



**LOMNESS CPA**  
TAX & ACCOUNTING SERVICES

Introducing **SafeSend**, a secure, effortless, and reliable online portal that streamlines your tax experience with Lomness CPA!



- Upload important tax documents and organizers
- Review and e-sign your tax returns in just a few clicks
- Experience a seamless portal for all your document needs
- Benefit from bank-level security for every file you send us

***Tax season—and every season—just got easier, faster, and safer!***

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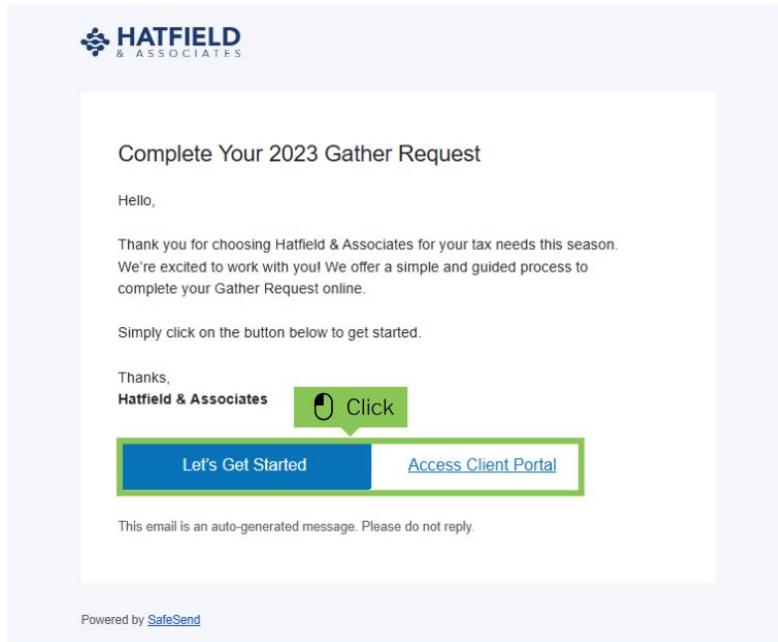
- Tax Organizers (“Gather Requests”) — page 2
- Client Portal — page 6
- Tax Returns — page 8

## Tax Organizers (also called “Gather Requests”)

Each year, once you sign your engagement letter in Ignition, you will receive a link to your tax organizer emailed from [NoReply@SafeSendReturns.com](mailto>NoReply@SafeSendReturns.com). This link will include a personalized questionnaire and a customized list of documents to upload, ensuring you know exactly what to provide.

### How to Complete Your Tax Organizer (for Personal Tax Returns Only):

1. Sign your proposal in Ignition.
2. Check your inbox: Look for a SafeSend email from [NoReply@SafeSendReturns.com](mailto>NoReply@SafeSendReturns.com).
3. Access your organizer:
  -  Recommended: Click **Access Client Portal** (*see registration steps on page 6*).
  - Or click **Let’s Get Started**.
  -  Please avoid simultaneous access with your spouse!



4. Verify your identity:
  - Click **Send Code**
  - Retrieve the 6-digit code from your email and enter it (code valid for 20 minutes).
  - *See Tips & Tricks on page 5.*



### Verify your identity

[Request Access Code](#)

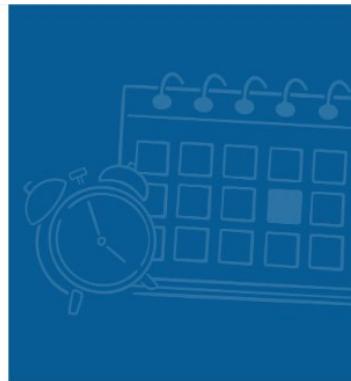
We will send you a One-Time Access Code to your email address.

[Send Code](#)

1

Need help? [Contact Us](#)

[Terms of Service](#) | [Privacy Policy](#)



### Verify your identity

A One-Time Access Code has been sent to your email address; it expires in 20 minutes.

0 0 2 4 7 9 9 0 2

If you did not receive it yet, check your junk/spam.

