

1040 Quick Reference Guide



1. Your tax firm will send you an email from noreply@safesendreturns.com.
 - a. We recommend that you add this email address to your email client's safe sender list to avoid these notifications going into a spam/junk folder.
 - b. Your accountant or CPA firm's name will appear in front of the email address.
 - c. Your CPA firm's logo may appear in the body of the email.
 - d. Your name may appear in the subject line of the email.
2. Click the link in the email.

Robert Moore, please review your 2020 tax return and sign your e-file forms Inbox x

Hatfield & Associates <noreply@safesendreturns.com> **1** 12:21 PM (0 minutes ago) ☆ ↶ ⋮
to me ▾



PLEASE DO NOT REPLY TO THIS EMAIL NOTIFICATION

Welcome to the Hatfield & Associates Tax Return Processing Center. This new electronic delivery system is designed for ease of use and will allow you to process your tax return in just a few short minutes.

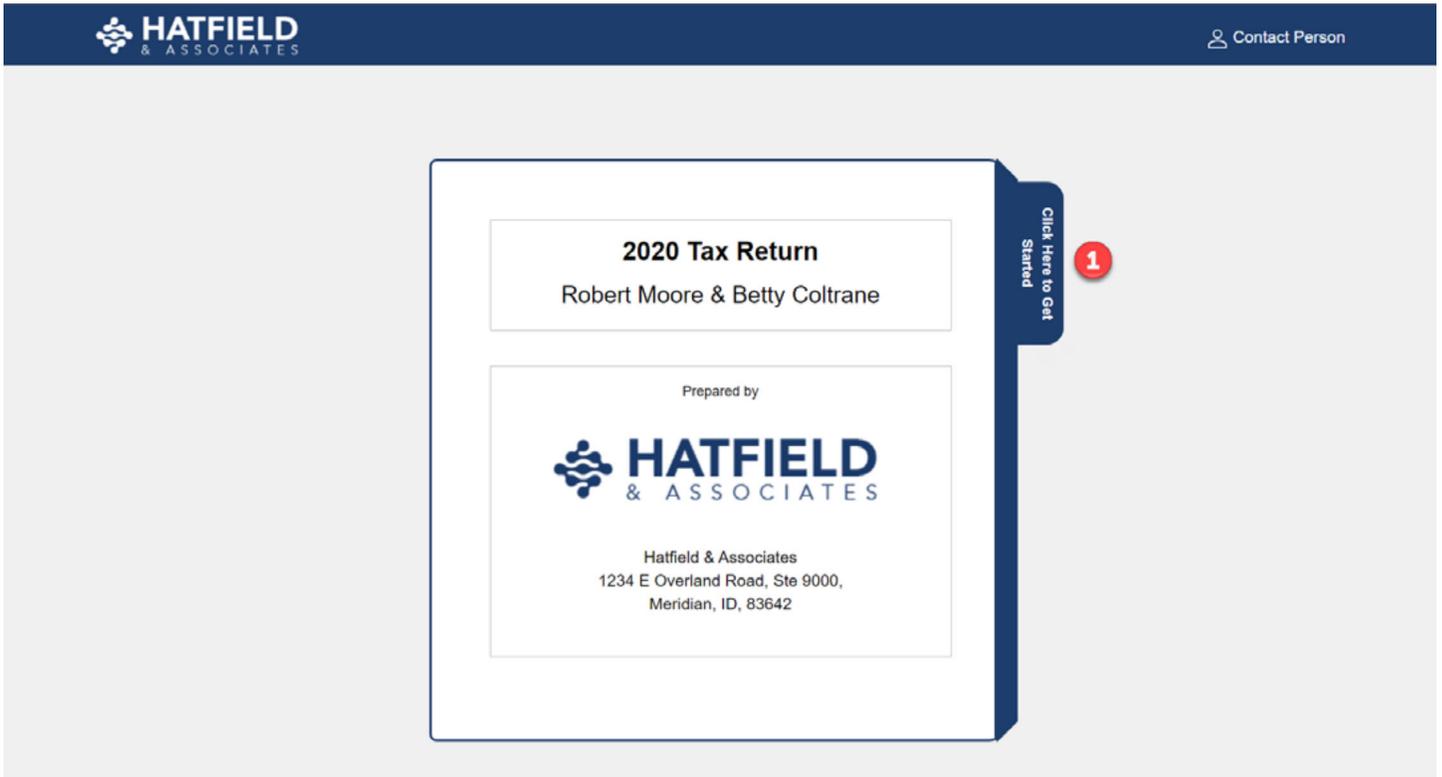
For the best experience, please use the Google Chrome browser on either a desktop or laptop computer, or on a mobile device.

