommend that you add this email address to your email client's safe sender list to avoid these notifications going into a spam/junk folder.
    b. Your accountant or CPA firm's name will appear in front of the email address.
    c. Your CPA firm's logo may appear in the body of the email.
    d. Your name may appear in the subject line of the email.
2. Click the link in the email.


Robert Moore, please review your 2020 tax return and sign your e-file forms Inbox ×

Hatfield & Associates <noreply@safesendreturns.com> 1
to me
12:21 PM (0 minutes ago)

HATFIELD & ASSOCIATES

PLEASE DO NOT REPLY TO THIS EMAIL NOTIFICATION

Welcome to the Hatfield & Associates Tax Return Processing Center. This new electronic delivery system is designed for ease of use and will allow you to process your tax return in just a few short minutes.

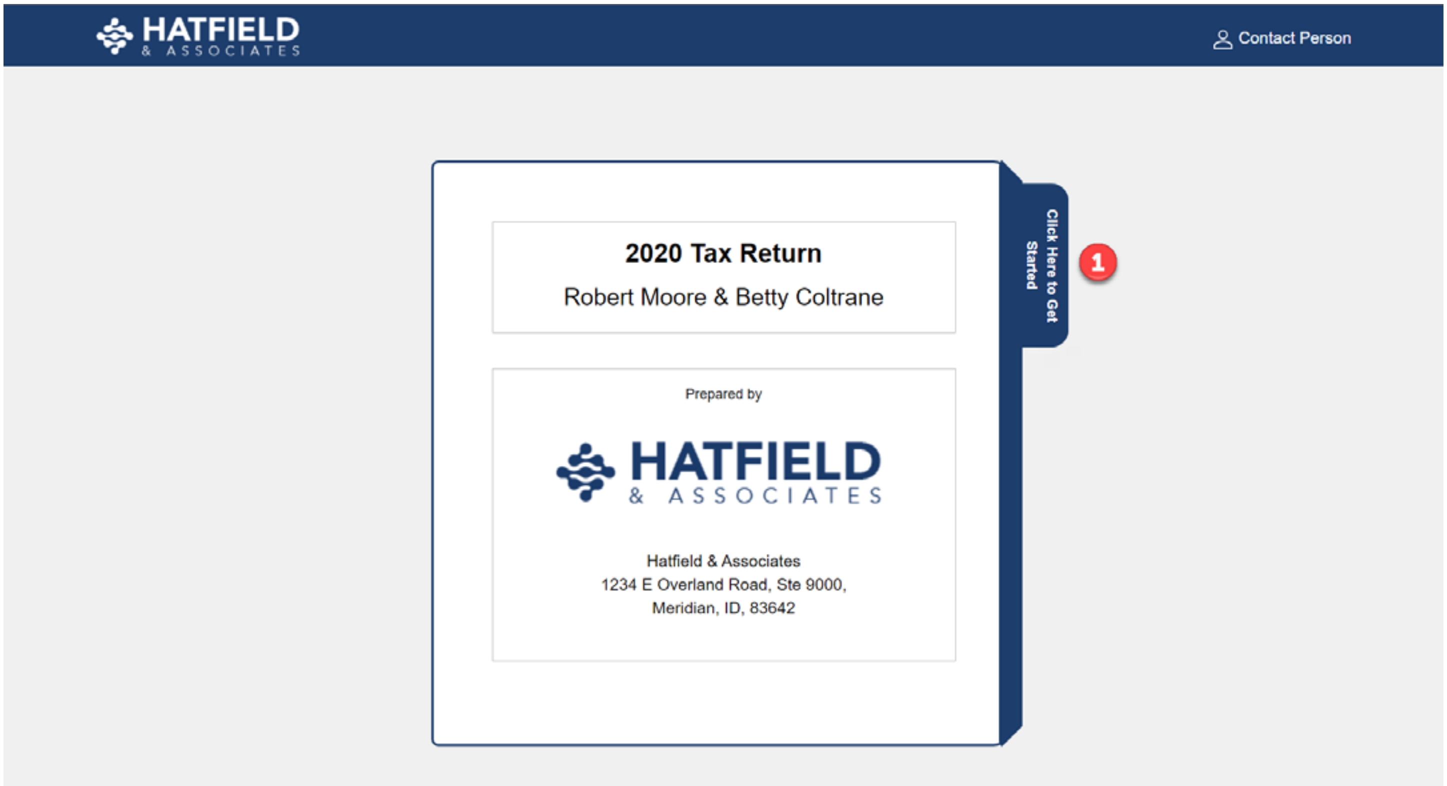
For the best experience, please use the Google Chrome browser on either a desktop or laptop computer, or on a mobile device.

Please save a copy of this email. The included link will allow you to access your return in the future if you want to review or download a copy at a later date.

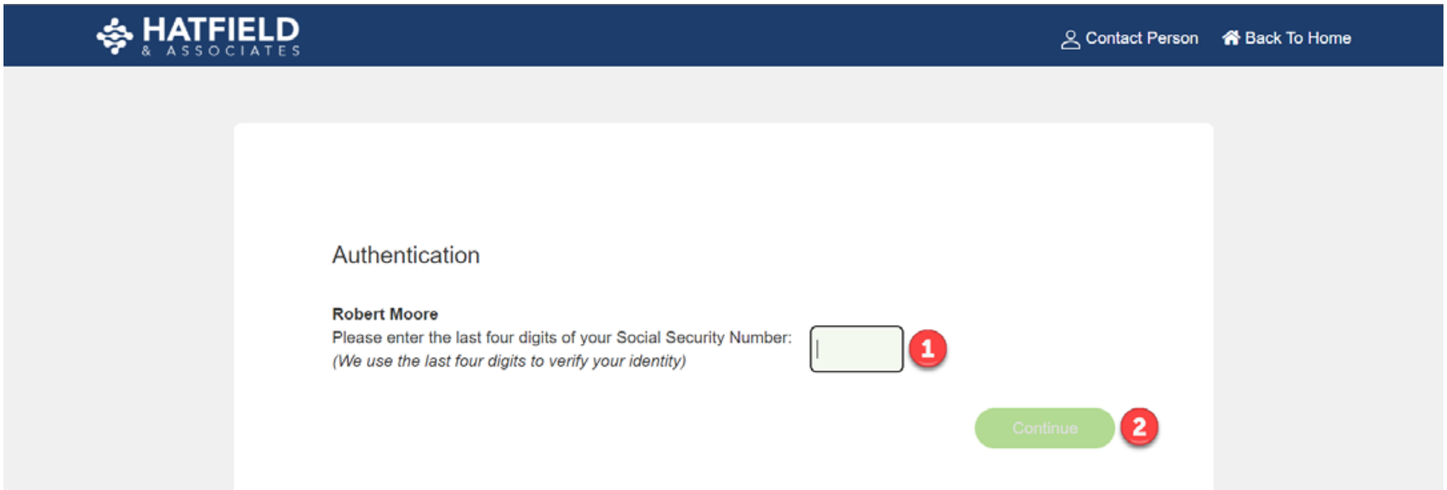
Please click the link below to access your tax return. If the link in this email does not work, please copy the URL and paste it directly into your web browser.

https://taxpayer.safesendreturns.com/Taxpayer/j26t9ud4lcz41fgtt4z68666t5n0r000 2

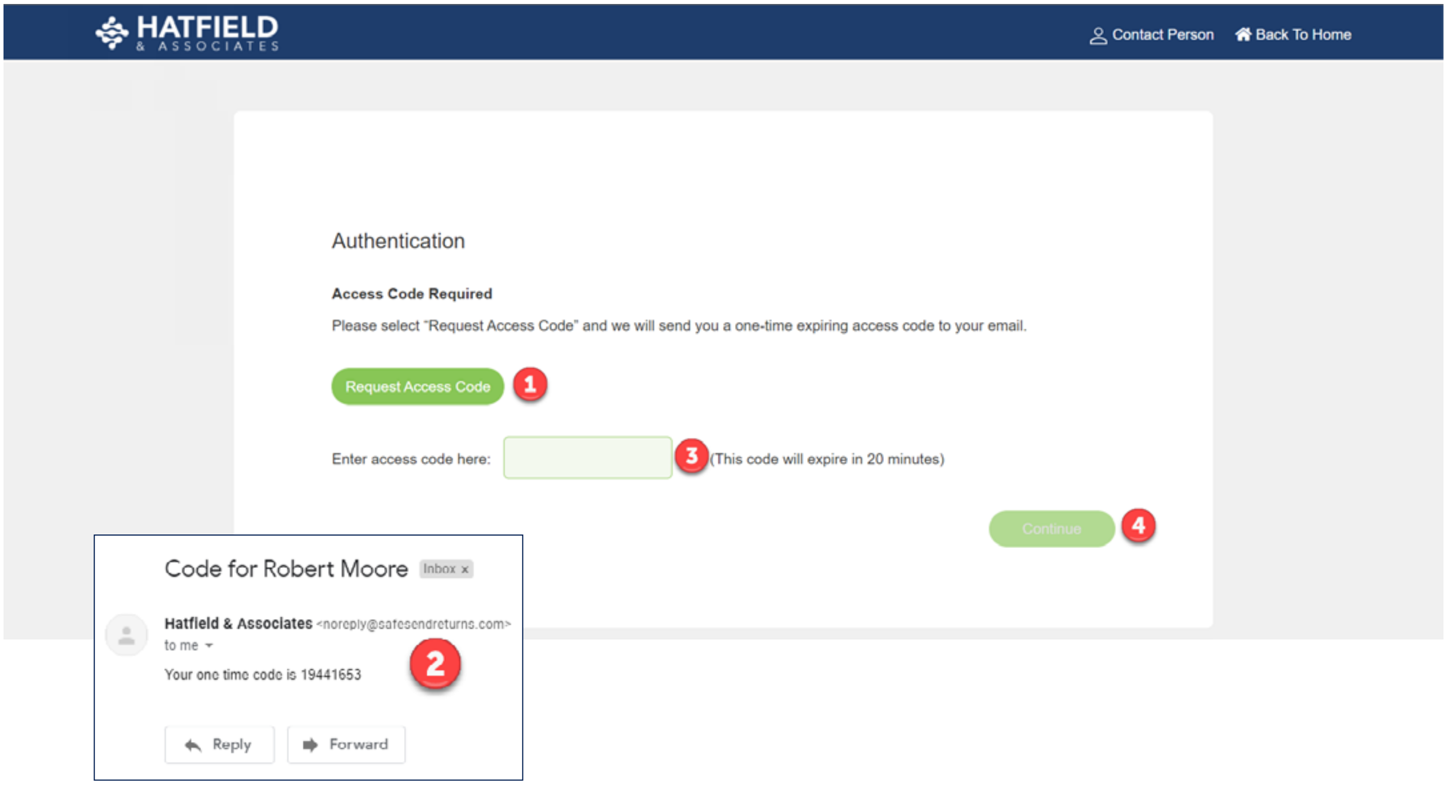
1. Click the **Click Here to Get Started** tab to continue.



