Getting Started

Drake Tax®

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Getting Started with Drake Tax

For a full, detailed documentation of each subject presented in this class, view the *2022 Drake Tax Manual*, located in the PDF folder on the Drake Software CD and from your User Account (*Support.DrakeSoftware.com* **> Support > Documents**).

Table of Contents

EFIN Registration

Before you can begin e-filing returns with Drake Tax, you must first register any valid IRS EFIN that you plan to use with Drake Software, including a copy of your e-File Application Summary from the IRS e-Services website.

When you are ready to submit a copy of your IRS e-File Application Summary (showing a status of "Completed"), sign in to your User Account (*Support.DrakeSoftware.com*), and take the following steps:

1. From the left menu pane, select **Account > Manage EFINs**.

2. On step 1, enter the **EFIN to register with Drake Software**.

3. On step 2, choose **Select File** to browse your computer for the applicable e-File Application Summary. This document must be a PDF.

4. **Submit** the document to Drake Software for validation.

Figure 1: The **Manage EFINs** Page

EFIN Registration FAQs

How do I access my e-File Application Summary from IRS e-Services?

1. Go to *irs.gov*, and select **Tax Pros** (located in the top-right) to open the **Tax Professionals** page.

2. Under **E-Services**, choose **Access e-Services**.

3. On the **e-Services** page, scroll down to the **E-Services Applications** section. Choose **E-file Provider Services**.

4. In the **E-file Application** section, select **Access e-file Application**, and sign in with your ID.me account.

5. Select the appropriate organization.

6. On the **External Services Authorization Management** page, click the blue eye icon in the **View/Edit** column.

7. In the **EFIN** section (near the bottom of the screen), verify that the EFIN status is **Active**.

8. Below the **Application Status**, choose **Print** to save a PDF copy of your Application Summary.

Can I verify my EFIN using the letter the IRS mailed me?

Unfortunately, no. The e-File Application Summary from your e-Services account is required.

Can I have more than one EFIN associated with my account?

Yes! But you must register each EFIN you plan to use.

How will I know when my EFIN is registered?

You will receive an email once Drake Software has verified your EFIN. Drake Software will contact you should there be additional issues.

Who can I call if I need help?

- Drake Software EFIN Management — (866) 273-9032

- IRS e-Services Help Desk — (866) 255-0654

- (*for information regarding your IRS account)* IRS Online Services Information Hotline — (888) 841-4648

Helpful Knowledge Base Articles

- [11426 — EFIN Registration or Change – What Drake Requires for e-Filing](#)
- [11475 — Get an EFIN; Become an IRS e-File Provider](#)
- [17449 — IRS – e-File Application Summary](#)

Setting Up Drake Tax

It is important to install Drake Tax and become familiar with the program as soon as you can. Drake Software recommends installing Drake Tax on the computers or network that you intend to use during tax season.

Drake Tax Versions

There are several versions of Drake Tax.

Trial

To request a trail version of Drake Tax, visit *DrakeSoftware.com*, and choose **Try Drake Tax**. Once you complete and **Submit** the required information, you will receive a confirmation email with a link to current-year download of Drake Tax. The trial version of Drake Tax:

- Is available April – November
- Can be updated to the full, current-year release for $300
- Can be updated to the full, prior-year release for free (beginning December)

Table 1 provides an overview of all features available with the trial version of Drake Tax.

Table 1: Drake Tax — Trial Functionality

Function	Available
Create federal and state returns[1]	✔
View and print returns	✔
Download state packages	✔
Update returns from prior year	✔
Reports	✔
File returns	
Change SSN or file type of return	
Drake User Account[2]	✔
Convert returns created using other tax programs	✔

Preseason Release (December)

The first version of Drake Tax is released in December prior to the start of tax season. This allows you to produce preseason documents for your customers, such as letters and contracts, as well as those that help clients gather the essential tax information you need (organizers). The preseason release is also the ideal time to get familiar with new program features and set up preparers, firms, banks, and program preferences. Download the preseason release from your User Account (*Support.DrakeSoftware.com*).

