

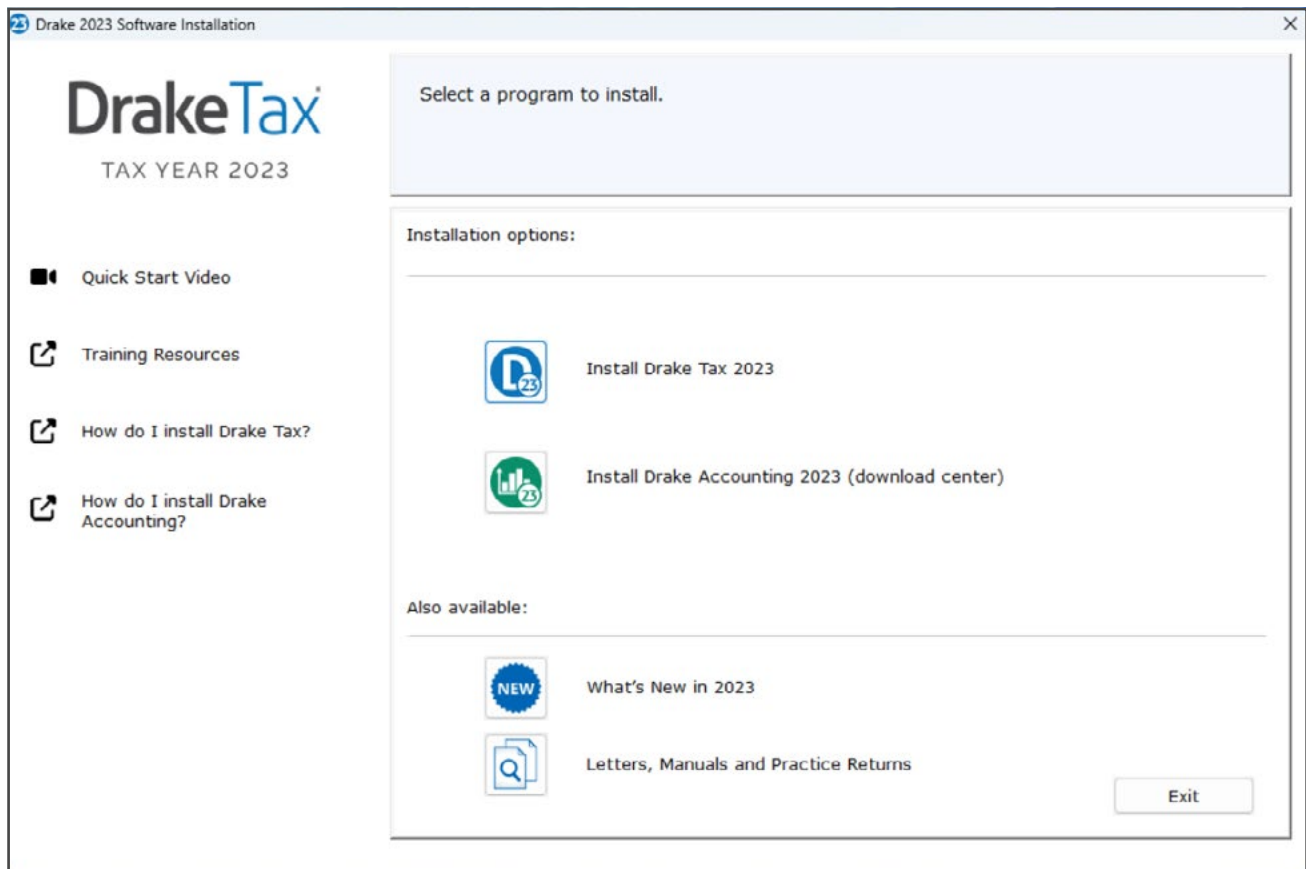
QUICK START

Welcome! We are delighted to be your tax software solution and excited to invest in the success of your practice. Questions? Let us know at (828) 524-8020 or Support@DrakeSoftware.com.

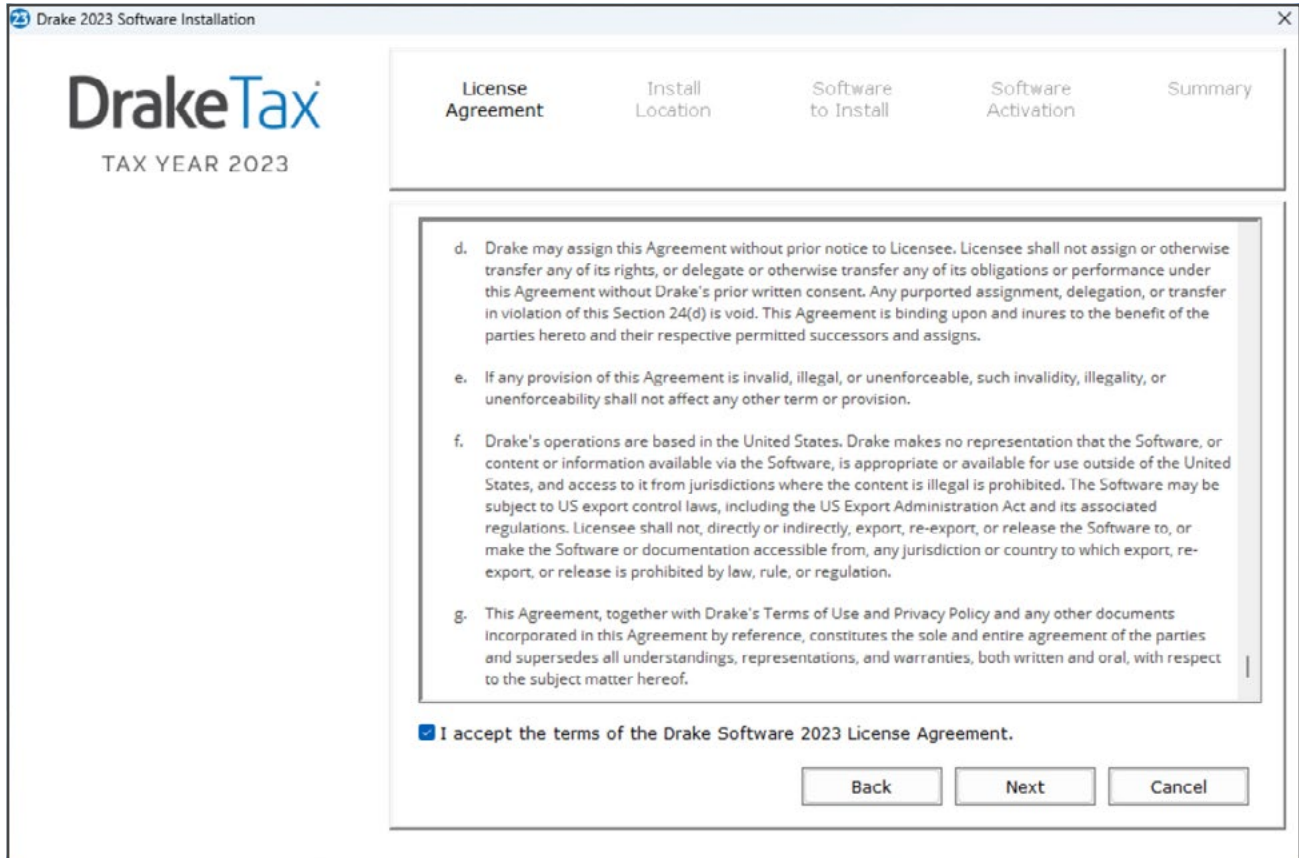
INSTALLATION

Install Drake Tax® from your trial CD or the Drake Software Support site (Support.DrakeSoftware.com > **Downloads > Drake Tax**).