[Resend Code](#)

Confirm

3

Need help? [Contact Us](#)

[Terms of Service](#) | [Privacy Policy](#)



## 5. Click **Get Started** to complete your organizer:

Let's start completing your tax return journey:

① This may take 20 minutes

① Sign Documents

② Answer Questionnaire

③ Complete Organizer

④ Upload Documents

Click

Get Started

Need Help?

Welcome Walter Stylus!

To get started, we'll need some information from you.

A message from your CPA:

Dear Walter Stylus:

Thank you for working with Hatfield & Associates this tax season. We offer a guided process to complete necessary forms and gather all necessary information. Click on the link below to access our electronic processing center and get started!

Hi, Walter Stylus!

Profile

Log Out

- **Sign** any additional documents.
- **Answer** the tax questionnaire – required for compliance purposes.
  - Click **Save & Close** to save progress.
  - Click **Next** to complete and lock.

Default template  
CQ template testing.

Section 1

1. Question one \*

Answer goes here

2. Question two \*

Yes  No

3. Question three

Option 1  Option 2

4. Question five

Answer goes here

0% 0/6

Save & Close Next >

- Upload your supporting tax docs (custom list provided, but you may add more).  
Please upload ALL documents you want us to review for your return.

Choose a file or drag and drop here  
Please upload file size no more than 500 MB. [Choose File](#)

22 Requested Documents 2 Submitted Documents 0 Additional Documents 9% 2/22

Important! Encrypted, password-protected, or locked files are not supported.

Print

Requested Files (22)

JILL'S Information	W-2S AND WAGES <input type="checkbox"/> Due Nov 30	INTEREST INCOME <input type="checkbox"/> Due Nov 30	DIVIDEND INCOME <input type="checkbox"/> Due Nov 30
Payment Co...ax Payment	<input checked="" type="checkbox"/> US BANK - ...ERSON (W2) + 1	<input type="checkbox"/> BANK OF AME...A (1099INT)	<input type="checkbox"/> BANK OF AME...A (1099DIV)
Payment Co...ax Payment	MISCELLANEOUS INCOME <input type="checkbox"/> Due Nov 30	<input type="checkbox"/> SYNCHRONY ... (1099INT)	REAL ESTATE INFORMATION <input type="checkbox"/> Due Nov 30
Payment Co...ax Payment		K-1S	

[Save & Close](#) [Finish](#)

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- See *Tips & Tricks on page 5.*

6. Click **Finish** to submit.

- Don't skip this step!** If you do not click **Finish**, your organizer will remain pending, and your return will be delayed. Once you hit finish you will not be able to open the organizer again.

 **Tips & Tricks: Tax Organizers – Click [here](#) to watch a video guide!**

Issue	Solution
<b>Access Code</b> (valid for 20 minutes)	<ul style="list-style-type: none"> <li>• Delivery may take up to 3 minutes.</li> <li>• If you don't receive it in 5 minutes, call us at (281) 962-0310.</li> </ul>
<b>Browser</b>	<ul style="list-style-type: none"> <li>• Use Chrome, Firefox, Edge, or Safari.</li> <li>• Internet Explorer is NOT supported.</li> <li>• Clear browser cache – <a href="#">click here</a> for a guide.</li> </ul>
<b>Devices</b>	<ul style="list-style-type: none"> <li>• Use a computer (not a phone/tablet).</li> </ul>
<b>Itemized Deductions</b> (including but not limited to)	<ul style="list-style-type: none"> <li>• Charitable donations</li> <li>• Medical expenses</li> <li>• Mortgage interest</li> <li>• Property taxes</li> <li>• Closing statements</li> <li>• Major purchase receipts, etc.</li> </ul>
<b>Uploading Docs</b>	<ul style="list-style-type: none"> <li>• <b>Acceptable:</b> PDF, Word, Excel, JPEG.</li> <li>• <b>Not Accepted:</b> <ul style="list-style-type: none"> <li>○ Password-protected or encrypted files</li> <li>○ HEIC (live photos)</li> <li>○ Apple: Pages/Numbers</li> <li>○ File names &gt;200 characters</li> </ul> </li> <li>• <b>Questions:</b> See our <a href="#">Tax Return Document Checklist</a>.</li> </ul>
<b>Troubleshooting</b>	<ul style="list-style-type: none"> <li>• Watch a video tutorial <a href="#">here</a>.</li> <li>• Please avoid simultaneous access with your spouse.</li> <li>• Check spam or junk for SafeSend emails.</li> <li>• Add <a href="mailto&gt;NoReply@SafeSendReturns.com">NoReply@SafeSendReturns.com</a> to your safe sender list.</li> <li>• Need more help? Email Operations at <a href="mailto:Info@LomnessCPA.com">Info@LomnessCPA.com</a> or call (281) 962-0310.</li> </ul>

