bland & associates
beyond accounting
Certified Public Accountants

How to Complete Gather Request Instructions

Initial Email

The initial email comes from noreply@safesendreturns.com.

1. Click **Let's Get Started** to open the Gather request**.**

Authentication

1. Click the **Send Code** button.
    - This sends a code to your email address or mobile device.
2. Enter the 6 or 8-digit access code in the code field.
3. Click **Confirm** to proceed to the **Welcome Page**.

Welcome Page

This is the main dashboard for your Gather request.

A. Click your name to update your profile or log out.

B. View the steps required to complete the Gather request.

C. Review the message from your tax preparer.

D. Select **Get Started** to move to the first step.

E. Click **Need Help?** to see the contact information for someone at your tax firm.

Custom Questionnaire

The Custom Questionnaire must be completed before you can complete your Organizer. Click the **Next** button to finalize the questionnaire.

1. Answer the questions provided by your tax preparer.
    - You may see the following question types:
        - Yes/No - These may have follow-up questions as well.
        - Short Answer.
        - Multiple Choice.
2. **View** your progress in the top right corner.

3. Click **Save & Close** to continue later OR

4. Click **Next** to mark the questionnaire as completed.

    - The questionnaire cannot be re-opened if this option is selected.

Tax Organizer

After completing the questionnaire, you may be directed to fill out the **Organizer** if one was included. This option may or may not be available based on your firm's settings.

Filling out the Organizer

1. Click a bookmark name in the **Bookmarks Panel** to move to a specific page.

2. **Navigation**

    - Click the navigation arrows to move through the organizer pages OR
    - Scroll down.

3. Type into the **Notes to Preparer** to provide additional information to your tax firm.

    - Click **Save** to apply the note to that page.

4. Type into the green fillable fields of the organizer.

    - Text can be entered over the original text.
    - If your organizer is sent to you *and* your Spouse, edits are identified with color coding to distinguish who filled the field.

5. Click **Click Here to Upload** to upload source documents. You can drag/drop files or click to open your file explorer.

    - This option only appears on certain pages.
    - A paper clip icon in the bookmarks panel indicates that the page may have source documents associated with it.

6. Click **Save & Close** to continue later OR

7. Click **Next** to mark the organizer as complete.

Finishing the Organizer

After you click the **Next** button, a pop-up notification appears to confirm the organizer is complete. If a spouse was not included on the Organizer, the following options appear.

1. Click **Review Missing Information** if the organizer is not completed.
    - This option brings you back to the organizer to continue filling it.
2. Click **Finish** if the organizer is completed.

If a spouse was included on the Organizer, the following options appear.

1. Click **Send for Review** if you would like to send the organizer to your spouse for review.
2. Click **Complete Organizer** if the Organizer is completed.

Upload Documents

After completing the organizer, you my be directed to **Upload** documents.

A list of requested files is displayed to help you determine what documents are needed. After the documents are uploaded, our Gather AI software recognizes and categorizes many of the documents.

Please note:

- The following file types can be uploaded: .pdf, .doc, .xls, .txt, .png and .jpeg files.
    - Only PDF and image files go through document recognition with Gather AI.
- File names must be 200 characters or less.
- Encrypted or password-protected documents should not be uploaded and cannot be previewed.

Uploading of Documents

1. Drag/drop into the box OR click **Choose File** to upload.
    - Files will automatically be marked as Uncategorized. The recognition engine may take a moment to categorize the document.
2. Once they become recognized, a green check mark will be added to the requested file.
3. Click **NA** next to a file request to mark as Not Applicable.
4. Click **Undo NA** to reactivate the file request.
5. Hover over an uncategorized document to preview, edit or delete it.

- We recommend you use the Edit feature to categorize the documents before clicking Finish.
- See the **Uncategorize Documents** section below for more information.

6. Review your upload progress.
7. Click **Save & Close** to continue later OR
8. Click **Finish** to mark the upload process as complete.
    - Once confirmed, you are not able to upload additional documents.

Uncategorized Documents

Documents that are not automatically recognized by SafeSend will be put in the Uncategorized section. Here you can manually categorize the document(s) as needed.

Drag/Drop to Categorize

1. Click and hold the **file name** of an uncategorized file.
2. Drag the item to the appropriate document type.
3. Release the click to drop the file.
4. Click **Finish** to mark the upload process as complete.
    - Once confirmed, you are not able to upload additional documents.

Manually Categorize

1. Hover over an uncategorized document and click the **Edit** icon.
2. Select a pre-populated document type OR
3. Click **Other** to enter your own document type name.
4. Click **Update** to categorize the document.
5. The document will appear under the category name in **Other Recognized Files**.
6. Click **Finish** to mark the upload process as complete.
    - Once confirmed, you are not able to upload additional documents.