

QUICK START

DrakeSoftware®

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 from your User Account ([Support.DrakeSoftware.com](https://support.drakesoftware.com) > **Downloads > Drake Tax**).

On the **Software Installation** screen, choose an install location for Drake Tax, then select the states you want to install from the **State Install** window. Click **Next** to continue.

Drake 2022 Software Installation

DrakeTax
TAX YEAR 2022

Drake Tax Software will be installed to: Select a drive...

Install States: 0 selected

Federal Install

Select a Drake Tax Software location
Select a drive...

☒ Install Test Returns

State Install

Alabama
Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware & Cities
Florida
Georgia
Hawaii
Idaho
Illinois
Indiana

Select
Select All
Unselect
Unselect All

Back Next Cancel

FULL RELEASE



On the next screen, if you agree to the license and nondisclosure agreement, select **I accept the terms of the Drake Software 2022 License Agreement**. Select the **Evaluation Version (Trial)** option, and click **Next**.

Review the information at the top of the **Software Installation** screen. If it is correct, click **Next**.

The screenshot shows the 'Drake 2022 Software Installation' window. On the left, the 'DrakeTax' logo is displayed with 'TAX YEAR 2022' below it. The top right corner has a close button (X). The main content area is divided into sections. The top section, highlighted in light blue, contains the text 'Drake Tax Software will be installed to: I:\ (Network drive)' and 'Install States: 4 selected'. Below this is a section titled '2022 Drake Software License and Non-Disclosure Agreement'. This section contains a scrollable text area with the following text: 'This 2022 DRAKE SOFTWARE LICENSE AND NON-DISCLOSURE AGREEMENT ("Agreement") is between Drake Software, LLC ("Drake") and Licensee (as defined below). PLEASE READ THIS CAREFULLY. This Agreement is effective immediately upon opening, installing or using the Software, whichever occurs first, and shall remain in force until terminated. Should this Agreement be terminated for any reason, including Drake's termination for Licensee's failure to comply with these terms and conditions, Licensee shall destroy or return to Drake the original and any copies of the Software, including partial copies, in any and all forms, with a written statement that such destruction or return of the Software has been accomplished.' Below the scrollable text is a section header '1 Definitions'. Underneath, there are two radio button options: 'I accept the terms of the Drake Software 2022 License Agreement.' (which is selected with a blue checkmark), 'Licensed Version', and 'Evaluation Version (Trial)' (which is also selected with a blue dot). At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Cancel'. In the bottom left corner, the text 'FULL RELEASE' is visible.

Drake 2022 Software Installation

DrakeTax
TAX YEAR 2022

Drake Tax Software will be installed to: I:\ (Network drive)

Install States: 4 selected

2022 Drake Software License and Non-Disclosure Agreement

This 2022 DRAKE SOFTWARE LICENSE AND NON-DISCLOSURE AGREEMENT ("Agreement") is between Drake Software, LLC ("Drake") and Licensee (as defined below).

PLEASE READ THIS CAREFULLY. This Agreement is effective immediately upon opening, installing or using the Software, whichever occurs first, and shall remain in force until terminated. Should this Agreement be terminated for any reason, including Drake's termination for Licensee's failure to comply with these terms and conditions, Licensee shall destroy or return to Drake the original and any copies of the Software, including partial copies, in any and all forms, with a written statement that such destruction or return of the Software has been accomplished.

1 Definitions

☒ I accept the terms of the Drake Software 2022 License Agreement.

☐ Licensed Version ☒ Evaluation Version (Trial)

Back Next Cancel

FULL RELEASE

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 2022

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 2022

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**.

Drake Tax Security 2022



[Drake Tax security information](#)

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.