Please save a copy of this email. The included link will allow you to access your return in the future if you want to review or download a copy at a later date.

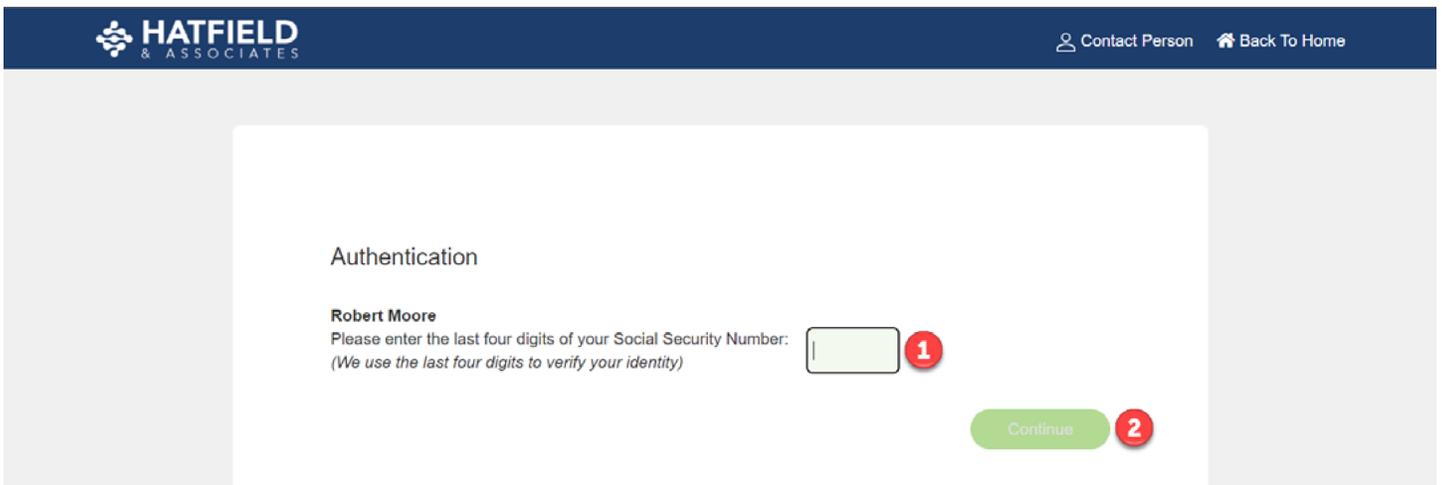
Please click the link below to access your tax return. If the link in this email does not work, please copy the URL and paste it directly into your web browser.

<https://taxpayer.safesendreturns.com/Taxpayer/j26t9ud4lcz41fgtt4z68666t5n0r000> **2**

1. Click the **Click Here to Get Started** tab to continue.



1. Insert the first (or last) four digits of your social security number based on the instructions provided.
2. Click **Continue**.



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1. Click **Request Access Code**.
2. You will receive an email or text notification with a one-time code.
 - a. Copy the access code and go back to the Authentication screen.
3. Paste or type the access code into the requested field.
4. Click **Continue**.