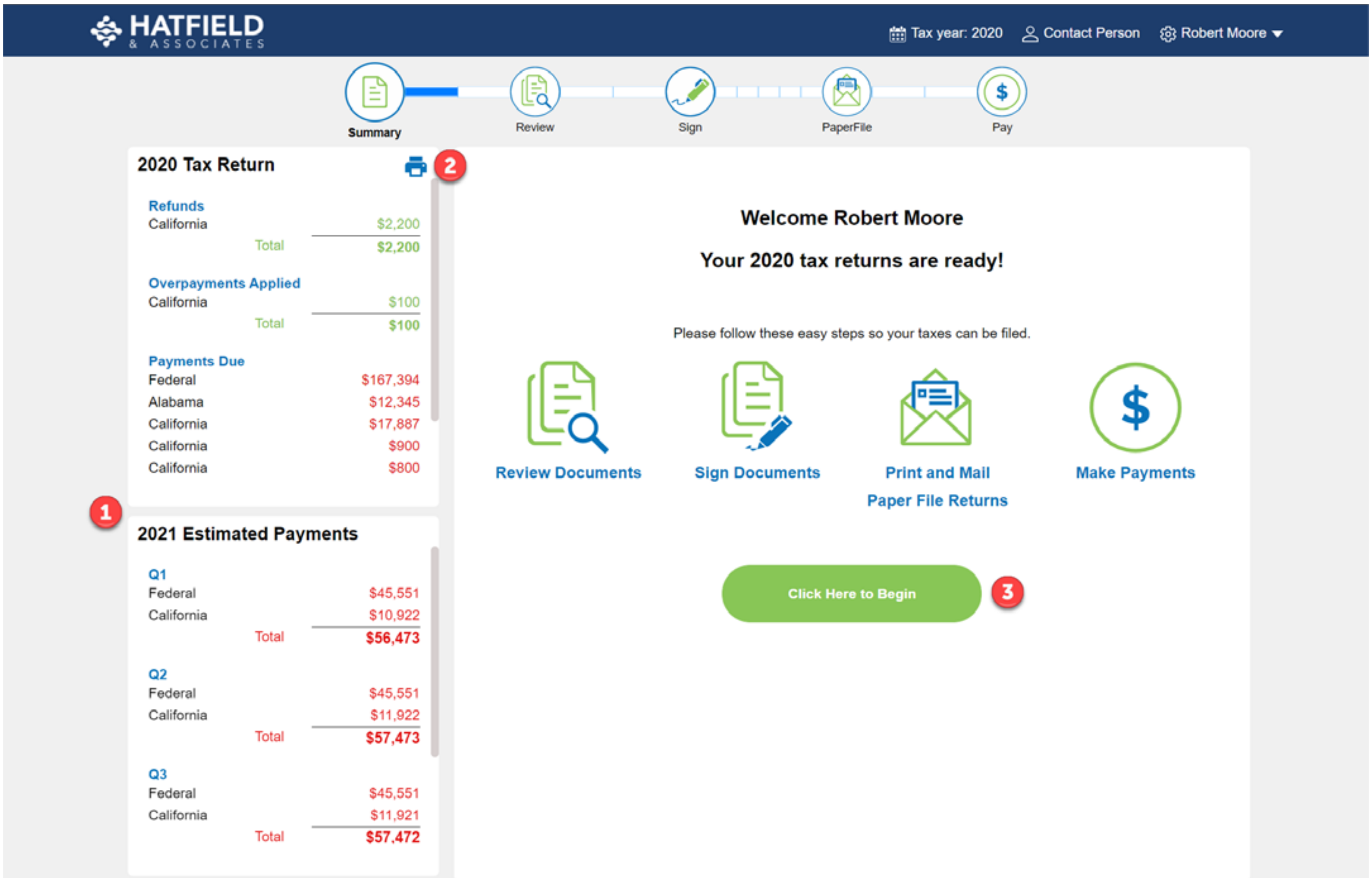
1. Insert the first (or last) four digits of your social security number based on the instructions provided.
2. Click **Continue**.



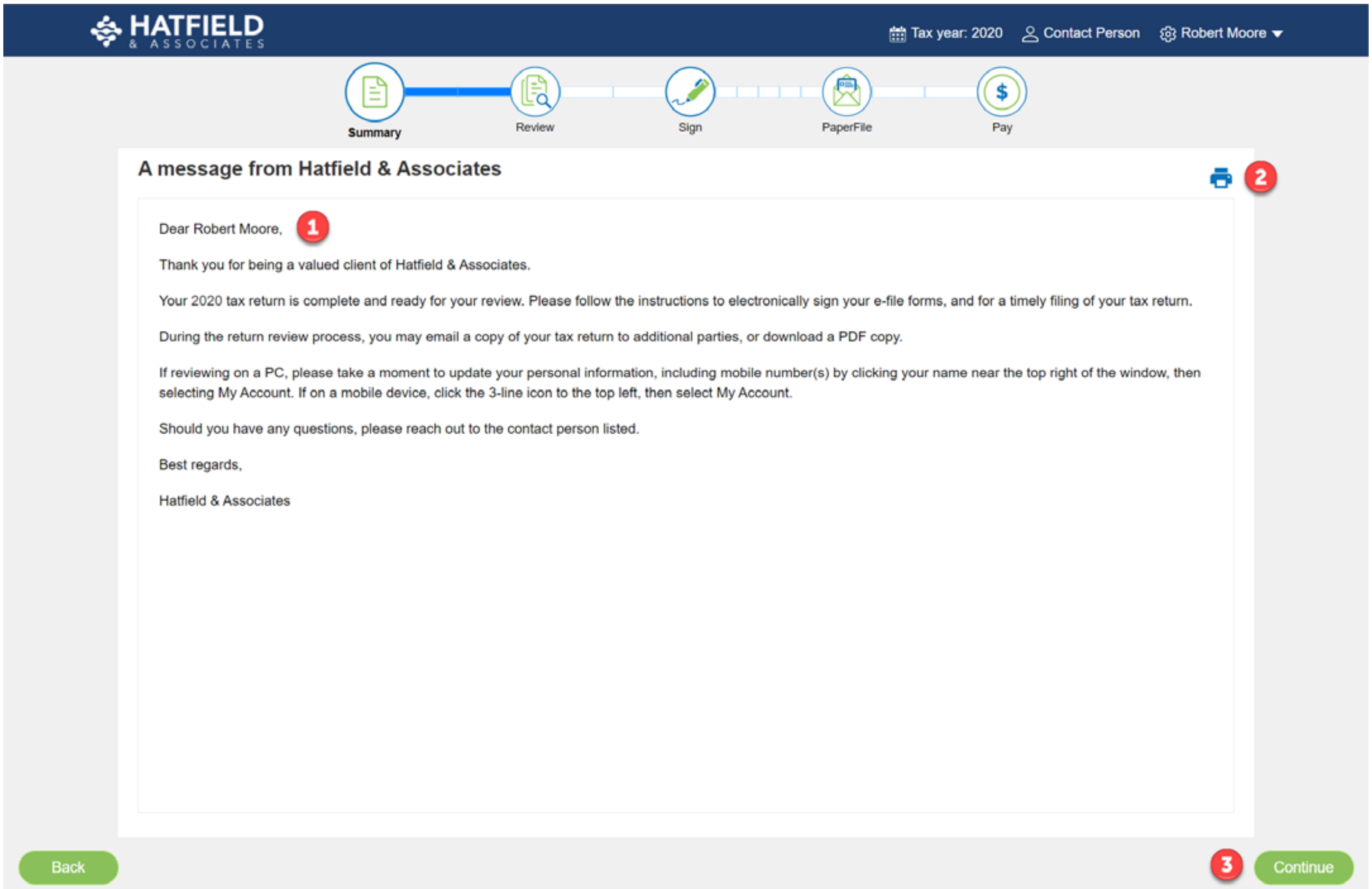
1. Click **Request Access Code**.
2. You will receive an email or text notification with a one-time code.
    a. Copy the access code and go back to the Authentication screen.
3. Paste or type the access code into the requested field.
4. Click **Continue**.



