

SAFESEND RETURNS FAQ

FOR INDIVIDUALS

Will I receive a notification when my return is ready to sign?

Yes. Email notifications will be sent from Perkins at noreply@safesendreturns.com. To prevent the email from getting filtered to spam/junk, we recommend adding this email address to your safe list.

Is it safe to enter part of my Social Security Number?

Yes. SafeSend Returns offers a secure system to view and sign your e-file authorization form(s).

Look for <https://> at the beginning of the site URL and a locked padlock symbol in your browser's URL bar to confirm you are on the secure site.

What if I don't receive an email with my access code?

Check your spam/junk email folder. If you do not receive your code within the 20-minute time limit, please request another.

You might also search your email for noreply@safesendreturns.com. Some emails hide junk items in peculiar places.

Will this work on any internet-connected device? Does SafeSend Returns offer an app for my smartphone?

This process can be completed on any computer, smartphone, or tablet via a web browser. There is currently no SafeSend Returns app available.

Will I have the option to download and print my return to retain for my records?

Yes. If you're using a smartphone or tablet, you may not be able to download and print your return, but you'll be able to review and e-sign it. You can always download and print your return from a computer at a later date.

I use TaxCaddy; will a copy of my return also be available in TaxCaddy?

Yes! If you have a TaxCaddy account connected to Perkins, SSR communicates directly with TaxCaddy. After you review your SSR packet, a copy will be sent to your TaxCaddy account.

How is this process different from e-filing?

SafeSend Returns allows you to electronically sign your e-file authorization form(s), but it won't submit your return to the IRS. Once signed, Perkins is automatically notified, and we will then complete the filing process for you, including submission to the IRS.

My spouse and I file our individual return jointly. How can we both sign the e-file authorization form(s)?

For spouses filing jointly, there are three ways to sign via SafeSend Returns:

- **If each spouse has an email address on file with Perkins**, both will receive an email with a link to view the return and sign the e-file authorization form(s). First, one spouse will receive the link with identity verification questions specific to him or her. They will sign the e-file authorization form(s) and input the spouse's email address, which will send an email link to the second spouse. The second spouse will answer identity verification questions specific to them and then sign the form(s).
- **If only one spouse has an email address on file**, that spouse will first receive the link with identity verification questions specific to them. They will sign the e-file authorization form(s) and then enter an email address for the second spouse. The second spouse will then receive the email link with identity verification questions specific to them. Once the second spouse electronically signs the e-file authorization form(s), Perkins will be notified that the signing is complete.
- **If a couple shares an email address**, the primary signer will first receive a link with identity verification questions specific to them. After the primary signer signs the e-file authorization form(s), they can then enter the shared email address again. A new link will be sent with identity verification questions specific to the second spouse.

Can I sign my dependent's return electronically?

Perkins will deliver your dependent's return using SafeSend Returns. However, most dependents may not have sufficient government and financial data available to successfully complete the electronic signature process. Because of this, we will generally deliver those returns through SafeSendReturns in a manner set up for manual signature. The intended forms will require you to return them through SafeSend Returns or via email at efileforms@perkinsaccounting.com. For your own security, we recommend using SafeSend Returns rather than emailing these forms but will continue to accept them via email if you prefer.

I'd rather print and sign my e-file authorization form(s). Can I do that?

Yes—you can still print, sign and upload your e-file authorization form back into SafeSend Returns. Or you can email your e-file form(s) back to Perkins if you'd prefer to do so at efileforms@perkinsaccounting.com. For your own security, we recommend using SafeSend Returns rather than emailing these forms, but will continue to accept them via email if you prefer.

After signing my e-file authorization form(s), will I receive confirmation that it was successfully submitted?

Yes! Once you sign your e-file authorization form(s), you will receive an email stating it was successful. The email will also include a link to download a copy of your tax return for your records.

Can I set up reminders for my quarterly estimated payment?

If estimated payments are included in your copy, you will automatically receive an email reminder 14 days before your payment is due.

Will I have to print and mail anything to the government?

Possibly. You may need to print and mail out to government authorities the tax and estimate payment vouchers. (If applicable, you will also be provided options to make tax payments electronically if you prefer not to mail payments.) If you have any returns that require paper filing (such as the City/County tax return), and you asked that those returns be sent to you electronically, they will be in the Attachments section of SafeSendReturns and will need to be downloaded, printed, signed and mailed as instructed.

What about my source documents? What happens to them?

If you provided us with paper documents, Perkins will return them to you via separate mailing.

Is my information secure using SafeSendReturns?

Yes. If you want to learn more, check out SafeSendReturns Information Security Overview [here](#).

Still have questions about SafeSendReturns?

Please contact us at SSR@perkinsaccounting.com.

FOR BUSINESSES/TRUSTS

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Yes. Email notifications will be sent from Perkins at **noreply@safesendreturns.com**. To prevent the email from getting filtered to spam/junk, we recommend adding these email addresses to your safe list.

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Still have questions about SafeSendReturns?

Please contact us at SSR@perkinsaccounting.com.

Is my business's information secure using SafeSendReturns?

Yes. If you want to learn more, check out SafeSendReturns Information Security Overview [here](#).