# Client Portal (Powered by SafeSend)

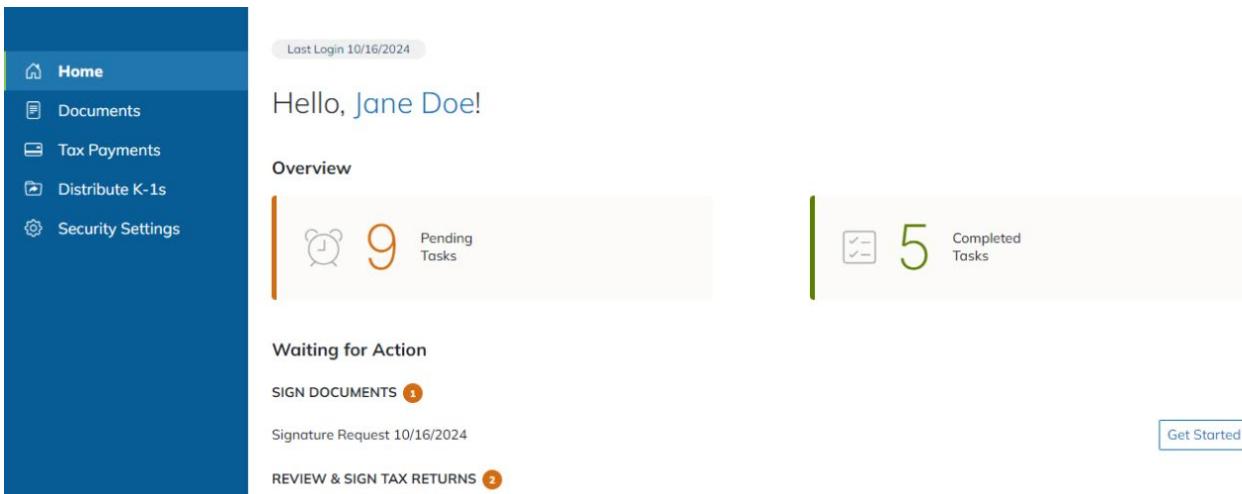
Your central hub to view, e-sign, upload or download documents, make payments, distribute K-1s (businesses only), and update settings.

## How to Register

1. Open the email from [NoReply@SafeSendReturns.com](mailto:NoReply@SafeSendReturns.com) and click **Access Client Portal**.
2. Click **Sign Up**, enter your name and email address, then click **Verify your email**.
3. Enter the 6-digit access code sent to your email.
4. Create a 6-digit numerical PIN (needed for future logins on different devices or browsers).
5. Click **Create Account** and log in!

## Portal Home Page Features

- Review and e-sign tax returns and complete other pending tasks all in one place
- View and manage upcoming tax payments from the **Make Payments** dashboard
- Securely send/receive files, search, filter, and sort documents
- Distribute K-1s (businesses only)
- Manage security settings
  - Update your email address or 6-digit PIN
  - Merge multiple email addresses into one account



Last Login 10/16/2024

Hello, Jane Doe!