Enter authenticator code for ADMINISTRATOR

☐ I choose to OPT OUT of enabling MFA at this time



Help

< Back

Finish

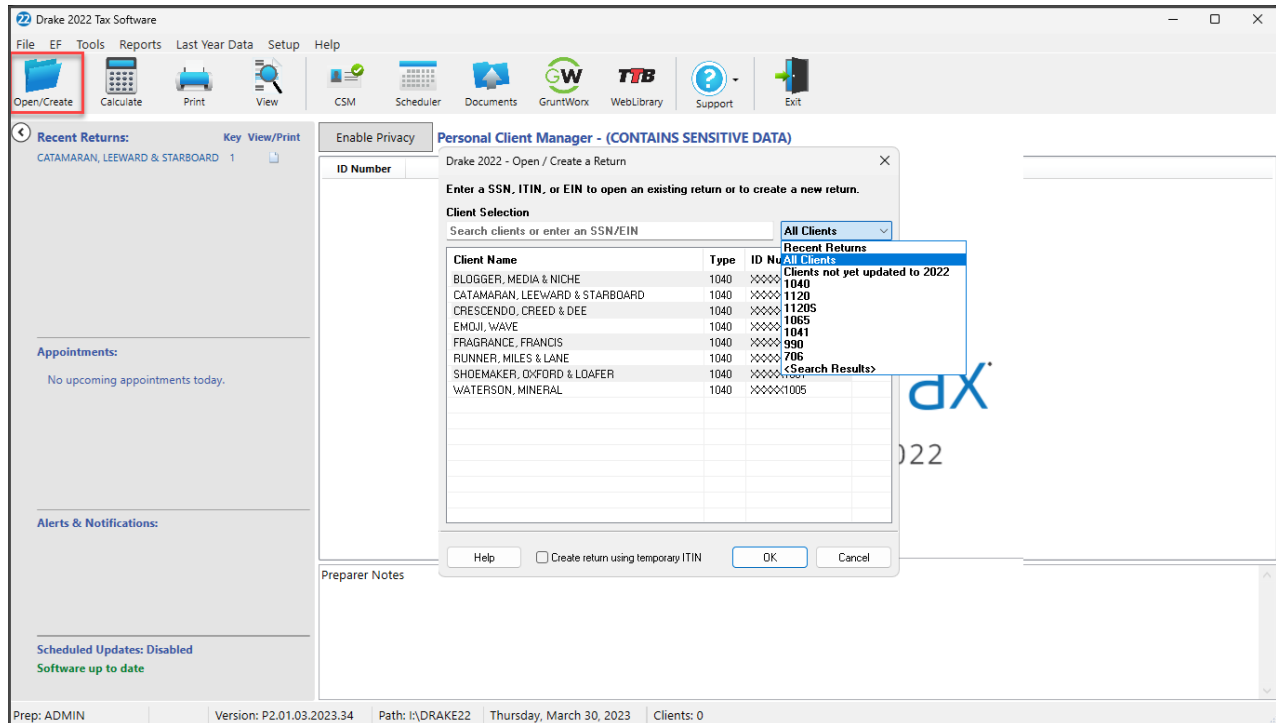
Cancel

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 to 2022**, 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 the 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.

The screenshot shows the 'DRAKE 2022 - Data Entry' window. At the top is a toolbar with icons for Calculate, View/Print, Split, Documents, Tax Planner, Import, CSM, Email, e-Pay, Help, and Exit. Below the toolbar is a row of tabs: General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The 'Miscellaneous' tab is selected and highlighted in blue. The main area is divided into two columns. The left column lists various tax items with their corresponding screen codes: 1 Name and Address, 2 Dependents, 3 Income, 4 Adjustments, 5 Taxes, Credits, ES Estimated Taxes, 2441 Child Care Credit, W2 Wages - (2), W2G Gambling Income, 1099 1099-R, Retirement, DIV 1099-DIV, Dividend Income, INT 1099-INT, Interest Income, 99G 1099-G, Government Payments, 99M 1099-MISC, Miscellaneous Income, 99N 1099-NEC, Nonemployee Compensation, SSA 1099, Social Security, PAD Preparer Notepad, NOTE Notes About Return, and FAQ Frequently Asked Questions. The right column lists other forms and schedules: A Itemized Deductions Schedule, STAX Sales Tax Worksheet, 2106 Employee Business Expense, Due Diligence, 8867 Due Diligence Checklist, DD1 Due Diligence Assistance, DD2 Due Diligence Notes, Electronic Filing and Banking, BANK Bank Info. Not Set Up in Firm, IDS Identification for Taxpayer/Spouse, USE Consent to Use of Tax Return Info., DISC Consent to Disclosure of Tax Return Info., DD Direct Deposit/Form 8888, PMT Electronic Funds Withdrawal, PIN 8879/8878 e-File Signature, EF EF Selections, PDF PDF Attachments, AP Protection Plus Audit Protection, and BILL Client Adjustments. Red arrows and boxes highlight specific features: 'Screen Codes' points to the left column; 'Active Screens' points to the 'IDS' entry in the right column; 'Data Entry Menu Tabs' points to the 'Miscellaneous' tab; and 'Selector Field' points to the input field at the bottom labeled 'Enter Screen, State, or Search Phrase'. The bottom status bar shows 'Return Status: EF Accepted', 'Return Type: Individual Tax Return', and 'Current Package: Federal'.

