Integration Between SafeSend Returns® and UltraTax CS® or GoSystem® Tax RS

Built on innovative technology, SafeSend Returns has redefined the way accounting firms digitally assemble, deliver, and capture e-signatures from clients on completed tax return packages.

What is SafeSend Returns? SafeSend Returns is a cloud-based solution that eliminates the manual, labor-intensive tasks associated with tax package assembly, delivery, and e-signing many firms experience. It is a multi-year winner of the CPA Practice Advisor Technology Innovation Award.

Availability of SafeSend Returns Integration:
- Integration with UltraTax CS released in January 2021.
- Integration with GoSystem Tax RS is scheduled to release in July 2021.

SafeSend Returns automates the assembly and delivery of 1040, 1041, 1065, 1120, and 1120s tax returns, as well as easily captures e-signatures on 8879s for all return types. Once the return has been reviewed and approved for delivery, the SafeSend Returns user at a firm transmits the client copy of the tax return to SafeSend Returns directly from UltraTax CS or GoSystem Tax RS, in just a few clicks!

Why Firms Love SafeSend Returns
Once the tax return has been transmitted, SafeSend Returns reads the document and extracts important information to allow for a quick review. The recognition engine divides the return into different categories automatically:
- Transmittals/Filing Instructions
- Tax Return
- E-File Forms (e-signature and date blocks are automatically placed)
- Vouchers/Estimate Amounts and Due Dates
- Invoice (if included)

Only One Requirement for Success
Firms also love the fact that the only item required to successfully use SafeSend Returns is one email address. Firms do not need to know both the taxpayer and spouse email address to get a return out the door – plus it is okay if they share the same email address.

Tax Package Adjustments on the Fly
If needed, firms can adjust the tax return or add to the tax package within SafeSend Returns. For example, firm users can delete or move pages, add documents such as an engagement letter or power of attorney (POA) for e-signature, include additional documents for review, provide digital copies of the client source documents, or customize a message from the firm to the client.

Knowing Where the Client is in the Process
SafeSend Returns offers amazing real-time reporting with unmatched available actions for firms to assist their clients throughout the last mile of the tax engagement. Available features include Client Tracking, Recall a Return (if updates need to be made), View Access Codes, and much more! With these features, firms eliminate the problem of tracking down e-signed 8879s.

SafeSend Returns is not only easy for firms to use, but the intuitive client experience means a fast turnaround and less client questions.
Why Clients Love SafeSend Returns
Clients love SafeSend Returns ease of use and Form 8879 e-sign, but quarterly reminders for payment vouchers and electronic K-1 distribution to shareholders/partners can make them clients for life.

Simple, Guided Process with NO Passwords
The intuitive client experience user interface (UI) is clean, simple and includes an on-screen guided process. Here is how it works:

1. The process of sending the completed tax return through SafeSend Returns triggers an email to the client with an access link.

2. The client does not need to create an account or set up a password. SafeSend Returns uses two-factor authentication to grant secure access to the tax return.

3. Next, the client can view the cover letter, review tax returns, sign e-file forms (Knowledge Base Authentication and 8879 certification embedded into process), and pay taxes and/or the invoice (if applicable).

4. Last, clients have the ability to securely and electronically deliver K-1 packages to Partners or Shareholders.

Bottom Line Benefits
For tax and accounting professionals using UltraTax CS or GoSystem Tax RS for compliance, integrating SafeSend Returns allows them to automate the tax engagement at every client touchpoint, eliminate manual and labor-intensive tasks, and provide a superior client experience!

Visit safesend.com to schedule a demo.

Note: Clients can securely forward all of the above or just a portion to a third party.

Forward a copy of my tax documents

Please enter the email addresses that you would like to share the tax documents with. Documents will be sent from report@safesendreturns.com. Recipients will be required to enter an Access Code which will be sent in a secondary email or with text message authentication.

Note: Recipients will only be able to download copies of tax documents. They will not be able to sign forms or manage payments.

Choose the document(s) to forward:
- Filing Instructions
- 8879 Forms
- Vouchers
- Tax Return

Email Tax Documents