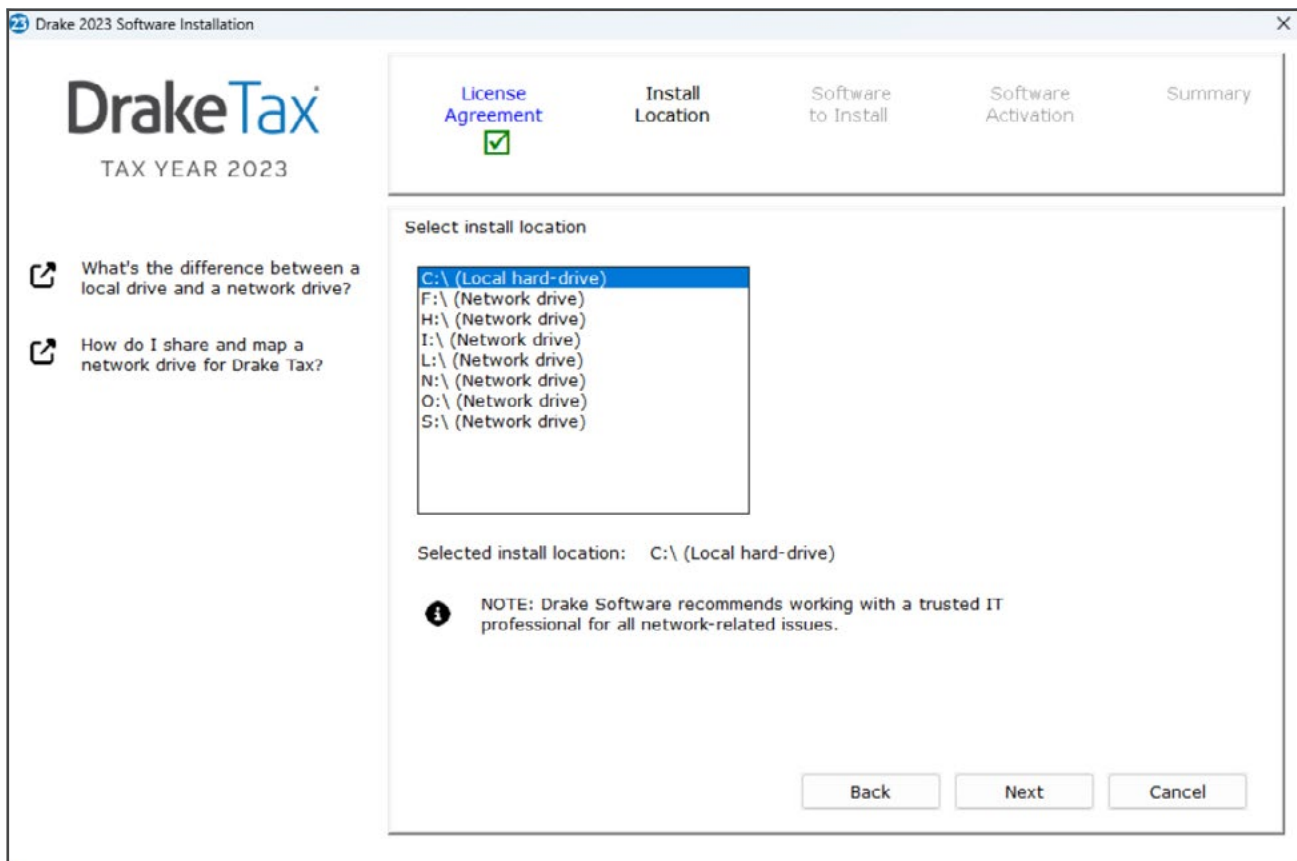
On the **Software Installation** screen, click **Install Drake Tax 2023** to begin the installation process.



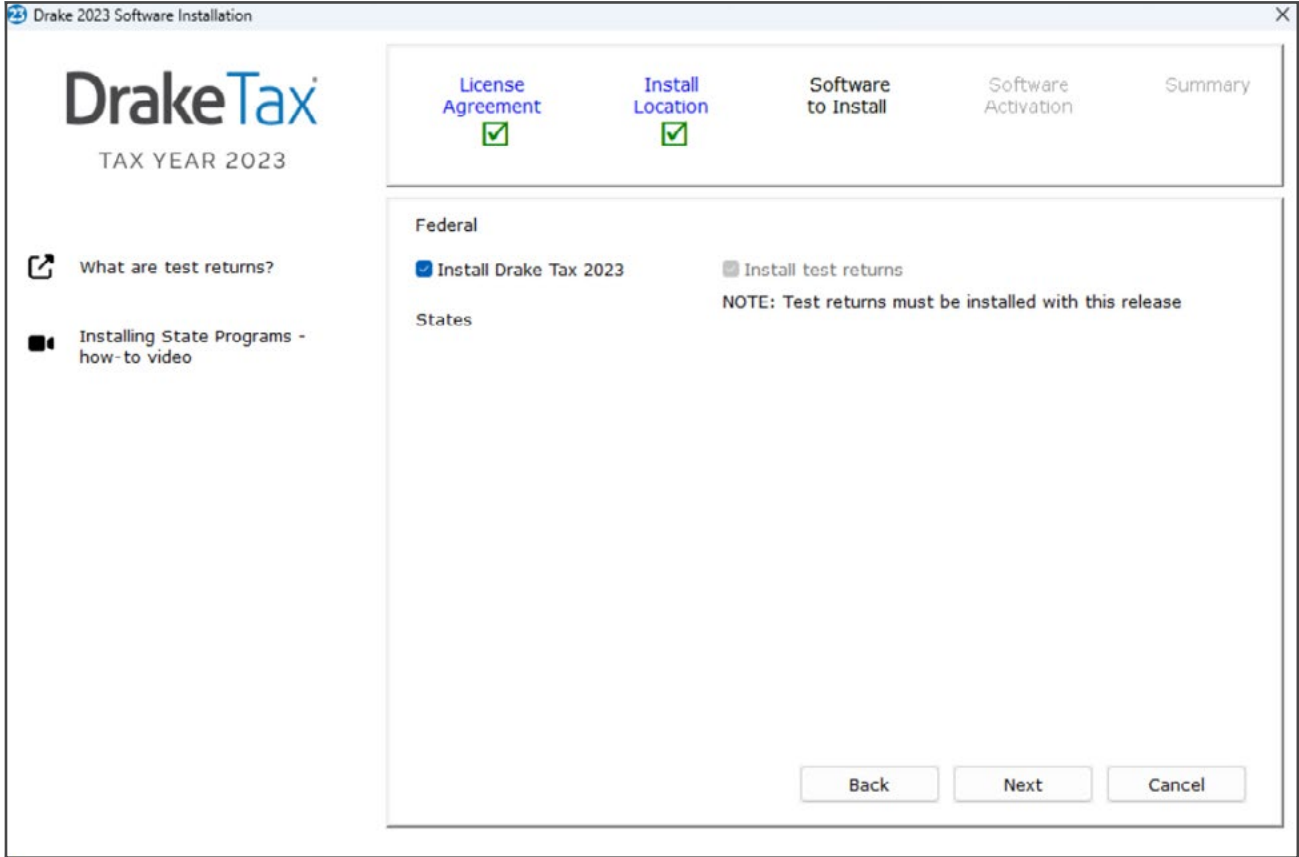
Read and accept the Drake Software 2023 License Agreement. Click **Next** to continue.



Choose an installation location. If using a network drive, we recommend working with an IT professional for setup. Click **Next** to continue.



Install Drake Tax 2023 is marked by default; test returns must be installed with the preseason release and any initial Drake Tax installation. Select any desired state installs, and click **Next** to continue.



Select the applicable software version. If you have a **Licensed version**, enter your Drake Software **Account number** and **Serial number**. Click **Next**.

The screenshot shows the 'Drake 2023 Software Installation' window. The title bar reads 'Drake 2023 Software Installation'. The main content area is divided into two sections. The top section is a progress bar with five steps: 'License Agreement' (checked), 'Install Location' (checked), 'Software to Install' (checked), 'Software Activation' (current step), and 'Summary'. The 'Software Activation' section contains two radio buttons: 'Licensed version' (selected) and 'Evaluation version (trial)'. Below these are input fields for 'Account number' and 'Serial number' (split into four boxes). On the left side, there are two links: 'Look up your account number, EFIN, e-file password, and serial number' and 'How to find my account number?'. At the bottom right, there are three buttons: 'Back', 'Next', and 'Cancel'.

Carefully read each **Summary** page, clicking **Next** to proceed.

The screenshot shows the 'Drake 2023 Software Installation' window. The title bar reads 'Drake 2023 Software Installation'. The main content area is divided into a left sidebar and a main panel. The sidebar contains the Drake Tax logo, 'TAX YEAR 2023', and four links: 'Quick Start Video', 'Training Resources', 'How do I install Drake Tax?', and 'How do I install Drake Accounting?'. The main panel features a progress bar at the top with five steps: 'License Agreement', 'Install Location', 'Software to Install', 'Software Activation', and 'Summary'. The first four steps are marked with green checkmarks, indicating they are completed. The 'Summary' step is currently active. Below the progress bar, there is a text block containing information about the IRS Security Summit. At the bottom right of the main panel, there are three buttons: 'Back', 'Next', and 'Cancel'.

Drake 2023 Software Installation

Drake Tax

TAX YEAR 2023

- Quick Start Video
- Training Resources
- How do I install Drake Tax?
- How do I install Drake Accounting?