Screen Code	Screen Name
1	Name and Address
2	Dependents
3	Income
4	Adjustments
5	Taxes, Credits
ES	Estimated Taxes
2441	Child Care Credit
W2	Wages - (2)
W2G	Gambling Income
1099	1099-R, Retirement
DIV	1099-DIV, Dividend Income
INT	1099-INT, Interest Income
99G	1099-G, Government Payments
99M	1099-MISC, Miscellaneous Income
99N	1099-NEC, Nonemployee Compensation
SSA	1099, Social Security
PAD	Preparer Notepad
NOTE	Notes About Return
FAQ	Frequently Asked Questions

Form Number	Form Name
A	Itemized Deductions Schedule
STAX	Sales Tax Worksheet
2106	Employee Business Expense
	Due Diligence
8867	Due Diligence Checklist
DD1	Due Diligence Assistance
DD2	Due Diligence Notes
	Electronic Filing and Banking
BANK	Bank Info. Not Set Up in Firm
IDS	Identification for Taxpayer/Spouse
USE	Consent to Use of Tax Return Info.
DISC	Consent to Disclosure of Tax Return Info.
DD	Direct Deposit/Form 8888
PMT	Electronic Funds Withdrawal
PIN	8879/8878 e-File Signature
EF	EF Selections
PDF	PDF Attachments
AP	Protection Plus Audit Protection
BILL	Client Adjustments

Enter Screen, State, or Search Phrase

Return Status: EF Accepted Return Type: Individual Tax Return Current Package: Federal

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 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

Name and Address and General Information

Taxpayer		Spouse	
Filing status.....	Married Filing Jointly	SSN.....	400-00-8008
SSN.....	500-00-1008	First name.....	STARBOARD
First name.....	LEEWARD	MI.....	
Last name.....	CATAMARAN	Last name.....	
Date of birth.....	02-19-1974	Date of birth.....	01-03-1974
Age: 48 (as of 12/31/2022)		Age: 48 (as of 12/31/2022)	
Date of death.....		Date of death.....	
Occupation.....	SAILBOAT CAPTAIN	Occupation.....	SAILBOAT CAPTAIN
Phone Number		Phone Number	
Daytime.....	828-524-8020	Daytime.....	828-524-8020
Evening.....		Evening.....	
Cell.....		Cell.....	
Best time to call.....		Best time to call.....	
Fax.....		Fax.....	
Email or text msg.....		Email or text msg.....	
<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="checkbox"/> Nonresident alien	MFS Claiming Spouse Exemption
Health insurance coverage.....	HC	<input type="checkbox"/> Spouse is not filing a return	<input type="checkbox"/> Spouse has no U.S. income

In care of.....

[ID Screen](#) [Direct Deposit \(DD\)](#) [Direct Debit \(PMT\)](#)

Mailing Address

Street address..... 1120 SPINNAKER WAY Apt. #.....

City..... TAMPA

U.S. ONLY State..... FL ZIP..... 33602 County..... HILLSBOROUGH [Combat Zone](#)

☐ Stateside military address

Foreign ONLY Province or state..... Country..... Postal code.....

<Click to Access>

Resident state..... 0 Resident city..... School district.....

Foreign Account and Virtual Currency Questions

If taxpayer had any interest in or authority over any foreign account or foreign trust, answer questions on this screen..... [Foreign Accounts](#) **No Foreign Accounts**

Otherwise select this box..... ☒ Answer "No" to Sch. B, Part III questions

At any time during 2022, did the taxpayer receive (as a reward, award, or payment) or sell, exchange, gift, or otherwise dispose of a digital asset (or any financial interest in a digital asset)?..... ☐ Yes ☒ No [Video: Reporting Digital Assets](#)

Return Options

Firm #..... ES and OP codes..... ES

Preparer #.....

Data entry #..... Invoice number.....

ERO #..... Fee override.....

2210 Options

2210 code.....

2021 federal tax.....

2021 state tax.....

Miscellaneous Codes

Code 1.....

Code 2.....

Code 3.....

Code 4.....

Code 5.....

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.

DRAKE 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

W-2 [Additional Entries](#) [Ohio](#) [Import W2](#) [Video: Entering Multiple-State W2s](#)

Form W-2 - Wage and Tax Statement

TS **S** F ☐ Special tax treatment ☐

Employer information is required for e-file

EIN..... 11-1111111
 Name..... SHIPSHAPE MARINA
 Name cont.....
 Street..... 123 OCEAN AVE
 City..... TAMPA
 U.S. ONLY State ZIP
 FL 33602
 Foreign ONLY Province/State Country Postal Code
 <Click to Access>

Employee name and address (if different from screen 1)

Name: First..... STARBOARD Last..... CATAMARAN
 Street..... 1120 SPINNAKER WAY
 City..... TAMPA
 U.S. ONLY State ZIP
 FL 33602
 Foreign ONLY Province/State Country Postal Code
 <Click to Access>

1 Wages, tips 80000
 2 Federal tax w/h 3000
 3 Soc Sec wages 50000
 4 Soc Sec w/h 3100
 5 Medicare wages 50000
 6 Medicare tax w/h 725
 7 Soc Sec tips
 8 Allocated tips
 9
 10 Dep care benefit [Form 2441](#)
[Form 8880](#)
 11 Nonqualified plan
 12 Code Amount Year
 13 ☐ Statutory employee
☐ Retirement plan
☐ Sick pay
 14 Other [SEH](#)
[8889](#) [QSEHRA](#)

