

SafeSend Organizer – A Secure Way to Share Your Tax Documents

Why Use SafeSend Organizers: [Watch an Overview \(Video\)](#)

- Receive your tax organizer electronically and securely
- Sign your engagement letter electronically
- Upload your documents easily from your computer
- Send directly and efficiently to your preparer as soon as you have completed your organizer

FAQ

What is the tax organizer?

- The tax organizer is a tool that helps you share the info we need for your return—like income, deductions, and personal details.

Do I have to fill out the organizer?

- **Nope!** You can fill out as much or as little as you'd like. Some clients find it helpful, while others skip it entirely—and that's totally fine.

Can I submit my tax documents electronically without filling out the organizer?

- **Absolutely!** You can upload your tax documents through the SafeSend Organizer or your existing SafeSend Client Portal.
- You can also use the secure link found in our email signatures.

How to Access Your Organizer

- Look for an email from **noreply@safesendreturns.com**.
- If you don't see it, check your spam or junk folder and add the email address to your safe sender's list.

Tips for Using the Organizer

- Use the "Upload Documents" section for anything new or that doesn't fit existing categories
- Preferably upload PDFs that are clear, legible, and saved as separate files
- Most financial documents can be downloaded directly from your online accounts
- Only enter current-year data (prior year info is just for reference)
- Use the notes box to leave comments for your tax preparer

Saving and submitting:

- Use **"Save and Close"** if you need to pause and return later.
- Click **"Finish"** only when you're completely done - your organizer will then be locked
- **Need changes/support?** Contact your admin—we can unlock it for you
- You can upload documents in batches, but all organizers will lock on HHB's submission deadline

Technical considerations:

- Use Google Chrome for best performance (Safari, Firefox, and Edge also work)-Clear your Cookies
- Avoid using Internet Explorer
- Upload from a mobile device or tablet by taking photos—just make sure they're well-lit and clear
- PDFs must not be password-protected

Access Code Issues?

- Make sure your email and phone number are up-to-date
- Check spam/junk folders
- Codes expire in 20 minutes and can only be used once—request a new one if needed
- Ensure your browser is updated