The screenshot shows the Hatfield & Associates authentication interface. At the top, the logo and navigation links "Contact Person" and "Back To Home" are visible. The main content area is titled "Authentication" and includes the heading "Access Code Required". Below this, a message states: "Please select 'Request Access Code' and we will send you a one-time expiring access code to your email." A green button labeled "Request Access Code" with a red circle containing the number "1" is positioned below the message. Underneath, there is a text input field with the label "Enter access code here:" and a red circle containing the number "3" next to it, followed by the text "(This code will expire in 20 minutes)". A green button labeled "Continue" with a red circle containing the number "4" is located at the bottom right of the input area. An inset window shows an email notification from "Hatfield & Associates" with the subject "Code for Robert Moore" and the body text "Your one time code is 19441653", with a red circle containing the number "2" next to the code.

1. The left panel shows a summary of refunds and payments due.
2. Click the **print icon** to save a PDF copy of refunds and payments due.
3. **Click Here to Begin** to continue.

The screenshot displays the HATFIELD & ASSOCIATES tax software interface. At the top, the logo and navigation menu are visible, including 'Tax year: 2020', 'Contact Person', and 'Robert Moore'. A progress bar at the top indicates the current step: 'Summary' (Step 1), followed by 'Review', 'Sign', 'PaperFile', and 'Pay'. The main content area is divided into two panels. The left panel, labeled '2020 Tax Return', shows a summary of refunds, overpayments, and payments due. The right panel, labeled 'Welcome Robert Moore', displays a message that 'Your 2020 tax returns are ready!' and provides instructions on how to proceed. A 'Click Here to Begin' button is prominently displayed at the bottom of the right panel. Red callout boxes with numbers 1, 2, and 3 highlight the '2021 Estimated Payments' section, the 'Print' icon, and the 'Click Here to Begin' button, respectively.

2020 Tax Return	
Refunds	
California	\$2,200
Total	\$2,200
Overpayments Applied	
California	\$100
Total	\$100
Payments Due	
Federal	\$167,394
Alabama	\$12,345
California	\$17,887
California	\$900
California	\$800

2021 Estimated Payments	
Q1	
Federal	\$45,551
California	\$10,922
Total	\$56,473
Q2	
Federal	\$45,551
California	\$11,922
Total	\$57,473
Q3	
Federal	\$45,551
California	\$11,921
Total	\$57,472

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1. You will see a message from the firm.
2. Click the **print icon** to save a PDF copy of the message, if necessary.
3. Click **Continue**.

The screenshot displays the Hatfield & Associates software interface. At the top, the logo for Hatfield & Associates is on the left, and the tax year (2020) and contact person (Robert Moore) are on the right. A progress bar below the logo shows five steps: Summary, Review, Sign, PaperFile, and Pay. The 'Summary' step is currently active. The main content area is titled 'A message from Hatfield & Associates' and contains a letter addressed to Robert Moore. A red circle with the number '1' is placed over the name 'Robert Moore' in the salutation. In the top right corner of the message area, there is a print icon and a red circle with the number '2'. At the bottom of the interface, there are 'Back' and 'Continue' buttons. A red circle with the number '3' is placed over the 'Continue' button.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review Sign PaperFile Pay

A message from Hatfield & Associates

Dear Robert Moore, **1**

Thank you for being a valued client of Hatfield & Associates.

Your 2020 tax return is complete and ready for your review. Please follow the instructions to electronically sign your e-file forms, and for a timely filing of your tax return.

During the return review process, you may email a copy of your tax return to additional parties, or download a PDF copy.

If reviewing on a PC, please take a moment to update your personal information, including mobile number(s) by clicking your name near the top right of the window, then selecting My Account. If on a mobile device, click the 3-line icon to the top left, then select My Account.

Should you have any questions, please reach out to the contact person listed.

