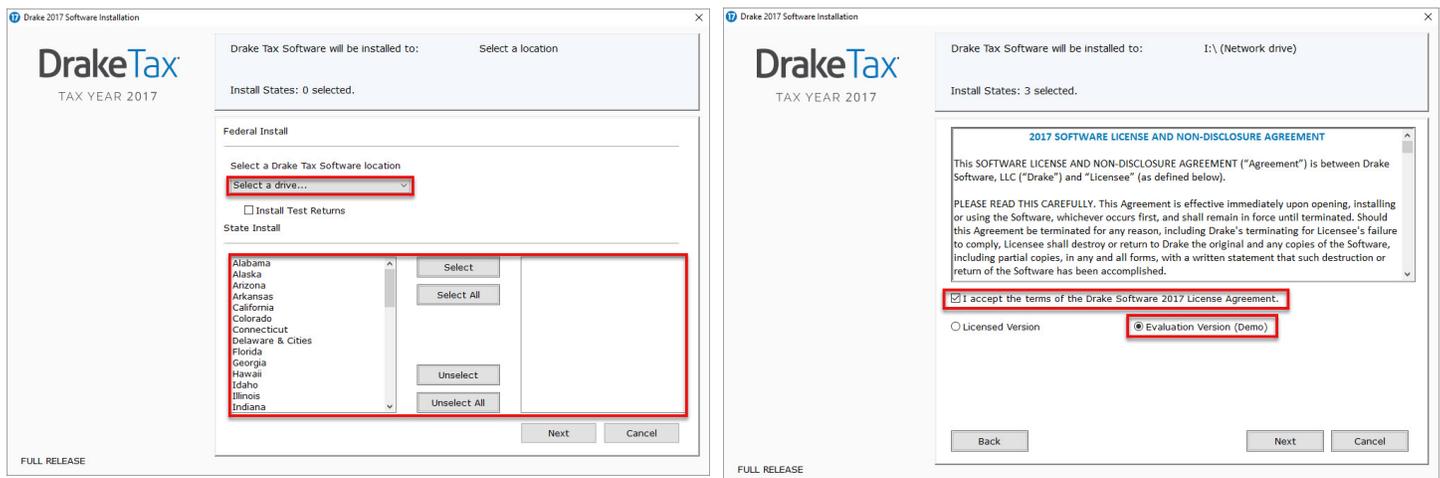


INSTALLATION

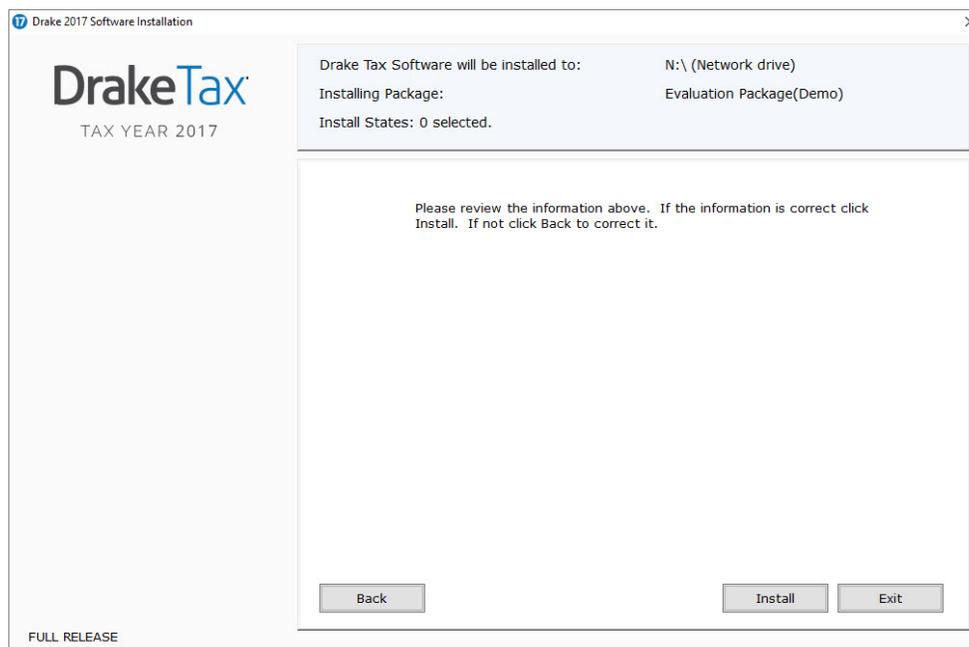
Install Drake Tax from your demo CD or from the online Download Center. On the **Software Installation** screen, choose an install location for Drake Tax from the **Select a drive** drop list, then select the states you want to install from the **State Install** window—choose all that apply—and click **Next** to continue.