License Agreement

Install Location

Software to Install

Software Activation

Summary

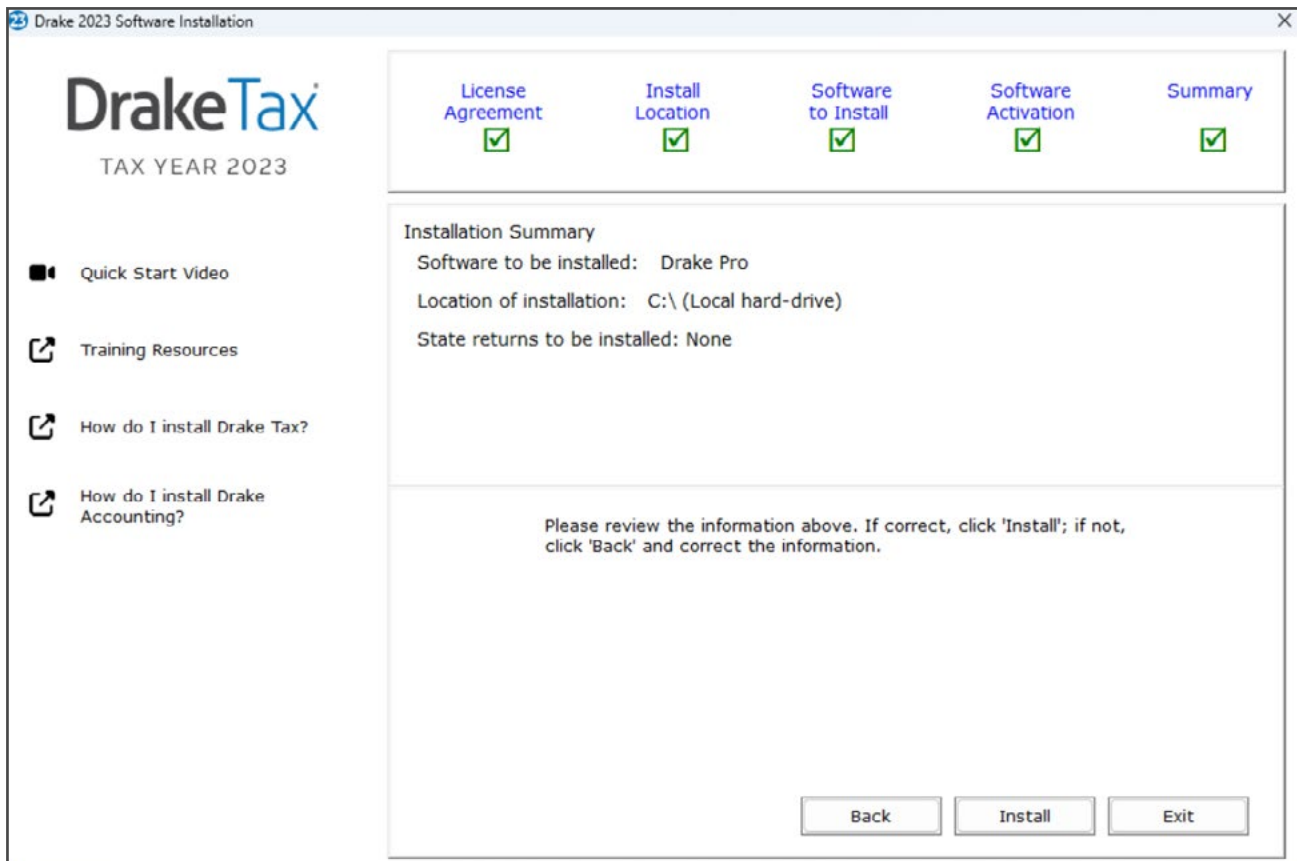
The IRS has joined representatives of the software industry, tax preparation firms, payroll and tax financial product processors, and state tax administrators to combat identity theft refund fraud in order to protect the nation's taxpayers.

The Security Summit consists of the IRS, state tax agencies, and the tax community, including tax preparation firms, software developers, payroll and tax financial product processors, tax professional organizations, and financial institutions. Total membership includes 42 state agencies and 20 industry offices in addition to the IRS.

Everyone has a role to play in protecting taxpayer data, including tax preparation firms.


Back Next Cancel

Once you have finished reading the **Summary**, check that all the information displayed is correct. If not, click **Back** and make the required changes. Once you are ready, **Install** Drake Tax.



Enter your **Account Number** and **Serial Number** to activate your software. Press **OK** when finished.

Drake 2023 - Software Activation



To activate your software, enter the Account number and Serial number provided by Drake Software.

Account Number:

Serial Number:

SETUP

The first time you open the program, you are prompted to set an administrator password. The password must be a minimum of eight characters and have at least one uppercase letter, lowercase letter, number, and special character. Confirm the entered password by re-entering it in the **Repeat Password** field, then click **Next**.

Drake Tax Security 2023

Password setup for ADMINISTRATOR

All tax preparers and office personnel are required to set up and use strong passwords when accessing tax software. Strong passwords must be at least 8 characters long and contain an uppercase letter, a lowercase letter, a number, and a special character (for instance, !, @, #, \$, etc.). For more information, click the Drake Tax security information link on the left-hand side of the screen.

[Drake Tax security information](#)

Password

[Show password](#)

Repeat password

[Show password](#)

Password Requirements

- Minimum 8 characters
- Lowercase letter
- Uppercase letter
- Number
- Special characters / punctuation (Ex: !@#\$\$%^)
- Passwords match

Help < Back Next > Cancel

Select and answer a security question. Click **Next**.

Drake Tax Security 2023

Security question for ADMINISTRATOR

Provide the answer to a security question in case you ever forget your password and need to reset it.

[Drake Tax security information](#)

Select a security question from the list provided or type in your own

Answer

[Show answer](#)

Help < Back Next > Cancel

MULTI-FACTOR AUTHENTICATION

The **Multi-Factor Authentication (MFA)** window is opened next. MFA is activated automatically. The Admin may either proceed with MFA or opt out of MFA by selecting **I choose to OPT OUT of enabling MFA at this time**. The primary admin can change MFA settings at any time from **Setup > Preparer(s)**.

Drake Tax Security 2023

Multi-Factor Authentication (MFA)

Enable Multi-Factor Authentication to help safeguard your practice and your clients by adding an additional layer of security.

To set up Multi-Factor Authentication (MFA), follow the steps below:

Step 1: Scan the barcode on the right using the authenticator app on your mobile device.

Step 2: Enter the code generated by the authenticator app in the space below and click 'Next' to complete the process.

[Drake Tax security information](#)

