

## How to Distribute K-1s: Taxpayer Instructions

### Accessing the Return

The taxpayer can only distribute the K-1s after the return has been signed

1. Click the **Let's Get Started** button in the email sent to you by Bland
2. Click **Get Started**.
3. Click the **Send Code** button to receive access code.
4. Enter the code that was sent to you via email or phone and click **Confirm**.
5. Click **Distribute K-1s** on the summary page.

### Distribute K-1s Electronically

1. Click **Send Electronically** on the K-1 distribution dashboard.
2. Click the Edit Partner Details button in the Action Column.
3. Enter the shareholder's email address in the **Update K-1 Partner Details** window.
  - An email address is required before a K-1 package can be delivered.
  - If a mobile number is added, the Access Code are sent by text.
4. Click **Save** to save any changes made.
5. Select one or more K-1 packages to be distributed.
  - If you **Select All**, the K-1s on the current page and any additional pages are selected.
6. Click the **Email Documents** button.
7. View the **Status** of delivered K-1s

**Note:** *The taxpayer will receive an email notification if the K-1 recipient declines to consent to receive the document(s) electronically.*

## Mail Hard Copies of K-1s

1. Click **Mail Hard Copies** on the K-1 distribution dashboard.
  - Documents can be downloaded individually or in bulk.

### ***Download Individual K-1s***

The K-1 is downloaded as a single PDF to your browser's default location.

1. Locate the K-1 to be downloaded.
2. Click the **Download** options in the Action Column.

### ***Download Multiple K-1 Packages***

The K-1(s) are downloaded to your browser's default location.

1. Check the box next to the K-1 package(s) to be downloaded.
2. Click **Download** to select how you would like to download the K-1s.
  - A. Click **Download All K-1s** to download all K-1s for each shareholder into 1 PDF.
  - B. Click **Download Selected K-1s** to download each checked K-1 as a separate PDF in a ZIP file.

## **IMPORTANT**

When K-1s are downloaded, the document(s) either go directly to the default download location on your PC or go to the My Downloads folder inside of SafeSend.

If there are many files or very large files, they go to the **My Downloads** folder in SafeSend.

1. Click on your entity name.
2. Click **My Downloads**.