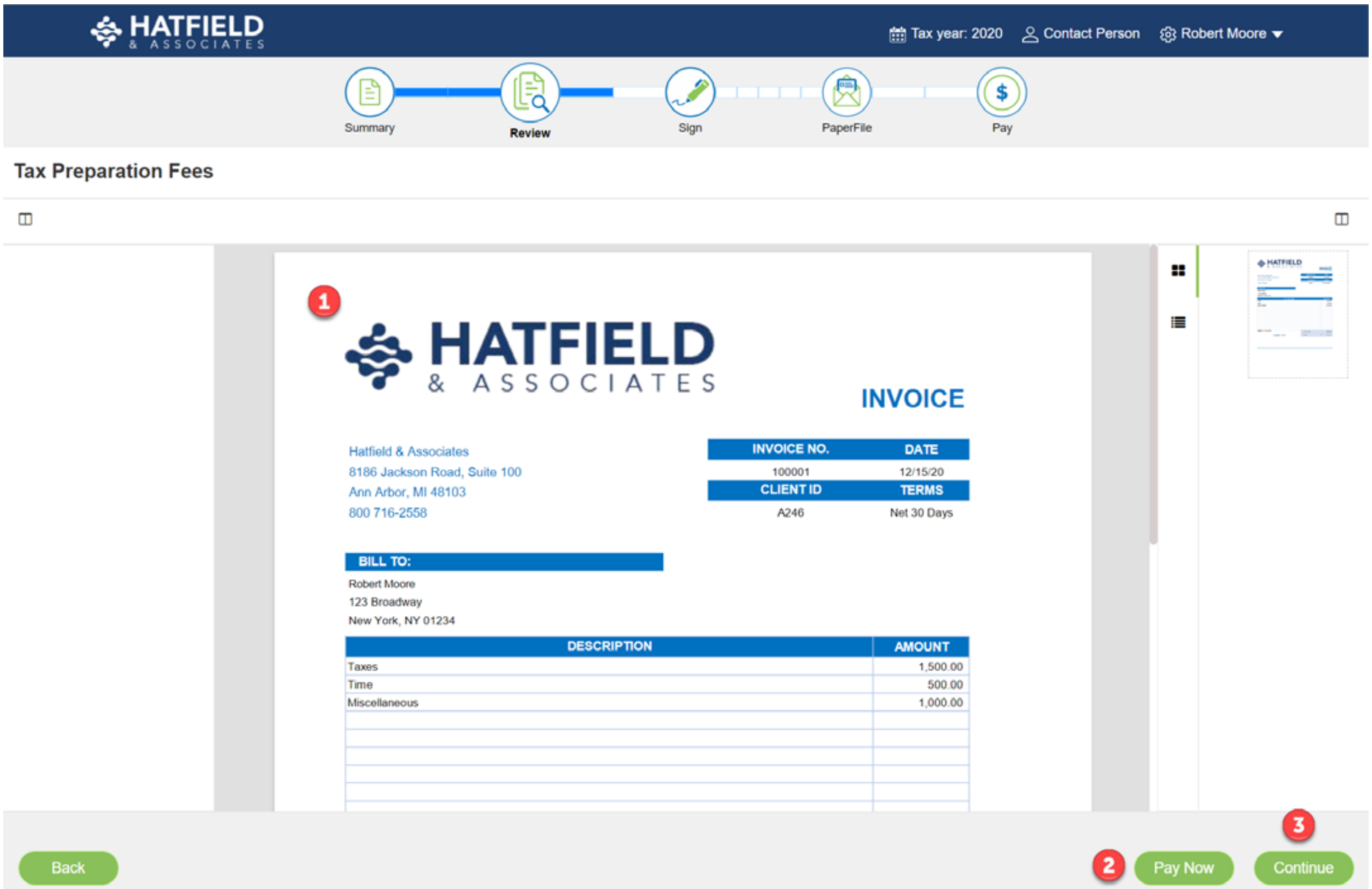
1. The left panel shows a summary of refunds and payments due.
2. Click the **print icon** to save a PDF copy of refunds and payments due.
3. **Click Here to Begin** to continue.



1. You will see a message from the firm.
2. Click the **print icon** to save a PDF copy of the message, if necessary.
3. Click **Continue**.