Enter authenticator code for ADMINISTRATOR

I choose to OPT OUT of enabling MFA at this time

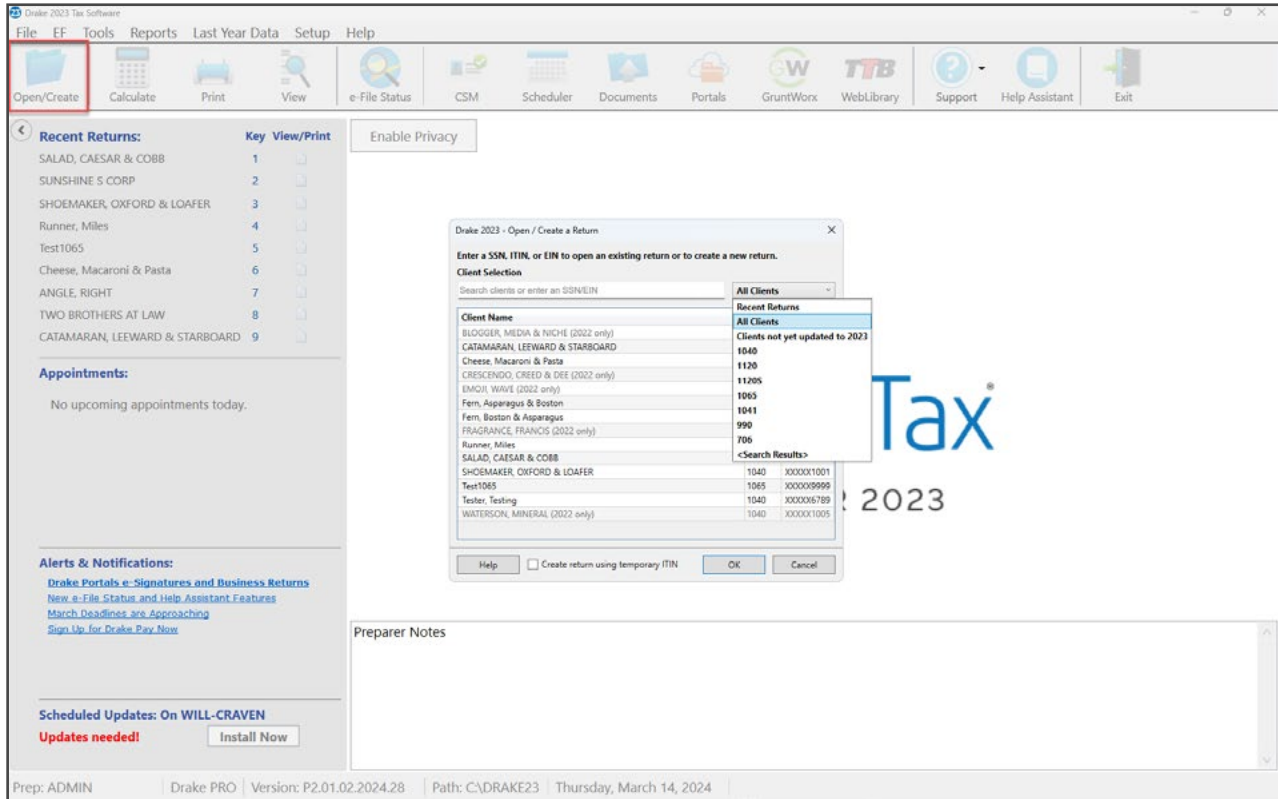
Help < Back Finish Cancel

OPEN A RETURN

To begin entering data for a return, click **Open/Create** from the Drake Tax **Home** window toolbar.

To open an existing return in Drake Tax, select a return from the list, or enter the taxpayer's ID number or name. Use the filters on the right side to show **Recent Returns**, **All Clients**, **Clients not yet updated**, or filter by return type. To create a new return, enter the client's ID number, and click **OK**.

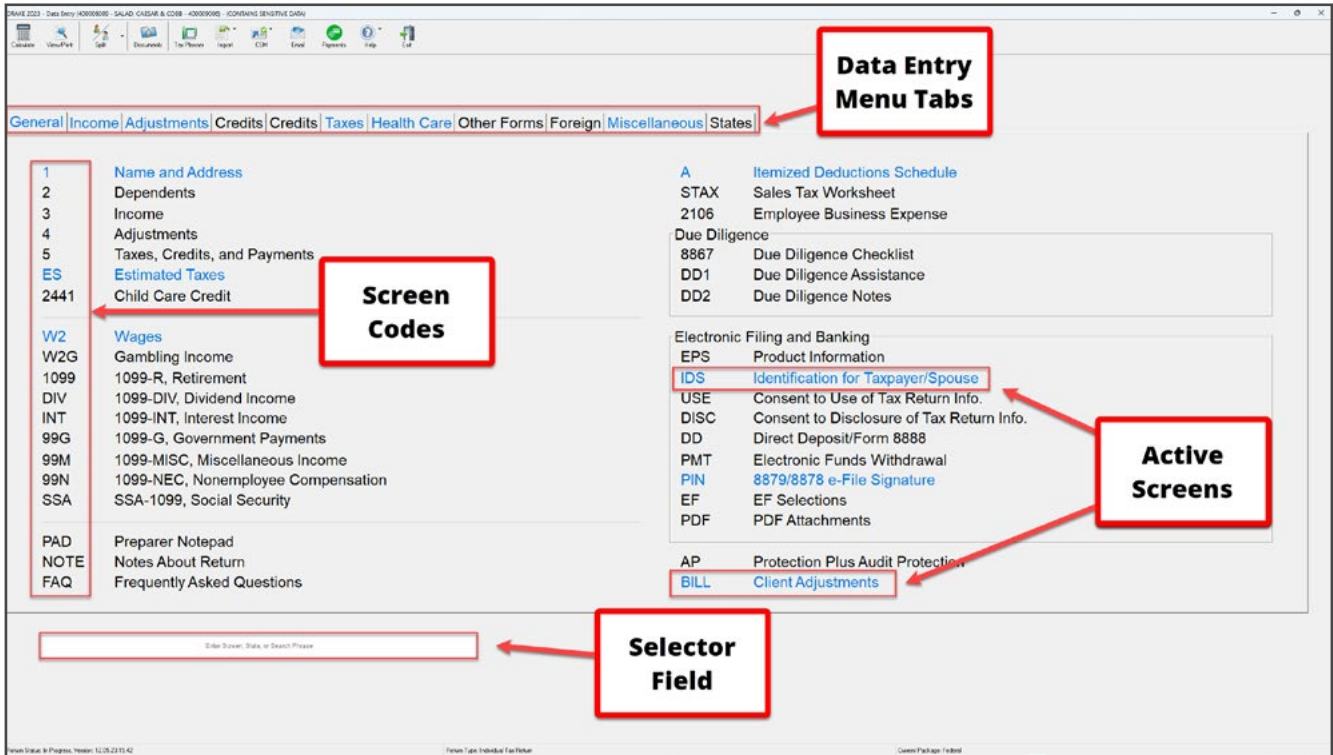
To view a completed practice return in Drake Tax, enter a test SSN (500-00-1001 to 500-00-1008).



DATA ENTRY

This is the **Data Entry Menu** of an individual 1040 return. To open a data entry screen, click the appropriate line, or enter the screen code, state abbreviation, or form number in the **Selector** field, and press ENTER. You may also enter keywords, phrases, or numbers in the **Selector** field to locate specific data within a return.

Note: Tabs and screen names in blue indicate data is present.



NAME AND ADDRESS

To open the **Name and Address** screen, click the screen name from the menu, or type **1** in the **Selector** field, and press ENTER. The **Name and Address** screen is normally the first screen completed on a new return.

Enter the taxpayer's street address. Entering a **ZIP** code automatically completes the **City, State, County,** and **Resident State** fields.

By default, the return is assigned to the preparer logged in to Drake Tax. To choose a different preparer, make a selection from the **Preparer #** drop list.

DRAKE 2023 - Data Entry (400006009 - SALAD, CAESAR & COBB - 400009006) - (CONTAINS SENSITIVE DATA) - (ScrNum 48, ScrVer 2, RecVer 2)

Name, Address, and General Information

Taxpayer		Spouse	
Filing status.....	2 Married Filing Jointly	SSN.....	400-00-9006
SSN.....	400-00-6009	First name.....	COBB
First name.....	CAESAR	Last name.....	= SALAD
Last name.....	SALAD	Date of birth.....	12-21-1978
Date of birth.....	02-27-1977	Age: 46 (as of 12/31/2023)	Age: 45 (as of 12/31/2023)
Date of death.....		Date of death.....	
Occupation.....	FARMER	Occupation.....	SALES
Phone Number Extension Daytime..... 828-524-8020 <input type="text"/> Evening..... <input type="text"/> Cell..... <input type="text"/> Best time to call..... <input type="text"/> Print on return..... = EVENING		Phone Number Extension Daytime..... <input type="text"/> Evening..... <input type="text"/> Cell..... <input type="text"/> Best time to call..... <input type="text"/> Print on return..... = <input type="text"/>	
Fax.....	<input type="text"/>	Fax.....	<input type="text"/>
Email or text msg.....	CAESAR@1040.COM	Email or text msg.....	COBB@1040.COM
<input type="checkbox"/> Dependent of another	<input type="checkbox"/> Full-time student	<input type="checkbox"/> Dependent of another	<input type="checkbox"/> Full-time student
<input type="checkbox"/> Presidential campaign	<input type="checkbox"/> Blind	<input type="checkbox"/> Presidential campaign	<input type="checkbox"/> Blind
Taxpayer did not live with spouse.....	<input type="text"/>	<input type="checkbox"/> Nonresident alien MFS Claiming Spouse Exemption <input type="checkbox"/> Spouse is not filing a return <input type="checkbox"/> Spouse has no U.S. income	
Health insurance coverage.....	LIC Screen	ID Screen Direct Deposit (DD) Direct Debit (PMT)	

In care of.....

Mailing Address

Street..... 144 ROMAINE ST Apt #.....