15 **ST** Employer's state ID number 16 State wages 17 State tax 18 Local wages 19 Local tax 20 Locality

☐ Was this W-2 altered or handwritten? (Nonstandard) ☐ Corrected W-2 ☐ Do not update ☐ Agent for Employer

If either spouse has an ITIN on screen 1, the TIN from the W-2 must be entered in this field

Record 2 of 2 Press Page Down for New Screen; Ctrl+Tab for Next Tab Press F1 or Right-Click for Help (Screen Help)

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**.

Drake 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

Schedule A - Itemized Deductions

TSJ F ST CITY

[Print Options](#)

☐ Force itemized
☐ Force standard

State Information
[AR](#) [HI](#) [IA](#) [KY](#) [PA](#)
[NY-214](#) [NY-249](#) [VA](#) [VT](#) [WI](#)

Medical and Dental

1 Health insurance premiums.....
[Long Term Care Premiums](#)
Number of medical miles before July 1.....
Number of medical miles after June 30.....
Other medical and dental expenses.....

Taxes Paid [Video: SALT Limitations](#)

5 Income taxes..... +/-
General sales tax..... [STAX](#) screen.
☐ Force income tax ☐ Force sales tax
5b Real estate..... +/-
Taxes that qualify for State Property Tax Credit.....
5c Personal property.....
6 Other.....

Interest Paid [Loan Limit Worksheet](#)

8a Home mortgage interest and points reported on..... [Form 1098](#) +/-
☐ Some home mortgage loans not used to buy, build, or improve taxpayer's home
8b Home mortgage interest not reported on Form 1098
Name..... SSN/EIN.....
Street.....
City.....
U.S. Only State..... ZIP.....
Foreign Province/State..... Country..... Postal C.....
Amount.....
Portion of lines 8a and 8b that is home equity interest.....
8c Points not reported on Form 1098..... +/-
9 Investment interest..... [Form 4952](#)

Gifts to Charity

11 Gifts by cash or check (60% AGI limitation).....
30% limitation.....
Charitable miles.....
12 Other than by cash or check..... [Form 8283](#)
13 Charitable Contributions Carried over from prior years.....
[Video: Charitable Contributions Carryovers](#)

Other Miscellaneous Deductions

16 Other not subject to 2% limit:.....
.....
.....

For State Use Only

Job Expenses and Most Other Misc Deductions
Unreimbursed employee expenses:..... [Form 2106](#)

Drake Software - Data Entry - Help
State and local income taxes (adjustment)
Enter state or local income tax payments that are not entered on screen W2. Withholding entered on the W2 screen flow to Schedule A. Any amounts entered on screen ES with a payment date also flow to Schedule A.

[Copy](#) [Print](#) [OK](#)

New Screen Press F1 or Right-Click for Help (Screen Help)

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.

Drake 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

Calculate View/Print Refresh Delete Clear Flags Previous Next Calculator PY Fields PY Data Help Exit

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.

DRAKE 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

Calculate View/Print Refresh Delete Clear Flags Previous Next Calculator PY Fields PY Data **Help** Exit

Dependent first name M.I. Last name (if different) Suffix SSN Relationship in home Date of birth
DINGY = 400-00-5008 SON 12 12-12-2009

Childcare Expense Information [Form 2441](#)
Qualifying childcare expenses incurred and paid in 2022:
Portion of qualifying expenses provided by employer:
TSJ
Age determined by date of birth: Age: 13 as of 12/31/2022

NOTE: If EIC, Child Tax Credit, or EITC
Is either of the following dependent, and is
Could another person claim this dependent?
If YES: Dependent
If the tie-breaker rules apply,
If this is not the taxpayer's dependent,
Did the dependent live with the taxpayer for more than half the year?
10 The qualifying person is the taxpayer's child
11 Did you explain that he or she is not a qualifying child?
12 Did you explain to the taxpayer the requirement to attach documentation?

Drake Software - Data Entry - Help - Screen 2, Dependent Information
Use this screen to identify the taxpayer's dependents and to provide information on childcare expenses, EIC, and other dependent-specific issues.
NOTE: Education expenses are now entered on screen 8863.
A "qualifying child" is now defined as a dependent of the taxpayer. Due to this revision, Form 8901, Information on Qualifying Children Who Are Not Dependents, is now obsolete.
The following additional changes have been made to the definition of a qualifying child:
- The child must be younger than the taxpayer claiming him or her

Copy Print OK

Which documents below, if any, did you rely on to determine EIC or CTC eligibility for this dependent? Mark all that apply.
Additional entries for this section can be made on screen 8867.

