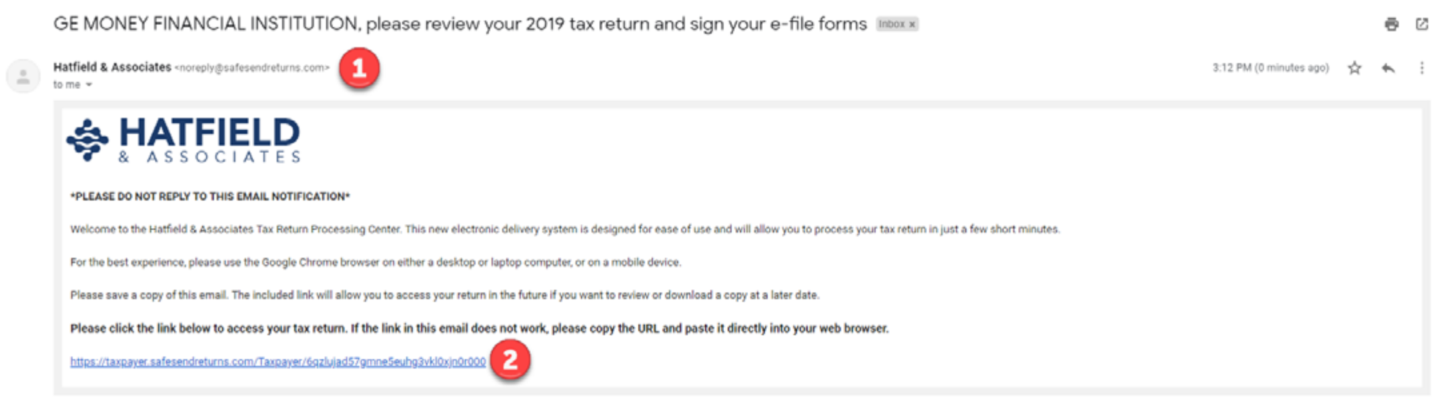
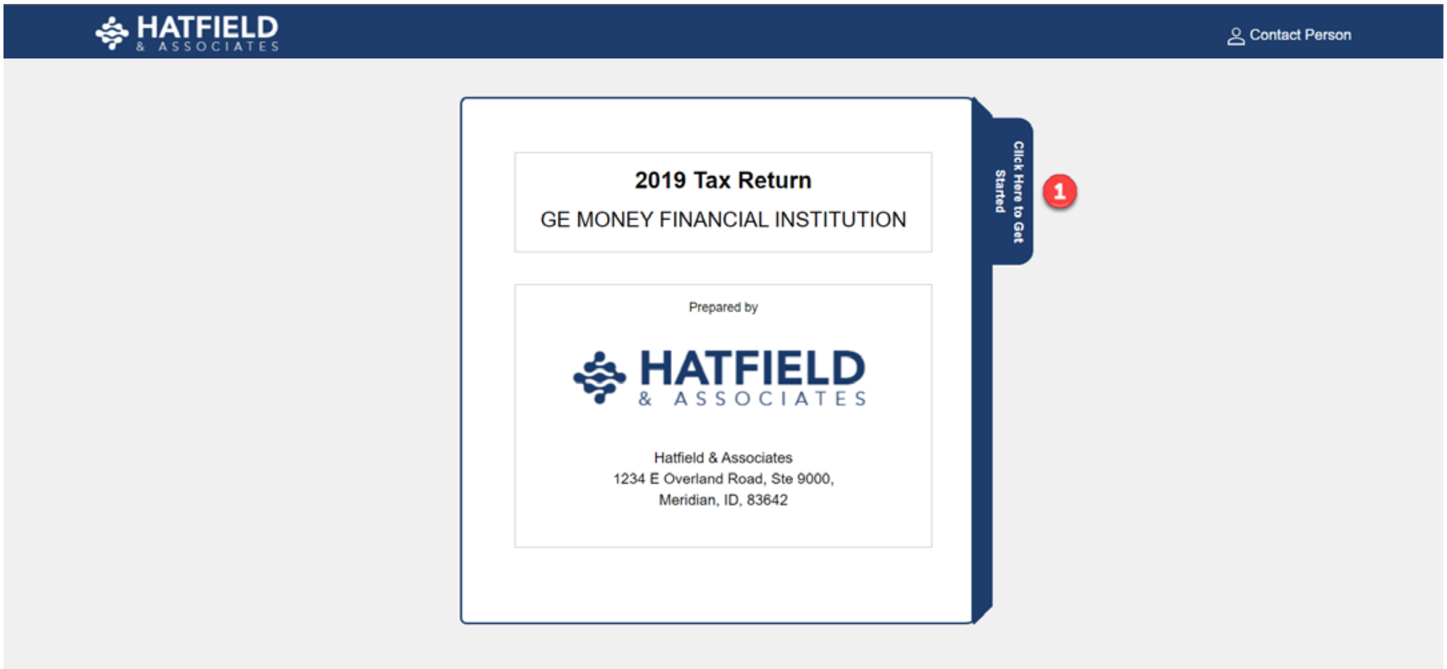
Entity Quick Reference Guide

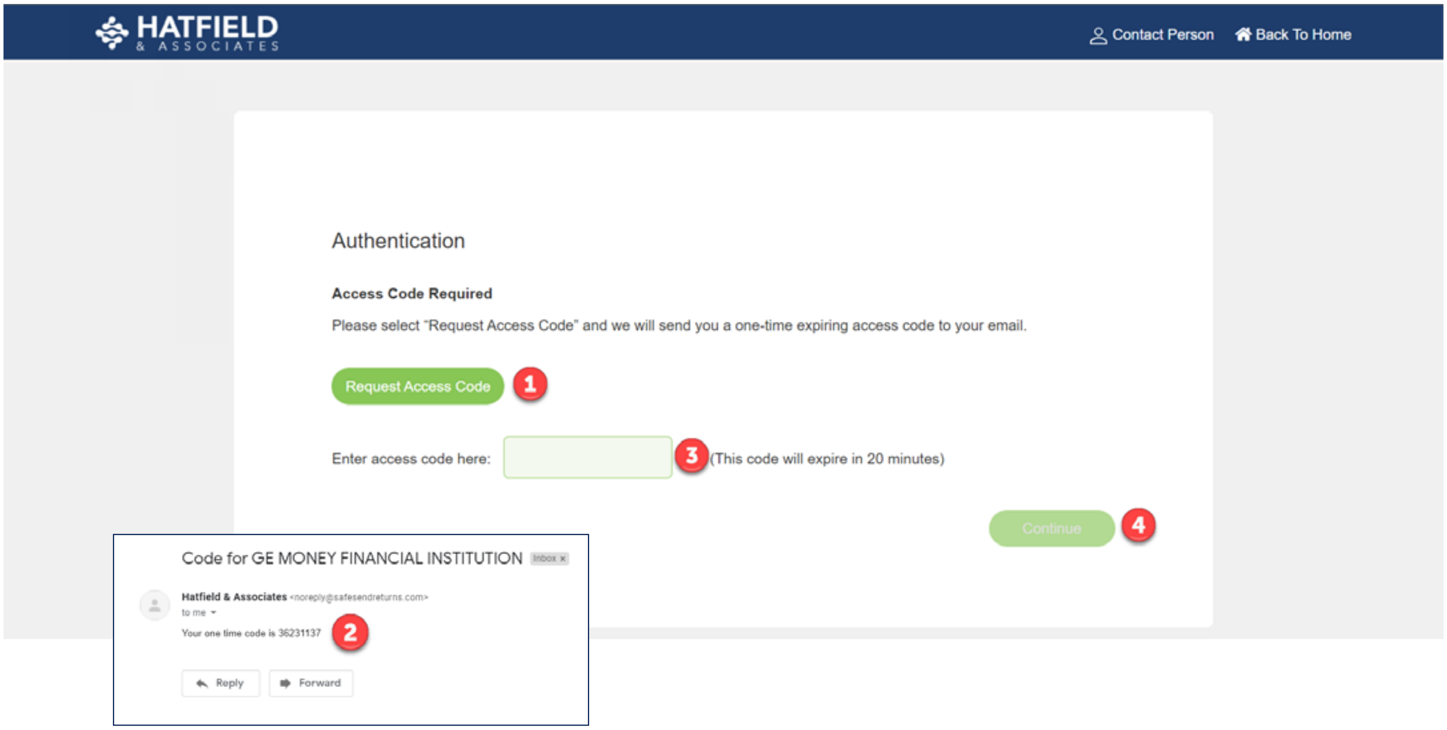
1. Your tax firm will send you an email from noreply@safesendreturns.com.
   a. We recommend that you add this email address to your email client's safe sender list to avoid these notifications going into a spam/junk folder.
   b. Your accountant or CPA firm's name will appear in front of the email address.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