Note: Select the **Install Test Returns** check box if you want to view example returns while learning Drake Tax.

If you agree to the license and nondisclosure agreement, select the **I accept the terms of the Drake Software 2017 License Agreement** check box. Then select the **Evaluation Version (Demo)** option and click **Next**.



You will now be prompted by the **Installation** dialog box. 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**.

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

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 for e-filing, program updates, and more.

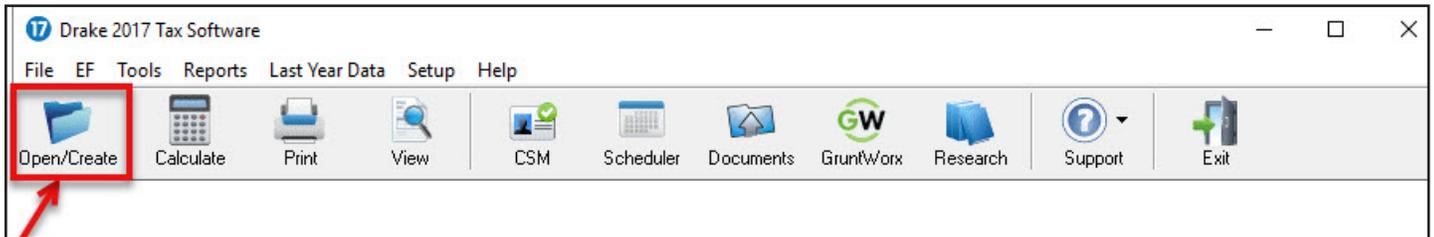
If you have not registered your demo, click **Register an account**.

The screenshot displays the Drake 2017 Tax Software interface. The main window has a menu bar (File, EF, Tools, Reports, Last Year Data, Setup, Help) and a toolbar with icons for Open/Create, Calculate, Print, View, CSM, Scheduler, Documents, GruntWorx, Research, Support, and Exit. The main area is titled "Personal Client Manager - (CONTAINS SENSITIVE DATA)" and contains a table with columns: Client Name, Type, Status, Started, Completed, Last Change, and Tran Date. The table is currently empty. On the left side, there are sections for "Recent Returns:", "Appointments:" (with the text "No upcoming appointments today."), and "Notifications:". A "Drake 2017 - Setup Assistant" dialog box is overlaid on the main window, highlighted with a red border. The dialog box has a yellow header "E-File Setup" and contains the following text: "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." Below this text is a checkbox labeled "Do not show Setup Assistant on startup." and a link "Don't have an account yet? Register an account". Under the heading "Setup Information", there are three input fields: "Account Number", "EFIN", and "e-File Password". At the bottom of the dialog box are "Save" and "Cancel" buttons.

OPEN A RETURN

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

Note: Enter the client's SSN or EIN to create a new return.



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

Drake 2017 - Open / Create a New Return

Enter a SSN, ITIN, or EIN to open an existing return or to create a new return.

Search: To search for a return, enter a primary taxpayer's last name or a business entity name and press the Enter key or click OK. The closest match will be selected automatically. Narrow your search by selecting the desired return PACKAGE TYPE on the right of this screen.

500001005

Name	SSN
BEANS, COFFEE	500001001
HERB, OREGANO & ROSEMARY	500001006
LEAF, DILL & CURRY	500001007
MUSTARD, WASABI	500001002
PEA, SNOW & SNAP	500001008
ROOT, SASSAFRAS	500001004
SEASONS, SAFFRON & TURERIC	500001003
TEA, MINT	500001005

Last 9 All Clients
 1040
 1120
 1120S
 1065
 1041
 990
 706

Help Create return using temporary ITIN OK Cancel

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 2017 Data Entry interface. At the top, the window title is "DRAKE 2017 - Data Entry (500001005 - TEA, MINT) - (CONTAINS SENSITIVE DATA)". Below the title bar is a toolbar with icons for Calculate, View, Print, Split, Documents, Tax Planner, Import, CSM, Email, e-Pay, Help, and Exit. The main menu has tabs for General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The "Miscellaneous" tab is selected and highlighted in blue. The menu lists various screens with their codes and descriptions. Red boxes and arrows highlight specific elements: "1" and "W2" are boxed in the left column; "Screen Codes" and "Screens with Data" are labeled with arrows pointing to the left column; "Data Entry Menu Tabs" is labeled with an arrow pointing to the "Miscellaneous" tab; and "Selector/Search Field" is labeled with an arrow pointing to the input field at the bottom.