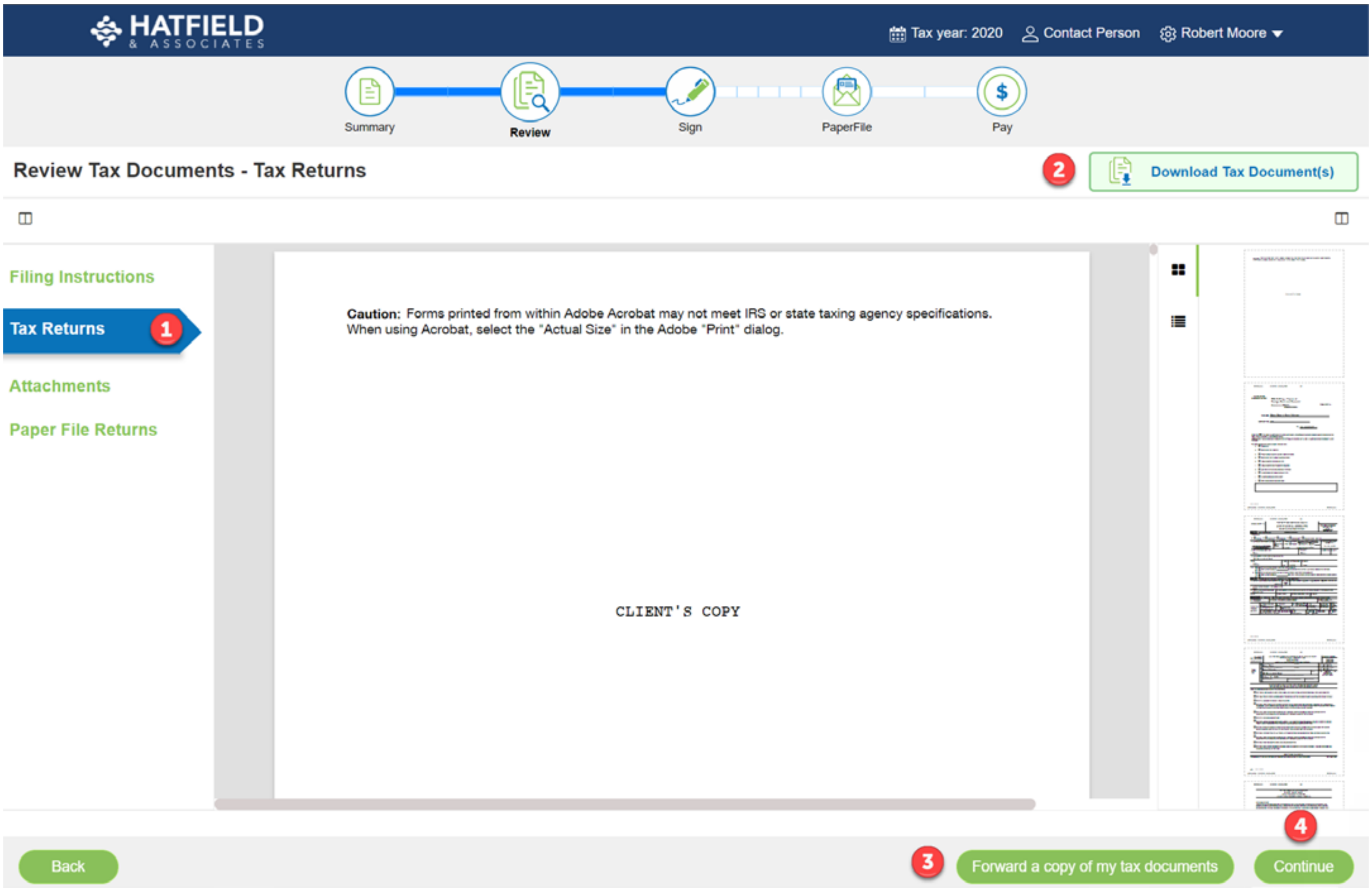


1. Review your invoice if one was included.
2. Click **Pay Now** to pay your invoice.
3. Click **Continue**.



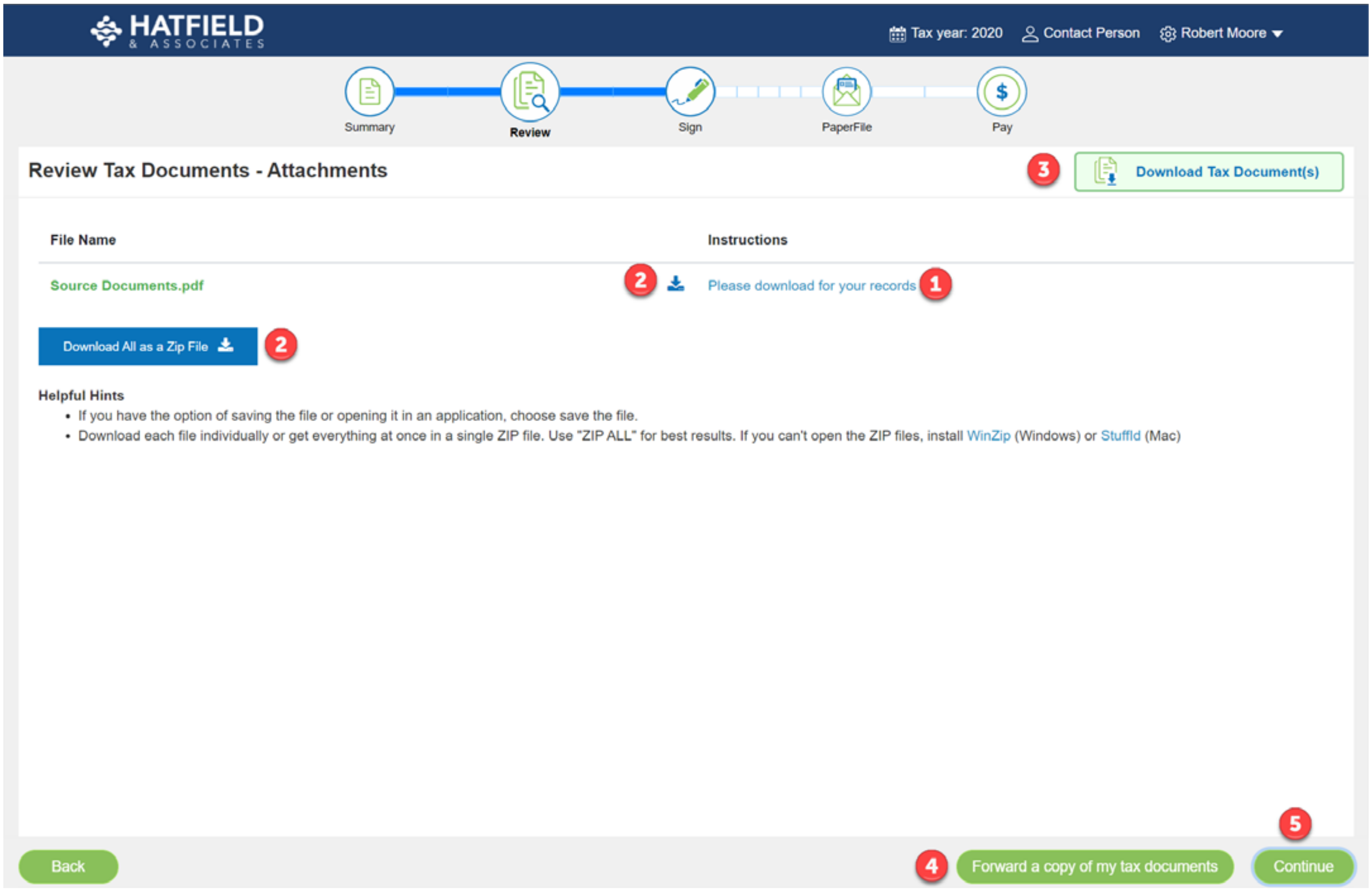
1. Review the Filing Instructions.
2. Download tax documents, if necessary.
3. Forward tax documents to third parties.
4. Click **Continue**.

1. Review the tax returns.
2. Download tax documents for your records.
3. Forward tax documents to third parties.
4. Click **Continue**.



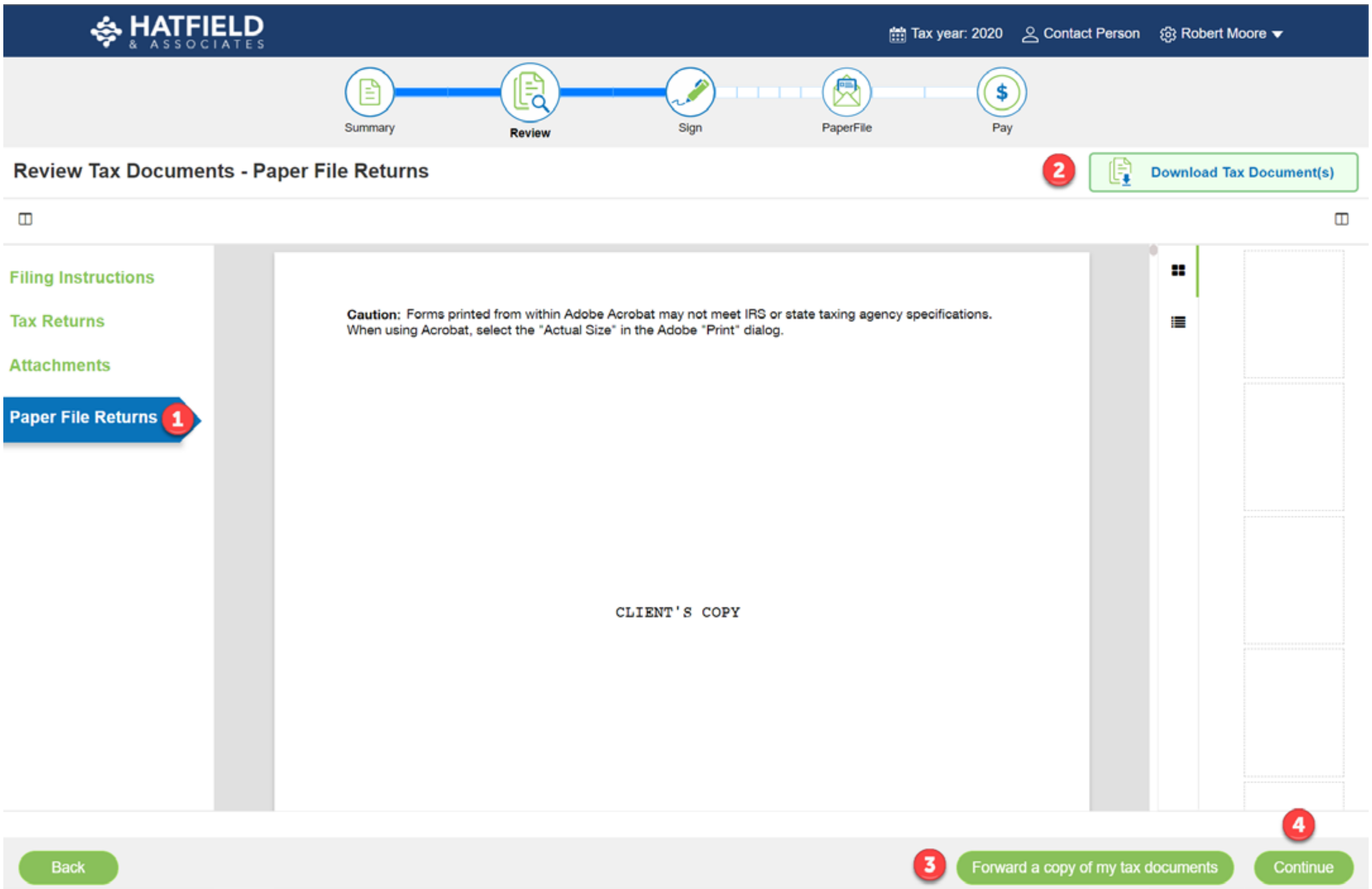
If no attachments are included, continue to the next page.

1. Review instructions for attachments.
2. Download attachments individually or in bulk to a zip file.
3. Download tax documents for your records.
4. Forward tax documents to third parties.
5. Click **Continue**.



