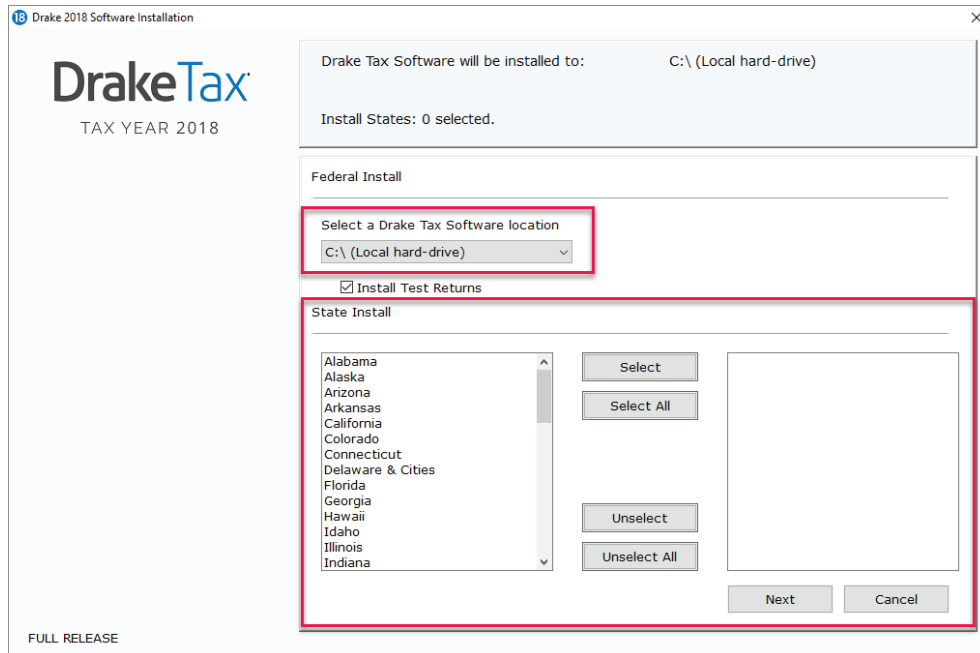


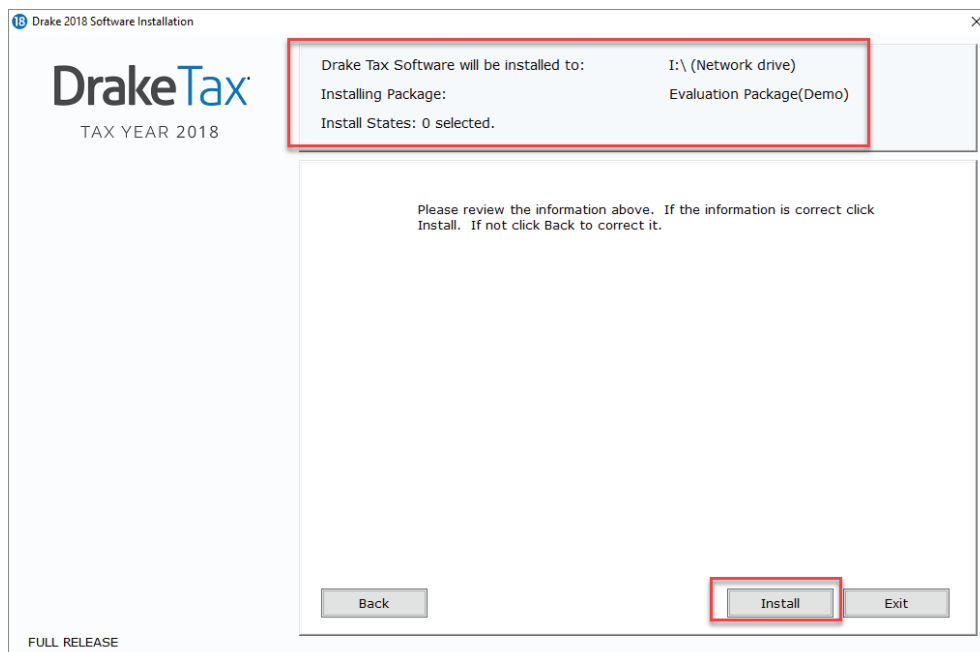
INSTALLATION

Install Drake Tax from your demo CD or from the online Download Center. 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—choose all that apply—and click **Next** to continue.



On the next screen, if you agree to the license and nondisclosure agreement, select the **I accept the terms of the Drake Software 2018 License Agreement** check box. Then select the **Evaluation Version (Demo)** option and click **Next**.

Review the information at the top of the software installation screen, if it is correct click **Install**.



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, numeral, and special character. Confirm the entered password by re-entering it in the **Repeat** password field, then click **Next**.

Drake Tax Security

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 a security question from the drop list and type an answer. Click **Finish**.

Drake Tax Security

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
What was your kindergarten teacher's last name?

Answer
●●●●● [Show answer](#)

[Help](#) [< Back](#) [Finish](#) [Cancel](#)

Next, you are presented with the **Setup Assistant**. Enter your Drake account number, EFIN, and Drake password. This information is needed in order for Drake Tax to connect to Drake servers.

If you have not registered your demo, click **Register an account**.