Residency of Qualifying Child
☐ School records or statement
☐ Landlord or property management statement
☐ Healthcare provider statement
☐ Medical records
☐ Childcare provider records
☐ Placement agency statement

Disability of Qualifying Child
☐ Doctor statement
☐ Other healthcare provider statement
☐ Social services agency or program statement
☐ Did not rely on any documents, made notes in file
☐ Did not rely on any documents
Other

Not Applicable

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.

DRAKE 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

Calculate View/Print Split Documents Tax Planner Import CSM Email e-Pay Help Exit

General Income Adjustments Credits Credits Taxes Health Care Other Forms Foreign Miscellaneous **States**

AL	Alabama	KY	Kentucky	NV	Nevada
AR	Arkansas	LA	Louisiana	NY	New York
AZ	Arizona	MA	Massachusetts	OH	Ohio
CA	California	MD	Maryland	OK	Oklahoma
CO	Colorado	ME	Maine	OR	Oregon
CT	Connecticut	MI	Michigan	PA	Pennsylvania
DC	Washington, DC	MN	Minnesota	RI	Rhode Island
DE	Delaware	MO	Missouri	SC	South Carolina
FL	Florida	MS	Mississippi	TN	Tennessee
GA	Georgia	MT	Montana	TX	Texas
HI	Hawaii	NC	North Carolina	UT	Utah
IA	Iowa	ND	North Dakota	VA	Virginia
ID	Idaho	NE	Nebraska	VT	Vermont
IL	Illinois	NH	New Hampshire	WA	Washington
IN	Indiana	NJ	New Jersey	WI	Wisconsin
KS	Kansas	NM	New Mexico	WV	West Virginia

STEX	State Extensions	99K	1099-K, Third-Party Transactions	HID2	Hide State Return Notes
STX2	Amount Paid with State Extension	8903	Domestic Production Activities Deduction		

Enter Screen, State, or Search Phrase

Return Status: EF Accepted Return Type: Individual Tax Return Current Package: Federal

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

DRAKE 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

Calculate View/Print Split Documents Tax Planner Import CSM Email e-Pay Help Exit

General Credits Other

1 General Information
PMTS Other Tax Payments
ADDS Schedule S Additions
DEDS Schedule S Deductions
SCHA Itemized Deductions
RPY Repayment of Claim of Right Wksht
PN Schedule PN PY/Nonresident Schedule
PN1 NR/PY Other Additions and Deductions
2 Consumer Use Tax Worksheet
LOSS Net Operating Loss Worksheet
CONT Direct Debit Contact Information

FAQ Frequently Asked Questions

Enter Screen, State, or Search Phrase

Return Status: EF Accepted Return Type: Individual Tax Return Current Package: North Carolina

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 click the **8879/8878 e-file Signature** link 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.

DRAKE 2022 - Data Entry (500001008 - CATAMARAN, LEEWARD & STARBOARD - 400008008) - (CONTAINS SENSITIVE DATA)

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

PIN signature date..... 03-27-2023 **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..... 06907 **Taxpayer entered:** ☐ **Identity Protection PIN.....**
Spouse's PIN signature..... 50443 **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.

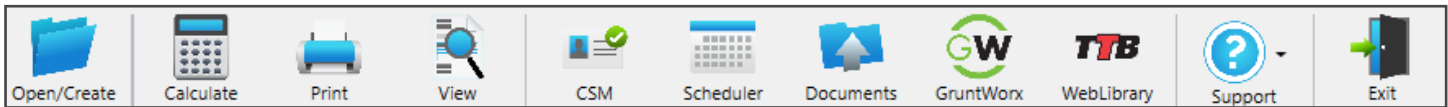
Select Form: ☒ 1040 (default) ☐ 4868 with payment ☐ 2350 ☐ 9465 ☐ 56
☐ 1040-X / Superseded ☐ 1040-X - 2nd Amended Return / Superseded ☐ 1040-X - 3rd Amended Return / Superseded

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.

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-clicking it opens the data entry screen that contains the error. All identified issues must be corrected in order for a return to be e-filed.

DRAKE 2022 - Calculation Results - (500-00-1008 - CATAMARAN, LEEWARD & STARBOARD)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	100,000	74,100	6,484	0	1,309	Check or CC	

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	5350	REQUIRED E-FILE INFORMATION MISSING: The signature date, the ERO's...
Federal	4904	DUE DILIGENCE ERROR: In data entry, you failed to answer "Yes" that...

Return Notes:

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Owed: 1,309

Current Program: Calculation Complete **SEE MESSAGE PAGE**

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

EF Select Continue

Once all EF Messages are cleared, the return is eligible and can be selected for e-file.