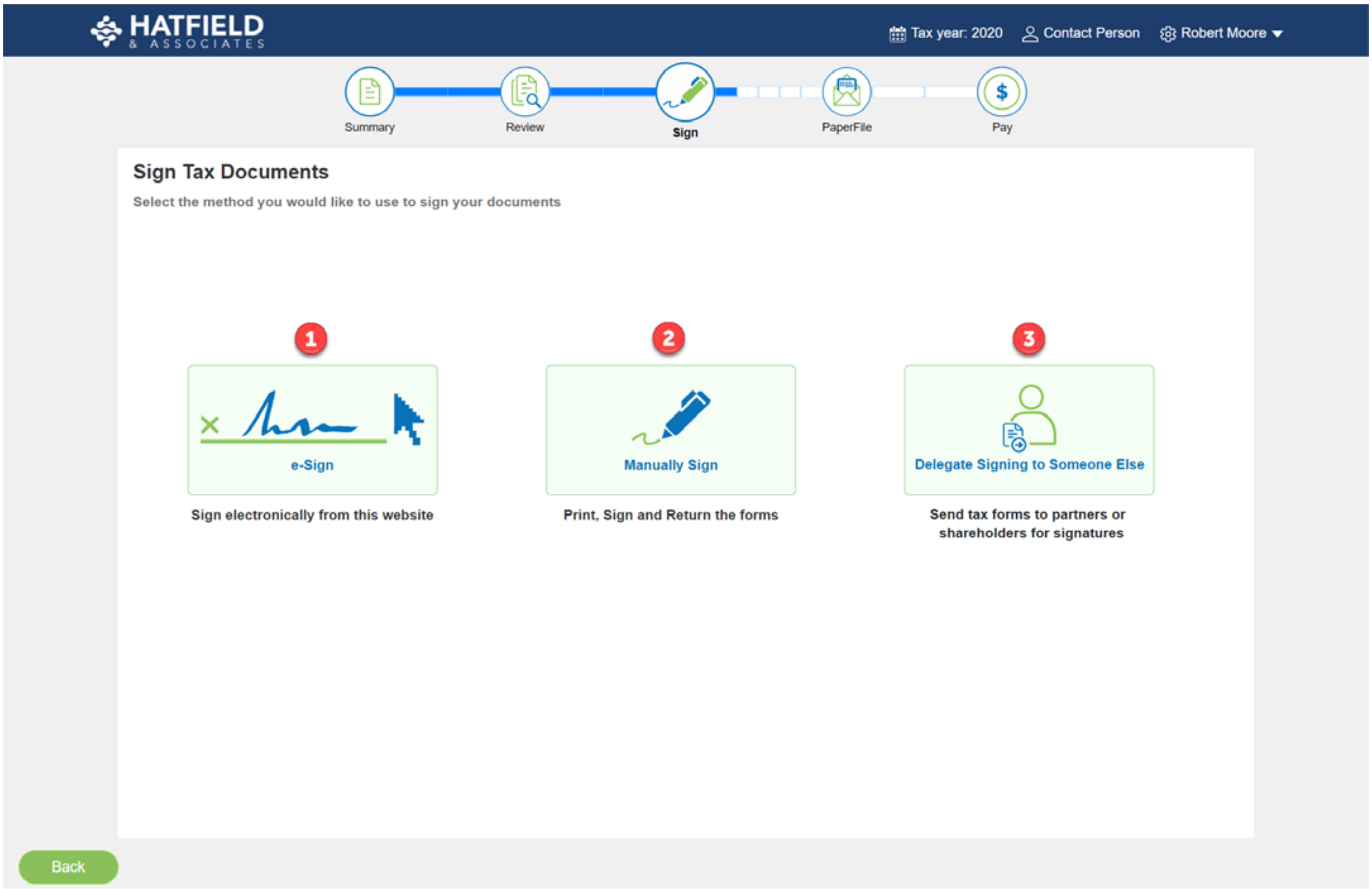
If no paper-filed returns are included, continue to the next page.

1. Review paper-file required returns.
2. Download tax documents for your records.
3. Forward tax documents to third parties.
4. Click **Continue**.



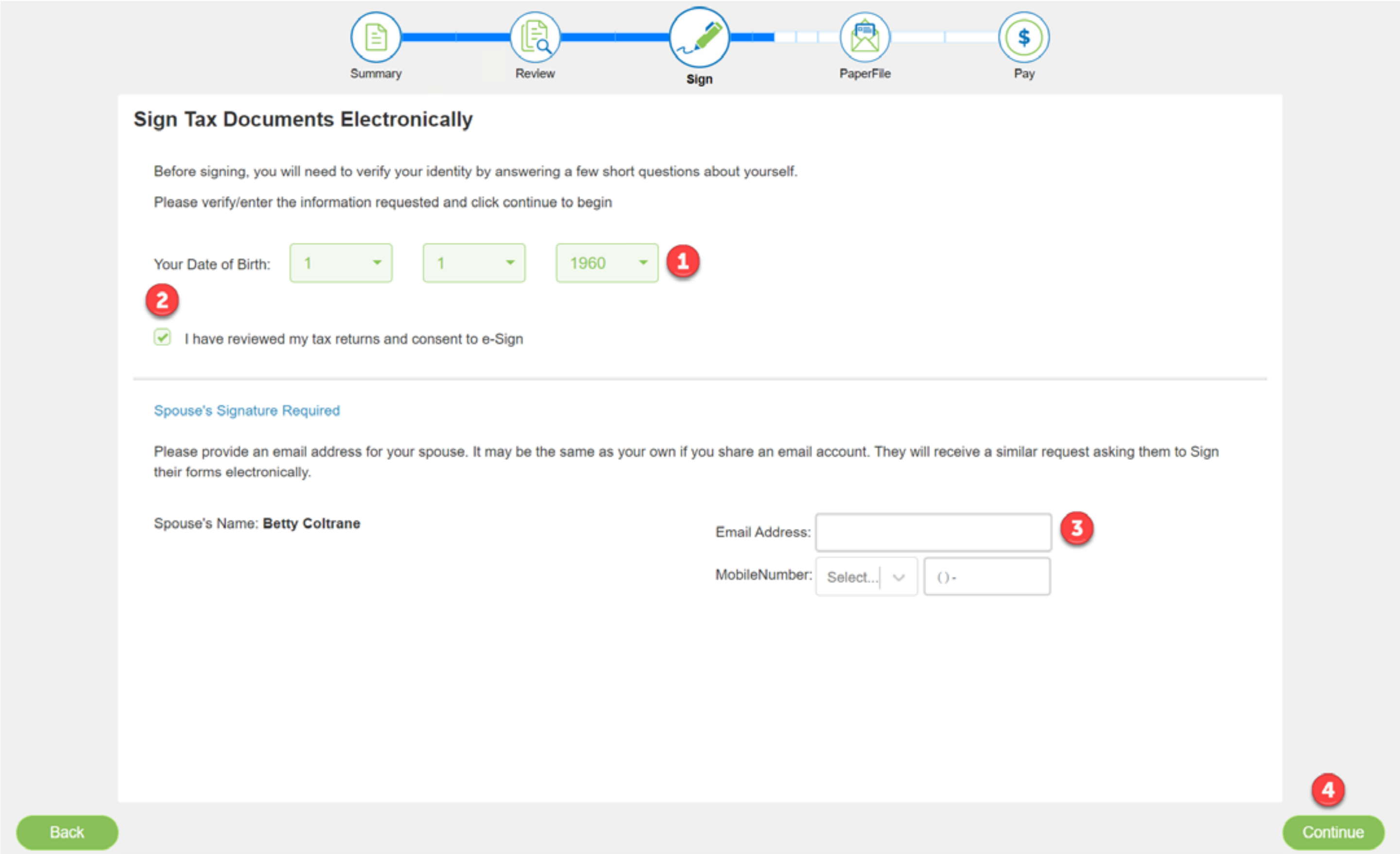
You have three options to sign your return:

1. Click **E-Sign** to sign electronically.
2. Click **Manually Sign** to download the unsigned e-signature forms and sign manually.
3. Click **Delegate to Someone Else** to delegate the e-signature process to another person.

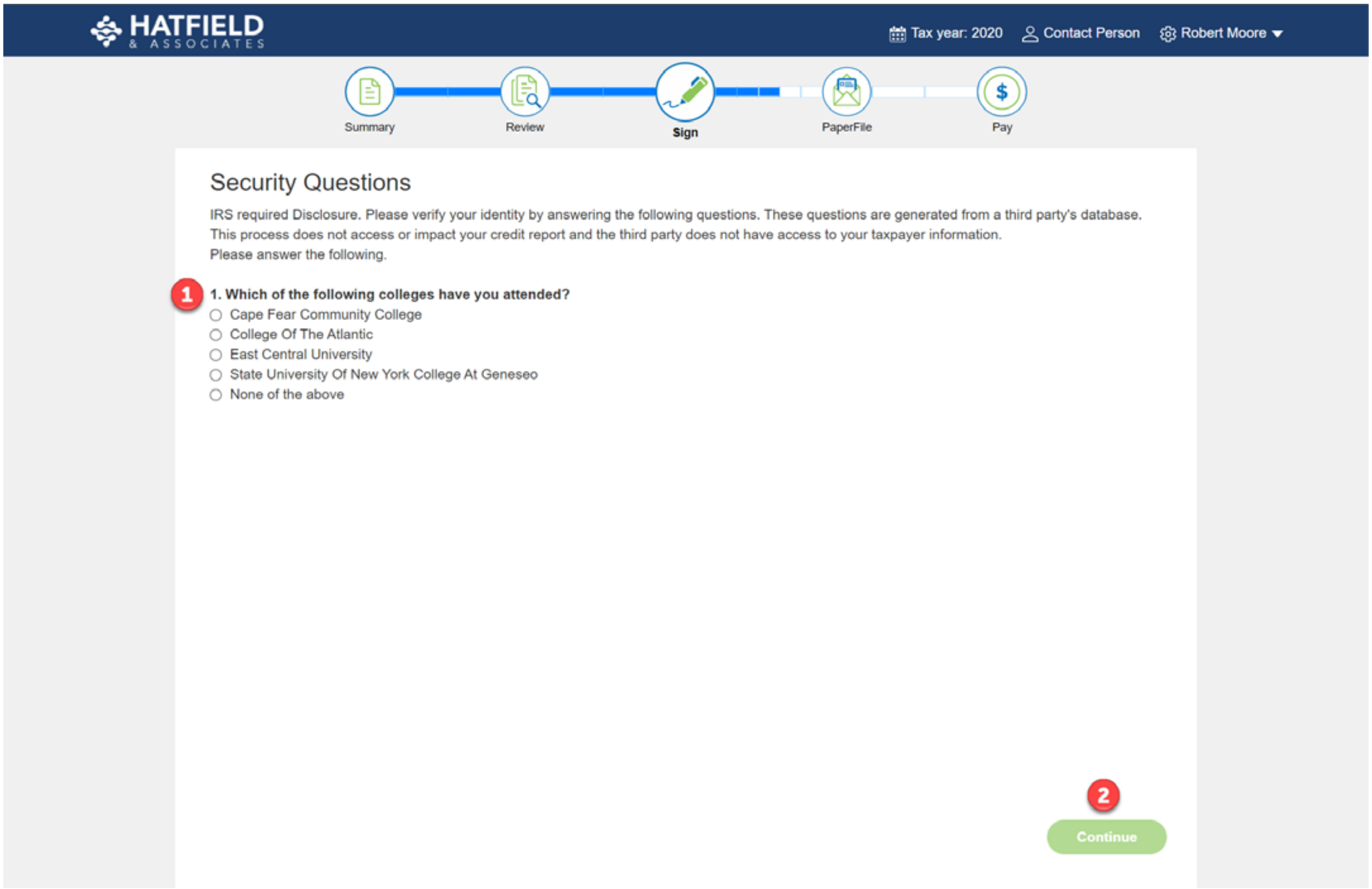


Follow the instructions below to sign electronically. If signing manually, skip to page 15.
For signer delegation, skip to page 16.