Drake 2018 - Setup Assistant

E-File Setup

Enter your Drake Software account information below. These items are required to E-file test returns with Drake software. To skip this screen press Cancel below.

Do not show Setup Assistant on startup.

Don't have an account yet? [Register an account](#)

Setup Information

Account Number

EFIN

e-File Password

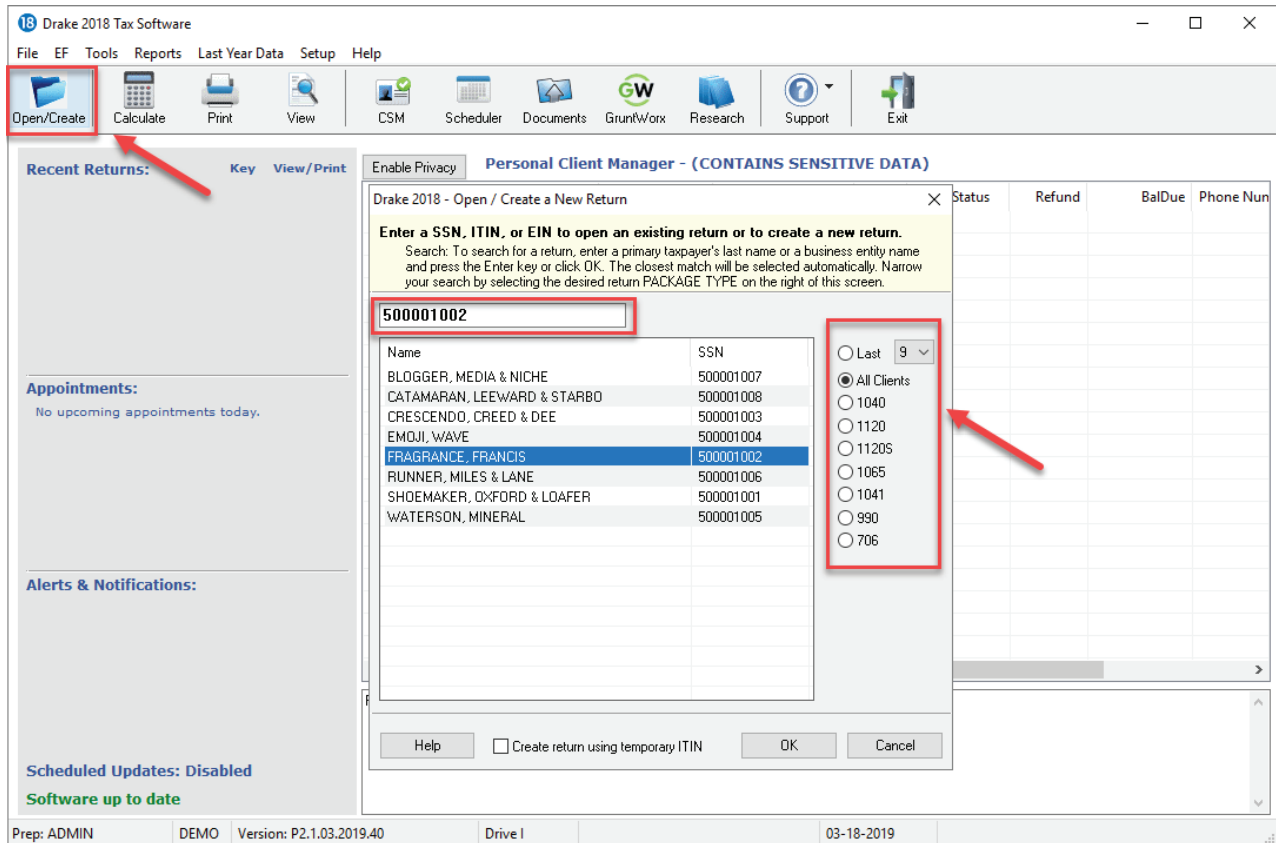
[Save](#) [Cancel](#)

OPEN A RETURN

To begin data entry, click **Open/Create** from the toolbar.

To open an existing return in Drake Tax, click the name from the list or enter the taxpayer's ID number or last name. Use the filters on the right side to show the last nine returns, all clients, 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 select a data entry screen, click the line item or type the screen code, state abbreviation, form number, or a search phrase in the **Selector/Search** field and press ENTER. You may also enter keywords, phrases, or numbers in the **Selector/Search** field to locate specific data within a return.

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

The screenshot shows the Drake 2018 Data Entry interface for a return titled "DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)". The interface includes 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 menu bar with tabs: General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The main area is divided into two columns. The left column lists various data entry screens, with some highlighted in blue to indicate data presence. The right column lists various forms and documents, also with some highlighted in blue. A search field at the bottom is labeled "Selector/ Search Field".