DRAKE 2022 - Calculation Results - (500-00-1008 - CATAMARAN, LEEWARD & STARBOARD)

Summary

Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	100,000	74,100	6,484	0	1,312	Check or CC	

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

\$0.00

Total Tax Owed: 1,312

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 to navigate the forms. The selected form is displayed in the viewing pane.

Click a category 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.

Drake 2022 View/Print Client Return | CATAMARAN, LEEWARD & S (500001008) - (CONTAINS SENSITIVE DATA)

Toolbar: Data Entry, Print, Setup, Documents, eSign, Email, eFile Taxpayer, Refresh, Basic View, 8615 Export, Help, Exit

Select Forms to View/Print

Form Category: Form 1040

Forms, Schedules, and Worksheets generated for this return

Expand and Collapse Sections

Form 1040 U.S. Individual Income Tax Return **2022**

Department of the Treasury Internal Revenue Service

Filing Status: ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

Name of your spouse: If you checked the HOH or QSS box, enter the child's name if the qualifying child.

Your Last name: **CATAMARAN** Your social security number: **500-00-1008**

LEEWARD Last name: **CATAMARAN** Spouse's social security number: **400-00-8008**

STARBOARD Home address (number and street): If you have a P.O. box, see instructions. Apt. no. **1120 SPINNAKER WAY** State: **FL** ZIP code: **33602**

TAMPA Foreign country name: Foreign province/state/country: Foreign postal code: Presidential Election Campaign: Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

☐ You ☐ Spouse

Digital Assets: At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

Age/Blindness: You: ☐ Were born before January 2, 1958 ☐ Are blind Spouse: ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see instructions):
DINCY	CATAMARAN	400-00-5008	SON	Child tax credit <input checked="" type="checkbox"/> Credit for other dependents <input type="checkbox"/>

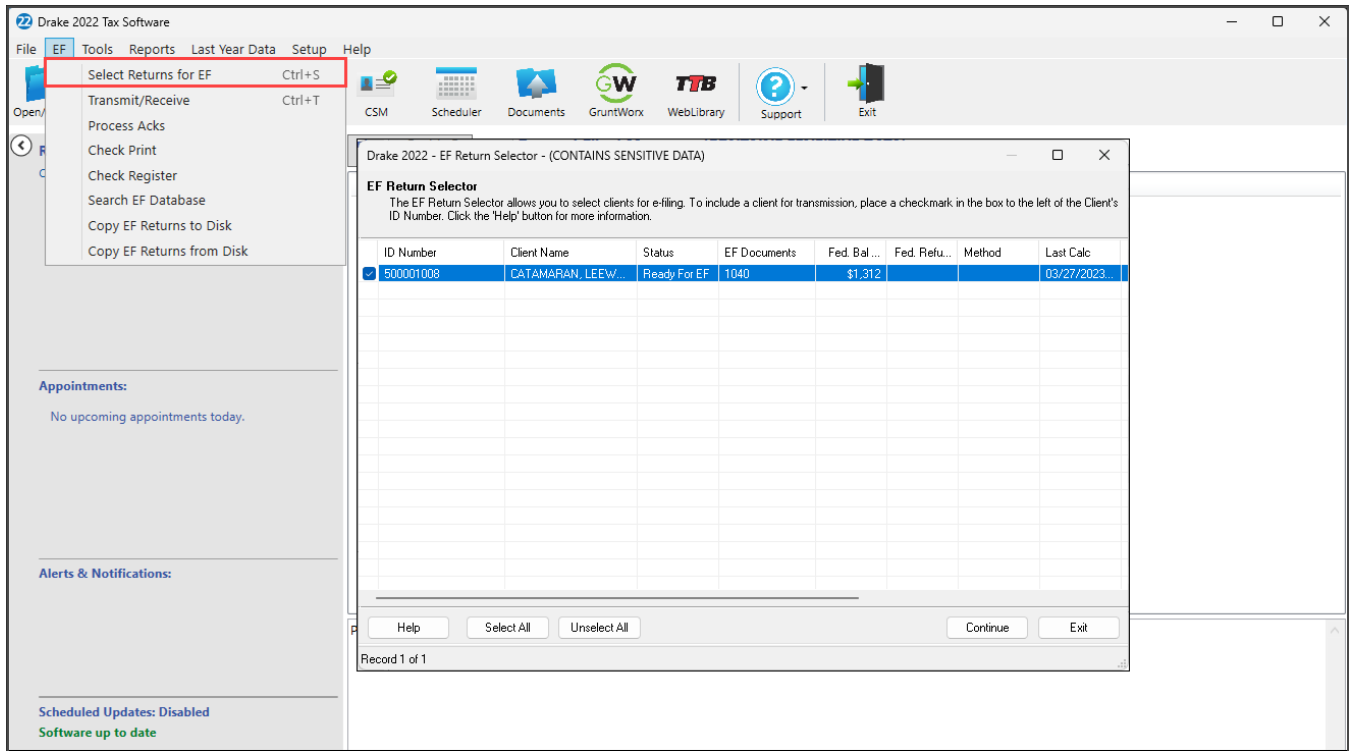
Income

1a	1b	1c	1d	1e	1f
Total amount from Form(s) W-2, box 1 (see instructions)	Household employee wages not reported on Form(s) W-2	Tip income not reported on line 1a (see instructions)	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	Taxable dependent care benefits from Form 2441, line 26	Employer-provided adoption benefits from Form 8839, line 29