Screen Code	Screen Name
1	Name and Address
2	Dependents - (2)
3	Income
4	Adjustments
5	Taxes, Credits and Payments
ES	Estimated Taxes
2441	Child Care Credit
W2	Wages
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
RRB	RRB 1099-R Railroad Retirement
SSA	1099-SSA Social Security
PAD	Preparer Notepad
NOTE	Notes about the return
FAQ	Frequently Asked Questions
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: 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 2017 - Data Entry (500001005 - TEA, MINT) - (CONTAINS SENSITIVE DATA)

Name and Address and General Information

Taxpayer

Filing Status: **4** Head of Household
SSN: 500-00-1005
First name: MINT MI:
Last name: TEA Suffix:
Date of birth: 09-03-1971 Age: 46 (as of 12/31/2017)
Date of death:
Occupation: SALES
Phone Number: Daytime: 828-524-8020 Extension:
Evening: 828-524-8020 Extension:
Cell:
Best time to call: Print on return:
Fax:
Email / text msg:
 Dependent of another Full-time student Presidential campaign Blind
Taxpayer did not live with spouse:
Health insurance coverage: [HC](#)

Spouse

SSN:
First name: MI:
Last name: Suffix:
Date of birth:
Date of death:
Occupation:
Phone Number: Daytime: Extension:
Evening: Extension:
Cell:
Best time to call: Print on return:
Fax:
Email/text msg:
 Dependent of another Full-time student Presidential campaign Blind
 Nonresident alien MFS/HOH claiming spouse exemption
 Spouse is not filing a return Spouse has no U.S. income

In care of: [ID Screen](#)

Mailing Address

Street address: 10 SPEARMINT LEAVES Apt #:
City: SANTA FE [Combat Zone](#)
U.S. ONLY State: NM ZIP: 87505 County: SANTA FE Stateside military address
Foreign ONLY Province/State: Country: Postal Code:

Resident state: 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 #:
Data entry #: Invoice number:
ERO #: Fee override:

2210 Options

2210 Code:
2016 Fed tax: 0
2016 State tax: 0

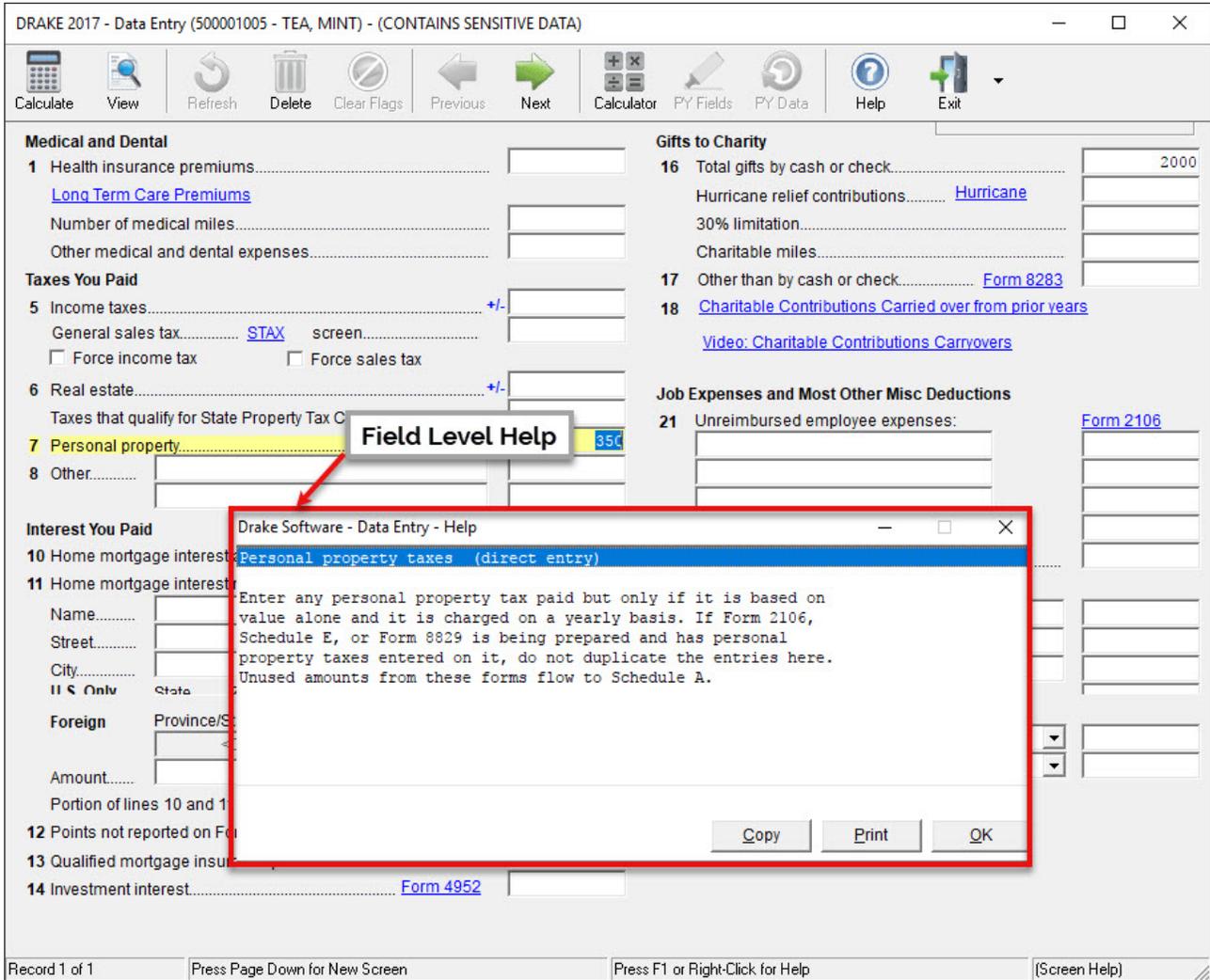
Miscellaneous Codes

Code 1:
Code 2:
Code 3:
Code 4:
Code 5:

FIELD HELP

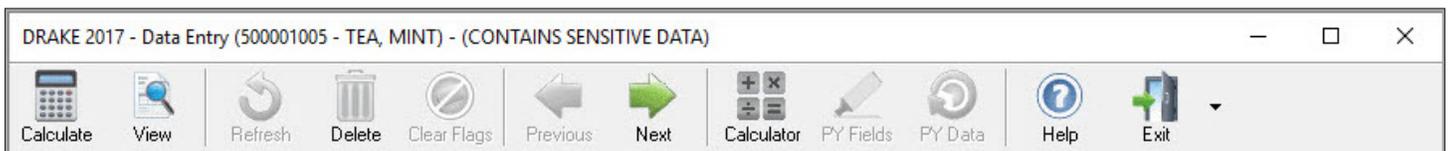
Field help provides information about a selected field. There are three ways to access field help:

- 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



Press Esc to save data and exit the screen.

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.



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 2017 - Data Entry (500001005 - TEA, MINT) - (CONTAINS SENSITIVE DATA)

Form W2 - Wage and Tax Statement

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

TS F Special tax treatment State Information [IN](#) [NJ](#) [NY](#) [PA](#)

Employer information is required for e-file

EIN..... 51-0000000
 Name..... FANTASTIC EMPLOYER
 Name cont.....
 Street..... 200 JOB CIRCLE
 City..... SANTA FE
 U.S. ONLY State ZIP
 NM 87505
 Foreign ONLY Province/State Country Postal Code
 <Click to Access>

1 Wages, tips 2 Federal tax w/h
 32500 3250
 3 Soc Sec wages 4 Soc Sec w/h
 32500 2015
 5 Medicare wages 6 Medicare tax w/h
 32500 471
 7 Soc Sec tips 8 Allocated tips
 9 Verification Code 10 Dep care benefit

Employee name and address (if different from screen 1)

Name: First = MINT Last = TEA
 Street = 10 SPEARMINT LEAVES
 City = SANTA FE
 U.S. ONLY State ZIP
 NM 87505
 Foreign ONLY Province/State Country Postal Code
 <Click to Access>

11 Non-qual plan 12 Code Amount Year
 13 Stat 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**.

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. 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 2017 - Data Entry (500001005 - TEA, MINT) - (CONTAINS SENSITIVE DATA)

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

PIN signature date..... 03-06-2018 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..... 97158 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)

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 2017 Data Entry software interface. At the top, the title bar reads "DRAKE 2017 - Data Entry (500001005 - TEA, MINT) - (CONTAINS SENSITIVE DATA)". Below the title bar is a toolbar with various icons: Calculate, View, Refresh, Delete, Clear Flags, Previous, Next, Calculator, PY Fields, PY Data, Help, and Exit. The Help button, which is a question mark icon, is highlighted with a red box. A red arrow points from this button to a pop-up window titled "Drake Software - Data Entry - Help - PIN Form 8879".