Screen Code	Screen Name	Form/Document	Description
1	Name and Address	A	Itemized Deductions Schedule
2	Dependents	STAX	Sales Tax Worksheet
3	Income	2106	Employee Business Expenses
4	Adjustments		Due Diligence
5	Taxes, Credits and Payments	8867	Due Diligence Checklist
ES	Estimated Taxes	DD1	Due Diligence Assistance
2441	Child Care Credit	DD2	Due Diligence Notes
W2	Wages		Electronic Filing and Banking
W2G	Gambling Income	BANK	Bank info not set up in firm
1099	1099-R Retirement	IDS	Identification for Taxpayer/Spouse
DIV	1099-DIV Dividend Income	USE	Consent to Use of Tax Return Info
INT	1099-INT Interest Income	DISC	Consent to Disclosure of Tax Return Info
99G	1099-G Government Payment	DD	Direct Deposit/Form 8888
99M	1099-MISC Miscellaneous Income	PMT	Electronic Funds Withdrawal
RRB	RRB 1099-R Railroad Retirement	PIN	8879/8878 e-file Signature
SSA	1099-SSA Social Security	EF	EF Selections
		PDF	PDF Attachments
PAD	Preparer Notepad	AP	Protection Plus Audit Protection
NOTE	Notes about the return	BILL	Client Adjustments
FAQ	Frequently Asked Questions		

Annotations:

- Data Entry Menu Tabs:** Points to the menu bar tabs.
- Screen Codes:** Points to the screen codes in the left column.
- Active Screens:** Points to the blue-highlighted screen codes.
- Selector/ Search Field:** Points to the search input field at the bottom.

Search Field: Enter Screen, State, or Search Phrase

Status Bar: Return Status: In Progress | 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 will automatically fill in 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 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

Name and Address and General Information

Taxpayer		Spouse	
Filing Status.....	4 Head of Household	SSN.....	
SSN.....	500-00-1005	First name.....	
First name.....	MINERAL MI.....	Last name.....	
Last name.....	WATERSON Suffix.....	Date of birth.....	
Date of birth.....	09-03-1975 Age: 43 (as of 12/31/2018)	Date of death.....	
Date of death.....		Occupation.....	
Occupation.....	SALES	Phone Number	Extension
Daytime.....	828-524-8020	Daytime.....	
Evening.....	828-524-8020	Evening.....	
Cell.....		Cell.....	
Best time to call.....	Print on return.....	Best time to call.....	Print on return.....
Fax.....		Fax.....	
Email / text msg.....	WATERSON@1040.COM	Email/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](#)

Mailing Address

Street address..... FRESHWATER CIRCLE Apt #.....

City..... SANTA FE [Combat Zone](#)

U.S. ONLY State ZIP County Stateside military address
NM 87505 SANTA FE

Foreign ONLY Province/State Country Postal Code
<Click to Access>

Resident state 0 Resident city School district

Foreign Account Questions

If taxpayer has any interest in or authority over any foreign account or foreign trust, answer questions on this screen..... [Foreign Accounts](#) **Otherwise check here.....** Answer "No" to Sch B, Part III questions

Return Options

Firm #..... ES and OP codes..... ES
Preparer #..... 1
Data entry #..... Invoice number.....
ERO #..... Fee override.....

2210 Options

2210 Code.....
2017 Fed tax.....
2017 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. In the first field, enter "T" (taxpayer) or "S" (spouse) to fill the employee's fields. Enter the employer's EIN (Employer Identification Number). After you have used this EIN once, the employer's fields fill automatically on subsequent returns.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

W-2 Additional Entries Ohio RITA Import W2 Video: Entering Multiple-State W2s

Form W-2 - Wage and Tax Statement

TS **T** F Special tax treatment

State Information: [IN](#) [NJ](#) [NY](#) [PA](#)

Employer information is required for e-file

EIN: 51-0000000
 Name: HYDRO PLANT
 Name cont.:
 Street: 200 HYDRATION AVENUE
 City: SANTA FE
 U.S. ONLY: State: NM ZIP: 87505
 Foreign ONLY: Province/State: <Click to Access> Country: Postal Code:

1 Wages, tips: 25000
 2 Federal tax w/h: 3000
 3 Soc Sec wages: 25000
 4 Soc Sec w/h: 1550
 5 Medicare wages: 25000
 6 Medicare tax w/h: 363
 7 Soc Sec tips:
 8 Allocated tips:
 9 Verification Code:
 10 Dep care benefit: [Form 2441](#) [Form 8880](#)

Employee name and address (if different from screen 1)

Name: First: MINERAL Last: WATERSON
 Street: FRESHWATER CIRCLE
 City: SANTA FE
 U.S. ONLY: State: NM ZIP: 87505
 Foreign ONLY: Province/State: <Click to Access> Country: Postal Code:

11 Non-qualified plan
 12 Code Amount Year
 13 Statutory employee
 Retirement plan
 Sick pay
 14 Other: [SEHI](#) [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