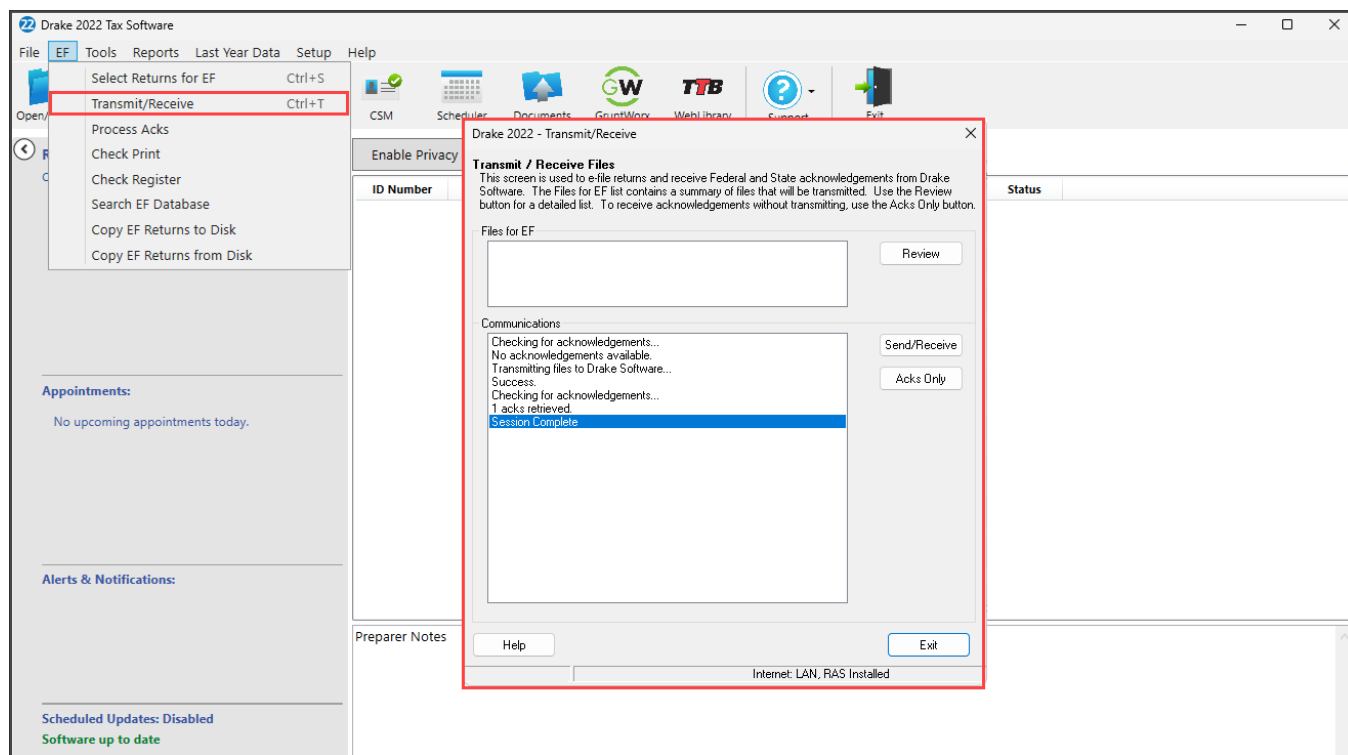
E-FILE A RETURN

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**.



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



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

To review the 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 2022 - Search EF Database - (CONTAINS SENSITIVE DATA)

SSN/EIN/Name to Search for:
500001008

Go

SSN: 500001008
Taxpayer: 500001008
Spouse: 400008008

Name: CATAMARAN , LEEWARD & STARBOARD

OK

F10 - Online DB

F5 - Data Entry

Exit

Help

F1 - General Information

F2 - Bank/Direct Deposit Info

F3 - Fees/Miscellaneous Info

F4 - Reject Code Lookup

In Care of:

Address: 1120 SPINNAKER WAY

City St Zip: TAMPA FL 33602

On Behalf of:

Daytime Phone: 8285248020

Evening Phone:

Cell Phone:

Reject Code

Form I.D.