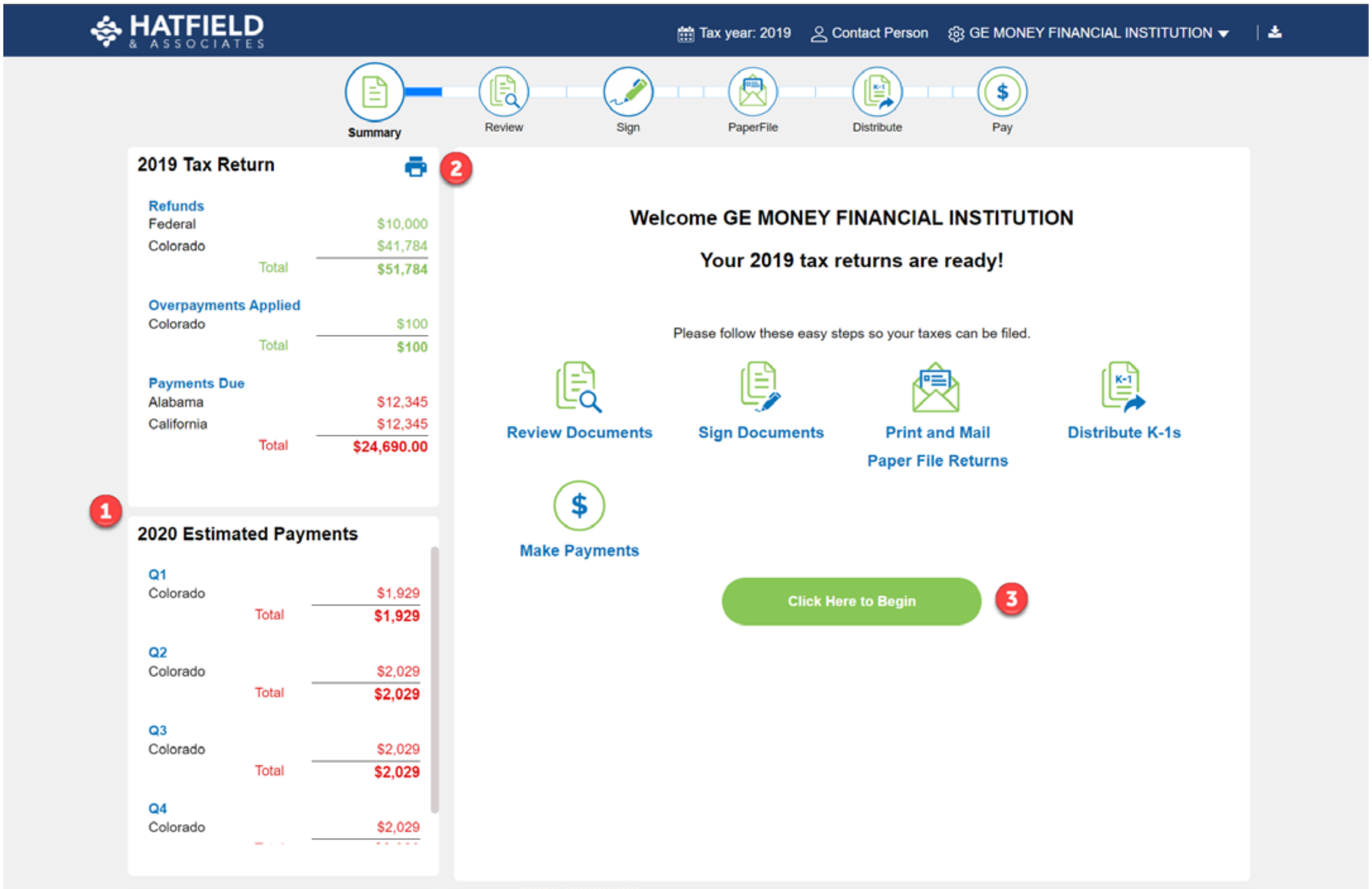
1. Click the Click Here to Get Started tab to continue.



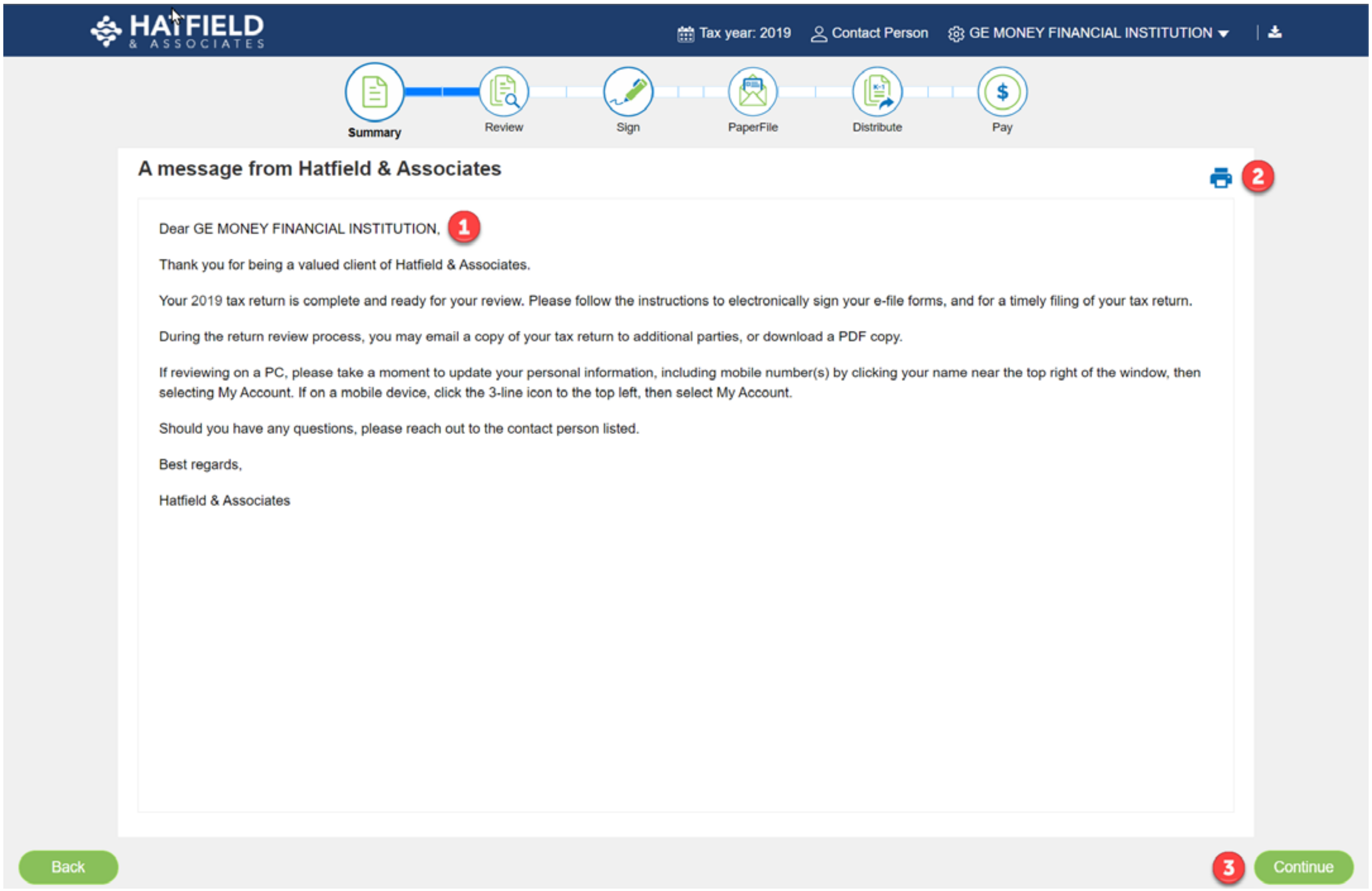
1. Click **Request Access Code**.
2. You will receive an email or text notification with a one-time code.
    a. Copy the access code and go back to the Authentication screen.
3. Paste or type the access code into the requested field.
4. Click **Continue**.