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

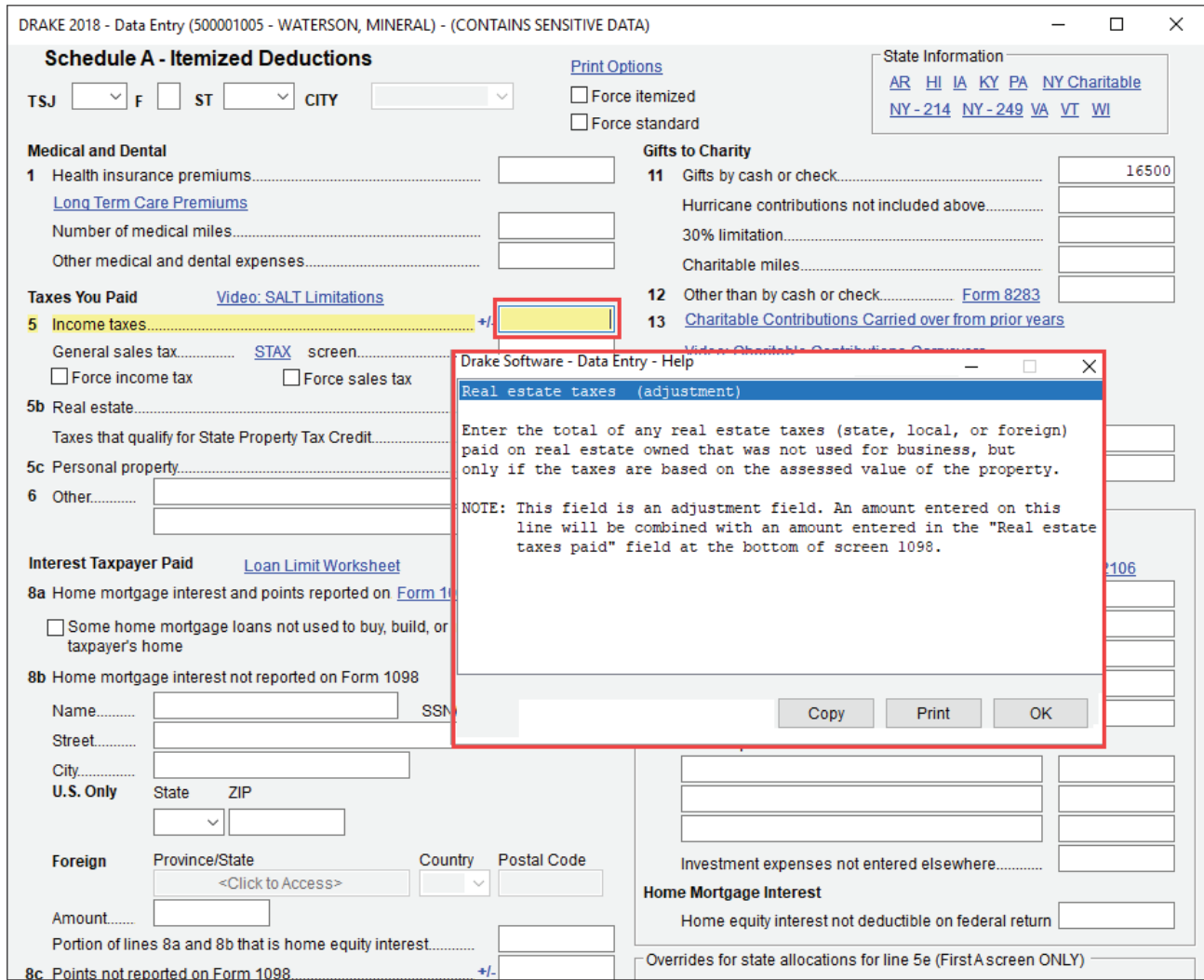
Record 1 of 1 Press Page Down for New Screen; Ctrl+Tab for Next Tab Press F1 or Right-Click for Help (Screen Help)

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

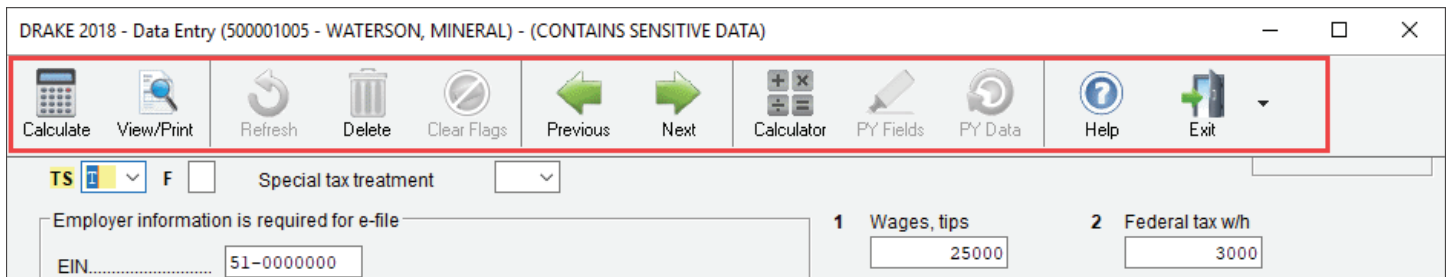
FIELD HELP

Field help provides information about a selected field. There are three ways to access field help:

- 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** from the menu



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



SCREEN HELP

Most data entry screens have **Screen Help** to provide more information about the open screen. Click the **Help** button from the **Data Entry Toolbar** or select **Help** from the right-click menu.

The screenshot displays the Drake 2018 Data Entry software interface. At the top, a window title bar reads "DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)". Below this is a toolbar with icons for Calculate, View/Print, Refresh, Delete, Clear Flags, Previous, Next, Calculator, PY Fields, PY Data, Help, and Exit. A red box highlights the Help button. The main screen shows a form for "2018 ESTIMATED TAXES ALREADY PAID FOR THIS YEAR" with sections for "Federal Section" and "State and City Section". A "Screen Help" window is open over the form, titled "Drake Software - Data Entry - Help - Estimated Tax". The help text explains the purpose of the package and provides instructions on how to use it, including a list of rules for tax payments. The help window has "Copy", "Print", and "OK" buttons at the bottom.