Best regards,

Hatfield & Associates

Back **3** Continue **2**

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1. Review the Filing Instructions.
2. Download tax documents, if necessary.
3. Forward tax documents to third parties.
4. Click **Continue**.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review Sign PaperFile Pay

Review Tax Documents - Filing Instructions 2 Download Tax Document(s)

Filing Instructions 1

Tax Returns
Attachments
Paper File Returns

December 27, 2020

Betty Coltrane
785 Horseradish Road
Oldham, CA 94005

Dear Betty:

Enclosed are your 2020 income tax return and 2021 estimated tax vouchers.

Specific filing instructions are as follows.

FEDERAL INCOME TAX RETURN:

This return has qualified for electronic filing and the practitioner PIN program has been elected. After reviewing the return for completeness and accuracy, please sign and return Form 8879 to our office. We will then transmit your return electronically to the IRS, and no further action is required.

Back 3 Forward a copy of my tax documents 4 Continue

1040 Quick Reference Guide

1. Review the tax returns.
2. Download tax documents for your records.
3. Forward tax documents to third parties.
4. Click **Continue**.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary **Review** Sign PaperFile Pay

Review Tax Documents - Tax Returns **2** Download Tax Document(s)

Filing Instructions

Tax Returns **1**

Attachments

Paper File Returns

Caution: Forms printed from within Adobe Acrobat may not meet IRS or state taxing agency specifications. When using Acrobat, select the "Actual Size" in the Adobe "Print" dialog.

CLIENT'S COPY

3 Back **3** Forward a copy of my tax documents **4** Continue

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If no attachments are included, continue to the next page.

1. Review instructions for attachments.
2. Download attachments individually or in bulk to a zip file.
3. Download tax documents for your records.
4. Forward tax documents to third parties.
5. Click **Continue**.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary **Review** Sign PaperFile Pay

Review Tax Documents - Attachments

3 Download Tax Document(s)

File Name	Instructions
Source Documents.pdf	Please download for your records

2 Download All as a Zip File

1

Helpful Hints

- If you have the option of saving the file or opening it in an application, choose save the file.
- Download each file individually or get everything at once in a single ZIP file. Use "ZIP ALL" for best results. If you can't open the ZIP files, install [WinZip](#) (Windows) or [StuffIt](#) (Mac)

5

Back **4** Forward a copy of my tax documents **5** Continue

If no paper-filed returns are included, continue to the next page.

1. Review paper-file required returns.
2. Download tax documents for your records.
3. Forward tax documents to third parties.
4. Click **Continue**.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review Sign PaperFile Pay

Review Tax Documents - Paper File Returns 2 Download Tax Document(s)

Filing Instructions
Tax Returns
Attachments
Paper File Returns 1

Caution: Forms printed from within Adobe Acrobat may not meet IRS or state taxing agency specifications. When using Acrobat, select the "Actual Size" in the Adobe "Print" dialog.

CLIENT'S COPY

Back 3 Forward a copy of my tax documents 4 Continue

You have three options to sign your return:

1. Click **E-Sign** to sign electronically.
2. Click **Manually Sign** to download the unsigned e-signature forms and sign manually.
3. Click **Delegate to Someone Else** to delegate the e-signature process to another person.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review **Sign** PaperFile Pay

Sign Tax Documents

Select the method you would like to use to sign your documents

- 1**
e-Sign
Sign electronically from this website
- 2**
Manually Sign
Print, Sign and Return the forms
- 3**
Delegate Signing to Someone Else
Send tax forms to partners or shareholders for signatures

Back

Follow the instructions below to sign electronically. If signing manually, skip to page 15.
For signer delegation, skip to page 16.

1. Enter your date of birth.
2. Check the box to consent to e-signing.
3. Provide your spouse's email, if applicable.
 - a. Both parties may use the same email address.
 - b. (Optional) Add your spouse's mobile number.
4. Click **Continue**.