Overview

9 Pending Tasks

5 Completed Tasks

Waiting for Action

SIGN DOCUMENTS 1

Signature Request 10/16/2024

REVIEW & SIGN TAX RETURNS 2

Get Started



## Tips & Tricks: Client Portal – Click [here](#) to watch a video guide!

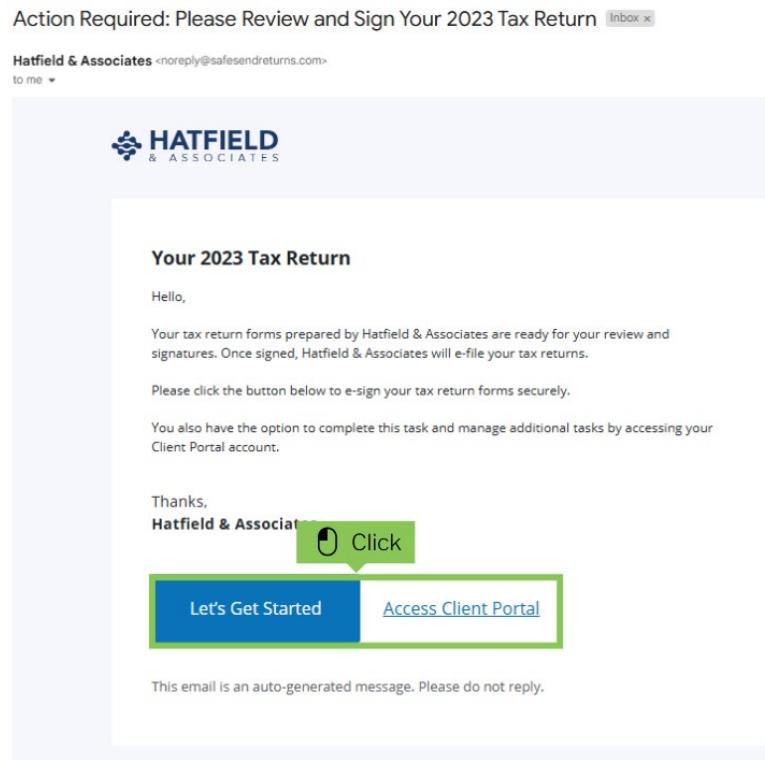
Issue	Solution
Browser	<ul style="list-style-type: none"><li>• Use Chrome, Firefox, Edge, or Safari.</li><li>• Internet Explorer is NOT supported.</li><li>• Clear browser cache – <a href="#">click here</a> for a guide.</li></ul>
Devices	<ul style="list-style-type: none"><li>• Use a computer or a tablet (not smartphones).</li></ul>
Login	<ul style="list-style-type: none"><li>• Merged emails cannot be used to login.</li><li>• Each address can only be linked to one Client Portal.</li><li>• Access on a new device/internet browser requires use of your PIN.</li></ul>
Uploading Docs	<ul style="list-style-type: none"><li>• <b>Acceptable:</b> PDF, Word, Excel, JPEG.</li><li>• <b>Not Accepted:</b><ul style="list-style-type: none"><li>○ Password-protected or encrypted files</li><li>○ HEIC (live photos)</li><li>○ Apple: Pages/Numbers</li><li>○ File names &gt;200 characters</li></ul></li></ul>
Troubleshooting	<ul style="list-style-type: none"><li>• Watch a video tutorial <a href="#">here</a>.</li><li>• Check spam or junk for SafeSend emails.</li><li>• Add <a href="mailto&gt;NoReply@SafeSendReturns.com">NoReply@SafeSendReturns.com</a> to your safe sender list.</li><li>• Need more help? Contact Operations at <a href="mailto:Info@LomnessCPA.com">Info@LomnessCPA.com</a> or call (281) 962-0310.</li></ul>

# Tax Returns

Whether it's for personal or business taxes, SafeSend offers an intuitive, user-friendly experience for reviewing and signing off on your tax return, paying your taxes, and securely distributing K-1s if you are a business owner — all in just a few simple steps!