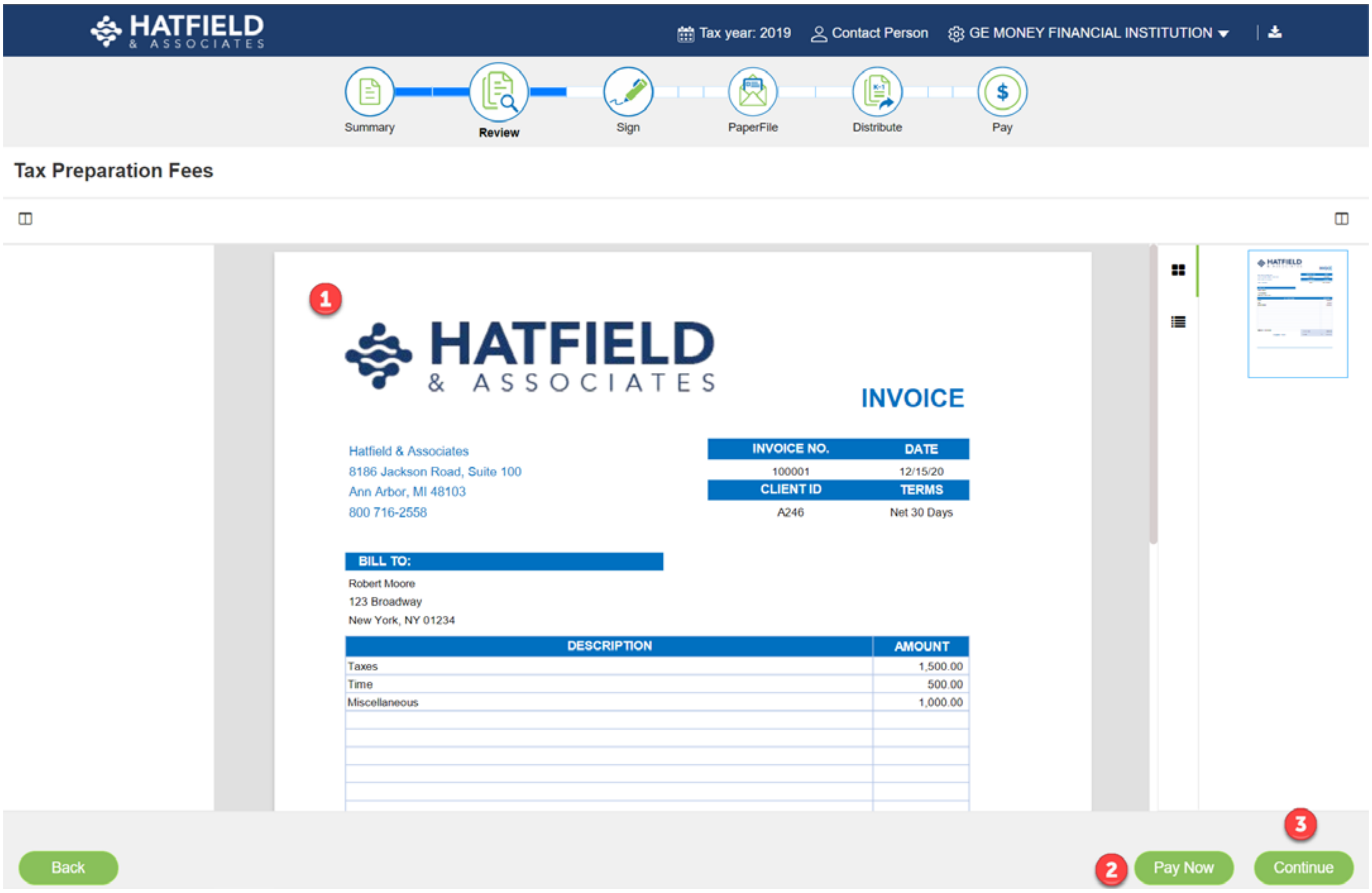
1. The left panel shows a summary of refunds and payments due.
2. Click the **print icon** to save a PDF copy of refunds and payments due.
3. Click **Click Here to Begin** to continue.



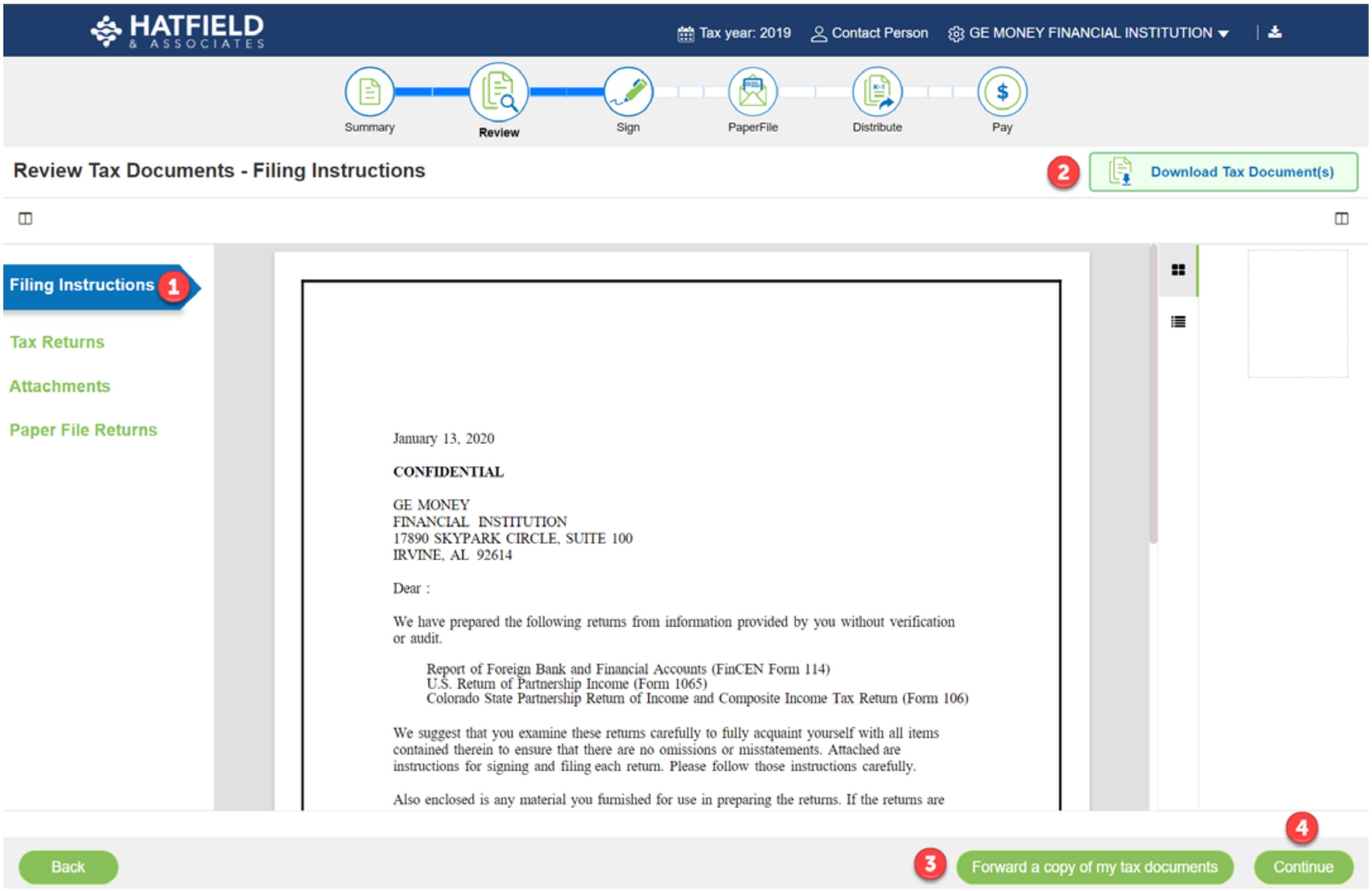
1. You will see a message from the firm.
2. Click the **print icon** to save a PDF copy of the message, if necessary.
3. Click **Continue**.



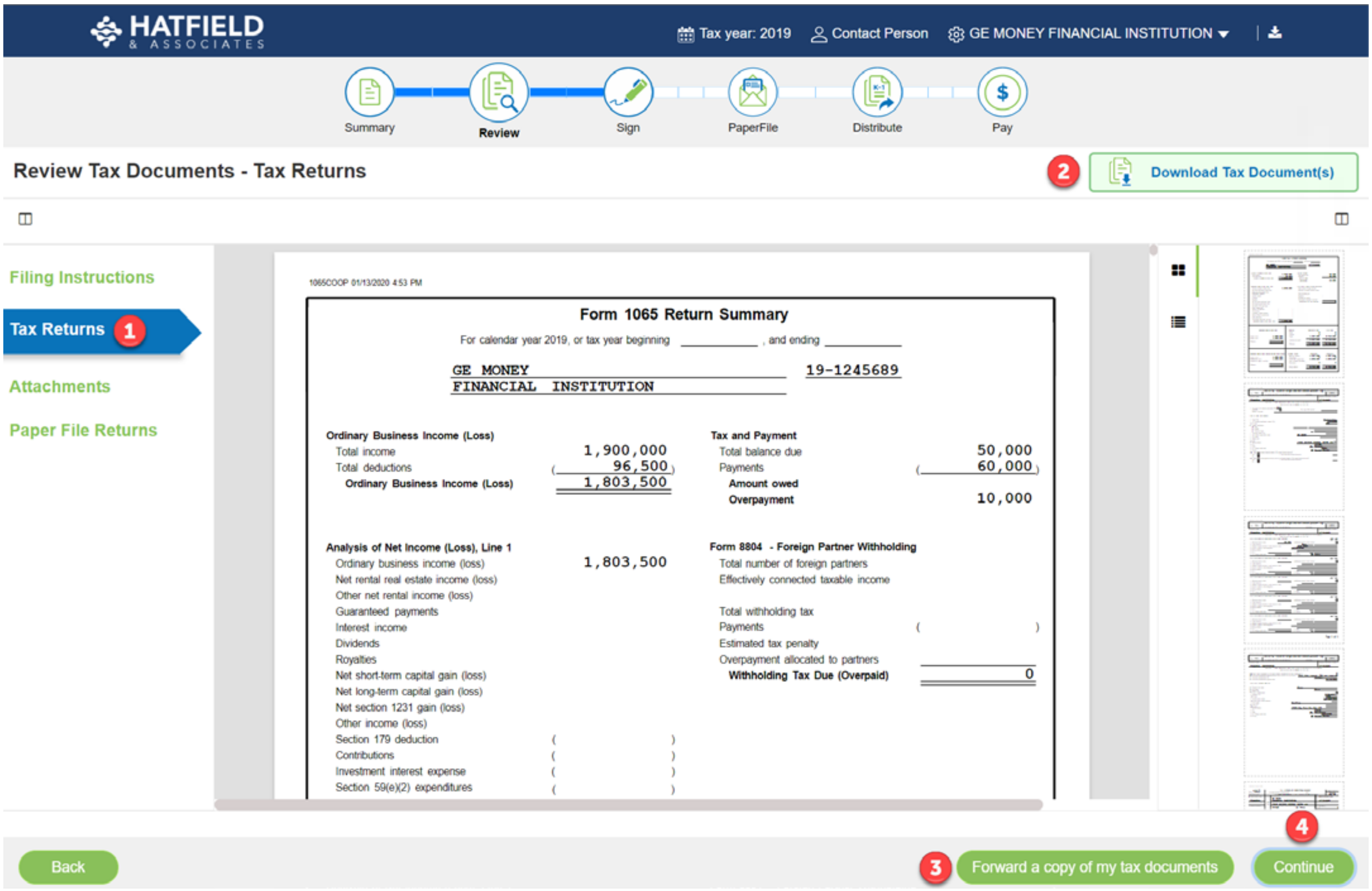
1. Review your invoice if one was included.
2. Click **Pay Now** to pay your invoice.
3. Click **Continue**.