City..... ALBERT [Combat Zone](#)

U.S. ONLY State ZIP County Stateside military address
 OK 73001 CADD0

Foreign ONLY Province/state Country Postal code Change of address from last year
 <Click to Access>

Resident state 0 Resident city School district

Foreign Account and Digital Asset Questions

If the taxpayer had any interest in or authority over any foreign account or trust, use the Foreign Accounts screen..... [Foreign Accounts](#) Otherwise select this box..... No Foreign Accounts

At any time during 2023, did the taxpayer receive (as a reward, award, or payment) or sell, exchange, give, or otherwise dispose of a digital asset (or any financial interest in a digital asset)?..... Yes No [Video: Reporting Digital Assets](#)

Return Options	2210 Options	Miscellaneous Codes
Firm #..... = <input type="text"/>	2210 code..... = <input type="text"/>	Code 1..... <input type="text"/>
Preparer #..... = <input type="text"/>	2022 federal tax..... 16000	Code 2..... <input type="text"/>
Data entry #..... = <input type="text"/>	2022 state tax..... <input type="text"/>	Code 3..... <input type="text"/>
ERO #..... = <input type="text"/>		Code 4..... <input type="text"/>
ES and OP codes..... ES Screen		Code 5..... <input type="text"/>
Invoice number..... <input type="text"/>		
Fee override..... = 250		

Record 1 of 1 Press F1 or Right-Click for Help [Screen Help]

FORM W-2

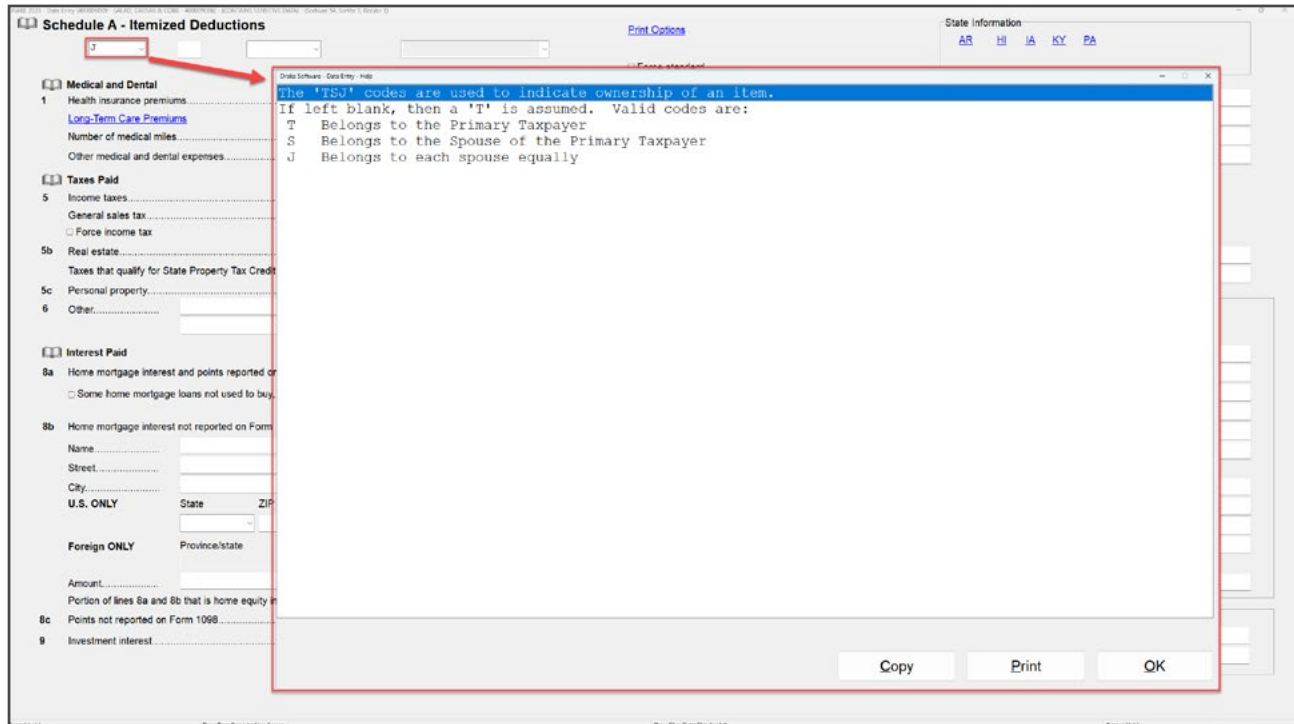
Type **w2** in the **Selector** field, and press ENTER, or click **W2** to enter Form W-2 information. Enter the W-2 information as it appears on the taxpayer's actual form. Use the **TS** drop list to indicate if the W-2 belongs to the taxpayer (**T**) or spouse (**S**). Enter the employer's **EIN** (Employer Identification Number); the employer's information is saved and automatically used on subsequent returns using the same EIN.

Press PAGE DOWN to enter additional Forms W-2. When finished, press Esc to save the entries and return to the **Data Entry Menu**.

FIELD HELP

Field helps provide information about a selected field. There are three ways to access field helps:

- Click inside a field and press F1.
- Click inside a field and press **SHIFT+?**.
- Right-click in a field and select **Help > Help for this Field**.

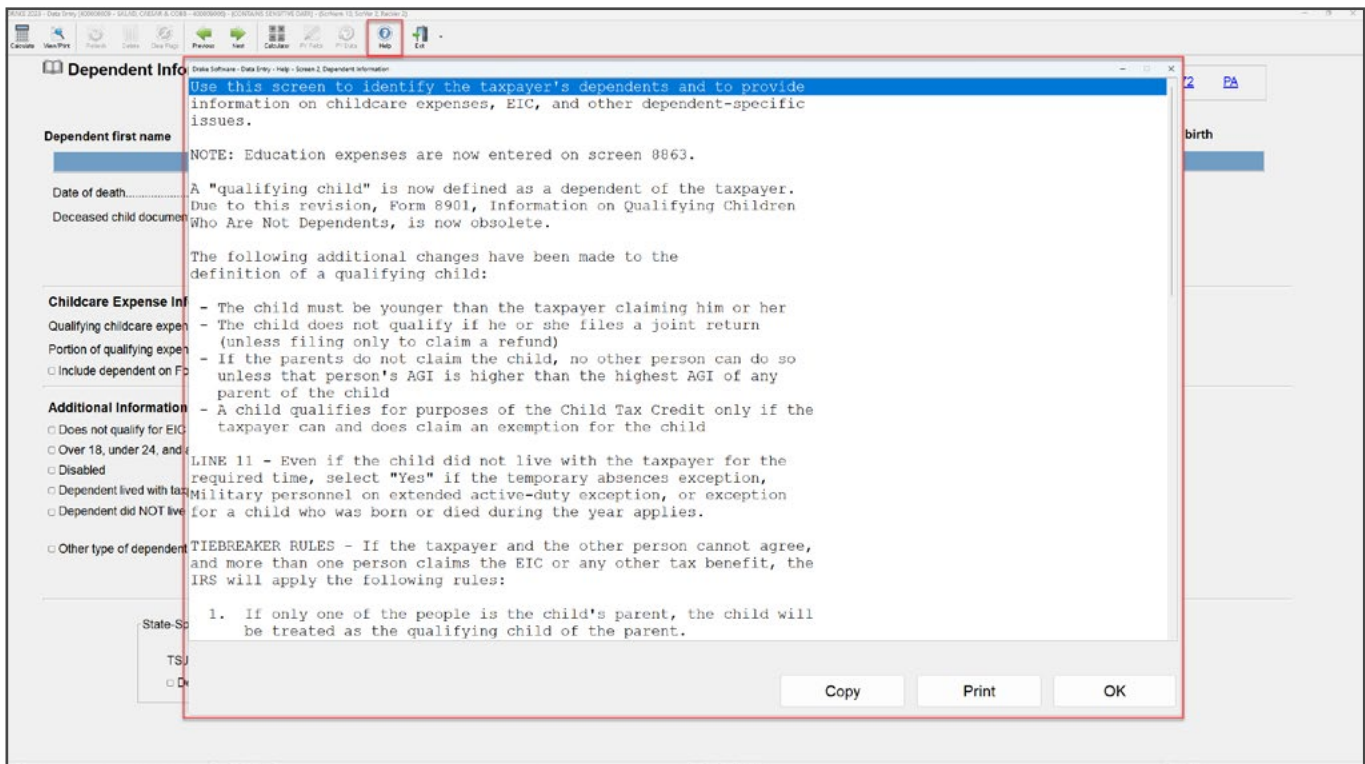


The **Data Entry Toolbar** appears on data entry screens when the pointer is moved to the top of the screen. Click the toolbar buttons to quickly perform the various functions. To close the toolbar, move your pointer away from the top of the screen.