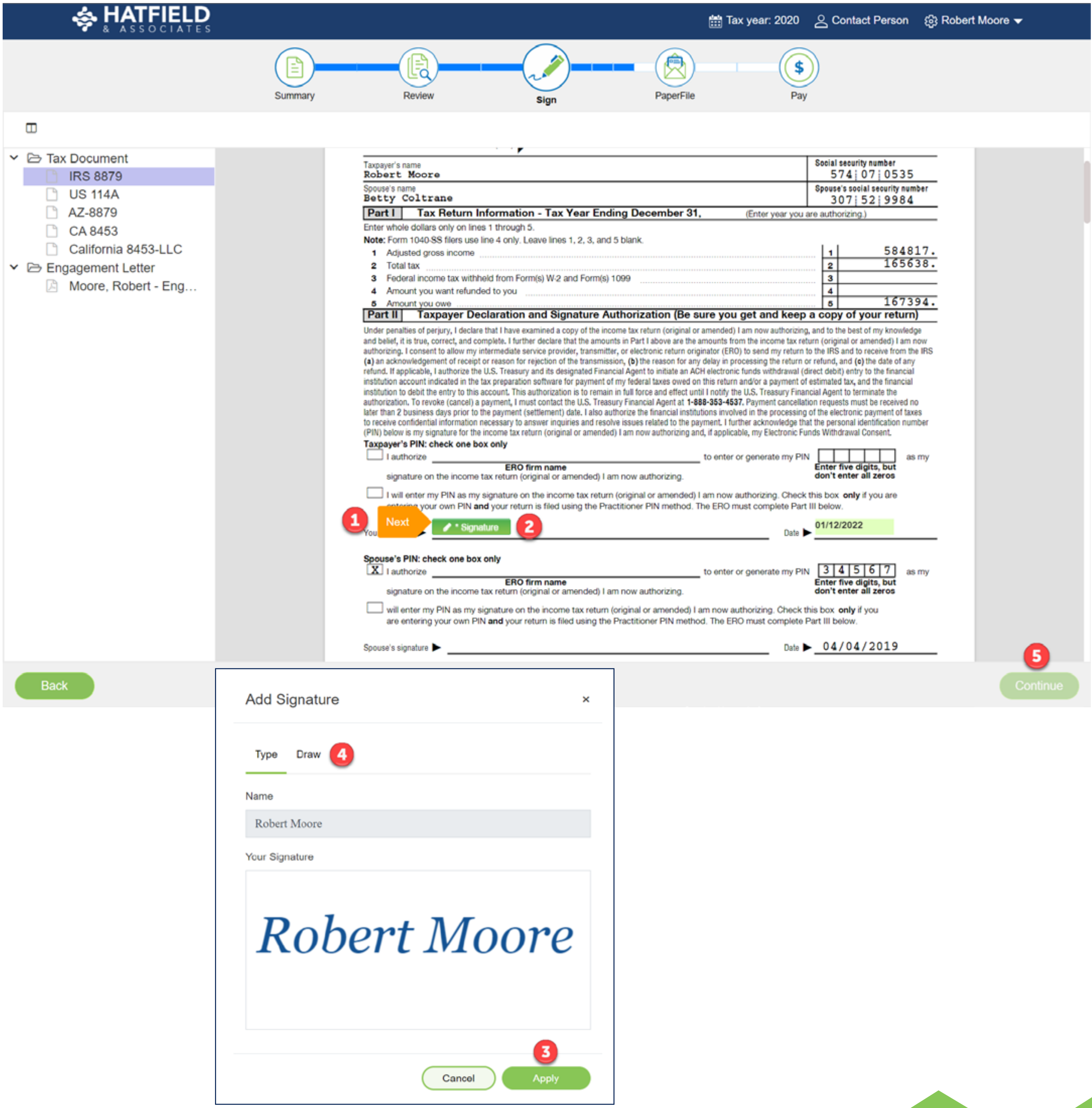
1. Enter your date of birth.
2. Check the box to consent to e-signing.
3. Provide your spouse's email, if applicable.
    a. Both parties may use the same email address.
    b. (Optional) Add your spouse's mobile number.
4. Click **Continue**.



1. Answer 3 questions out of 5 correctly to verify your identity.
2. Click **Continue**.

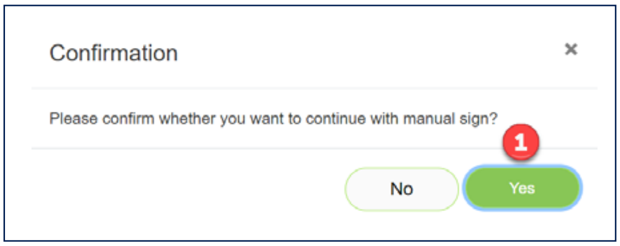


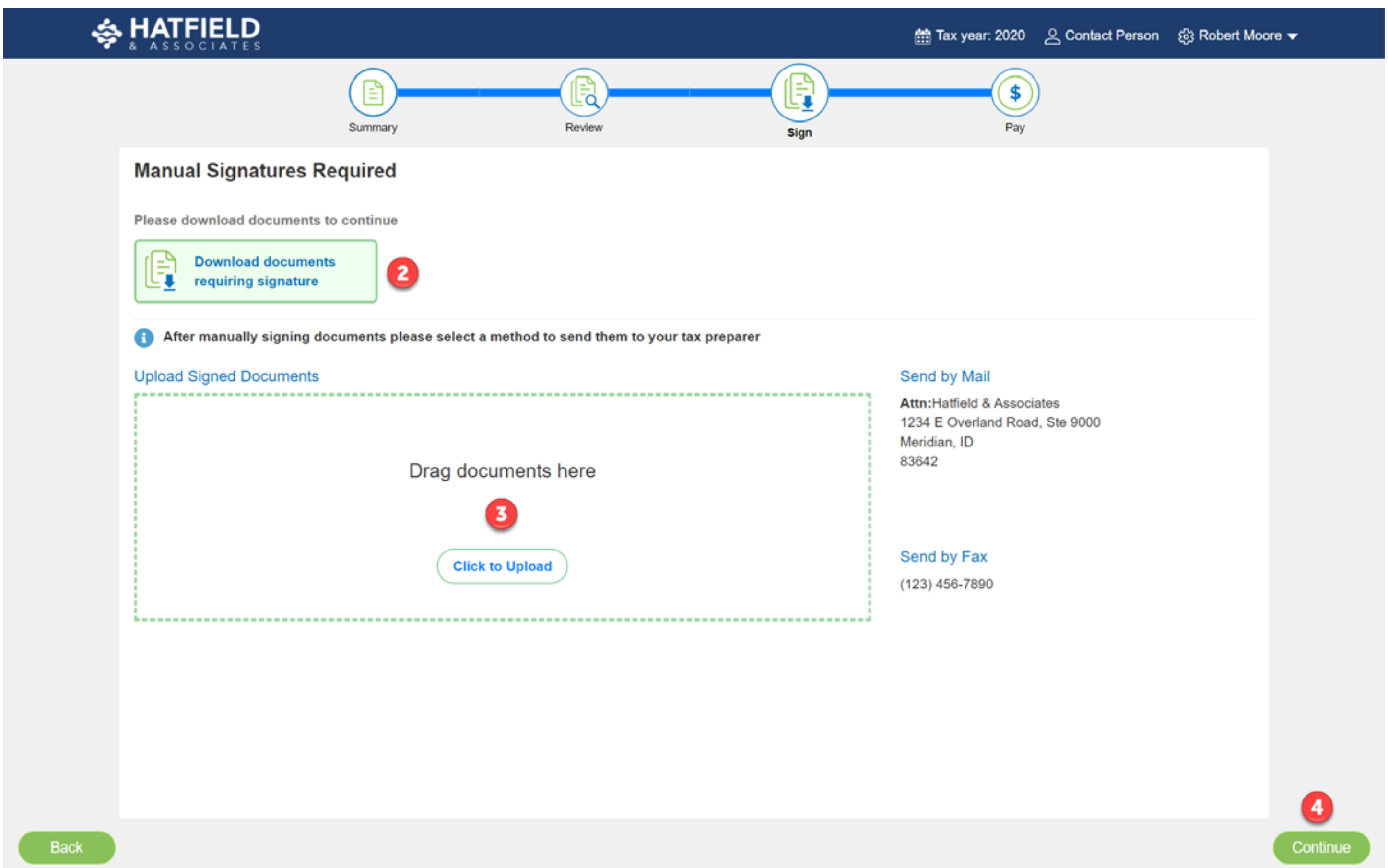
1. Click the **Start** or **Next** flag.
2. Click **Signature**.
3. Click **Apply**.
4. Click **Draw** to sign using your mouse/finger.
5. Click **Continue**.