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

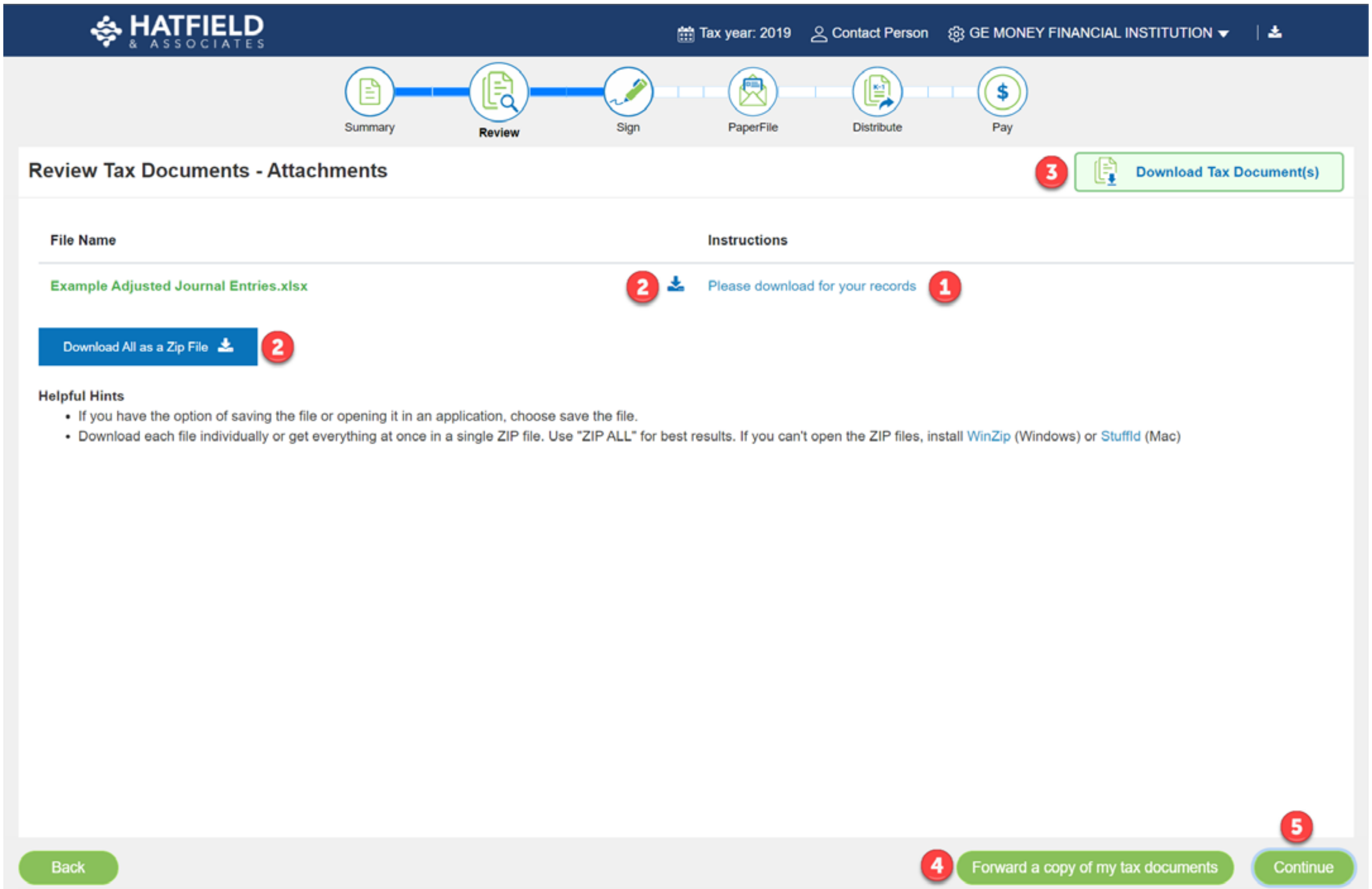


1. Review the tax returns.
2. Download tax documents for your records.
3. Forward tax documents to third parties.
4. Click **Continue**.



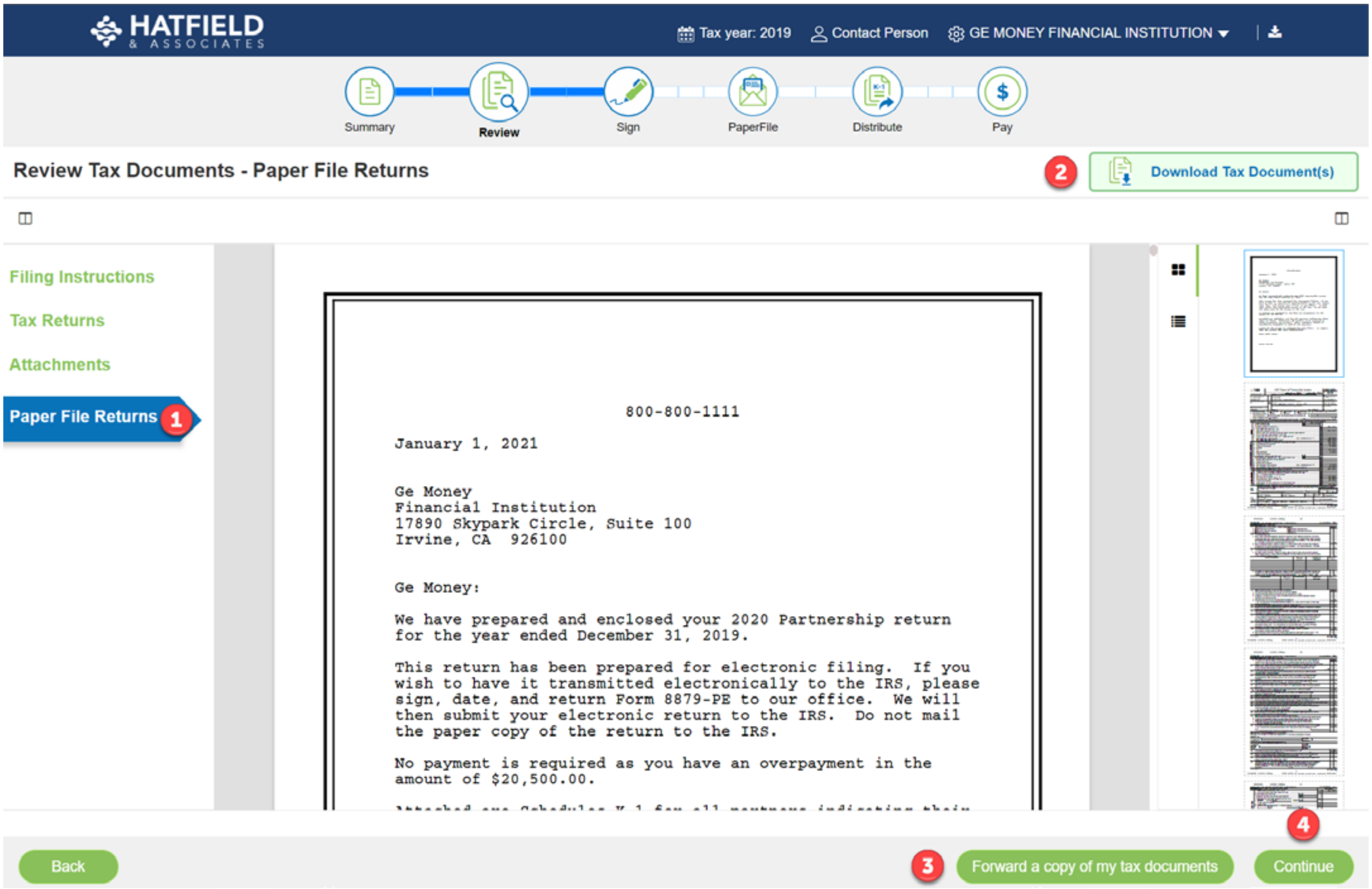
If no attachments are included, continue to the next page.