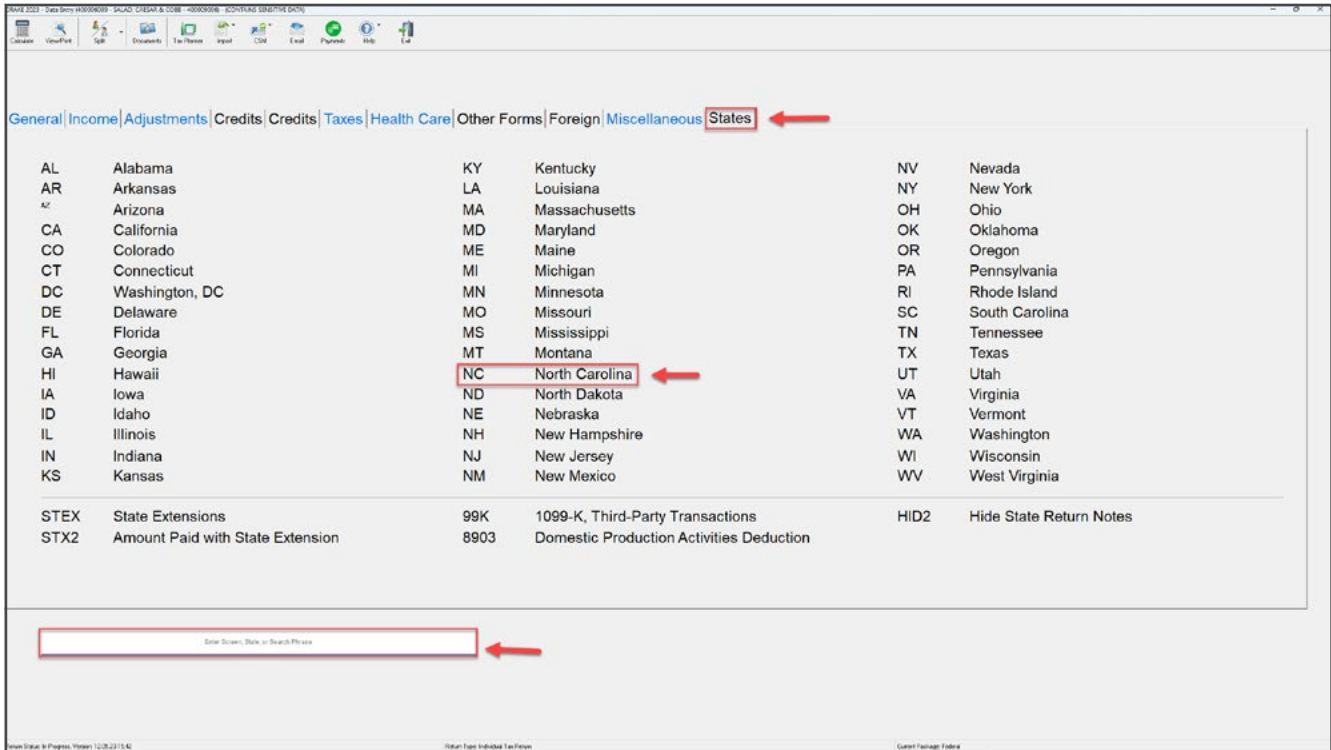
SCREEN HELP

Most data entry screens have screen helps to provide more information about the open screen. To open a screen help, click the **Help** button from the data entry toolbar, or select **Screen Help** from the right-click menu.

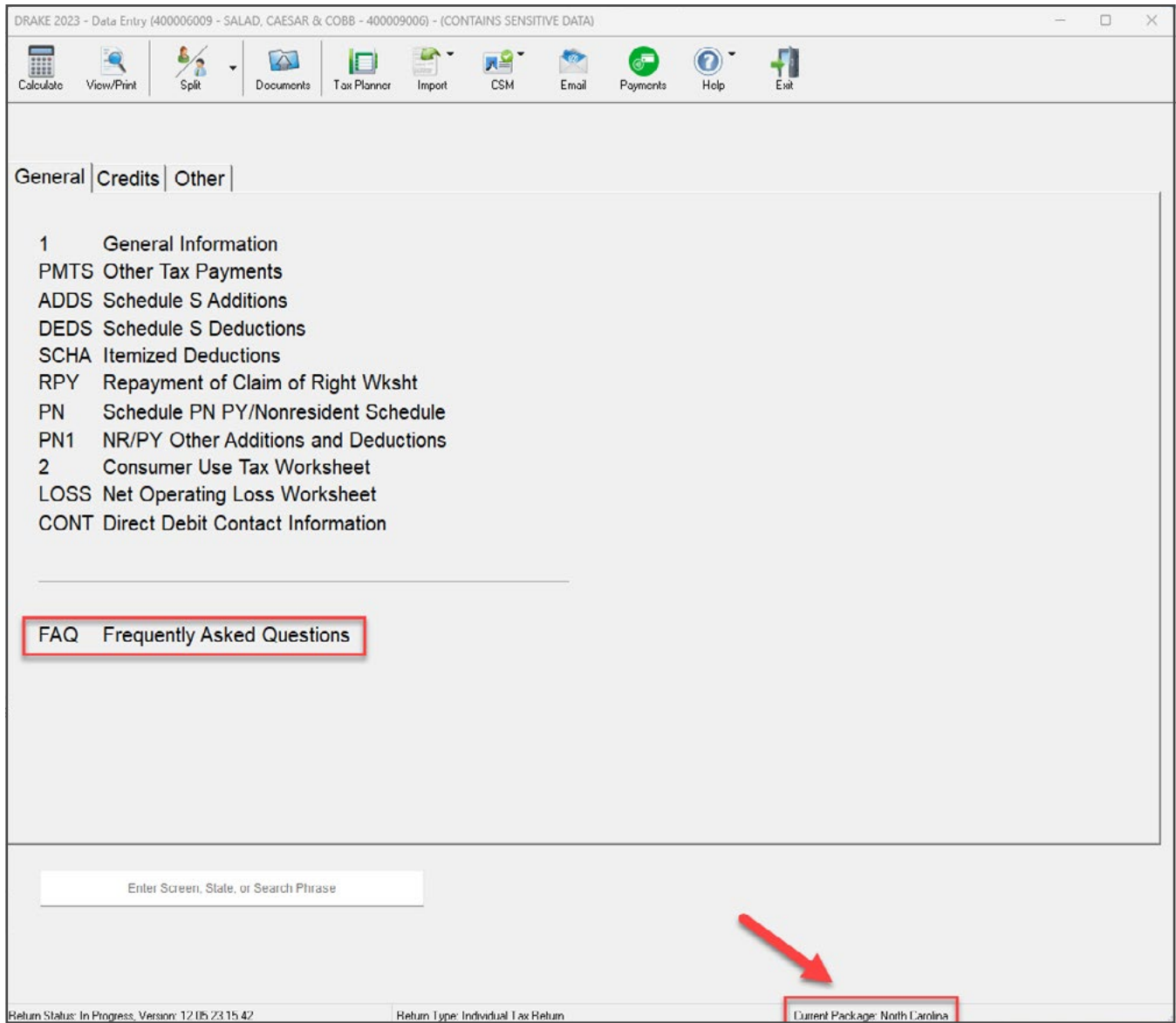


STATE AND CITY PROGRAMS

Drake Tax produces state returns using the data entered on federal screens. To override or supplement information from federal screens, enter the state code in the **Selector** field and press ENTER, or select the state from the **States** tab. Note that applicable state modules must be installed in order to access state data entry screens.



Available forms are found on each state's **Data Entry Menu**.



An **FAQ** screen is included with each tax package in Drake Tax. It is accessible from the **General** tab of the **Data Entry Menu** or by typing **FAQ** into the **Selector** field and pressing **ENTER**. FAQ content varies by state and package.

The current package is displayed on the bottom-right of the screen.

SIGN THE RETURN

Type **PIN** in the **Selector** field, or from the **General** tab of the **Data Entry Menu**, click **PIN** to open the **PIN** screen. Enter the **PIN signature date** or press ALT+D to automatically enter today's date, then enter the **ERO's PIN signature**. The taxpayers' PIN signatures are automatically produced if the option **Auto-generate taxpayer(s) PIN (1040 Only)** is selected at **Setup > Options > EF** tab. Taxpayers can override the default PIN and enter their own, if desired.

DRAKE 2023 - Data Entry (400006009 - SALAD, CAESAR & COBB - 400009006) - (CONTAINS SENSITIVE DATA) - (ScrNum 156, ScrVer 1, Rec... - □ X

Signature Page for Paperless PIN Returns [Video: Using a PIN in Drake](#)

PIN signature date..... 10-19-2023 **ERO's PIN signature**..... ●●●●●

Under penalties of perjury, I declare that I have examined this return ... ; For a full version of the ERO's jurat, press F1 in the PIN field. By entering your PIN, you (the ERO) are stating that you have read and agree to the full version of the jurat.