The main data entry screen contains several sections:

- A declaration: "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."
- Input fields for "Taxpayer's PIN signature" (containing "97159") and "Spouse's PIN signature".
- Checkboxes for "Taxpayer entered:", "Spouse entered:", and "Identity Protection PIN" (two instances).
- A "Select Form:" section with a checkbox for "1040 (default)".
- A "Direct Debit Consent" section with a checkbox for "Direct Debit Consent".
- A long paragraph of text: "I authorize the U.S. Treasury and its design... financial institution account indicated for p... tax. I further understand that this authoriza... through the Electronic Federal Tax Paymen... IRS send me a personal identification num... effect until I notify the U.S. Treasury Finan... the U.S. Treasury Financial Agent at 1-888... date."
- A "Form 2350/9465 Only" section with a "Taxp" label and input fields for "Prior Year AGI" and "Prior-year PIN".
- A note: "Press Page Down for New York E-File/Dir".

The pop-up help window provides detailed information about Form 8879:

- Title: "Drake Software - Data Entry - Help - PIN Form 8879"
- Section: "Form Allows Individual Electronic Filer to Select Signature PIN and Authorize ERO to Enter It on Return"
- Text: "IRS has issued Form 8879, IRS e-file Signature Authorization, that allows individual filers of electronic income tax returns to select a PIN number to serve as their signature, and to authorize an electronic return originator (ERO) to enter the PIN number on the return for them."
- Section: "Individual taxpayers use Form 8879 to:"
- List of responsibilities:
 - * Certify the truthfulness, correctness, and completeness of the taxpayer's electronic income tax return
 - * Select a Personal Identification Number (PIN) as the signature for their electronic income tax return and, if applicable, the Electronic Funds Withdrawal Consent
 - * Authorize the electronic return originator (ERO) to enter the taxpayer's PIN as the taxpayer's signature on the electronic income tax return, and if applicable, the Electronic Funds Withdrawal Consent
- Text: "In some instances, taxpayers might wish to select their own PIN but indicate they are unavailable or unable to return to the ERO's office, or that it is inconvenient for them to sign the electronically prepared individual income tax return. These taxpayers can authorize the ERO to enter their selected PINs by selecting the appropriate box in the form."
- Section: "ERO responsibilities:"
- List of responsibilities:
 - * EROs must provide Form 8879 to taxpayers who wish to authorize
- Buttons: "Copy", "Print", "OK"

At the bottom of the software window, the status bar shows "Record 1 of 1", "Press F1 or Right-Click for Help", and "(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 2017 - Data Entry (500001005 - TEA, MINT) - (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 tabbed menu with the following tabs: General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The States tab is selected and highlighted with a red box. Below the tabs is a list of state abbreviations and names, organized in three columns. The list includes: AL Alabama, AR Arkansas, AZ Arizona, CA California, CO Colorado, CT Connecticut, DC Washington, DC, DE Delaware, FL Florida, GA Georgia, HI Hawaii, IA Iowa, ID Idaho, IL Illinois, IN Indiana, KS Kansas, KY Kentucky, LA Louisiana, MA Massachusetts, MD Maryland, ME Maine, MI Michigan, MN Minnesota, MO Missouri, MS Mississippi, MT Montana, NC North Carolina, ND North Dakota, NE Nebraska, NH New Hampshire, NJ New Jersey, NM New Mexico, NV Nevada, NY New York, OH Ohio, OK Oklahoma, OR Oregon, PA Pennsylvania, RI Rhode Island, SC South Carolina, TN Tennessee, TX Texas, UT Utah, VA Virginia, VT Vermont, WI Wisconsin, and WV West Virginia. Below the list are two additional entries: STEX State Extensions and 99K 1099-K Third Party Payments. At the bottom of the interface is a text input field containing the state code "NY", which is highlighted with a red box. The bottom status bar shows: Return Status: In Progress, Return Type: Individual Tax Return, and Current Package: Federal.