## How to View & Sign Your Tax Return

1. Open the [NoReply@SafeSendReturns.com](mailto:NoReply@SafeSendReturns.com) email.



2. Recommended: Use the **Client Portal** (see registration steps on page 6); or click **Let's Get Started**.
3. Verify Your Identity: Enter the requested 4 digits of your SSN, then enter the 6-digit access code.
4. Review Your Return:
  - Use the dashboard to check your progress, review refund or payment details, and review all pages of your return.

2022 TAX RETURN

Refunds	
Georgia	\$41,983
Total	<b>\$41,983</b>
Overpayments Applied	
Georgia	\$400
Total	<b>\$400</b>
Payments Due	
Federal	\$29,500
Federal	\$502,528
Alabama	\$49,204
Total	<b>\$581,232.00</b>

2023 ESTIMATED PAYMENTS

Q1	
Federal	\$140,000
Alabama	\$13,061

Review Documents      Sign Documents      Print and Mail Paper      Make Payments

File Returns

Click

Get Started

5. To Review and Sign Your Return click **Get Started**:

- **Summary:** Message from our Firm. Please click the **Next** button in the bottom right-hand corner to review your return.
- **Review:** Here you can review your return by navigating on the left side panel. You can also click at the top right **Download** so you have a copy of your return downloaded to your computer. By clicking the **Forward** button, you can forward your return to a third party. Once you are ready to sign click the **Next** button in the bottom right-hand corner.

Review Tax Documents - Paper File Returns

December 27, 2020

Jack & Jill Anderson  
1234 Main Street  
Newport Beach, CA 92660

Dear Mr. and Mrs. Anderson:

Enclosed are your 2020 Columbus Income Tax return and 2021 estimated tax vouchers. The return should be signed and dated by both taxpayer and spouse.

Your city return must be mailed on or before April 15, 2021.

Mail to: Columbus Income Tax Division

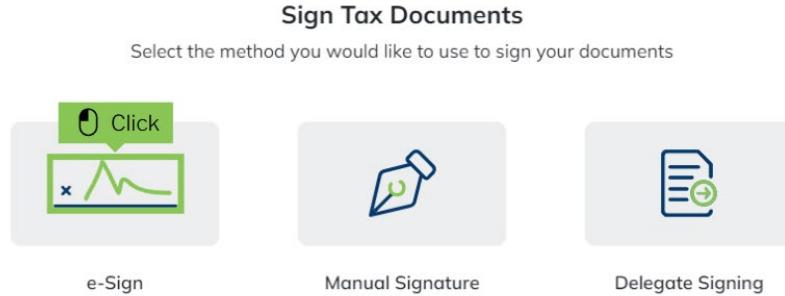
Forward      Download

Client  
Ohio Cities  
Transmittals  
Ohio City Title Page - General Form R  
FORM R PG1 & 2 - General Income Tax Return  
FORM R PG1 & 2 - General Income Tax Return

Next >

## 6. Options to Sign Tax Documents

- **E-sign (Recommended)** : For personal returns only, answer security questions (IRS required). If you fail, you must manually sign and upload.
- **Manual Sign**: Download, print, sign, scan, and upload your signed return.
- **Delegate Signing**: For Business Returns you can delegate the signature.



## 7. Security Questions

- The security questions are required by IRS for e-signatures and cannot be bypassed unless you manually sign your return.
- The security questions are not controlled by Lomness CPA or SafeSend.
  - If you or your spouse fails the KBA questions, **you will both be required to manually sign per IRS regulations.**

The form is titled 'Sign Tax Documents Electronically'. It includes a note: 'Before signing, verify your identity by answering a few security questions. Verify or enter the requested information and click "Next" to proceed.' It has a 'Date of Birth' field (1/1/1980) and a checkbox 'I have reviewed my tax returns and consent to e-Sign'. Below is a 'Spouse's Signature Required' section with a note: 'Please provide your spouse's email address. It can be the same as yours if you share an email account. They will receive a similar request to sign their forms electronically.' It shows a 'Spouse's Name: JILL ANDERSON', 'Email Address: safesend40@gmail.com', and 'Mobile' fields. A 'Next >' button is at the bottom right.

