

SafeSend - Detailed Instructions

At H2R, our primary platform for receiving tax documents and delivering your tax returns electronically is **SafeSend**. SafeSend allows us to exchange information in a secure, encrypted environment while reducing paper mailings, using an “electronic organizer.”

Information Request & Organizer Process

You will receive access to your electronic organizer via an email from **H2R CPA** at **noreply@safesendreturns.com**. These are typically delivered in mid-January. To help ensure delivery, we recommend adding this address to your list of approved or safe senders.

Your electronic organizer includes information from your prior-year return for easy reference. Use the bookmark tabs on the left side of the window to navigate through the organizer.

TO-DO: COMPLETE THE ORGANIZER

1. Please complete or review the following sections, as they are essential to preparing your tax return:
 - Organizer questions
 - Updates to personal information
 - Dependent information
 - Direct deposit and withdrawal information
 - Federal and state estimated tax payments
2. Once these sections are complete, click **“Upload Tax Documents”** to attach your supporting documents such as W-2s, brokerage statements, etc. The upload screen is pre-populated with document requests based on last year’s return. If a requested document does not apply to the current year, simply mark it **“N/A.”**

To upload documents, you may drag and drop files or upload them directly from your device. **PDFs are preferred**. SafeSend will automatically read each uploaded document and mark off the corresponding request.

3. Please click **“Finish”** only after at least 80% of your documents have been uploaded. This notifies our team that your organizer and document submission are complete. If you are not yet ready to submit or have uploaded less than 80% of your documents, please click **“Save and Close”** to return later.

Once you have **signed the engagement letter, completed the organizer, uploaded your documents, and clicked “Finish,”** we will begin preparing your income tax return.

Delivery of Your Completed Tax Return

Your income tax return will also be delivered electronically through SafeSend. At the time of delivery, you will receive:

1. An email from **SafeSendReturns@h2rcpa.com** notifying you that your return is ready
2. An email from **noreply@safesendreturns.com** with a link to access your return

TO-DO: REVIEW AND SIGN (AND MAKE ANY NECESSARY TAX PAYMENTS)

After selecting “**Let’s Get Started**” and answering the identity-verification prompts, you will be taken to the SafeSend platform to:

- Review your completed income tax return
- Review summaries of amounts due or overpaid
- View your estimated tax payment schedules
- Electronically sign required e-file authorization forms

Please carefully read the instruction letters included with your return, as they explain:

- Whether your returns will be electronically filed or require paper filing
- Any payments due
- Payment methods and mailing addresses

Once you sign the e-file authorization forms, SafeSend will send us the signed copies and electronically file your returns.

TO-DO: PRINT AND MAIL LOCAL INCOME TAX RETURN

Please note: Pennsylvania local tax returns **cannot** be electronically filed. If you have a local filing obligation, you will need to download the return and mail it directly to the appropriate local tax authority.

H2R CPA Invoice

Your invoice for services provided by H2R CPA will be delivered to you electronically using the email address we have on file. You will receive an email from H2R CPA at **H2RCPABilling@wolterskluwer.com**. This invoice is separate from SafeSend. To help ensure delivery, we request you add this address to your list of approved or safe senders.

Thank you for your business. We appreciate the opportunity to work with you.