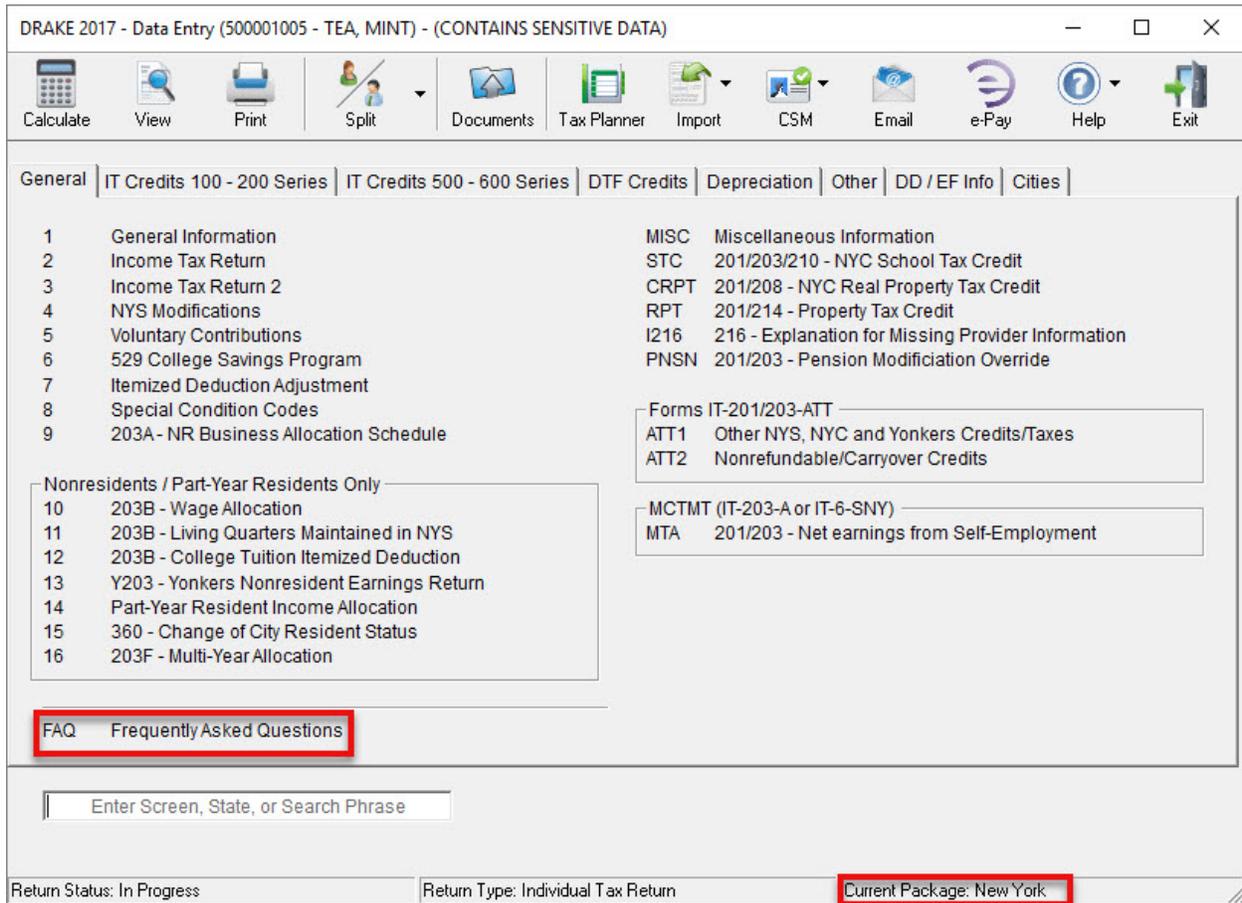
AL	Alabama	KY	Kentucky	NV	Nevada
AR	Arkansas	LA	Louisiana	NY	New York
AZ	Arizona	MA	Massachusetts	OH	Ohio
CA	California	MD	Maryland	OK	Oklahoma
CO	Colorado	ME	Maine	OR	Oregon
CT	Connecticut	MI	Michigan	PA	Pennsylvania
DC	Washington, DC	MN	Minnesota	RI	Rhode Island
DE	Delaware	MO	Missouri	SC	South Carolina
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
99K 1099-K Third Party Payments

NY

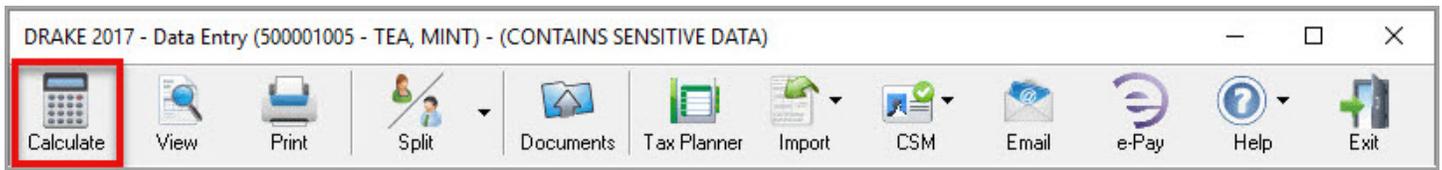
Return Status: In Progress Return Type: Individual Tax Return Current Package: Federal

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 2017*.



Note: To download additional state programs, go to **Tools > Install State Programs** from the Drake Tax **Home** window.

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 indicated the return is not eligible for e-file, having 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 for a return to be eligible for e-file.

