**Best Practice**

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

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. After tailoring the text/content the firm would like to provide (example shown below), copy and paste that information into the blank email.
   1. Leaving out salutations and identifying information will keep this process the most efficient for delivery purposes.
3. Add a clear Subject line, i.e. “Please Review and Complete your Tax Organizer”, etc.
4. Save As and make sure to change the File Type to Outlook Template. Place this file in a centralized location that is accessible to all processors like 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 Individual Income Tax Organizer will be delivered electronically via SafeSend Organizers.

Implementing SafeSend Organizers will allow us to complete the tax return preparation and delivery process in a completely paperless and secure manner from start to finish.

* 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 tax organizer in the future.

Once you have gained access to your tax organizer you will be able to:

* Electronically sign your Engagement Letter and other forms requiring signature (if applicable).
* Answer your Custom Questionnaire (if applicable).
* Fill out your Organizer.
* Upload Source Documents (if applicable).

The benefits of sending your tax organizer electronically include:

* Increased security around the sharing of your confidential tax documents.
* Improved turnaround time to prepare your tax return – we will no longer have the delay of information being routed through the mail, or scanning of hard copy documents, and we will have immediate access to start the prep process.
* Simultaneous access to the same tax documents – you will retain a copy of all information you provide us through the software, which means you will not have to wait for us to process and return any documents to you that you may need as we complete your tax return.

The following short video will walk you through the organizer experience.

* [Organizer Client Experience Tutorial](https://safesendorganizers.zendesk.com/hc/en-us/articles/12011806309011--Video-Organizer-Client-Experience)

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