Sign Tax Documents Electronically

Before signing, you will need to verify your identity by answering a few short questions about yourself.
Please verify/enter the information requested and click continue to begin

Your Date of Birth: **1**

2 I have reviewed my tax returns and consent to e-Sign

Spouse's Signature Required

Please provide an email address for your spouse. It may be the same as your own if you share an email account. They will receive a similar request asking them to Sign their forms electronically.

Spouse's Name: **Betty Coltrane**

Email Address: **3**

MobileNumber:

4

Back Continue

1. Answer 3 questions out of 5 correctly to verify your identity.
2. Click **Continue**.

The screenshot shows the Hatfield & Associates tax software interface. At the top, the logo for HATFIELD & ASSOCIATES is on the left, and the tax year (2020) and contact person (Robert Moore) are on the right. A progress bar below the logo indicates the current step is 'Sign', with other steps being Summary, Review, PaperFile, and Pay. The main content area is titled 'Security Questions' and contains the following text: 'IRS required Disclosure. Please verify your identity by answering the following questions. These questions are generated from a third party's database. This process does not access or impact your credit report and the third party does not have access to your taxpayer information. Please answer the following.' Below this text is a question: '1. Which of the following colleges have you attended?' with five radio button options: 'Cape Fear Community College', 'College Of The Atlantic', 'East Central University', 'State University Of New York College At Geneseo', and 'None of the above'. A red circle with the number '1' is next to the question. At the bottom right of the main content area, there is a green button labeled 'Continue' with a red circle containing the number '2' above it.

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1. Click the **Start** or **Next** flag.
2. Click **Signature**.
3. Click **Apply**.
4. Click **Draw** to sign using your mouse/finger.
5. Click **Continue**.

Tax year: 2020 | Contact Person | Robert Moore

Summary | Review | Sign | PaperFile | Pay

Tax Document

- IRS 8879
- US 114A
- AZ-8879
- CA 8453
- California 8453-LLC

Engagement Letter

- Moore, Robert - Eng...

Taxpayer's name Robert Moore		Social security number 574 07 0535
Spouse's name Betty Coltrane		Spouse's social security number 307 52 9984

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

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1 Adjusted gross income	1 584817.
2 Total tax	2 165638.
3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3
4 Amount you want refunded to you	4
5 Amount you owe	5 167394.

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 in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (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 to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. 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 confidential information necessary 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.

Taxpayer's PIN: check one box only

I authorize _____ to enter or generate my PIN [] [] [] [] [] as my signature on the income tax return (original or amended) I am now authorizing. **Enter five digits, but don't enter all zeros**

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

1 Next Signature **2** Date ▶ 01/12/2022

Spouse's PIN: check one box only

I authorize _____ to enter or generate my PIN [3] [4] [5] [6] [7] as my signature on the income tax return (original or amended) I am now authorizing. **Enter five digits, but don't enter all zeros**