DRAKE 2017 - Calculation Results - (500-00-1005 - TEA, MINT)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Method	EF Status
Federal	32,500	11,000	1,103	6,776	0	Receive Check	X
NCD400	32,500	18,500	817	0	817	Check or CC	X

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	5092	INVALID PIN: The taxpayer's PIN must be five digits (Do not use five...
NC	9069	Taxpayer PIN signature entered on the "PIN" screen...

Return Notes:
NC Electronic Filing NOT allowed - See Message Page

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Refund: 5,959

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 2017 - Calculation Results - (500-00-1005 - TEA, MINT)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Method	EF Status
Federal	32,500	11,000	1,103	6,776	0	Receive Check	
NCD400	32,500	18,500	817	0	817	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 Refund: 5,959

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 the forms generated for the return are listed in the tree view in the left pane.

Click to expand or collapse the 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* mode and return to data entry, press CTRL + E or click **Data Entry** from the toolbar.

The screenshot displays the Drake 2017 View/Print Client Return interface. The window title is "Drake 2017 View/Print Client Return | TEA, MINT (500001005) - (CONTAINS SENSITIVE DATA)".

Toolbar: Located at the top, it includes buttons for Data Entry, Print, Setup, Documents, eSign, Email, Refresh, Basic View, 8615 Export, Help, and Exit. A red arrow points to the toolbar.

Form Category Tabs: Below the toolbar, there are tabs for "All Forms", "Sets", "EF", "Federal", "Worksheets", "Miscellaneous", and "Notes/Messages". A red arrow points to the "All Forms" tab.

Forms and Schedules Generated: A tree view on the left lists various forms and schedules, including "Form 1040", "Form 8879", "Form 9325", "Wks CCLMT", "Wks 8812", "Wks 8879", "Tax Act Impact", "Folder Cover Sheet", "Filing Instructions", "Engagement Letter", "Result Letter", "Privacy Policy", "Bill", "Summary", and "Comparison". A red arrow points to the "Form 1040" entry.

Expand or Collapse Sections: A red arrow points to the expand/collapse icons in the tree view.

Main Form Content: The main area displays the "1040 U.S. Individual Income Tax Return 2017" form. The form includes the following fields and values:

- Department of the Treasury - Internal Revenue Service (99)
- OMB No. 1545-0074
- IRS Use Only: Do not write or staple in this space.
- For the year Jan. 1-Dec. 31, 2017, or other tax year beginning , 2017, ending , 20
- See separate instructions.
- Your first name and initial: MINT
- Last name: TEA
- Your social security number: 500-00-1005
- Spouse's social security number: (blank)
- City, town or post office, state, and ZIP code: SANTA FE
- Foreign country name: (blank)
- Foreign province/state/county: (blank)
- Foreign postal code: (blank)
- 4 Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here.
- 5 Qualifying widow(er) (see instructions)

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 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 2017 Tax Software

File EF Tools Reports Last Year Data Setup Help

Select Returns for EF Ctrl+S

Transmit/Receive Ctrl+T

Process Acks

Check Print

Check Register

Search EF Database

Copy EF Returns to Disk

Copy EF Returns from Disk

Personal Client Manager - (CONTAINS SENSITIVE DATA)

Client Name ID Number Type Status Started Completed Last Change

Drake 2017 - 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. Double-clicking on a client will allow you to modify the EF documents that are selected for transmission. After making the appropriate selections, click 'Continue' to complete the process.