## 8. Sign Tax Documents

- Click the **Start** button to start signing off on the documents. Once you had signed off all the documents click the **Next** button in the bottom right-hand corner.

Hi, Do you need help?

Summary      Review      Sign      PaperFile      Pay

Click

IRS e-file Signature Authorization

Start 8879

8879 (Rev. January 2021) Department of the Treasury Internal Revenue Service

► ERO must obtain and retain completed Form 8879. Go to [www.irs.gov/Form8879](http://www.irs.gov/Form8879) for the latest information.

OMB No. 1545-0074

Submission Identification Number (SID) ►

Taxpayer's name: JACK ANDERSON Social security number: 999-99-9991

Spouse's name: JILL ANDERSON Spouse's social security number: 999-99-9992

**Part I Tax Return Information - Tax Year Ending December 31, 2022** (Enter year you are authorizing.)

Enter Form 1040-SS filers only on lines 1 through 5. Leave lines 1, 2, 3, and 5 blank.

1 Adjusted gross income 1474155.  
 2 Total tax 492264.  
 3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099 7200.  
 4 Amount you want refunded to you 4  
 5 Amount you owe 502528.

**Part II Taxpayer Declaration and Signature Authorization** (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts I enter above are the amounts from the income tax return (original or amended) I am now authorizing, and that I am not claiming any deduction or credit. I declare that I am not claiming any deduction or credit (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution account indicated in the tax preparation software for payment of my state taxes owed on this return and/or a payment of estimated tax, and to cancel the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-351-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive inquiries from the U.S. Treasury to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Next >

## 9. For Businesses: Distribute K-1s

- **Electronically:** Send K-1s by email to shareholders.
  - i. Click **Edit** to add or update your shareholders' email addresses, then click **Save**.
  - ii. Send in bulk by clicking **Email Documents** in the upper right corner of the page.
- **Mail Hard Copies:** Download in bulk or individually and print for mailing.

## 10. View and Manage Tax Payments (includes federal and estimated as applicable):

- Click **Pay** to make the tax payment right now. You can either pay online (Recommended) or download the voucher to mail in your payment. We
- Download **payment vouchers** and **filing instructions**.
- Mark payments as paid (for your records only – this does not process or confirm payment with the taxing authority such as the IRS).

Summary      Review      Sign      PaperFile      Pay

Tax Payments

2022 TAX PAYMENTS

Due Oct 2024 \$581,232 >

Info

Payment Voucher      Filing Instructions

Due 10/16/24	Due 10/16/24	Due 10/16/24
Federal \$502,528	Federal \$29,500	Alabama \$49,204
<b>Pay</b>	<b>DO NOT PAY : Scheduled for automatic withdrawal</b>	<b>Pay</b>
<a href="#">Add Payment Details</a>		<a href="#">Add Payment Details</a>

## 11. Dashboard

- Once you have signed your return, our team will e-file your return. Access the tax return dashboard anytime from the client portal or through the secure link emailed from SafeSend.

**2022 TAX RETURN**

Refunds	
Georgia	\$41,983
Total	<b>\$41,983</b>

**Overpayments Applied**

Georgia	\$400
Total	<b>\$400</b>

**Payments Due**

Federal	\$29,500
Federal	\$502,528
Alabama	\$49,204
<b>Total</b>	<b>\$581,232.00</b>

Spouse electronic signature required to file taxes.

Hi, Do you need help?

You have successfully **completed** all the necessary steps.  
We are now waiting for **JILL ANDERSON**'s signature.

You can access and manage all of your tax documents by selecting an option below

Make Tax Payments

Download Documents

View or Forward Tax Documents

View or Download Signed Documents

View and Download Paper File Returns

Pay or View Tax Preparation Fees

**Tips & Tricks: Returns – Click [here](#) to watch a video guide!**

Issue	Solution
<b>Access Code</b> <i>(valid for 20 minutes)</i>	<ul style="list-style-type: none"> <li>Delivery may take up to 3 minutes.</li> <li>If you don't receive it in 5 minutes, call us at (281) 962-0310.</li> </ul>
<b>Browser</b>	<ul style="list-style-type: none"> <li>Use Chrome, Firefox, Edge, or Safari</li> <li>Internet Explorer is NOT supported.</li> <li>Clear browser cache – <a href="#">click here</a> for a guide.</li> </ul>
<b>Devices</b>	<ul style="list-style-type: none"> <li>E-sign on computer, tablet, or phone.</li> <li>Manually sign or download only from a computer.</li> </ul>

