

Why use SafeSend Returns?

SafeSend Returns allows you to review your tax return and electronically sign e-file authorization forms securely and easily from your computer, tablet, or smartphone. You can download copies of your tax returns, as well as forward them to third parties such as a bank. You can also download copies of your payment vouchers or be linked to online payment options.

How will I know when my return is ready to sign?

You will receive an email notification from BMG at **noreply@safesendreturns.com**. To prevent the email from getting filtered to spam/junk, we recommend adding this email address to your safe list.

How long do I have to sign the e-file authorizations form(s) once I receive the SafeSend email notification?

Please sign the e-file authorization form(s) as soon as possible so BMG can transmit your returns to the appropriate taxing authorities. Any tax owed is not due until the tax due date, regardless of when we electronically file your returns.

What device should I use to access my tax return?

We recommend using a computer, but the tax return review and e-Signature process can be completed on any computer, smartphone, or tablet via a web browser.

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

Yes, and we highly recommend this. You will have access to your return via the SafeSend email link for seven years, but we highly recommend downloading and/or printing a copy to retain with your tax records.

Is it safe to enter the last four digits of my Social Security Number as the access code?

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 to confirm you are on a secure site.

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

Check your spam or junk folder. If you do not receive your code within the time limit, please reopen the link from your SafeSend email notification and request another access code. You might also search your email for noreply@safesendreturns.com.

How are my security questions generated?

The Knowledge Based Authentication questions are required by the Internal Revenue Service to ensure that electronically signed forms are being signed by the appropriate party. These questions are generated by SafeSend Returns from publicly available credit data. BMG does not generate these questions. BMG is not able to view or answer these questions on your behalf.

What if I notice an error on my tax return?

If you notice an error or omission on your tax return, please do not complete the signature process. Call your tax preparer as soon as possible to notify us of the error. Once the change is made, you will receive a new email notification.

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

For spouses filing jointly, the SafeSend link will go to one spouse at a time. Each spouse will be required to view the return and sign the e-file authorization forms. Once the first spouse has signed, the second spouse will receive the SafeSend email notification. Once the second spouse has signed, both spouses will receive an email notification stating copies of their completed and signed returns are available to be downloaded.

Can I sign my dependent's return electronically?

Most dependents will not have sufficient government and financial data publicly available to successfully complete the electronic signature authorization process required by the Internal Revenue Service. Because of this, BMG will generally deliver dependent tax returns via another method.

Will I be receiving paper payment vouchers and envelopes for tax payments due and/or quarterly estimates?

No. Your payment vouchers are available to be downloaded and printed from your SafeSend Returns dashboard. We recommend downloading the vouchers and setting up your own reminder system in order to make these payments in a timely manner. Additionally, SafeSend provides links to tax agency websites to make payments electronically, if desired.

SafeSend Returns gives you the option to receive email reminders 14 days prior to estimated tax payment deadlines, if applicable.

What about my source documents? What happens to them?

If you provided our office with paper documents to prepare your tax return, you will receive a phone call when the documents are ready to be picked up.

Is my information secure using SafeSend Returns?

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

For business returns:

How does the SafeSend process work for business tax returns?

The SafeSend process works the same for business returns as for individuals. Business signers are *not* required to answer identity verification questions. Additionally, the recipient of the SafeSend link can assign the signature to another party if they are not the authorized signer.

How do I deliver shareholder, partner, or beneficiary K-1s?

SafeSend allows the secure, electronic delivery of K-1s. The signer or recipient of the SafeSend link will be able to enter K-1 recipient email addresses and send directly from the SafeSend portal. You will also have the option to download and print K-1s if you prefer to mail them to the recipients.



SafeSend Returns FAQ

www.bmgcpas.com
(402) 483-7781

Still have questions about SafeSend Returns?

The SafeSend client experience guide is available [here](#). A video of the client experience is available [here](#).

If you still have questions or issues, please call our office at (402) 483-7781 and ask to speak with someone on our SafeSend Team. If the question relates to the content of your tax return, please discuss those questions with your tax preparer.