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ _____ Date ▶ 04/04/2019

Back
Continue

Add Signature ×

Type Draw **4**

Name
Robert Moore

Your Signature

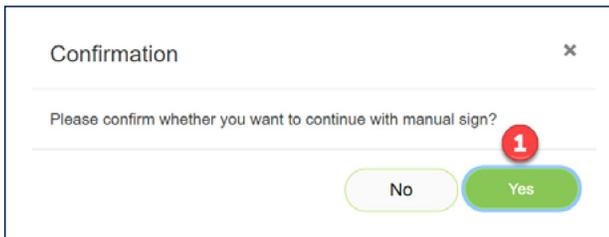
Robert Moore

3

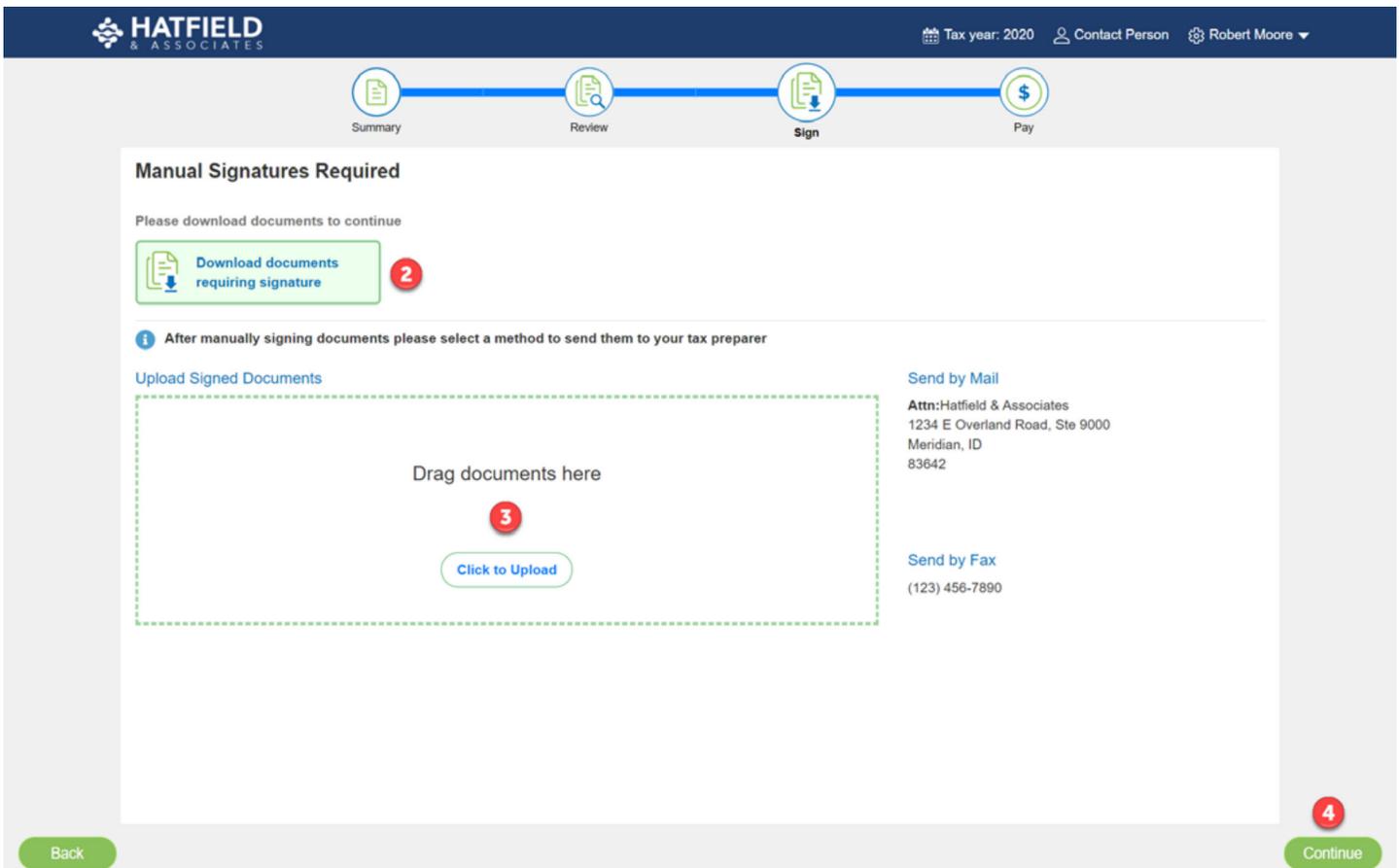
Cancel
Apply

Follow the instructions below to sign manually:

1. Click **Yes** to confirm manual signature
 - a. This will opt-out of the e-signature process. If you change your mind and want to e-sign after confirming manual signature, reach out to your CPA to undo the e-signature opt-out.
2. Click **Download documents requiring signature.**
3. Drag/drop the signed form or use the **Click to Upload** button to search for the signed form on your computer.
4. Click **Continue** after upload.