Taxpayer's PIN signature..... 63912 **Taxpayer entered:** **Identity Protection PIN**.....
Spouse's PIN signature..... 49568 **Spouse entered:** **Identity Protection PIN**.....

Under penalties of perjury, I declare that I have examined this return ... ; For a full version of the taxpayer's jurat, press F1 in the PIN field. By entering your PIN, you (the taxpayer/spouse) are stating that you have read and agree to the full version of the jurat.

Select Form: 1040 (default) 4868 with payment 2350 9465 56
 1040-X / Superseded 1040-X - 2nd Amended Return / Superseded 1040-X - 3rd Amended Return / Superseded

Direct Debit Consent
 Direct Debit Consent

I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal entry to the financial institution account indicated 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 no later than two (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.

	Taxpayer	Spouse
Form 2350/9465 Only		
Prior Year AGI.....	<input type="text"/>	<input type="text"/>
Prior-year PIN.....	<input type="text"/>	<input type="text"/>

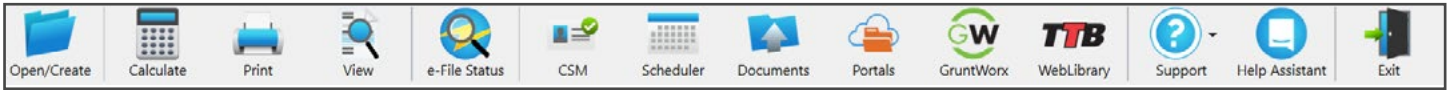
Print filing instructions for Form 8878 and Form 8879

Press "PAGE DOWN" for New York E-File/Direct Debit Authorization , Ohio Perjury Statement Acceptance and New Hampshire Perjury Statement Acceptance

Record 1 of 1 Press F1 or Right-Click for Help (Screen Help)

CALCULATION RESULTS

To calculate a return from data entry, click the **Calculate** button from the **Data Entry Menu** or from the data entry toolbar on any entry screen (or press CTRL+C).



The **Calculation Results** window displays the taxpayer's total income, taxable income, total tax refund amount, balance due, payment method, and the e-file eligibility of the return.

The **EF Status** column displays a green check mark for each return that is eligible for e-file. A red "X" indicates the return is not eligible for e-file and has an EF Message.

EF Messages are displayed in the center of the **Calculation Results** window. Review EF Messages by right-clicking to read the full description of the problem. If an EF Message is blue, double-click to open the data entry screen that contains the error. All identified issues must be corrected in order for a return to be e-filed.

DRAKE 2023 - Calculation Results - (400-00-6009 - SALAD, CAESAR & COBB)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	107,140	71,012	13,990	0	0		

EF Messages - Double click on any highlighted item in the list below to fix the problem:

Package	Code	Description - (right-click for full description)
Federal	66	MISSING DEPENDENT INFORMATION: For Form 1040, the following...
Federal	5044	MISSING INFORMATION: The dependent's "Date of birth" is required on...
Federal	68	INVALID SSN: The dependent's SSN on screen 2 (Dependents) must be...
Federal	68	INVALID SSN: The dependent's SSN on screen 2 (Dependents) must be...
Federal	68	INVALID SSN: The dependent's SSN on screen 2 (Dependents) must be...

Return Notes:

Child Tax Credit cannot be taken for a child over age 16

Fee Type	Amount
Preparation Fee	\$250.00


Total Tax Owed: 0

Continue

Once all EF Messages are cleared, eligible returns can be selected for e-file.

DRAKE 2023 - Calculation Results - (400-00-6009 - SALAD, CAESAR & COBB)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	107,140	71,012	14,490	0	0		

EF Messages - Double click on any highlighted item in the list below to fix the problem:

Package	Code	Description - (right-click for full description)

Return Notes:

Fee Type	Amount
Preparation Fee	\$250.00

Total Tax Owed: 0

Current Program: Calculation Complete **Eligible For E.F.**

Description: Press <ENTER> key or Click Here to Continue

EF Select Continue

VIEW AND PRINT A RETURN

At any time during data entry, click **View/Print** or press CTRL+V to view the return. All forms produced for the return are listed in the forms tree in the left pane.

Click the plus sign [+] to expand categories and the minus sign [-] to collapse them.

Click check boxes or use the arrow keys on your keyboard to navigate the forms. The selected form is displayed in the viewing pane.

Click a section header to select the entire group of forms for printing, or select specific forms.

Press CTRL+P to print all selected forms or to print only the form displayed in the viewing pane.

Press CTRL+Q to quick print the current form. In this example, Form 1040 will be printed.

To close View/Print mode and return to data entry, press CTRL+E or click **Data Entry** from the toolbar.

The screenshot displays the Drake 2023 View/Print Client Return software interface. The window title is "Drake 2023 View/Print Client Return | SALAD, CAESAR & COBB (100006009) - (CONTAINS SENSITIVE DATA)". The interface includes a toolbar at the top with icons for Data Entry, Print, Setup, Documents, Portals, eSign, Email, eFile Taxpayer, Refresh, Basic View, Help, and Exit. Below the toolbar is a "Select Forms to View/Print" section with a "Form Category" dropdown menu. The main area is divided into a left pane showing a tree of forms and schedules, and a right pane displaying the selected Form 1040. The Form 1040 is for the year 2023 and is for a taxpayer named SALAD. The form includes sections for Filing Status, Income, and Tax-exempt interest. The income section shows a total amount of 65,000. The tax-exempt interest section shows a total amount of 65,000. The interface also includes a "Forms, Schedules, and Worksheets generated for this return" section in the left pane.

Form Category

Toolbar

Expand/Collapse Sections

Forms, Schedules, and Worksheets generated for this return

Form 1040 U.S. Individual Income Tax Return 2023

For the year Jan. 1-Dec. 31, 2023, or other tax year beginning _____, 2023, ending _____

Last name: SALAD
Last name: SALAD

Your social security number: 400-00-6009
Spouse's social security number: 400-00-9006

144 ROMAINE ST
City, town, or post office: ALBERT, State: OK, ZIP code: 73001

Filing Status: Single Married filing jointly (even if only one had income) Head of household (HOH) Married filing separately (MFS) Qualifying surviving spouse (QSS)

Income

Line	Description	Amount
1a	Total amount from Form(s) W-2, box 1 (see instructions)	65,000
1b	Household employee wages not reported on Form(s) W-2	
1c	Tip income not reported on line 1a (see instructions)	
1d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	
1e	Taxable dependent care benefits from Form 2441, line 26	
1f	Employer-provided adoption benefits from Form 8839, line 29	
1g	Wages from Form 0919, line G	
1h	Other earned income (see instructions)	
1i	Nontaxable combat pay election (see instructions)	
17	Add lines 1a through 1h	65,000
2a	Tax-exempt interest	
2b	Taxable interest	

E-FILE A RETURN

e-Filing in Drake Tax is a simple, three-step process.

- 1. Select Returns for e-File.** Choose **EF > Select Returns for EF** from the **Home** window menu bar. Select the check box to the left of the return to select it for e-file, and click **Continue**. The **Report Viewer** lists the returns selected for transmission. Click **Exit**.

Drake 2023 Tax Software

File EF Tools Reports Last Year Data Setup Help

Select Returns for EF Ctrl+S

Transmit/Receive Ctrl+T

Process Acks

Prepare Extensions

Check Print

Check Register

Search EF Database

Copy EF Returns to Disk

Copy EF Returns from Disk

Cheese, Macaroni & Pasta 7

TWO BROTHERS AT LAW 8

CATAMARAN, LEEWARD & STARBOARD 9

Appointments:

No upcoming appointments today.

Alerts & Notifications:

Drake Portals e-Signatures and Business Returns

New e-File Status and Help Assistant Features

March Deadlines are Approaching

Sign Up for Drake Pay Now

Scheduled Updates: On WILL-CRAVEN

Updates needed! Install Now

Personal Client Manager - (CONTAINS SENSITIVE DATA)

Drake 2023 - EF Return Selector - (CONTAINS SENSITIVE DATA)

EF Return Selector

The EF Return Selector allows you to select clients for e-filing. To include a client for transmission, place a checkmark in the box to the left of the Client's ID Number. Click the 'Help' button for more information.