Form #

Seq. #

Federal 1040

ACK Code: A IRS Accepted

ACK Date: 11/23

Transmitted: 11/23 12:32

Filing Status: 2

Refund Amount:

Balance Due: 1299.00

State

Where is my refund?

Payment Req.:

DOB Validity:

Bank Code:

RT/Loan Status:

Check Information:

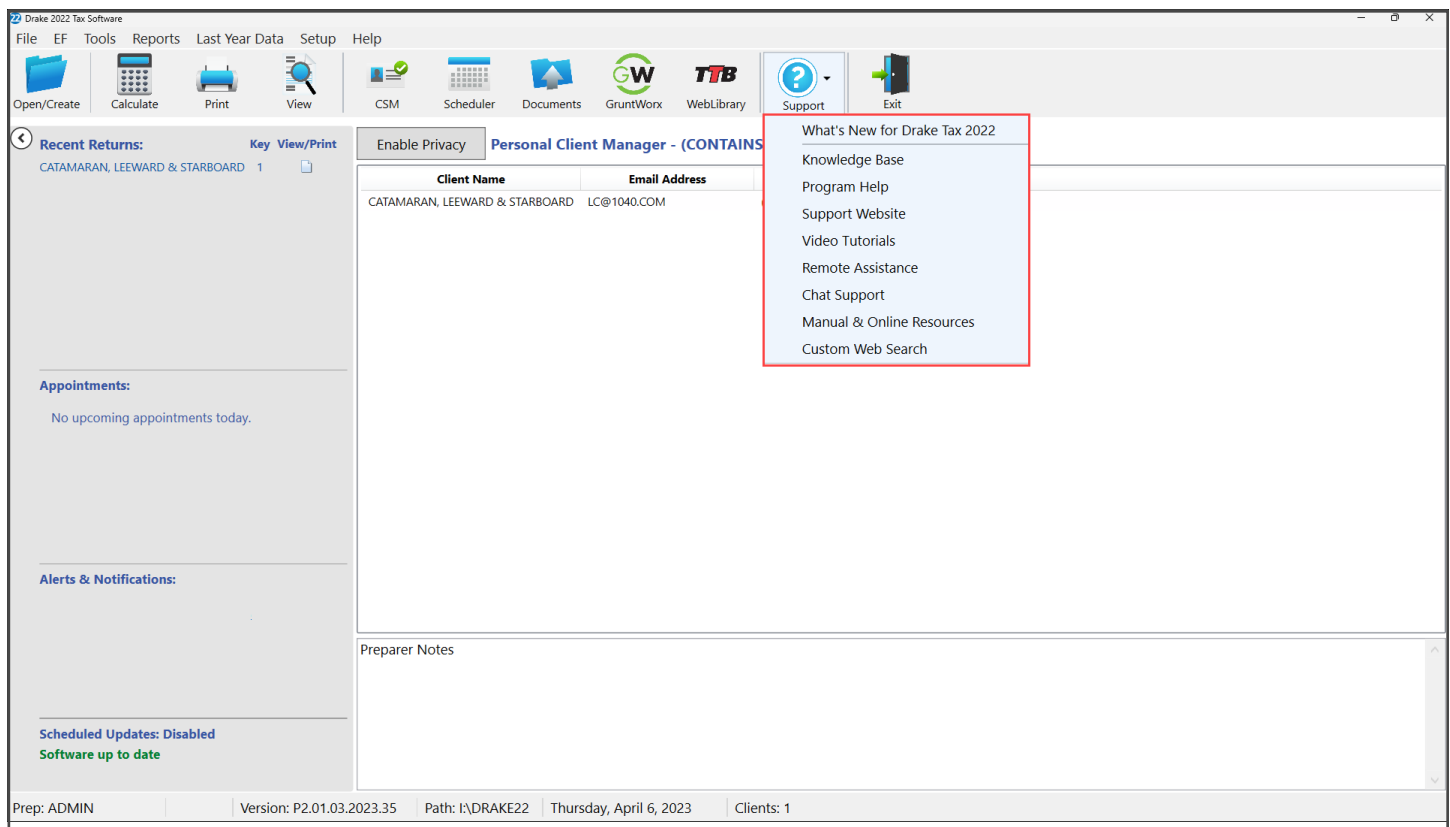
Ck	Status	Amount	Number	Prior #	Print Date	Clear Date	Ck Info	Ck Clear	Ck Type	Prod Type

Record: 1 of 1

ACK Date: 11/23 - ACK Code - A - CATAMARAN , LEEWARD & STARBOARD

19

PROGRAM HELP



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 2022**](#), 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 User Account**](#), 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 (*KB.DrakeSoftware.com*), and Drake Software's tax preparer blog, TaxingSubjects® (*DrakeSoftware.com/blog*). It also allows you to search any other websites you wish to add.