

SafeSend Organizers FAQs (FREQUENTLY ASKED QUESTIONS)

Edelstein utilizes the SafeSend Suite to connect with you year-round in a secure and efficient manner. SafeSend is Edelstein's preferred communication channel for collecting signatures and source documents to prepare your Tax filing, and to deliver your returns securely to you. All communication from SafeSend will come from noreply@safesendreturns.com, please save this as a favorite in your Inbox to ensure important notifications and information are not delivered to your SPAM folder.

Please see the below for answers to frequently asked questions about SafeSend Organizers.

Why is Edelstein using digital organizers?

- SafeSend Organizers increases the security of your tax documents. This is the same organizer we have always sent but now it is electronic.
- Our team can complete the preparation of your return faster, as there will not be delays through the mail and we will have immediate access to your documents once they are submitted.
- SafeSend Organizers allows both you and our team to have simultaneous access to the same tax documents. You will not have to wait for us to process and return any documents that you may need as we are completing your tax return.

Do I need to sign an engagement letter every year?

- Yes, we require a signed engagement letter each year for each individual return that we are filing for.

I prefer to fill out a paper organizer, is that still an option?

- Yes, please email TaxSupport@edelsteincpa.com and we will send your organizer via USPS.

Can I start completing my organizer and finish it later?

- Yes! Just be sure to save your work by clicking the green "save and continue" button in the bottom right corner.

Can I work on my organizer at the same time as someone else?

- We recommend that only one person work in the organizer at a time. If you and your spouse work on it at the same time, it will only save the last person's work.

What does the paper clip icon mean?

- The paper clip icon appears on certain pages of the organizer. These pages allow you to directly upload Source Documents that correlate with that specific page.

Where should I add major life events (marriage, birth of a child, sale of a home) in my organizer?

- You can use "Notes to Tax Preparer" box in the bottom right corner to notify us of these events or give any additional information about an organizer page. All notes are then compiled to a page at the end for our team to read.

If I add to the Notes section, will it be seen immediately?

- The Notes section is not a chat feature. The note will be read once we begin preparing your tax return.

What type of files can I attach?

- It is preferred that you attach PDF files of your tax documents. You can also submit JPEG, Word, and Excel files. If attaching a JPEG, please ensure all content is legible.

Where can I attach files that do not have an organizer page?

- Once you have completed your organizer and have clicked the green "finish" button in the bottom right corner, you will be taken to the home screen where you can upload these documents by clicking "upload documents" to attach any additional files.

What is the difference between "Complete" and "Save & Notify Tax Professional"?

- After you have completed the organizer and uploaded your documents, you will have two options. Select "Complete" if you are confident that you have submitted all your tax documents and are ready for our team to prepare your return. When you select "Complete," your organizer will be locked, and you will not be able to edit or add documents. If you are waiting on additional information or documents, select "Save & Notify Tax Professional."

What internet browser should I use?

- Use Google Chrome for the most optimal experience. SafeSend does not work well with Internet Explorer.

Can I use a mobile device or tablet?

- Yes, you can use your device to sign your engagement letter and upload documents. You will also be able to take pictures of documents with your device or tablet to upload documents securely.

What should I do if I cannot scan documents?

- You can use your mobile device or tablet to take pictures and then upload them. Please be sure the content in the images is legible.

I completed uploading documents and have clicked "Complete", what do I do if I have more documents or information to submit?

- Contact us at TaxSupport@edelsteincpa.com to have your organizer unlocked, which will allow you to upload more documents or submit more information.

If you were not able to find the answer to your question above, please contact us at TaxSupport@edelsteincpa.com or contact your Edelstein team member.