Follow the instructions below to sign manually:

1. Click **Yes** to confirm manual signature
    a. This will opt-out of the e-signature process. If you change your mind and want to e-sign after confirming manual signature, reach out to your CPA to undo the e-signature opt-out.
2. Click **Download documents requiring signature**.
3. Drag/drop the signed form or use the **Click to Upload** button to search for the signed form on your computer.
4. Click **Continue** after upload.



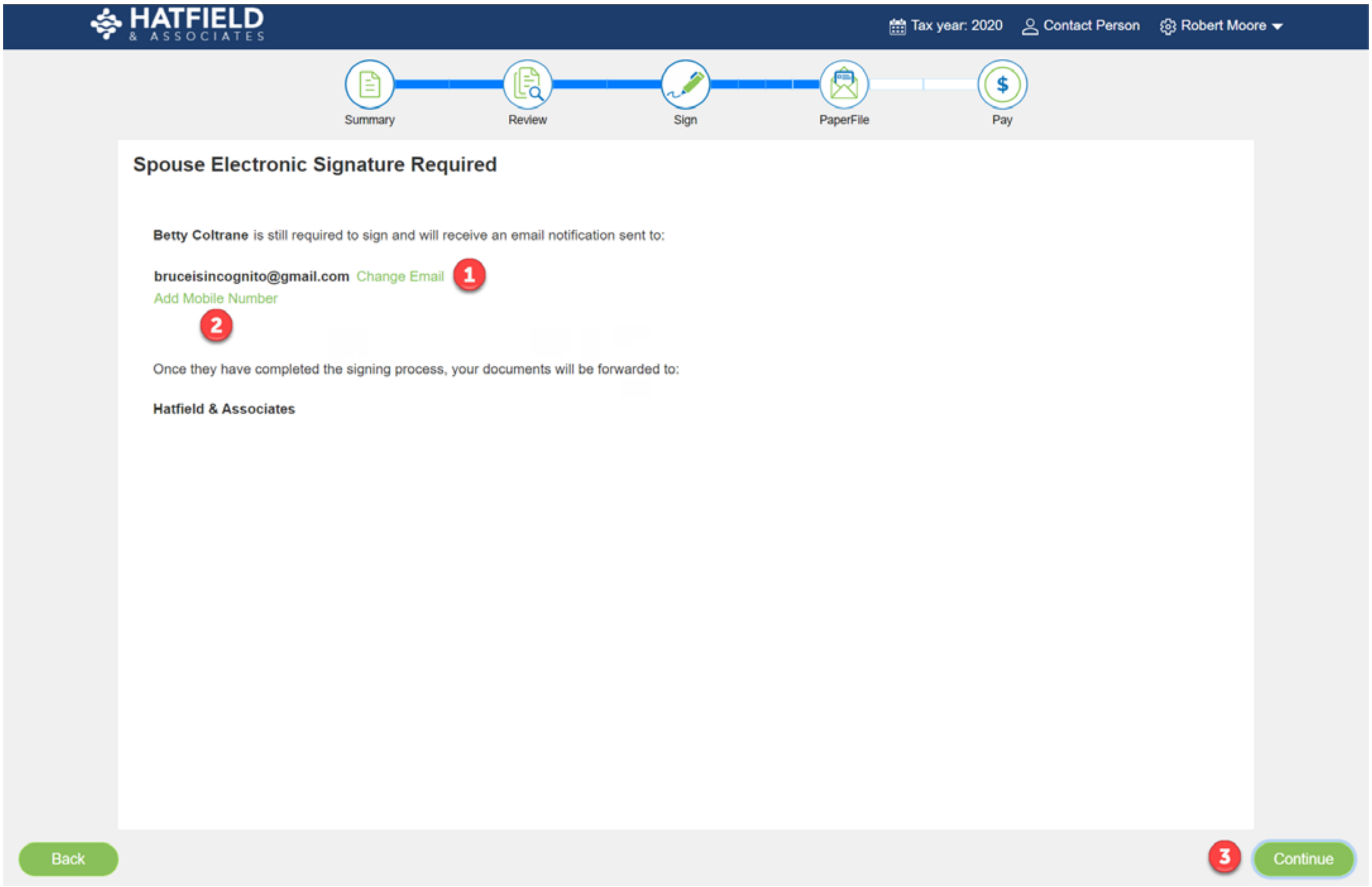


Follow these instructions to delegate signing to someone else:

1. Enter First and Last name, and the email address of the delegated signer.
   a. (Optional) Enter the signer's mobile number.
2. Write a message to be delivered to the signer upon successful login.
3. Click **Send**.

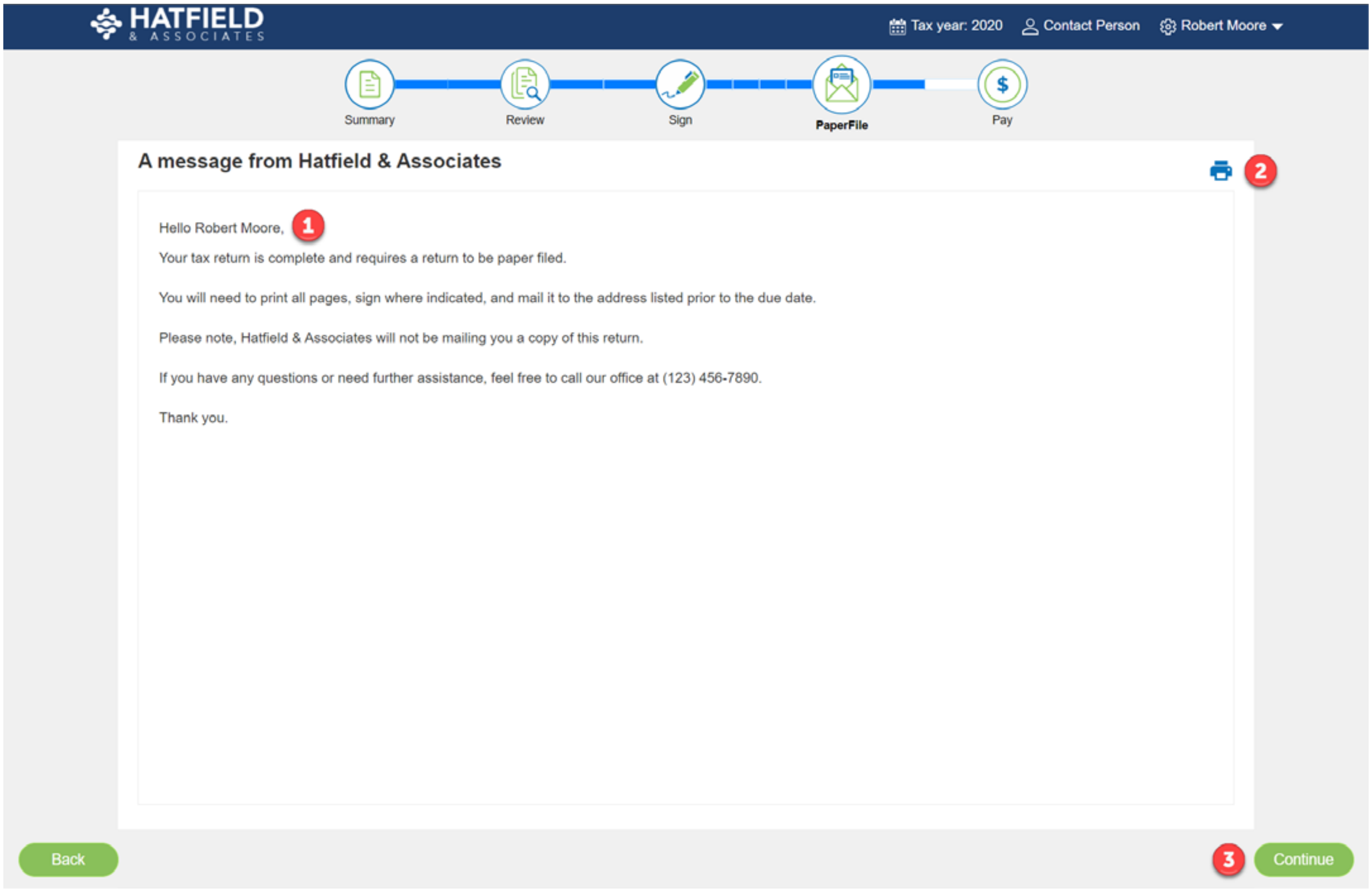
After completing the e-signature process, your spouse needs to sign.

1. Confirm/change the email address for your spouse.
2. (Optional) Add the mobile number for your spouse.
3. Click **Continue**.