Screen Help

Drake Software - Data Entry - Help - Estimated Tax

ES - Estimated tax

Use this package to figure and pay estimated tax. Estimated tax is the method used to pay tax on income that is not subject to withholding (for example, earnings from self-employment, interest, dividends, rents, alimony, etc.). In addition, if the taxpayer does not elect voluntary withholding, you should make estimated tax payments on unemployment compensation and the taxable part of his or her Social Security benefits. See the instructions for the tax return for details on income that is taxable.

Tax Payments

General rule. In most cases, the taxpayer must make estimated tax payments if he or she expects to owe at least \$1,000 in tax for 2019 (after subtracting any withholding and credits) and the taxpayer expects his or her withholding and credits to be less than the smaller of:

- (1) 90% of the tax shown on his or her 2019 tax return
- (2) 100% of the tax shown on the 2018 tax return.

(If the taxpayer did not file a 2018 tax return or if the taxpayer's 2018 return did not cover 12 months, item (2) above does not apply.)

Exception. The taxpayer does not have to pay estimated tax for 2019 if he or she was a U.S. citizen or resident alien for all of 2017 and the taxpayer had no tax liability for the full 12-month 2018 tax year. The taxpayer had no tax liability for the prior year if his or her total tax was zero or he or she did not have to file an income tax return.

Copy Print OK

SIGN THE RETURN

Type "PIN" in the **selector** field or click the **8879/8878 e-file Signature** screen to open the **PIN** screen. Enter the PIN signature date or press Alt+D to automatically enter today's date. Then proceed by entering the ERO's PIN signature. The taxpayers' PIN signatures will be automatically generated.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

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

PIN signature date..... 04-15-2019 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..... 02279 Taxpayer entered: Identity Protection PIN.....
Spouse's PIN signature..... 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

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. I further understand that this authorization may apply to future federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). In order for me to initiate future payments, I request that the IRS send me a personal identification number (PIN) to access EFTPS. 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 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.

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

Press Page Down for New York E-File/Direct Debit Authorization and Ohio Perjury Statement Acceptance

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

STATE & 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.

The screenshot shows the Drake Tax software interface. The window title is "DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)". The interface includes 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 navigation menu with tabs for General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The States tab is selected, and a red arrow points to it. The main area displays a list of states with their abbreviations and names, arranged in three columns. Below the list are three entries: STEX State Extensions, STX2 Amount Paid with State Extension, and 99K 1099-K Third Party Payments. At the bottom, there is a text input field containing "VA", which is highlighted with a red box. The status bar at the bottom shows "Return Status: In Progress", "Return Type: Individual Tax Return", and "Current Package: Federal".

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	WI	Wisconsin
IN	Indiana	NJ	New Jersey	WV	West Virginia
KS	Kansas	NM	New Mexico		

STEX State Extensions
STX2 Amount Paid with State Extension
99K 1099-K Third Party Payments

VA

Return Status: In Progress Return Type: Individual Tax Return Current Package: Federal

Available forms are found on each state's **Data Entry Menu**. For more information on accessing state and city programs, refer to the Drake Tax User's Manual: Tax Year 2018.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

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

General Credits Other

1 Demographic Info - Residency/Filing Status
2 Demographic Info - Additional Information

ADD Additions to Income
SUB Subtractions from Income
DIS Verification of Disability Income
763 Misc items of the NR
ITEM Itemized/Standard Deductions
DED Other Deductions
CSPD College Savings Plan Deduction
LTCW Long Term Care Worksheet
PMT Payments
PEN Penalties and Interest
USE Sales and Use Tax Worksheet
VAC College Savings Plan Contributions
VAC2 Voluntary Contributions
VAK1 K1's Received
EXCP Part-Year Resident Exemption Exception
FED Schedule FED - Federal Schedule Info

Taxpayer/Spouse Split Information
AGI VAAGI Wks-(Taxable Income/Adjustments/AGI)
SCHED VA Sch D Wks-(Capital Gains/Losses)
4797 VA 4797 Wks-(Other Gains/Losses)
SCHED VA Sch E Wks-(Rents, Royalties, etc...)
FDC VA Fixed Date Conformity
PRNT FDST Worksheet Suppression

Electronic Filing
PHWR Paid Tax Preparer Hardship Waiver Request

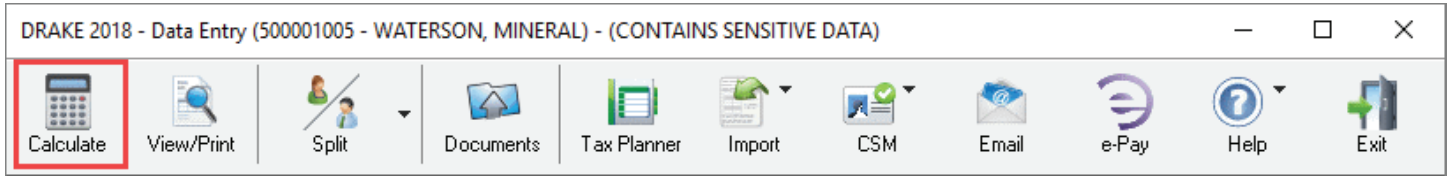
FAQ Frequently Asked Questions

Enter Screen, State, or Search Phrase

Return Status: In Progress Return Type: Individual Tax Return Current Package: Virginia

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 e-file message page.