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Issue	Solution
<b>Forward Return</b>	<ul style="list-style-type: none"> <li>SafeSend allows you to securely forward a copy of your tax return to a third party (i.e., financial advisory, mortgage lender, attorney).</li> <li>Per IRS regulations, any requests for Lomness CPA to share your tax information with a third party will <b>require</b> a signed disclosure form provided by our firm.</li> </ul>
<b>K-1s</b>	<ul style="list-style-type: none"> <li>Business owner is responsible for K-1 distribution.</li> <li>Can be done electronically or manually.</li> <li>If the shareholder <b>declines</b> to consent to receive their K-1 package electronically, you will receive an email notification. You will then be <b>required</b> to mail a hard copy to the shareholder.</li> </ul>
<b>KBA</b>	<ul style="list-style-type: none"> <li>The security questions are required by IRS for e-signatures and cannot be bypassed unless you manually sign your return. <ul style="list-style-type: none"> <li>generated from a third party's database. <ul style="list-style-type: none"> <li>This process does not access or impact your credit report. The third party does not have access to your taxpayer information.</li> </ul> </li> </ul> </li> <li>The security questions are not controlled by Lomness CPA or SafeSend.</li> <li>If you or your spouse fails the KBA questions, <b>you will both be required to manually sign per IRS regulations.</b></li> </ul>
<b>Manual/E-Sign Reset</b>	<ul style="list-style-type: none"> <li>Accidentally chose manual sign? Email <a href="mailto:Info@LomnessCPA.com">Info@LomnessCPA.com</a> for a reset. <ul style="list-style-type: none"> <li>➤ This will <u>not</u> work if you failed the KBA questions.</li> </ul> </li> </ul>
<b>Married Filing Joint</b>	<ul style="list-style-type: none"> <li>Returns go to the primary taxpayer first.</li> <li>The spouse receives their signatures link once the primary taxpayer has signed the return. <ul style="list-style-type: none"> <li>➤ Designed to remain in compliance with the IRS regulations requiring separate signatures from each spouse when filing married jointly.</li> <li>➤ Parallel signing is not currently available.</li> </ul> </li> </ul>

Issue	Solution
<b>Payments</b>	<ul style="list-style-type: none"> <li>• You are responsible for submitting/initiating all payments.</li> <li>• Neither Lomness CPA nor SafeSend processes or tracks your tax payments with taxing authorities such as the IRS.</li> <li>• Entering your payment details into SafeSend is for record-keeping purposes only and does <u>not</u> process / confirm payment with the IRS.</li> </ul>
<b>Questions</b>	<ul style="list-style-type: none"> <li>• Email <a href="mailto:Tax@LomnessCPA.com">Tax@LomnessCPA.com</a> with any tax return questions.</li> </ul>
<b>Troubleshooting</b>	<ul style="list-style-type: none"> <li>• Watch a video tutorial <a href="#">here</a>.</li> <li>• Check spam or junk for SafeSend emails.</li> <li>• Add <a href="mailto&gt;NoReply@SafeSendReturns.com">NoReply@SafeSendReturns.com</a> to your safe sender list.</li> <li>• Need more help? Contact Operations at <a href="mailto:Info@LomnessCPA.com">Info@LomnessCPA.com</a> or call (281) 962-0310.</li> </ul>

## Best Practices & Final Reminders

- Always click **Finish** after completing your organizer.
- Save your tax return to your computer after e-signing.
- Contact us with any questions!
  - ❖ [Info@LomnessCPA.com](mailto:Info@LomnessCPA.com)
  - ❖ [Tax@LomnessCPA.com](mailto:Tax@LomnessCPA.com)