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**.



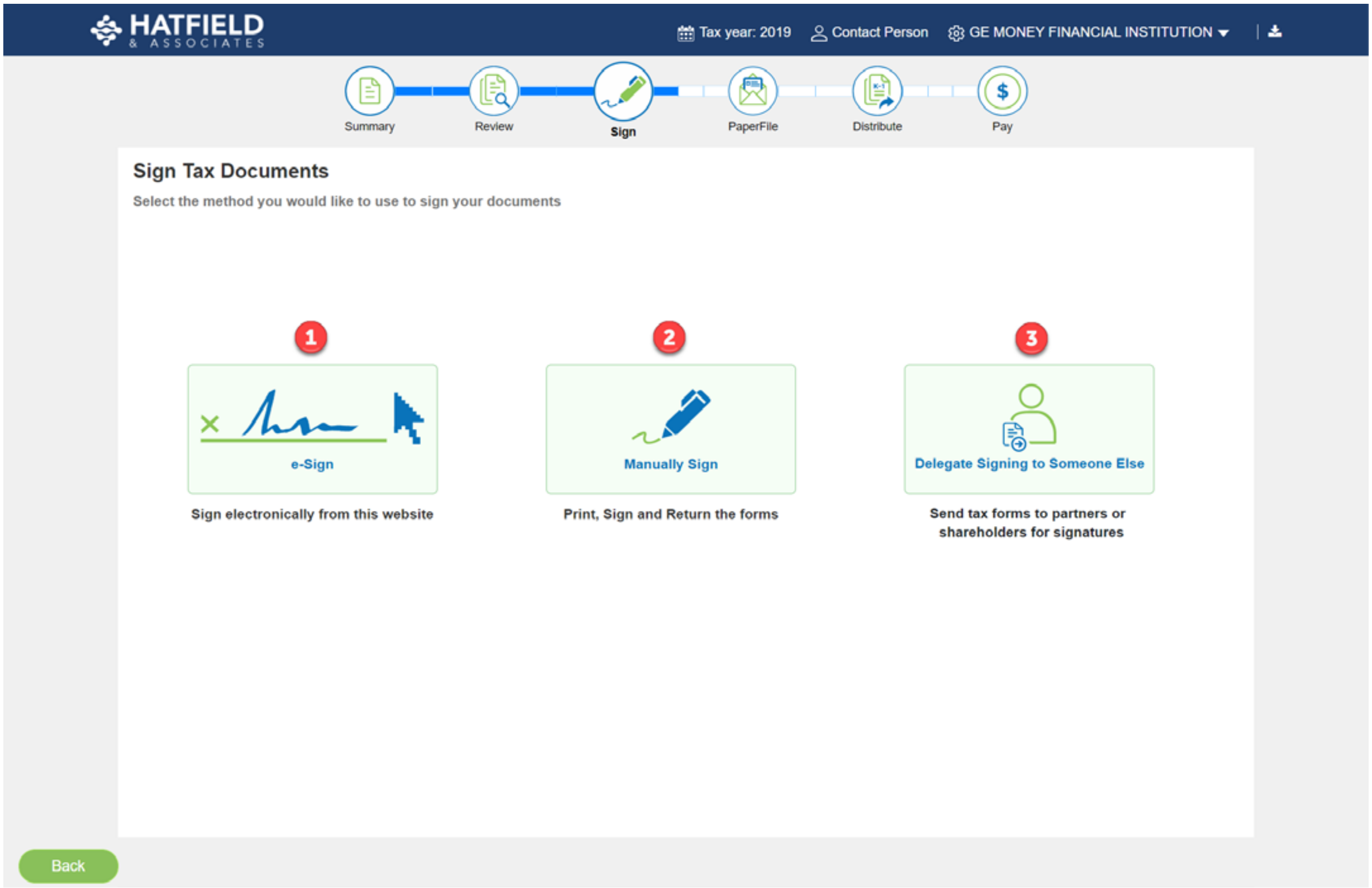
If no paper-filed returns are included, continue to the next page.

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



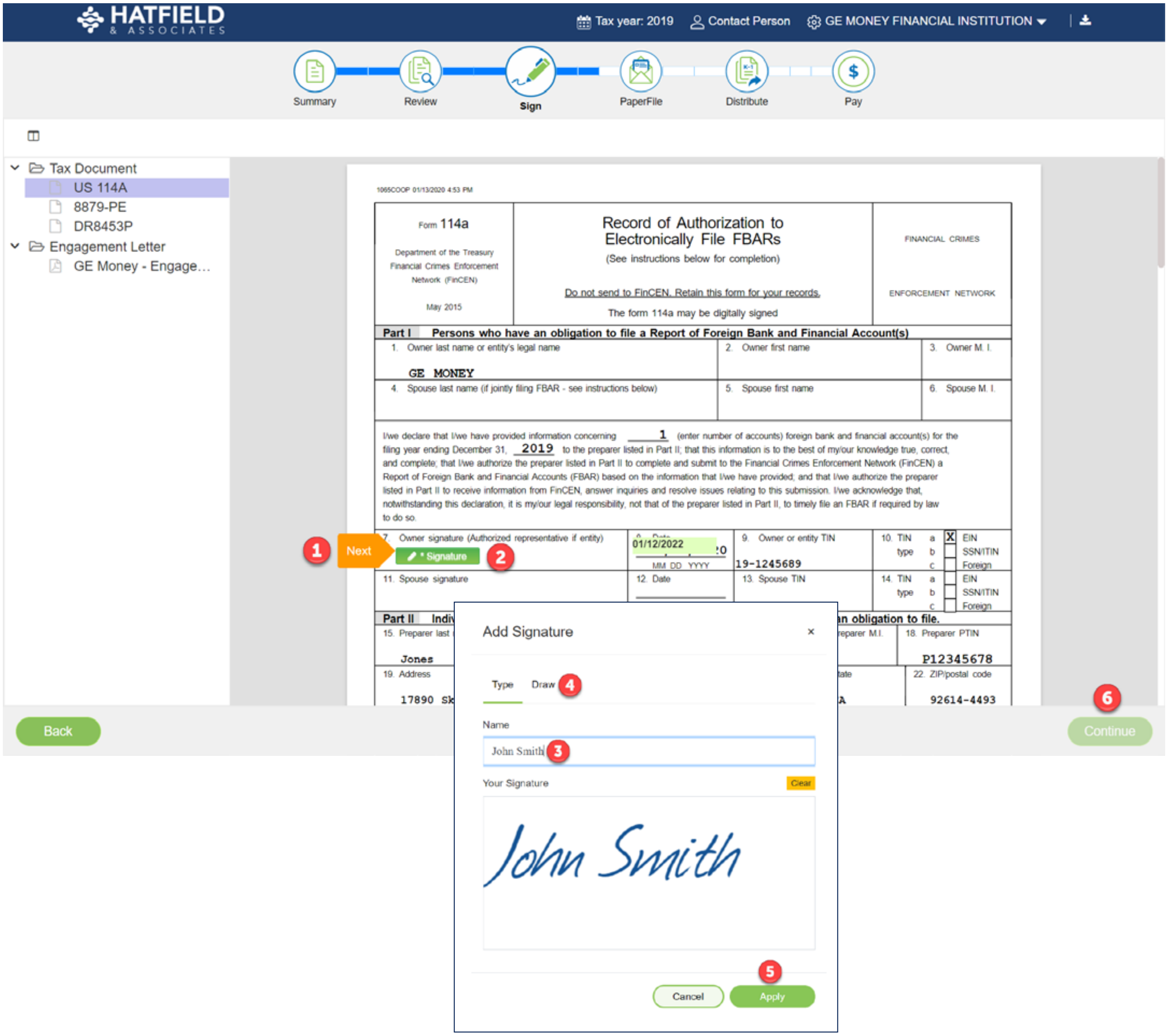
You have three options to sign your return:

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.



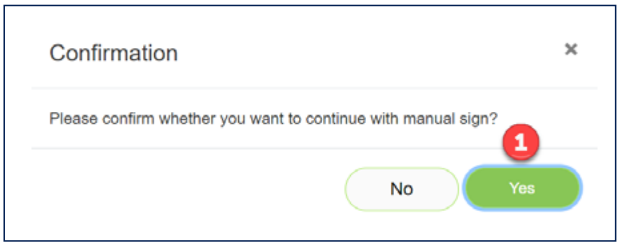
Follow the instructions below to sign electronically. If signing manually, skip to page 12. For signer delegation, skip to page 13.

