SafeSend

Interactive Worksheet Pt. 2

Client Info

1. You change the taxpayer's email using the green business card icon.

   ☐ True ☐ False

Columns - Status and Last Reminder

2. Statuses – Choose the correct Status for each definition.
   - A return was delivered to a client, but no signers have completed the signature process.

     ☐ Awaiting E-Sign ☐ Awaiting Upload
   - The Married Filing Jointly return has been signed by one taxpayer.

     ☐ Partially Signed ☐ Awaiting E-Sign
   - The return was e-signed by all clients.

     ☐ E-Signed ☐ Manually Signed
   - The return is set to be manually signed and the taxpayer has not uploaded their signed documents yet.

     ☐ Awaiting Upload ☐ Uploaded
   - The return status was changed by a user in the firm.

     ☐ Manually Signed ☐ E-Signed
3. The Last Reminder column displays when the last reminder was sent.

   ☐ True ☐ False
4. The Link Not Accessed report can be found with the Quick View Reports button (next to the refresh icon). ☐ True ☐ False

Bulk Buttons

5. The function of the *Set Access* button is to restrict access to internal users.

   ☐ True ☐ False
6. Change Status – Scenarios where you would use the Change Status button; Select all that apply.

   ☐ Awaiting E-sign to Manually Signed

   ☐ Awaiting Upload to Manually Signed

   ☐ Manually Signed to Awaiting E-Sign or Awaiting Upload
7. When would you use the Send Reminder button? Choose all that apply.

   ☐ When they have not signed ☐ If they have not accessed
8. You should archive a return when…

   ☐ the return is recalled. ☐ when the return is completed.

SafeSend

Actions Column

9. The Resend Access link is only available for E-signed, Uploaded or Manually Signed status.
   ☐ True ☐ False
10. What can you adjust in the Automated Reminders? Choose all that apply.
    ☐ Voucher and Signing Reminders Frequency
    ☐ Toggle Voucher and Signing Reminders on/off
11. Should you delete delivered returns?
    ☐ Yes ☐ No
12. When changes need to be made to a delivered return, you would,
    ☐ Recall the return ☐ Delete the return.
13. After a return is recalled, use the gray recycle arrows to upload the corrected return.
    ☐ True ☐ False
14. Client Tracking shows all actions taken by the firm and the taxpayer.
    ☐ True ☐ False
15. Where can you find the steps to screen share?
    ☐ In the Help Center ☐ In Settings
16. Can the firm distribute K-1's to a client?
    ☐ Yes ☐ No
17. Do we recommend K-1 distribution on the firm side?
    ☐ Yes ☐ No

Additional Notes:

Answers:

1. T	*2. Awaiting E-Sign, Partially Signed, E-Sign, Awaiting Upload, Manually Signed*
3. T	*4. T*
5. T	6. Manually Signed to Awaiting E-Sign or Awaiting Upload
7. Both	*8. When return is completed*
9. T	*10. Both*
11. No	*12. Recall the return*
13. True	*14. True*
15. Help Center	*16. Yes*
17. No	