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 for a return to be eligible for e-file.

DRAKE 2018 - Calculation Results - (500-00-1005 - WATERSON, MINERAL)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	25,000	7,000	0	6,741	0	Receive Check	✘
VA760	25,000	20,140	412	1,088	0	Receive Check	✘

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

Package	Code	Description - (right-click for full description)
VA	9074	THE PIN entered on the PIN screen does not match what is in the...
VA	9346	On the Federal IDS screen, a Driver's license or State ID was...
VA	307	VA Electronic Filing NOT Allowed...

Return Notes:
VA Low Income Calculation NOT Allowed: Family AGI = \$25,000 Poverty Guideline = \$16,460

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Refund: 7,829



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

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

Once all EF messages are cleared and the return is eligible, it is available for selection during the EF process.

DRAKE 2018 - Calculation Results - (500-00-1005 - WATERSON, MINERAL)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	25,000	7,000	0	6,741	0	Receive Check	
VA760	25,000	20,140	412	1,019	0	Receive Check	


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:
VA Low Income Calculation NOT Allowed: Family AGI = \$25,000 Poverty Guideline = \$16,460

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Refund: 7,760

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

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

VIEW & PRINT A RETURN

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

Click the plus to expand and the minus to collapse categories.

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 for a quick print.

In this example, a quick print will print Form 1040.

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

Drake 2018 View/Print Client Return | WATERSON, MINERAL (500001005) - (CONTAINS SENSITIVE DATA)

Toolbar

Select Forms to View/Print

Form Category Tabs

Forms, Schedules, & Worksheets Generated for Return

Expand & Collapse Sections

Form 1040 U.S. Individual Income Tax Return 2018

Filing status: Single Married filing jointly Married filing separately Head of household Qualifying widow(er)

Your first name and initial: MINERAL Last name: WATERSON Your social security number: 500-00-1005

Your standard deduction: Someone can claim you as a dependent You were born before January 2, 1954 You are blind

If joint return, spouses first name and initial: FRES Last name: WATERSON Spouse's social security number: 400-00-5004

Spouse's name: BUBBLE Relationship to you: Daughter

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see inst.):
BUBBLE	WATERSON	400-00-5004	Daughter	<input checked="" type="checkbox"/> Child tax credit <input type="checkbox"/> Credit for other dependents

Preparer Use Only

Preparer's name: John Doe Firm's name: Firm Name Firm's address: 123 Main St, Franklin, NC 28734

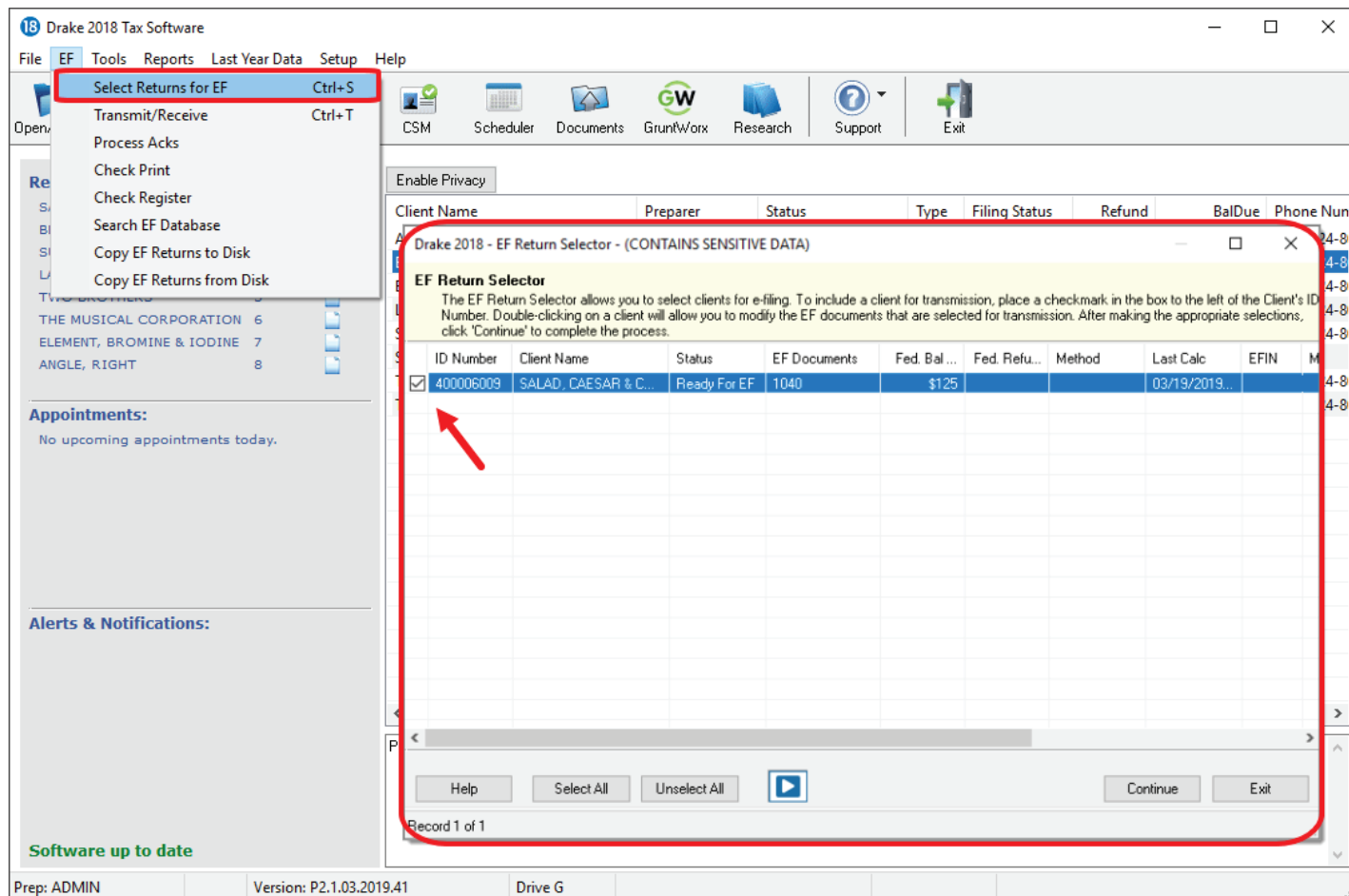
Form 1040 (2018)