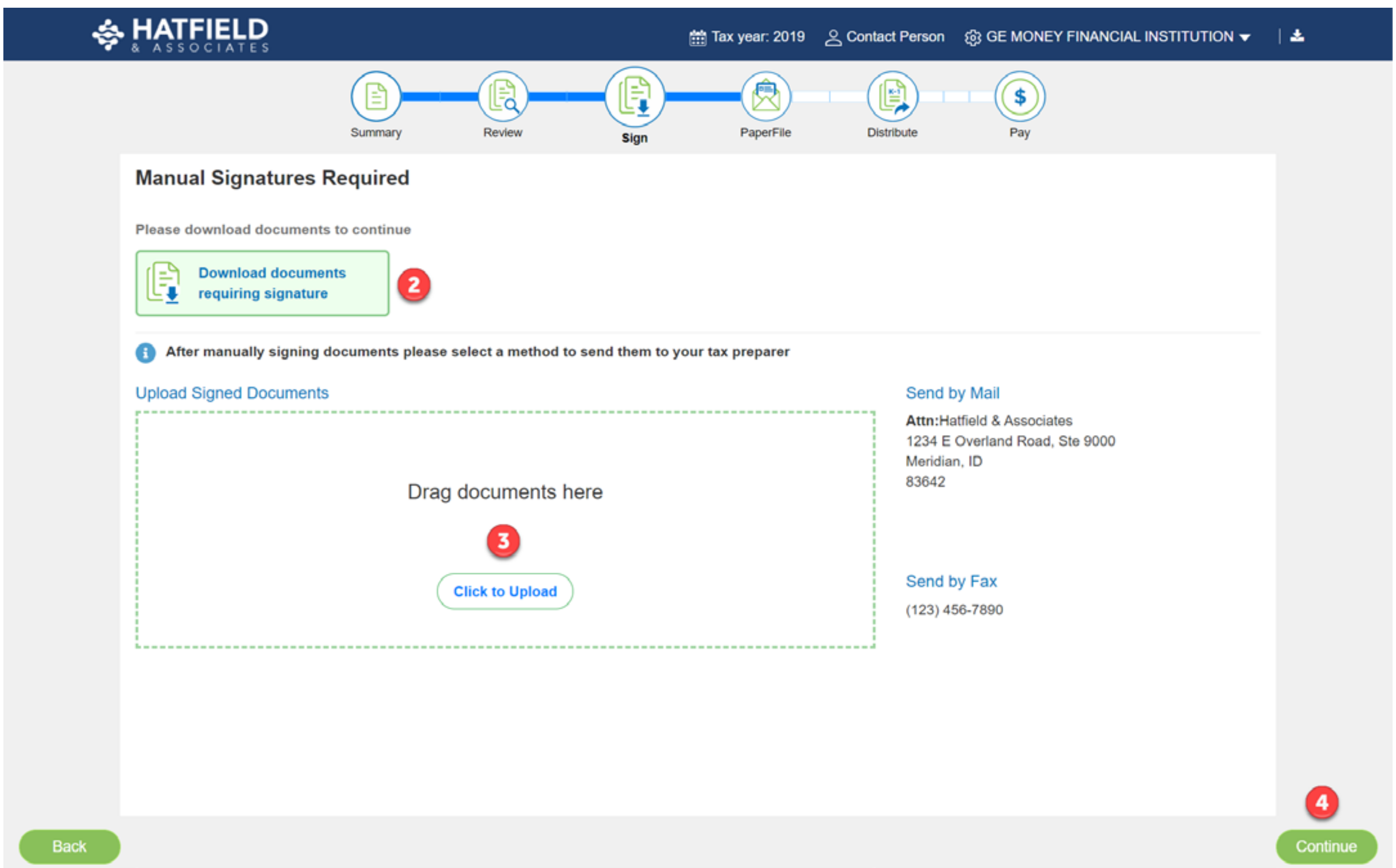
1. Click the **Start** or **Next** flag.
2. Click **Signature**.
3. Type the signer's name.
4. (optional) Click **Draw** to sign using your mouse/finger.
5. Click **Apply**.
6. Click **Continue**.



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.



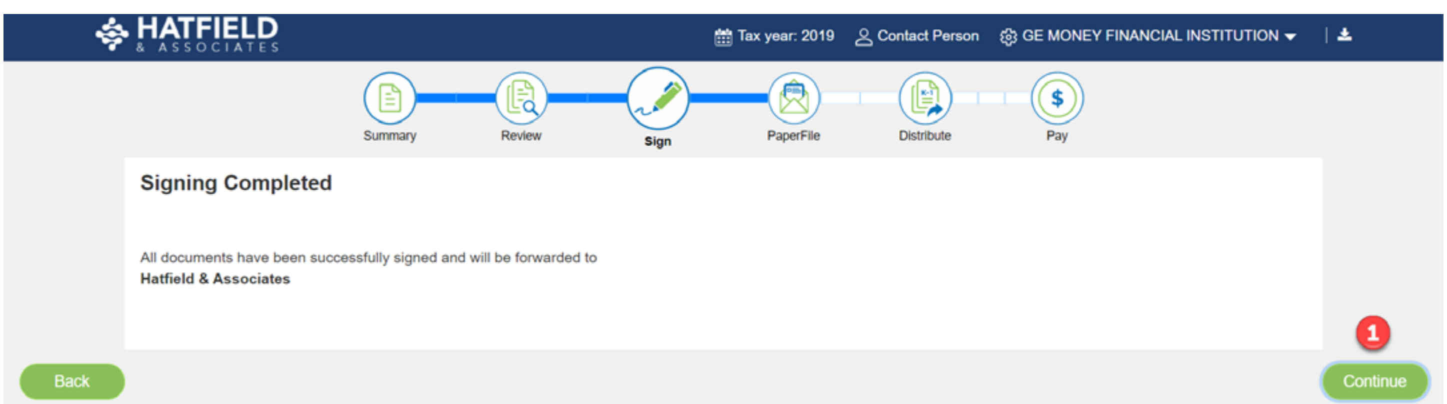


Follow these instructions to delegate signing to someone else:

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**.

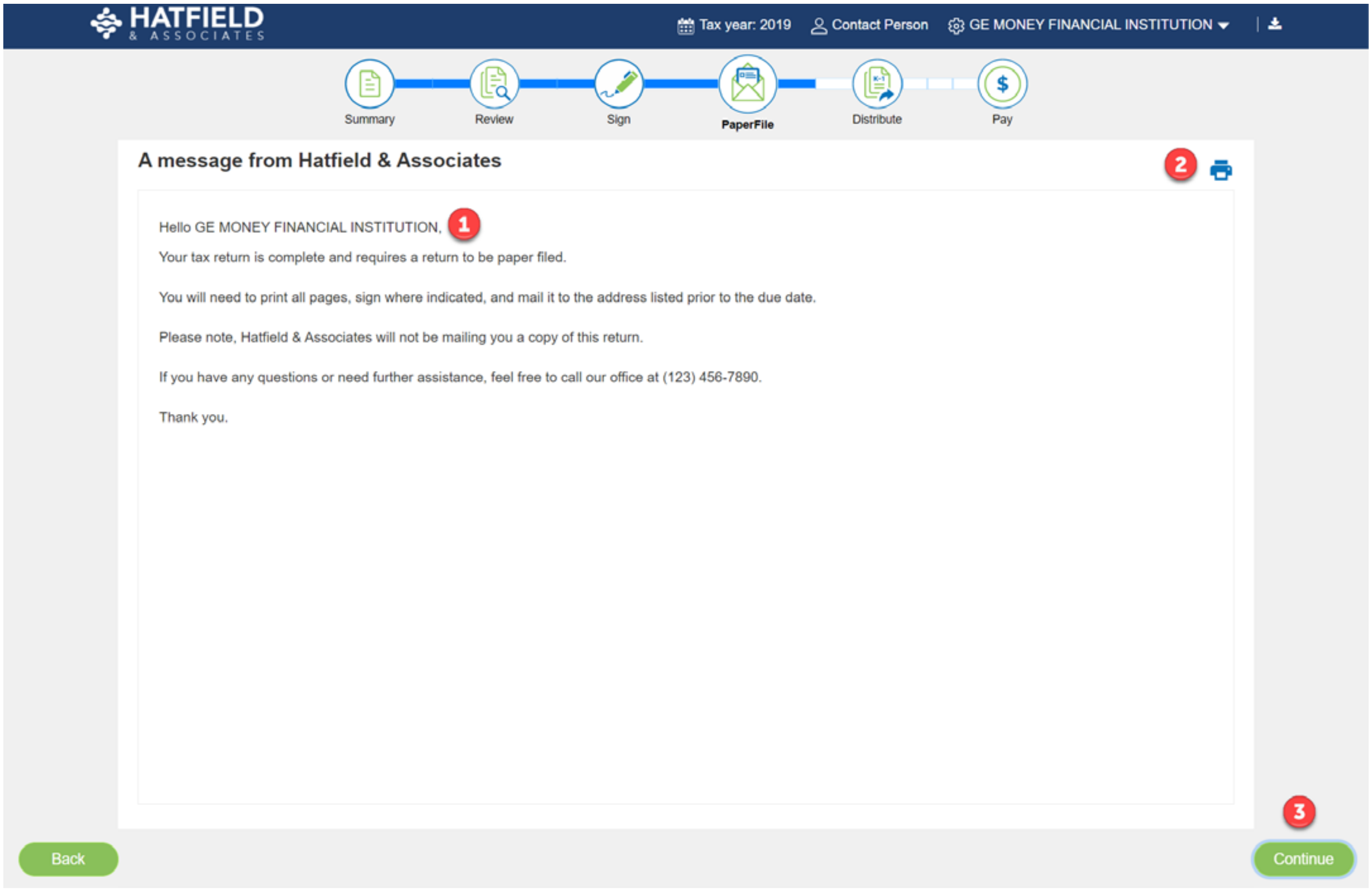
After completing the e-signature process, the form will be sent back to your CPA firm.

