**Best Practice**

**Send a templated email to the taxpayer around the same time you send them their tax return.**

Standardizing this delivery email template will ensure that no matter the sender or recipient, consistent information will be provided that partners/professional staff can be assured is accurate and instructional for all recipients.

**Template Creation Steps (MS Outlook Users)**

1. Open a new Outlook email and remove the Signature block if one prepopulates.
2. Tailor the text/content the firm would like to provide (example shown below).
3. Copy, then paste that information into the blank email.
   1. Save more time by leaving off salutations and personal client identifying information.
4. Add a clear Subject line, i.e. “Your Tax Return is Ready for Review/Signature”, etc.
5. Save As and change the File Type to Outlook Template. Place this file in a centralized location that is accessible to all processors such as a ‘SafeSend Templates’ folder.
   1. The Template file type ensures that there is no accidental overwriting of information saved in the copy everyone will be accessing.
   2. Any future changes are easy to make with a singular template to maintain.

**Template Content Sample**

Hello,

Your tax return is complete and will be delivered electronically via SafeSend Returns.

SafeSend Returns is a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer or smartphone.

* You will receive an email from **<FIRM NAME>** at [noreply@safesendreturns.com.](mailto:noreply@safesendreturns.com) Add this email to your safe list to prevent it from being categorized as spam or junk.
* If you do not see an email from **<FIRM NAME>** at [noreply@safesendreturns.com,](mailto:noreply@safesendreturns.com) please check your Spam or Junk Folder.
* For the best experience, we recommend using Google Chrome.
* Please save a copy of the email from noreply@safesendreturns.com to access your return in the future.

After signing successfully, your spouse (when applicable) will then receive a similar emailed link and follow the same instructions to electronically sign the e-file authorization forms. *Please note that the IRS requires both individuals electronically sign independently of each other.*

The following short video will walk you through the review and e-signature process.

* [Client Experience Tutorial](https://safesendreturns.zendesk.com/hc/en-us/articles/360010788033-TaxPayer-Help-1040-Recipient)

Additional Features for Entities:

* Electronically sign your e-file authorization forms or print, sign and upload your e-file authorization forms.
* Electronically distribute K-1s to your Partners/Shareholders. The following short video will walk you through the process.
  + Entity Client Experience with [K-1 Distribution Tutorial](https://safesendreturns.zendesk.com/hc/en-us/articles/360011132693-Entity-TaxPayer-Experience-with-K1-Distribution)

If you have any questions, please feel free to contact me.