Full Release (January)

The full version of Drake Tax is released at the start of tax season in January. The full version of Drake Tax must be downloaded from your User Account and installed over the existing preseason version of Drake Tax. Note that no information is lost when installing the full release.

All applicable state programs are released with the second version of Drake Tax; watermarks are removed from approved forms, and e-file and bank product functionality are activated. Updates needed throughout the year are downloaded directly from Drake Software's servers as they become available.

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1   All forms produced when using the trial version of Drake Tax are watermarked and cannot be filed.

2   If you have not received your User Account login information, contact a Drake Software Sales Representative for assistance at (800) 890-9500,

Downloading Drake Tax

To download Drake Tax:

1. Sign in to your User Account (*Support.DrakeSoftware.com*).

2. From the blue menu pane, go to **Downloads > Drake Tax**.

3. Select the appropriate **Tax year**, and **Download** the **Drake22_Federal.exe** program.

Installing Drake Tax

Once you have downloaded the current-year Drake Tax program:

1. Open the downloaded file (**Drake22_Federal.exe**), and select **Yes** to begin the installation

2. Choose the **Install Drake Tax 2022** icon.

3. **Select a Drake Tax Software location** where you want the program installed. Mark the **Install Test Returns** check box, if desired, in addition to all applicable state packages. Click **Next**.

4. Accept the Drake Software 2022 License Agreement. Make sure **Licensed Version** is selected,and enter your **Account number** and **Serial number**. If you want to update your 2021 admin information to 2022, make a selection from the **Update Admin account from** drop list. Click **Next**.

5. Review the installation information displayed. If correct, select **Install**; otherwise, choose **Back** and correct information as needed.

6. The **Drake Tax Prerequisites Setup** window is opened when the installation is **Finished**. **Install** the necessary program prerequisites. Click **Finished** when the installation is complete.

Data Conversions

Once you become a Drake Software customer, you can bring your client's prior-year tax returns with you using our free conversion service.

The conversion process converts as much information as possible that is meant to remain unchanged for the upcoming tax year; it is not intended to recreate prior-year tax returns.

To download conversion programs and view conversion instructions, sign in to your Drake Software User Account, and navigate to **Downloads > Conversions**. Choose the desired **Conversion for Drake Tax** year, and select the program from which you will convert returns. Each applicable field and form that can be converted is accessible from the respective **Packages Converted** link.

Table 2 lists all conversions currently supported by Drake Software.

Table 2: Available Data Conversion Programs

Program	Supported Packages
ATX™	1040, 1041, 1065, 1120, 1120-S
Crosslink®	1040
Lacerte®	1040, 1041, 1065, 1120, 1120-S
ProSeries®	1040, 1041, 1065, 1120, 1120-S
ProSystem FX®	1040, 1041, 1065, 1120, 1120-S
TaxAct®	1040, 1041, 1065, 1120, 1120-S
TaxSlayer®	1040
TaxWise®	1040, 1041, 1065, 1120, 1120-S
TurboTax® by Intuit®[3]	1040
UltraTax®	1040, 1041, 1065, 1120, 1120-S

To install a conversion program:

1. From *Support.DrakeSoftware.com* **> Downloads > Conversions**, choose the product from which to convert your returns. The download begins automatically.

2. Run the downloaded **DrakeConversion.exe** file.

3. Follow the on-screen prompts to complete the installation.

For detailed instructions, download the respective conversion **Instructions** from the **Download Software** page of your User Account.

Training

Select **Training** from your User Account menu to view a complete list of all training and educational resources Drake Software has to offer. Notable resources include:

- **Classroom Training** — Learn about the latest tax laws and how to use a multitude of Drake Software products, and earn CPE credits while doing it. Sessions are available both in person and online.

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3   No download available. Files must be sent to Drake Software for conversion. Contact the Conversions Support team at (828) 349-5546 for details.