1. Click **Continue**.

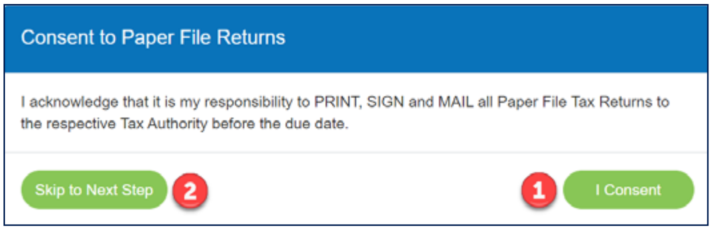


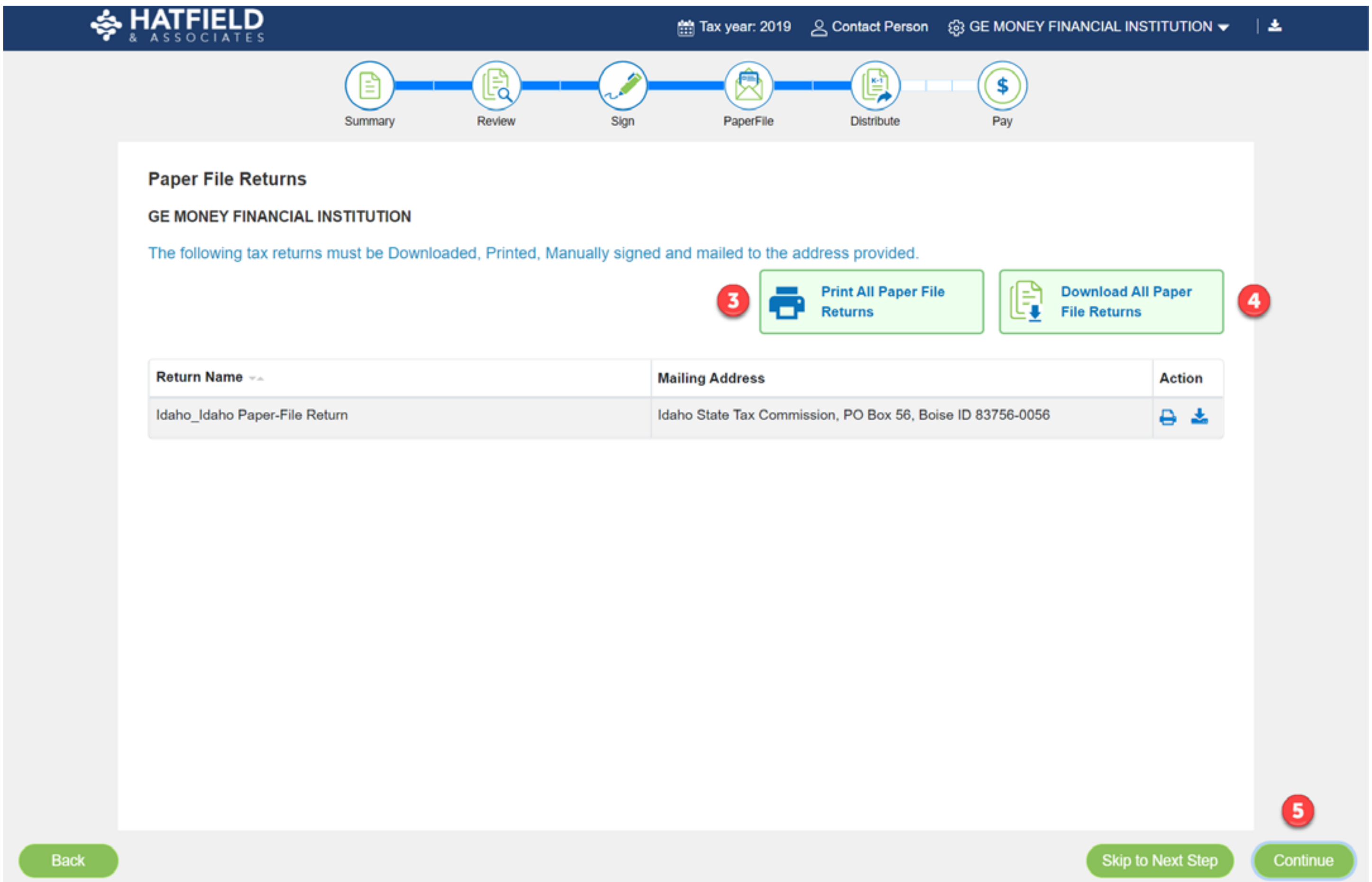
In the event a paper-file required return was uploaded by your firm, follow these instructions.
If no paper-file required return is present, skip to page 16.

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**.

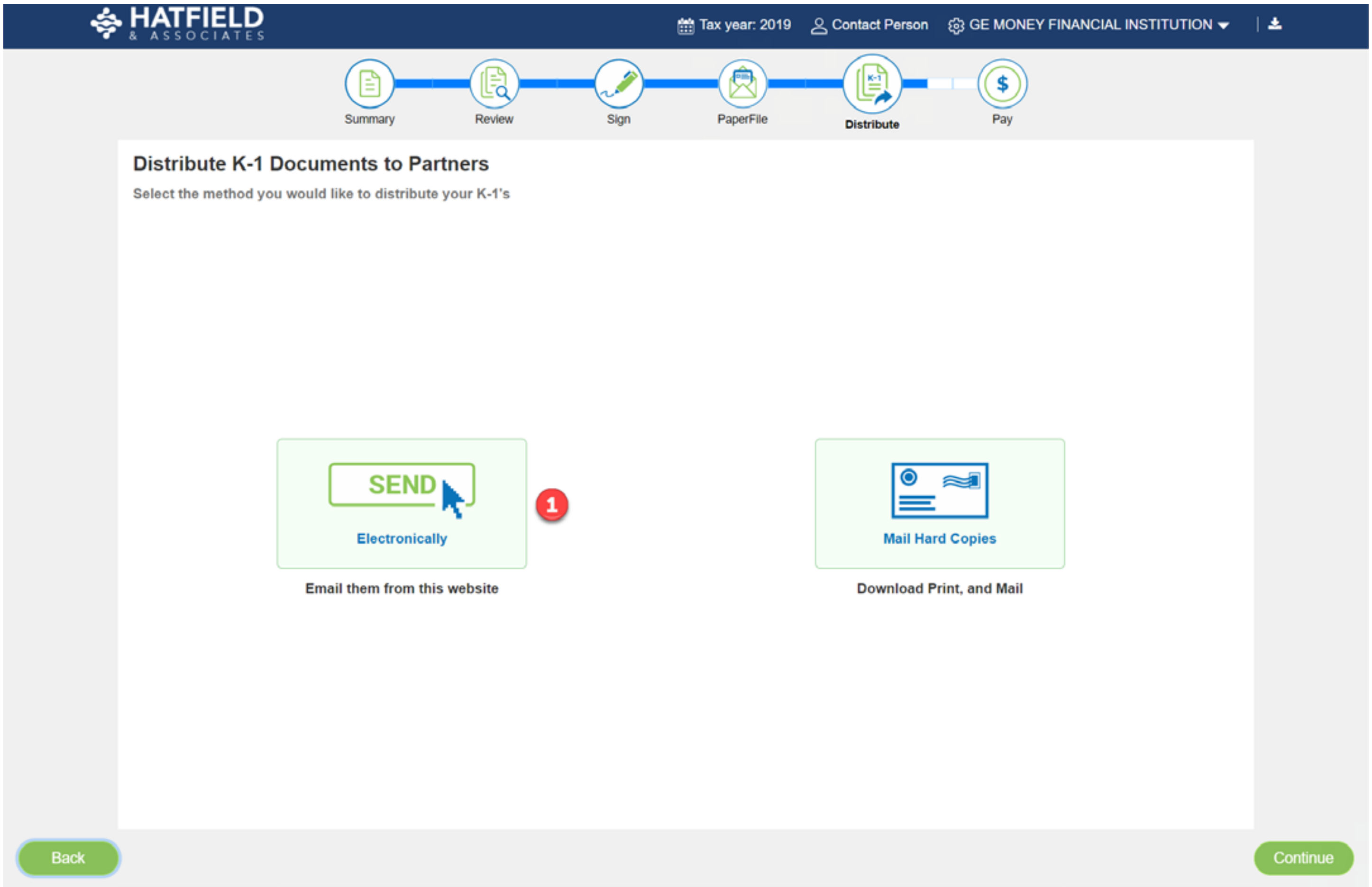


1. Click **I Consent** to review and download the required paper-filed returns.
2. Click **Skip to Next Step** to move to the Tax Payments screen without downloading documents.
3. Click **Print All Paper File Returns** or use the print icon to the right of each tax return.
4. Click **Download All Paper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