A confirmation dialog box titled "Confirmation" with a close button (X) in the top right corner. The text inside asks, "Please confirm whether you want to continue with manual sign?". Below the text are two buttons: "No" and "Yes". A red circle with the number "1" is positioned above the "Yes" button.



The screenshot shows the Hatfield & Associates software interface. At the top is a dark blue header with the company logo and name on the left, and navigation links for "Tax year: 2020", "Contact Person", and "Robert Moore" on the right. Below the header is a progress bar with four steps: "Summary", "Review", "Sign", and "Pay". The "Sign" step is currently active. The main content area is titled "Manual Signatures Required" and contains the following elements:

- A message: "Please download documents to continue".
- A green button labeled "Download documents requiring signature" with a red circle containing the number "2" next to it.
- An information icon followed by the text: "After manually signing documents please select a method to send them to your tax preparer".
- A section titled "Upload Signed Documents" with a dashed green box containing the text "Drag documents here" and a "Click to Upload" button. A red circle with the number "3" is above the button.
- A "Send by Mail" section with the address: "Attn: Hatfield & Associates, 1234 E Overland Road, Ste 9000, Meridian, ID 83642".
- A "Send by Fax" section with the number: "(123) 456-7890".

At the bottom of the interface are two buttons: "Back" on the left and "Continue" on the right. A red circle with the number "4" is positioned above the "Continue" button.

Follow these instructions to delegate signing to someone else:

1. Enter First and Last name, and the email address of the delegated signer.
 - a. (Optional) Enter the signer's mobile number.
2. Write a message to be delivered to the signer upon successful login.
3. Click **Send**.

The screenshot shows a web form titled "Send for Signature" with a close button (X) in the top right corner. Below the title is a prompt: "Please enter information for the person you would like to delegate the signing process to". The form contains several input fields: "First Name" and "Last Name" (two separate text boxes), "Email" and "Confirm Email" (two separate text boxes), and "SMS/Text enabled mobile number" (a dropdown menu labeled "Select..." and a text box with a placeholder "()-"). Below these fields is a note: "(Used for authorization)". The "Message to Signer" section features a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, bulleted list, numbered list, and text color. A red circle with the number "2" is placed in the top left corner of the message text area. At the bottom right of the form, there are two buttons: "Cancel" and "Send". A red circle with the number "3" is placed above the "Send" button.

After completing the e-signature process, your spouse needs to sign.

1. Confirm/change the email address for your spouse.
2. (Optional) Add the mobile number for your spouse.
3. Click **Continue**.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review Sign PaperFile Pay

Spouse Electronic Signature Required

Betty Coltrane is still required to sign and will receive an email notification sent to:

bruceisincognito@gmail.com [Change Email](#) **1**

[Add Mobile Number](#) **2**

Once they have completed the signing process, your documents will be forwarded to:

Hatfield & Associates

Back **3** Continue

In the event a paper-file required return was uploaded by your firm, follow these instructions. If no paper-file required return is present, skip to page 20.

1. You will see a message from the firm specifically related to paper-file required returns.
2. Click the **print icon** to save a PDF copy of the message, if necessary.
3. Click **Continue**.

The screenshot shows the Hatfield & Associates software interface. At the top, there is a dark blue header with the company logo and name on the left, and user information including 'Tax year: 2020', 'Contact Person', and 'Robert Moore' on the right. Below the header is a progress bar with five steps: Summary, Review, Sign, PaperFile, and Pay. The 'PaperFile' step is currently active. The main content area displays a message titled 'A message from Hatfield & Associates'. The message text reads: 'Hello Robert Moore, 1 Your tax return is complete and requires a return to be paper filed. You will need to print all pages, sign where indicated, and mail it to the address listed prior to the due date. Please note, Hatfield & Associates will not be mailing you a copy of this return. If you have any questions or need further assistance, feel free to call our office at (123) 456-7890. Thank you.' A red circle with the number '2' is next to a printer icon in the top right corner of the message box. At the bottom of the interface, there are 'Back' and 'Continue' buttons. A red circle with the number '3' is next to the 'Continue' button.