- **Videos** — Follow along with Drake Software experts as they demonstrate the many useful tools and programs within the Drake Software program suite, as well as how to set up Drake Tax and navigate tricky return scenarios.

- **DrakeCPE®** — Access recorded webinars, tax courses, and Drake Software's AFTR course, and earn CPE credits while learning more about such topics as the Inflation Reduction Act, EITC due diligence and avoiding an EITC audit, ethical standards, safeguarding client information, tax treatment of retirement plans and IRAs, section 199A pass-through deductions, and completing S corporation returns.

Resources

Table 3 provides a list phone numbers and emails you can use to reach the team you need.
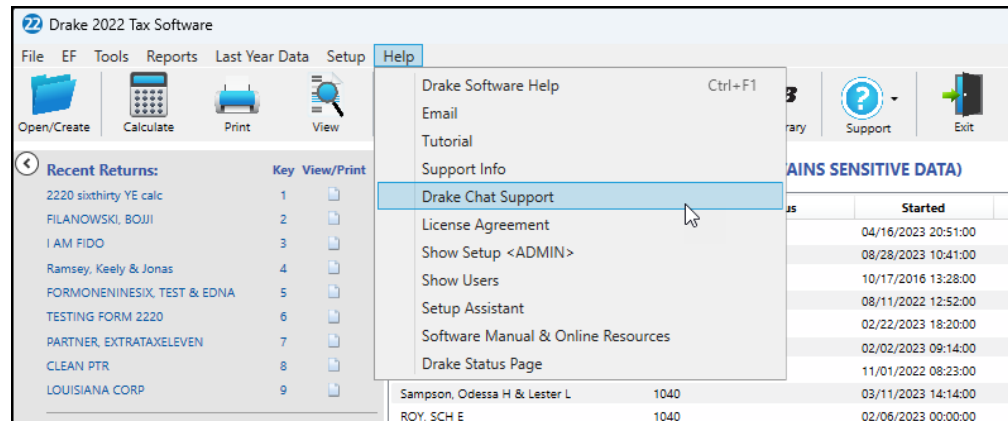
Table 3: Drake Software Directory

Team	Contact Information
Accounting (Department – Billing)	Accounting@DrakeSoftware.com (828) 349-5900
Education	Education@DrakeSoftware.com
EFIN Management	(866) 273-9032
Support (Drake Accounting®)	DAS@DrakeSoftware.com (828) 349-5908
Support (Drake Tax – General)	Support@DrakeSoftware.com (828) 524-8020
Support (Drake Tax – State-Specific)	STState@DrakeSoftware.com[4]

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4   Replace "ST" with the respective state's two-letter abbreviation.

Chat Support

To chat with a Drake Software Support agent, from the menu bar of the Drake Tax **Home** window, select **Help > Drake Chat Support**.

Figure 2: Accessing Drake Software Support Chat

Drake Software Knowledge Base (KB)

The Drake Software Knowledge Base is a searchable database of articles that address all sorts of topics, from tax law and program help to official Drake Software, IRS, and state revenue department announcements. There are thousands of articles covering many aspects of Drake Tax, as well as supplemental Drake Software tools and programs, including bank products, e-file restrictions, Drake Portals™, GruntWorx®, and Drake Accounting.

Access the Knowledge Base at *KB.DrakeSoftware.com* or from the menu bar of the Drake Tax **Home** window via **Support > Knowledge Base**.

Documents

Visit the **Support > Documents** page of your User Account to access most of Drake Software's published material, including:

- Drake Tax manuals
  ○ *2022 Drake Tax Manual*
  ○ *2022 Drake Tax Manual – Pay-Per-Return (PPR)*
  ○ *2022 Drake Tax Manual – Individual, Gift Tax, and Estate Returns*
  ○ *2022 Drake Tax Manual – Business Returns*
- What's New for 2022
- The *2023 Drake Accounting Manual*

- The [2022 Desk Reference Guide](), with important facts for professional tax return preparers
- [Free infographics]()
- Drake Tax shipment letters (federal and state)