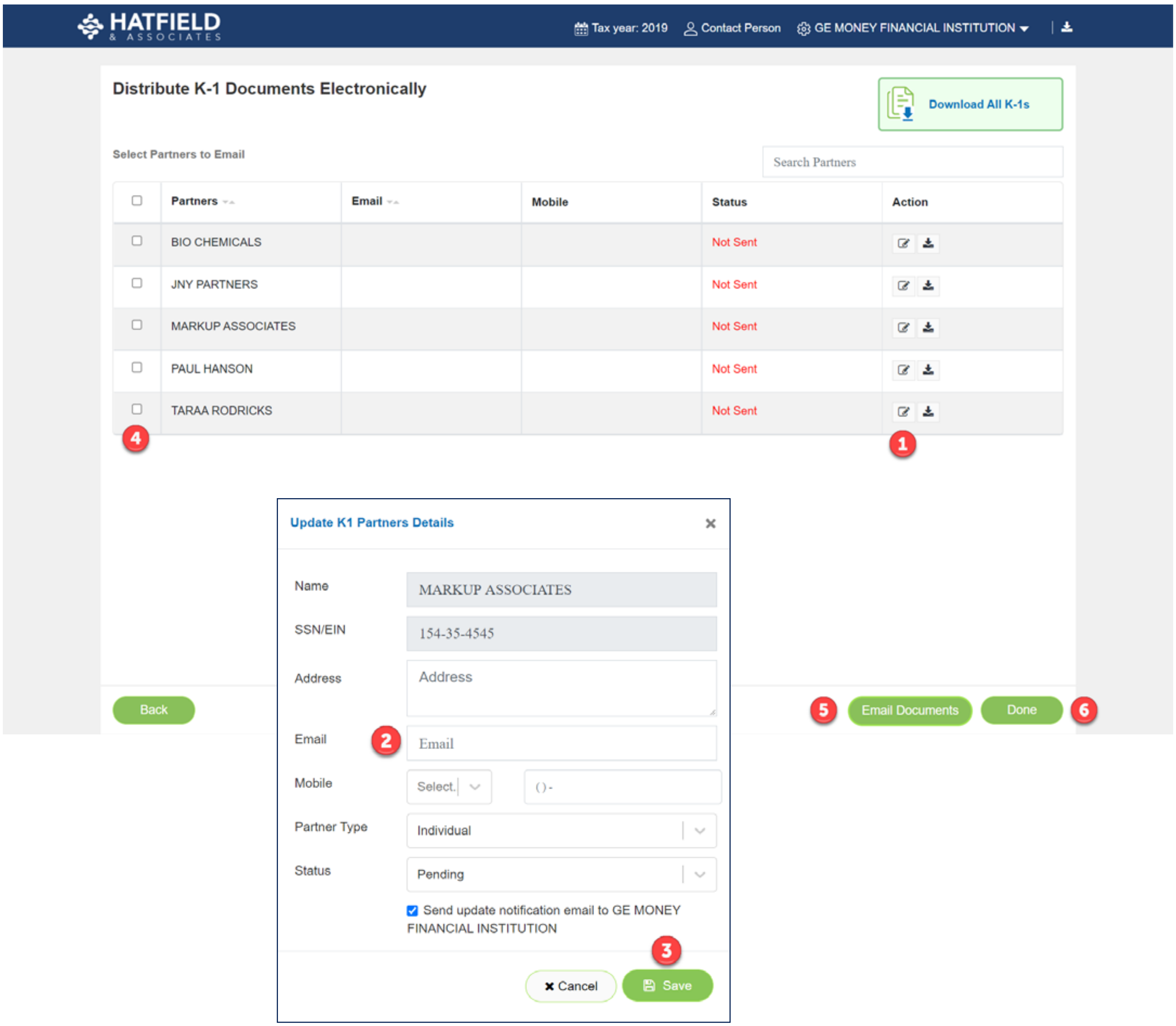




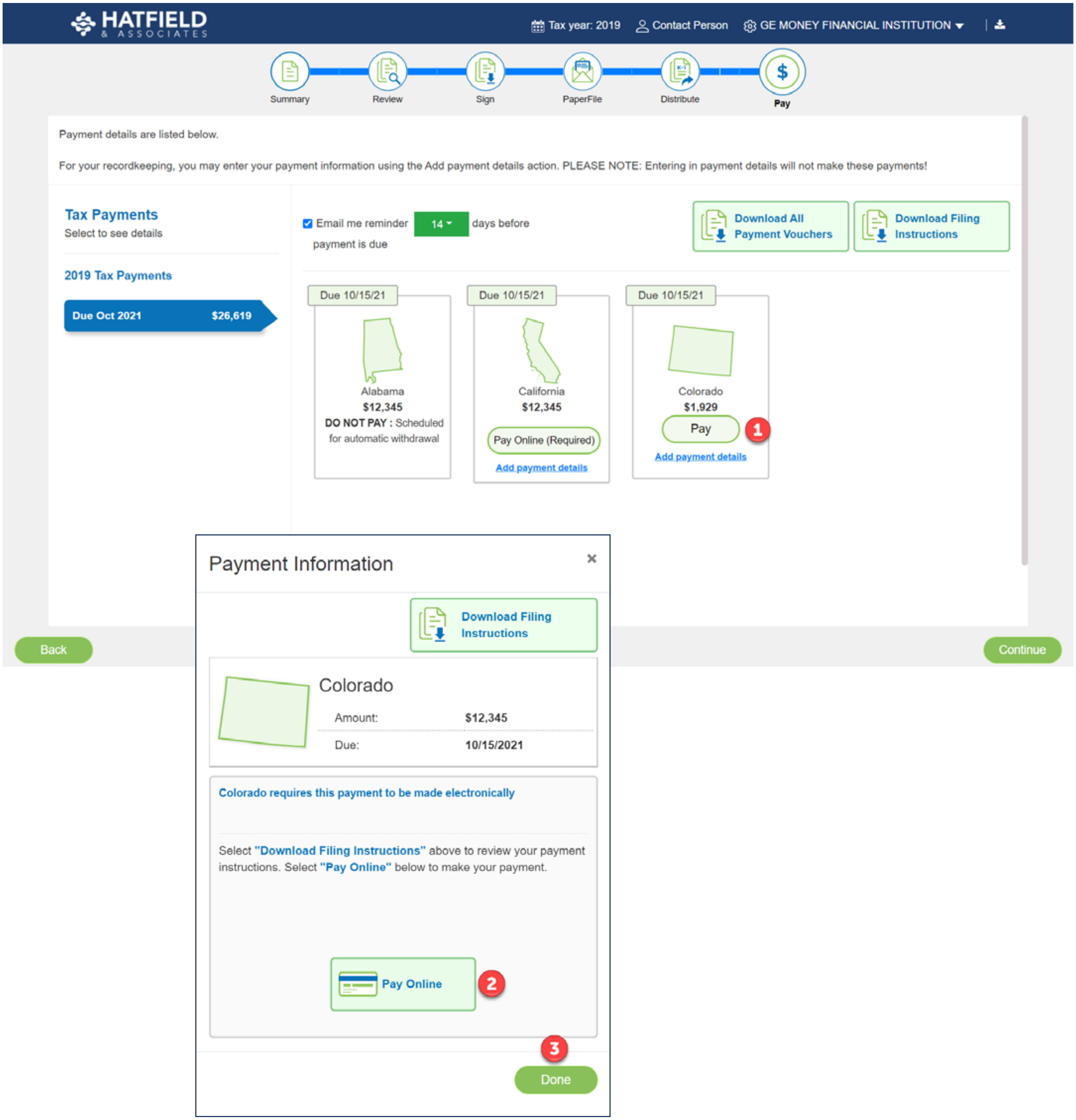
1. Click **Send Electronically** to start the K-1 delivery process via email.



1. Click the **pencil icon** in the Action column to edit each shareholder's contact information.
2. Add the shareholder's email address.
3. Click **Save**.
4. Once shareholder information is added, check the box next to each shareholder K-1 to be distributed.
5. Click **Email Documents**.
6. Click **Done**.



1. View payment options.
2. Click **Pay Online** to go to the respective IRS authority website to make a payment.
3. Click **Done**.



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.