1	2	3	4	5
1	Wages, salaries, tips	1	25,000	
2a	Tax-exempt interest	2b		
3a	Qualified dividend	3b		
4a	IRAs, pensions	4b		
5a	Social security	5b		

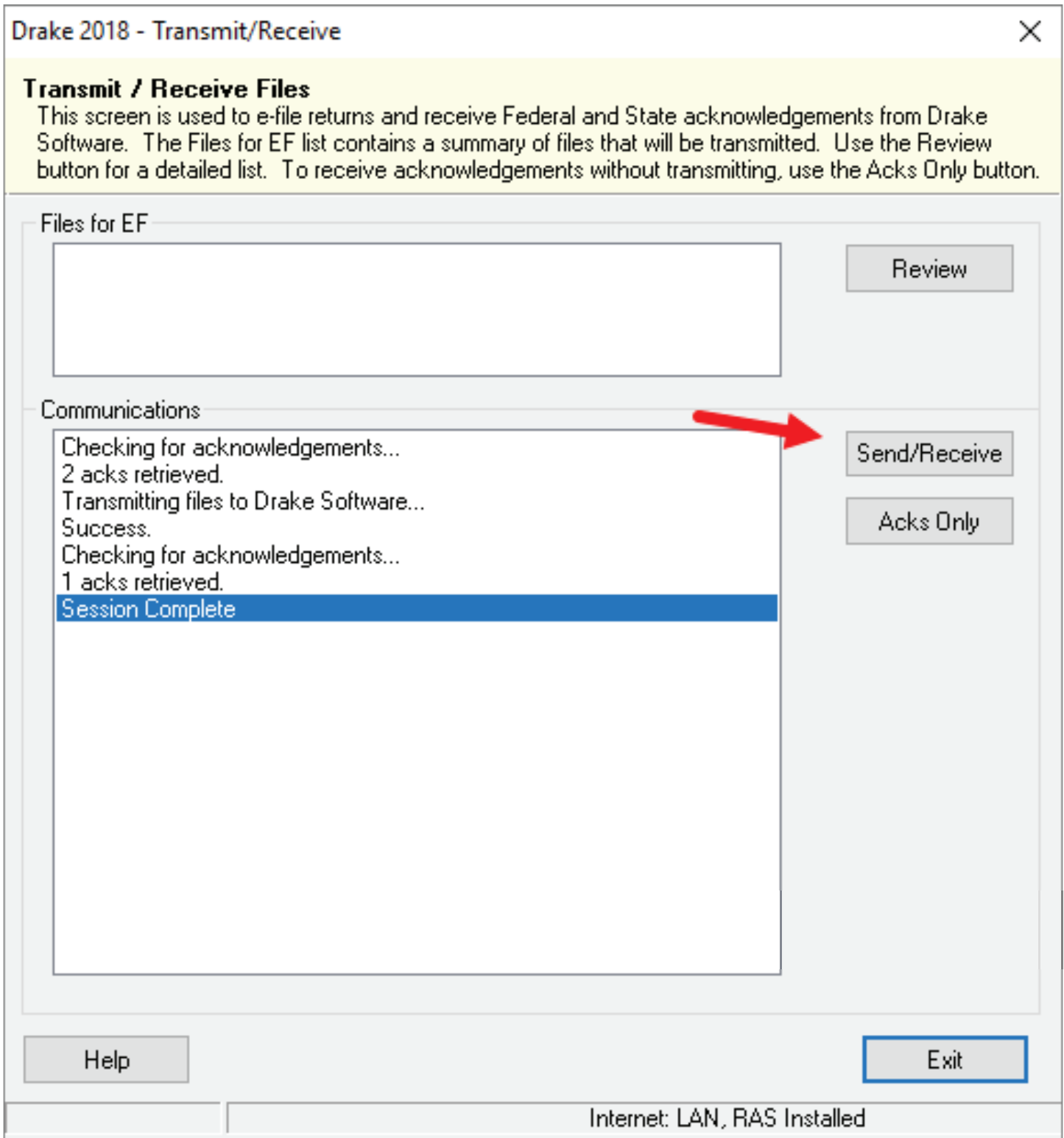
E-FILE A RETURN

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

- 1. Select Returns for e-File.** Choose **EF > Select Returns for EF** on the menu bar. Select the checkbox 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 SSN, ITIN, EIN, or last name and click **Go**. The EF database displays data about the return and the associated bank products, fees, reject codes, and more. Click the tabs to access more information about the return.

Drake 2018 - Search EF Database - (CONTAINS SENSITIVE DATA) ✕

SSN/EIN/Name to Search for:

Taxpayer:
 Spouse:

Name:

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

In Care of:	<input type="text"/>	Daytime Phone: <input type="text" value="8285248020"/>
Address:	<input type="text" value="144 ROMAINS ST"/>	Evening Phone: <input type="text"/>
City St Zip:	<input type="text" value="ALBERT"/> <input type="button" value="OK"/> <input type="text" value="73001"/>	Cell Phone: <input type="text"/>
On Behalf of:	<input type="text"/>	

Federal ACK Code:	1040	↖	State	<input type="text"/>			