1. Click **I Consent** to review and download the required paper-filed returns.
2. Click **Skip to Next Step** to move to the Tax Payments screen without downloading documents.
3. Click **Print All Paper File Returns** or use the print icon to the right of each tax return.
4. Click **Download All Paper File Returns** or use the download icon to the right of each tax return.
5. Click **Continue**.

Consent to Paper File Returns

I acknowledge that it is my responsibility to PRINT, SIGN and MAIL all Paper File Tax Returns to the respective Tax Authority before the due date.

[Skip to Next Step](#) **2** **1** [I Consent](#)

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review Sign PaperFile Pay

Paper File Returns

Robert Moore & Betty Coltrane

The following tax returns must be Downloaded, Printed, Manually signed by both you and your spouse and mailed to the address provided.

3 [Print All Paper File Returns](#) [Download All Paper File Returns](#) **4**

Return Name	Mailing Address	Action
Idaho_Moore, Robert Paper File Return	Idaho State Tax Commission, PO Box 56, Boise ID 83756-0056	

5

[Back](#) [Skip to Next Step](#) [Continue](#)

1040 Quick Reference Guide

1. View payment options.
2. Click **Download Voucher** for a PDF copy to mail with payment by check or money order.
3. Click **Pay Online** to go to the respective IRS authority website to make a payment.
4. Click **Continue**.

The screenshot shows the HATFIELD & ASSOCIATES tax payment interface. At the top, there is a navigation bar with the company logo, tax year (2020), and contact person (Robert Moore). Below this is a progress bar with five steps: Summary, Review, Sign, PaperFile, and Pay. The main content area displays a list of tax payments for 2020, with a total due of \$211,671. The payments listed are: Federal (\$167,394), Alabama (\$12,345), California (\$17,887), and California (\$900). A modal window titled 'Payment Information' is open, showing details for the Federal payment: Amount: \$167,394, Due: 10/15/2021. The modal provides two options: 'Pay By Check or Money Order' and 'Pay Online Now'. The 'Pay Online Now' option is selected, and the 'Pay Online' button is highlighted with a red circle and the number 3. A 'Continue' button is visible at the bottom right of the main interface, highlighted with a red circle and the number 4.

HATFIELD & ASSOCIATES Tax year: 2020 Contact Person Robert Moore

Summary Review Sign PaperFile Pay

For your recordkeeping, you may enter your payment information using the Add payment details action. PLEASE NOTE: Entering in payment details will not make these payments!

Tax Payments
Select to see details

2020 Tax Payments
Due Oct 2021 \$211,671

Email me reminder 14 days before payment is due

[Download All Payment Vouchers](#) [Download Filing Instructions](#)

Due 10/15/21
Federal \$167,394
1 Pay
[Add payment details](#)

Due 10/15/21
Alabama \$12,345
DO NOT PAY : Scheduled for automatic withdrawal
[Add payment details](#)

Due 10/15/21
California \$17,887
Pay
[Add payment details](#)

Due 10/15/21
California \$900
Pay
[Add payment details](#)

Due 10/15/21
Colorado \$12,345
Pay Online (Required)
[Add payment details](#)

Payment Information

[Download Filing Instructions](#)

Internal Revenue Service
Amount: \$167,394
Due: 10/15/2021

Pay By Check or Money Order
Select "Download Filing Instructions" above to review your payment and mailing instructions. Select the button below to download your payment voucher.
2 [Download Voucher](#)

Pay Online Now
Select "Download Filing Instructions" above to review your payment instructions. Select "Pay Online" below to make your payment.
3 [Pay Online](#)

Done

Back 4 Continue

After making a payment, record the payment details for future reference.

1. Click **Add Payment Details**.
2. Enter the payment information.
3. Click **OK**.
4. Payment will be marked as paid.

