SafeSend

SafeSend Knowledge Questions

Self Help:

1. Where do you locate the Help Center?
2. What are two best practices discussed on your training?
   a.
   b.
3. T/F: Your trainer's name is Bonnie?

Uploading a Return:

1. Where is the upload button located?
2. What Return types does SafeSend Returns support?
   a. 1040, 990, 1065, 1120F
   b. 1040, 1040NR, 1065, 1120, 1120s
   c. 1041, 1065, 1120S, 1120, 1040, 1040NR
   d. All return types.
3. T/F: We require the Federal Return to successfully upload.
4. T/F: K-1s are not needed to upload a return [for 1041, 1065, & 1120S].
5. T/F: The person who uploads the return is the only person able to process it.

Processing a Return:

1. What is the one thing needed to deliver a tax return?
2. T/F: Does SafeSend require both taxpayer and spouse's email address to deliver a return?
3. What are the two types of vouchers we cannot recognize?
   a.
   b.
4. Where can you manually add vouchers?
   a.
   b.
5. What is the **Additional E-Sign Documents** used for?

Delivery:

1. T/F: You can clear out the **Message from Preparer**?
2. Where is the **Finish** button located?
3. What do you click to **Deliver to Client**?
4. When is your firm charged for a tax return?

(800) 716-2558
training@safesend.com
www.safesend.com

Delivered Returns:

Filtering and Bulk Actions

1. T/F: You can filter all the columns?
2. Where can you create and save your own filters?
3. What do the below buttons allow you to do?
   - a. Set Access
   - b. Change Status
   - c. Send Reminder
   - d. Automated Reminders
   - e. Archive
   - e. Download e-file Forms
   - g. Delete
4. Do we recommend Deleting delivered returns? If so, when?

Actions Column:

1. Where can you update and correct email address for delivered returns?
2. What is the difference between **Send Reminder** and **Resend Access Link**?
3. Why would you recall a return?
   a. Forgot they had a kid.
   b. Human error
   c. Forgot important tax documents.
   d. All the above and more.

4. Once a return has been recalled, what do the below icons mean?
   a. 
   b. 
   c. 
5. T/F: You can update and add estimates after delivery?
6. T/F: **Client Tracking** is one of your most important tools?

Archive Returns:

1. When do we recommend Archiving a return?
2. T/F: You have all the same options in **Archive Returns** as you do in **Delivered Returns**?
3. T/F: Once archived, a tax return cannot be moved back into the Delivered Returns Report.

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Additional Notes:

Answers:

Self Help:

1. Bottom left within the navigation bar
2. Refer to notes from training
3. F
4. F

Uploading a Return:

1. Navigate to "Send Tax Return" then to the top right, your tax software will be there.
2. C
3. T
4. F
5. F

Processing a Return:

1. Email Address
2. F
3. Automatic withdrawal, online payment required
4. Transmittal Tab or Voucher Tab
5. Upload any documents not apart of the E-file tab that need to be electronically signed

Delivery:

1. T
2. Bottom right
3. Click "Finish" at the bottom right

4. Firm is charged when return is delivered to client

Delivered Returns: Filter and Bulk Actions

1. T
2. Above Actions top right is the filter icon
3.
    a. Restrict rights internally
    b. Update return signing status
    c. Resend return access if not signed
    d. Resend reminders to review and sign return
    e. Store return from main report
    f. Download signed e-file forms
    g. Delete return
4. Only when sending to someone other than the owner

Action Column:

1. The green business card- client information
2. Send reminder- used when client has not signed. Resend Access link- used when client has signed.
3. D.
4. A. Reprocess   b. Upload corrected return   c. Client tracking
5. T
6. T

Archive Returns:

1. After it's been signed and downloaded
2. T
3. F