ACK Date:	<input type="text" value="03/19"/>			<input type="text"/>			
Transmitted:	<input type="text" value="03/19"/> <input type="text" value="09:40"/>			<input type="text"/>			
Filing Status:	<input type="text" value="2"/>			<input type="text"/>			
Refund Amount:	<input type="text"/>			<input type="text"/>			
Balance Due:	<input type="text" value="125.00"/>			<input type="text"/>			

[Where is my refund?](#)

Payment Req.:

Bank Code:

DOB Validity:

RT/Loan Status:

Check Information:

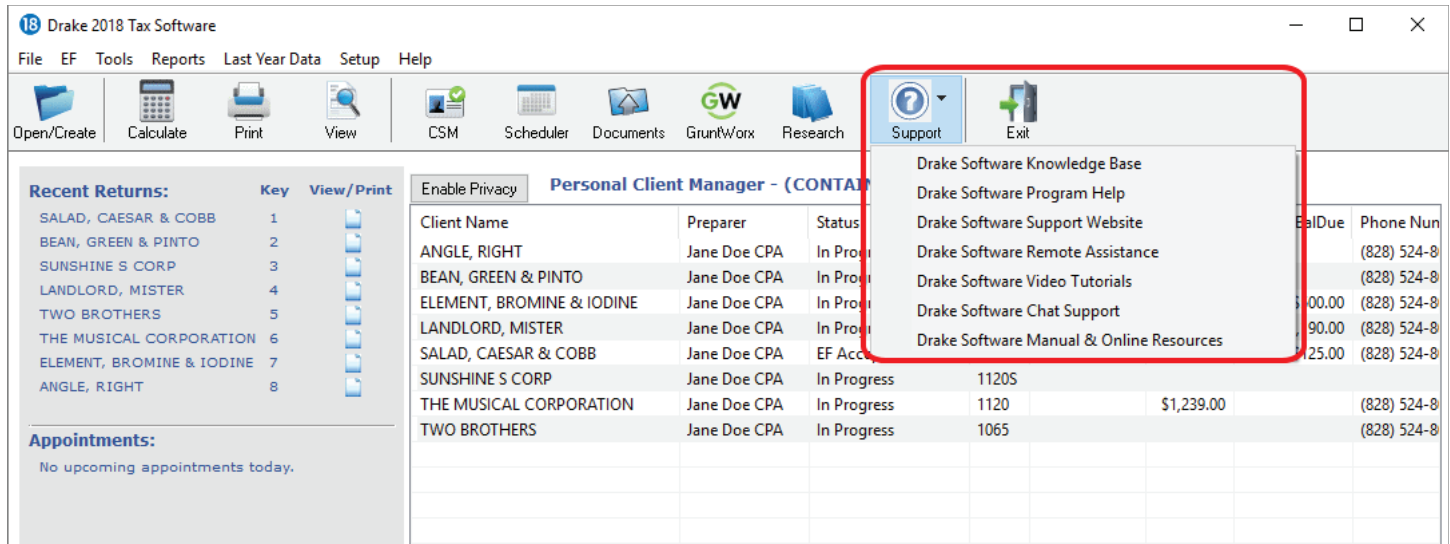
Ck	Status	Amount	Number	Prior #	Print Date	Clear Date	Ck Info	Ck Clear	Ck Type	Prod Type

Record: 1 of 2

No Search Criteria Entered.
 Scanning Entire Database.

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ACCESSING HELP



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

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

- **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." The 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 Website**, a website with links to all of our online help resources, including the Knowledge Base, Drake ETC 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 pubs, and Drake Software shipment letters, all in PDF format, readable online or available for download.