ID Number	Client Name	Status	EF Documents	Fed. Bal...	Fed. Refu...	Method	Last Calc	EFIN	M
<input checked="" type="checkbox"/> 400006009	SALAD, CAESAR & C...	Ready For EF	1040				02/23/2024	904071	
<input type="checkbox"/> 004006012	TWO BROTHERS AT ...	Expired Ret...	Recalculate Fe...				11/22/2023...	904071	
<input type="checkbox"/> 400006008	ELEMENT, BROMINE ...	Expired Ret...	Recalculate Fe...		\$10,000		10/26/2023...	904071	
<input type="checkbox"/> 400006006	BERG, ICE	Expired Ret...	Recalculate Fe...	\$9,676			10/25/2023...	904071	
<input type="checkbox"/> 400006005	EAST, NORTH & SOU...	Expired Ret...	Recalculate Fe...		\$3,866		10/24/2023...	904071	0/2023 T
<input type="checkbox"/> 400006004	BERRY, STRAW & BL...	Expired Ret...	Recalculate Fe...		\$4,201		10/23/2023...	904071	
<input type="checkbox"/> 400006003	HOUND, BASSET & G...	Expired Ret...	Recalculate Fe...		\$10,681		10/23/2023...	904071	
<input type="checkbox"/> 400006002	BEE, BUMBLE	Expired Ret...	Recalculate Fe...	\$525			10/19/2023...	904071	
<input type="checkbox"/> 400006001	PINE, PONDEROSA	Expired Ret...	Recalculate Fe...		\$7,695		10/18/2023...	904071	
<input type="checkbox"/> 400007745	FERN, BOSTON & AS...	Expired Ret...	Recalculate Fe...		\$8,325		09/27/2023...	904071	

Record 1 of 10

Help Select All Unselect All Continue Exit

Prep: ADMIN Drake PRO Version: P2.01.02.2024.28 Path: C:\DRAKE23 Thursday, March 14, 2024 Clients: 26

2. **Transmit Returns.** Go to **EF > Transmit/Receive** and click **Send/Receive** to transmit the return and pick up acknowledgements.

The screenshot displays the Drake 2023 Tax Software interface. The 'EF' menu is open, with 'Transmit/Receive' highlighted. The 'Transmit / Receive Files' dialog box is active, showing a list of files for transmission and a 'Send/Receive' button. The background window shows a 'Personal Client Manager' window with a table of transactions.

Completed	Last Change	Tran Date	Ack Cr
:00	10/17/2023 14:44:48		
:00	08/25/2023 10:17:56		
:00	03/14/2024 15:31:28		
:00	08/22/2023 11:19:26		
:00	10/19/2023 15:52:50		
:00	10/25/2023 11:26:12		
:00	10/23/2023 14:04:38		
:00	08/22/2023 11:19:18		
:00	01/26/2024 13:56:26	10/30/2023	T
:00	01/17/2024 14:20:50		
:00	10/30/2023 13:56:12		
:00	10/30/2023 13:55:48		
:00	10/12/2023 17:45:56		
:00	10/23/2023 11:17:40		
:00	08/22/2023 11:19:56		
:00	08/22/2023 11:21:52		
:00	10/18/2023 10:57:26		
:00	08/22/2023 11:19:28		
:00	08/22/2023 11:19:34		
:00	03/14/2024 15:31:28		

3. Process Acknowledgments. Finally, go to **EF > Process Acks**. Your acknowledgments are posted to the EF database. You should receive a "T" ack for a test return.

To review transmission details, go to **EF > Search EF Database**. The e-file database is a searchable database that displays information about all returns your office has e-filed for the current tax year. Enter the return's SSN, ITIN, EIN, or last name, and click **Go**. The EF database displays data about the return and its associated bank products, fees, reject codes, and more. Click the tabs to access more information about the return.

Drake 2023 - Search EF Database - (CONTAINS SENSITIVE DATA)
✕

SSN/EIN/Name to Search for:

SSN: Name:
 Taxpayer: Spouse:

F1 - General Information
F2 - Bank/Direct Deposit Info
F3 - Fees/Miscellaneous Info
F4 - Reject Code Lookup

In Care of:
 Address:
 City St Zip:
 On Behalf of:

Daytime Phone:
 Evening Phone:
 Cell Phone:
 Reject Code: Form I.D.: Form #: Seq. #:
 State:

Federal ACK Code:
1040
A IRS Accepted

 ACK Date:
 Transmitted:
 Filing Status:
 Refund Amount:
 Balance Due:

[Where is my refund?](#)
 Payment Req.: Bank Code:
 DOB Validity: RT/Loan Status:

Check Information:

Ck	Status	Amount	Number	Prior #	Print Date	Clear Date	Ck Info	Ck Clear	Ck Type	Prod Type

Record: 1 of 1

ACK Date: 02/29 - ACK Code - A - SALAD , CAESAR & COBB

PROGRAM HELP

The screenshot displays the Drake 2023 Tax Software interface. The top menu bar includes File, EF, Tools, Reports, Last Year Data, Setup, and Help. The toolbar contains icons for Open/Create, Calculate, Print, View, e-File Status, CSM, Scheduler, Documents, Portals, GruntWorx, and WebLibrary. A red box highlights the Support, Help Assistant, and Exit buttons. The Support dropdown menu is open, showing options: What's New for Drake Tax 2023, Knowledge Base, Program Help, Support Website, Video Tutorials, Co-Browse, Chat Support, Manual & Online Resources, Custom Web Search, and Help Assistant. The main window shows the Personal Client Manager with a table of client information.

Client Name	Type	Status	Started
ANGLE, RIGHT	1040	New Client	10/17/2023 14:11:00
ANGLE, OBTUSE	1040	Updated from 2022	
ANGLE, RIGHT	1040	Updated from 2022	11/21/2023 08:45:00
BEAN, GREEN & CAN, PINTO	1040	Updated from 2022	
BEE, BUMBLE	1040	Updated from 2022	10/11/2023 10:35:00
BERG, ICE	1040	Updated from 2022	10/12/2023 16:09:00
BERRY, STRAW & BLUE	1040	Updated from 2022	10/11/2023 11:39:00
BROWN, CHARLIE & VAN PELT, LUCY	1040	Updated from 2022	
CATAMARAN, LEEWARD & STARBOARD	1040	In Progress	10/30/2023 14:08:00
Cheese, Macaroni & Pasta	1040	In Progress	01/17/2024 14:01:00
EAST, NORTH & SOUTH	1040	Updated from 2022	10/11/2023 15:39:00
ELEMENT, BROMINE & IODONE	1040	Updated from 2022	10/19/2023 11:22:00
FERN, BOSTON & ASPARAGUS	1040	In Progress	09/22/2023 12:14:00
HOUND, BASSET & GREY	1040	Updated from 2022	10/11/2023 11:03:00
OIUOIWER	1041	Updated from 2022	08/22/2023 11:19:56
PEANUTS GANG	1065	In Progress	08/22/2023 11:21:00
PINE, PONDEROSA	1040	Updated from 2022	10/10/2023 14:59:00
RETIRED, RICHARD & ROXANNE	1040	Updated from 2022	08/22/2023 11:19:28
RETIRED, RICHARD & ROXANNE	1040	Updated from 2022	08/22/2023 11:19:34
Runner, Miles	1040	In Progress	10/20/2023 13:56:00

Drake Software offers a wide range of support resources, including a variety of online and program helps.

Click the **Support** button from the Drake Tax **Home** window toolbar to access many resources, including:

- [What's New for Drake Tax 2023](#), an overview with brief descriptions of updates and enhancements to Drake Tax peripheral programs, along with changes to tax forms and tax laws made by the IRS.
- [Drake Software Knowledge Base](#), an online reference source containing answers to common tax and program questions.
- [Drake Software Program Help](#), a searchable "Drake encyclopedia," arranged in "books." Program Help includes a Search feature, a searchable index, and a Favorites list. Program Help answers many of the most commonly asked questions about the tax program.
- [Drake Software Support Site](#), a website with links to all of our online help resources, including support and training options and many other helpful webpages.
- [Video Tutorials](#), a compendium of more than 200 instructional videos showing how to use Drake Tax and related programs.
- [Manual and Online Resources](#), a link to Drake Tax manuals, practice returns, IRS publications, and Drake Software shipment letters. All resources are in PDF format, readable online, and available for download.
- [Custom Web Search](#), a reference tool that allows you to search three default websites for answers—the IRS website (*irs.gov*), Drake Software's Knowledge Base (*DrakeSoftware.com/Site/*), and Drake Software's tax preparer blog, TaxingSubjects® (*DrakeSoftware.com/Blog*). It also allows you to search any other websites you wish to add.