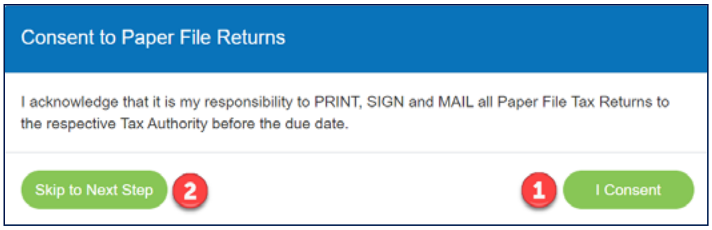


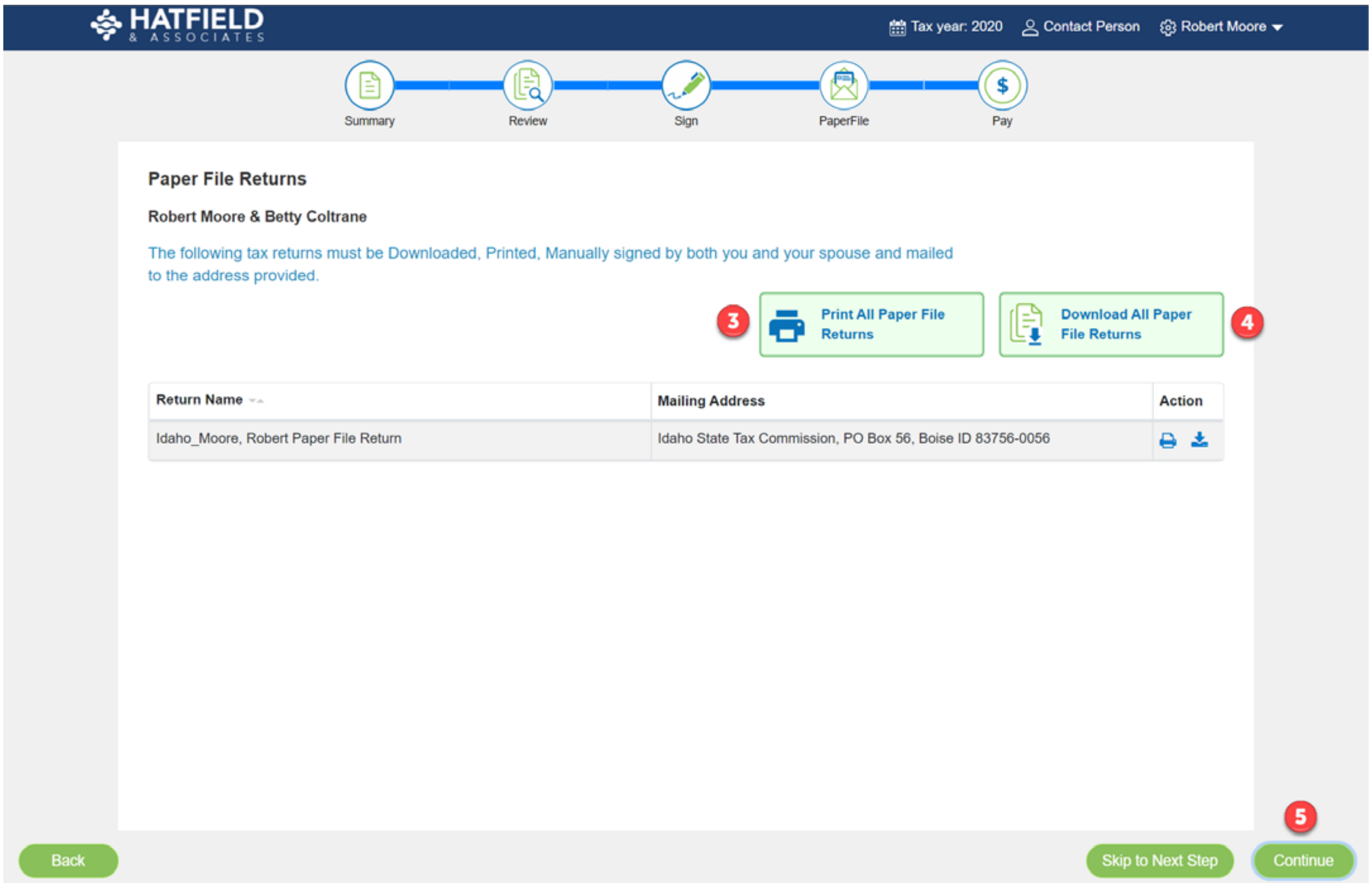
In the event a paper-file required return was uploaded by your firm, follow these instructions.
If no paper-file required return is present, skip to page 20.

1. You will see a message from the firm specifically related to paper-file required returns.
2. Click the **print icon** to save a PDF copy of the message, if necessary.
3. Click **Continue**.

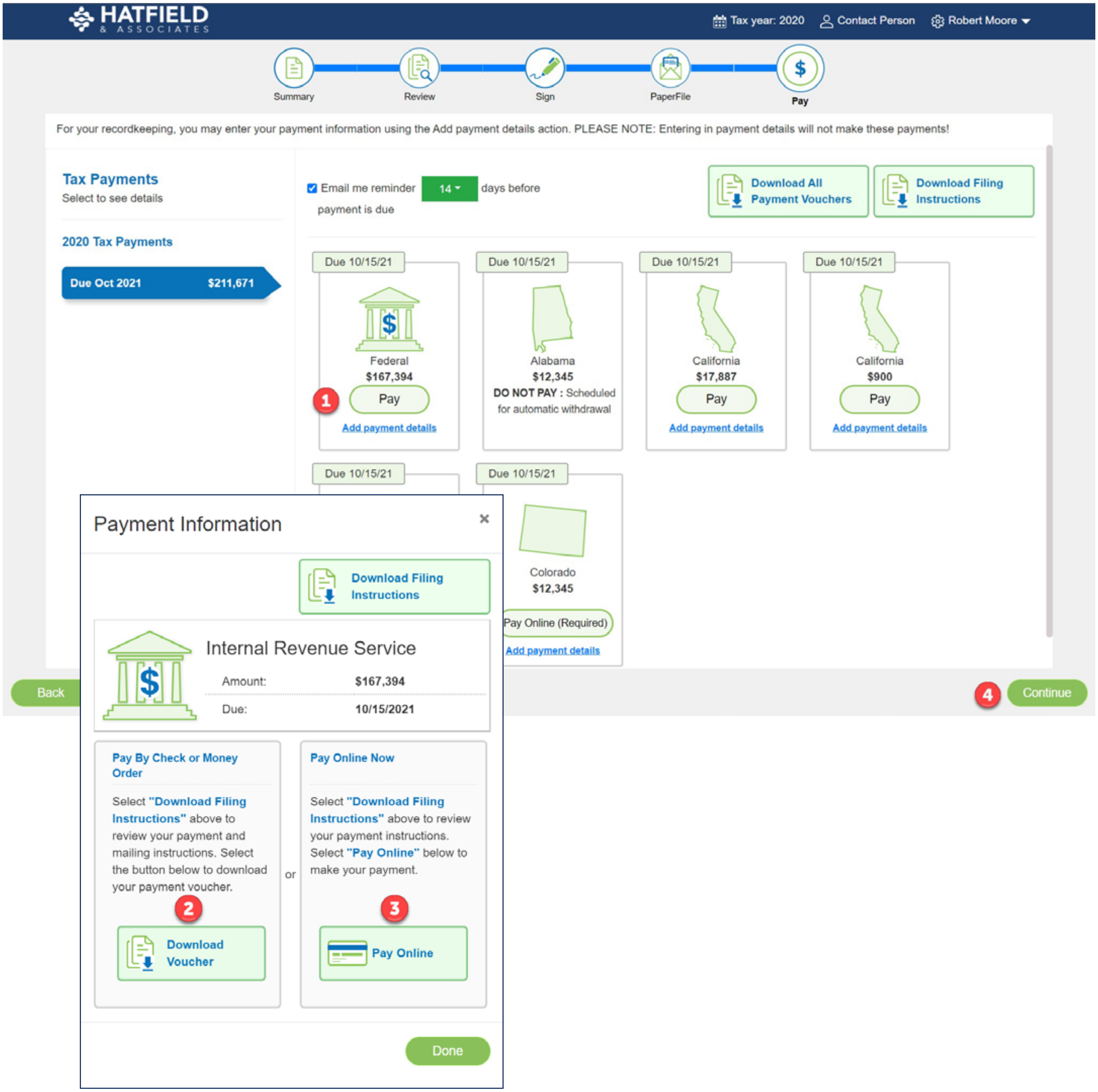


1. Click **I Consent** to review and download the required paper-filed returns.
2. Click **Skip to Next Step** to move to the Tax Payments screen without downloading documents.
3. Click **Print All Paper File Returns** or use the print icon to the right of each tax return.
4. Click **Download All Paper File Returns** or use the download icon to the right of each tax return.
5. Click **Continue**.





1. View payment options.
2. Click **Download Voucher** for a PDF copy to mail with payment by check or money order.
3. Click **Pay Online** to go to the respective IRS authority website to make a payment.
4. Click **Continue**.



After making a payment, record the payment details for future reference.

1. Click **Add Payment Details**.
2. Enter the payment information.
3. Click **OK**.
4. Payment will be marked as paid.