

## Recommended Practice

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

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.
  - a. 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 Gather request", 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.
  - a. The Template file type ensures that there is no accidental overwriting of information saved in the copy everyone will be accessing.
  - b. Any future changes are easy to make with a singular template to maintain.

## Template Content Sample

Hello {Recipient Name},

Your {Tax Year} Individual Income Tax Organizer will be delivered electronically via SafeSend Gather.

**(Or)**

Your {Tax Year} {Return Type} document request list will be requested electronically via SafeSend Gather.

Implementing SafeSend Gather will allow us to complete the tax return collection, 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. 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, please check your Spam or Junk Folder.
- For the best experience, we recommend using Google Chrome, Edge or FireFox on your desktop.
- Please save a copy of the email from noreply@safesendreturns.com to access your tax organizer, document request, engagement letter in the future. Once you have requested the access code and entered for entry to the welcome page, you will be able to do below in the following order:
  - E- sign your Engagement Letter and other forms requiring signature (if applicable).
  - Answer the Custom Questionnaire (if applicable).
  - Fill out your tax organizer (if applicable) [📄](#)
  - Upload Source Documents against a check list. Do not be alarmed when you see the documents categorized and a green check mark appear. That's the beauty of the product in action.
  - As you progress, click Finish to move to the next event.
  - Once all documents are uploaded, please mark Finish indicating to your Tax Professional all is submitted for tax preparation.
  - [Click here](#) to watch a step-by-step video.

The benefits 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, email and/or scanning of hard copy documents. We will have immediate access to start the preparation 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.

[Gather – Client Experience](#)

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