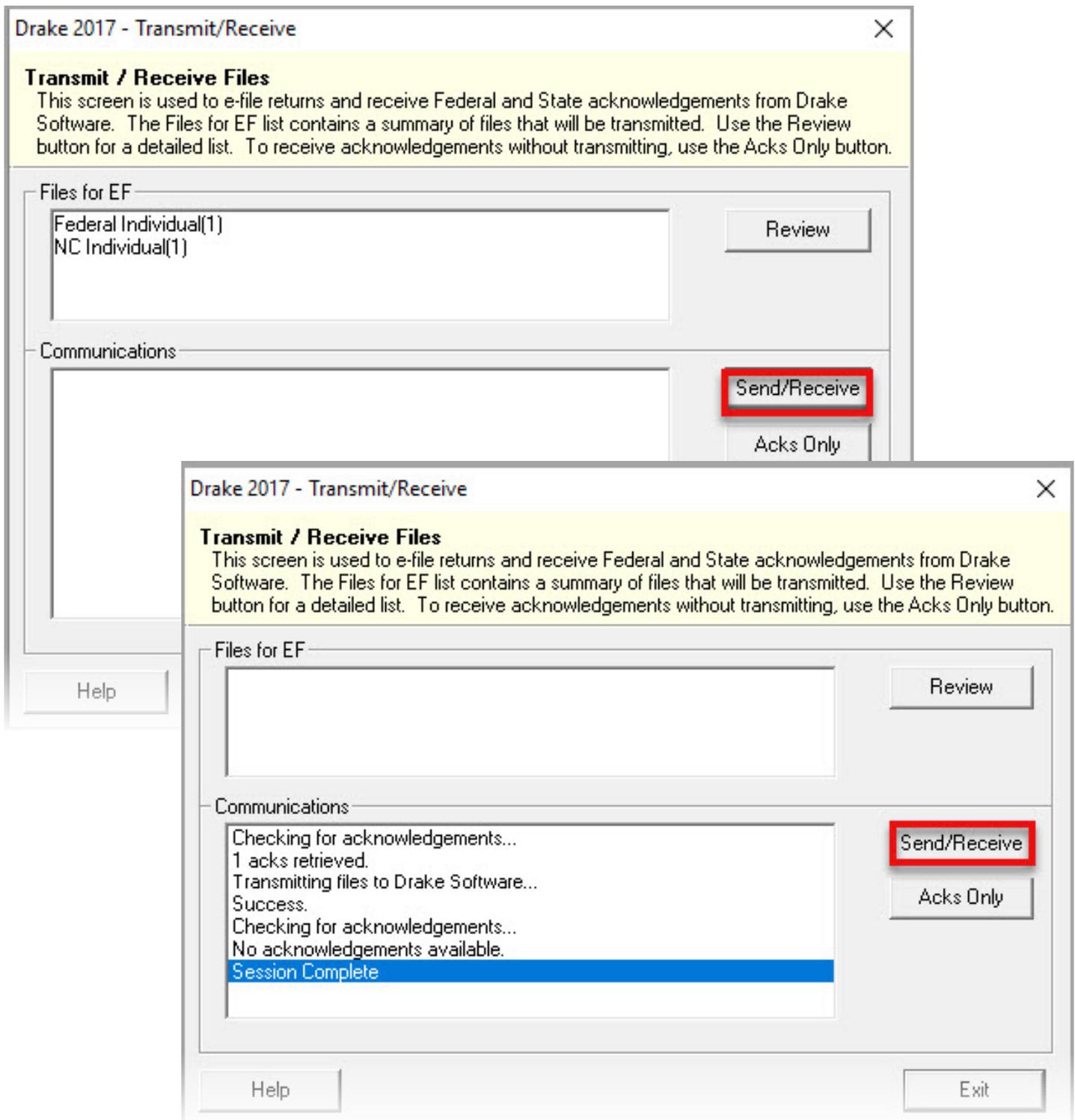
ID Number	Client Name	Status	EF Documents	Fed. Bal ...	Fed. Refu...	Method
<input checked="" type="checkbox"/> 500001005	TEA, MINT	Ready For EF	1040, NCD400		\$6,776	
<input type="checkbox"/> 500001003	SEASONS, SAFFRON...	Ready For EF	1040		\$1,704	
<input type="checkbox"/> 500001004	ROOT, SASSAFRAS S	Ready For EF	1040	\$868		
<input type="checkbox"/> 500001008	PEA, SNOW/ & SNAP	Ready For EF	1040		\$1,788	
<input type="checkbox"/> 500001007	LEAF, DILL & CURRY	Ready For EF	1040	\$623		
<input type="checkbox"/> 500001006	HERB, OREGANO & ...	Ready For EF	1040		\$2,208	
<input type="checkbox"/> 500001001	BEANS, COFFEE	Ready For EF	1040		\$2,381	

Help Select All Unselect All Continue Exit

Record 1 of 7

Prep: ADMIN DEMO Version: P2.01.02.2018.26 Drive I Windows 10 Pro 03-06-2018

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 2017 - Search EF Database - (CONTAINS SENSITIVE DATA)

SSN/EIN/Name to Search for: **TEA** SSN: Taxpayer: **500001005** Name: **TEA, MINT**
 Spouse:

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

In Care of: Address: **10 SPEARMINT LEAVES** City St Zip: **SANTA FE NM 87505** On Behalf of: State Only State **NC** NCD400
 Federal ACK Code: ACK Date: Transmitted: **03/06 13:30** Filing Status: **4** Refund Amount: Balance Due: **817.00**
 Daytime Phone: **8285248020** Evening Phone: **8285248020** Cell Phone: Reject Code Form I.D. Form # Seq #
 Payment Req.: Bank Code: RT/Loan Status: DOB Validity:

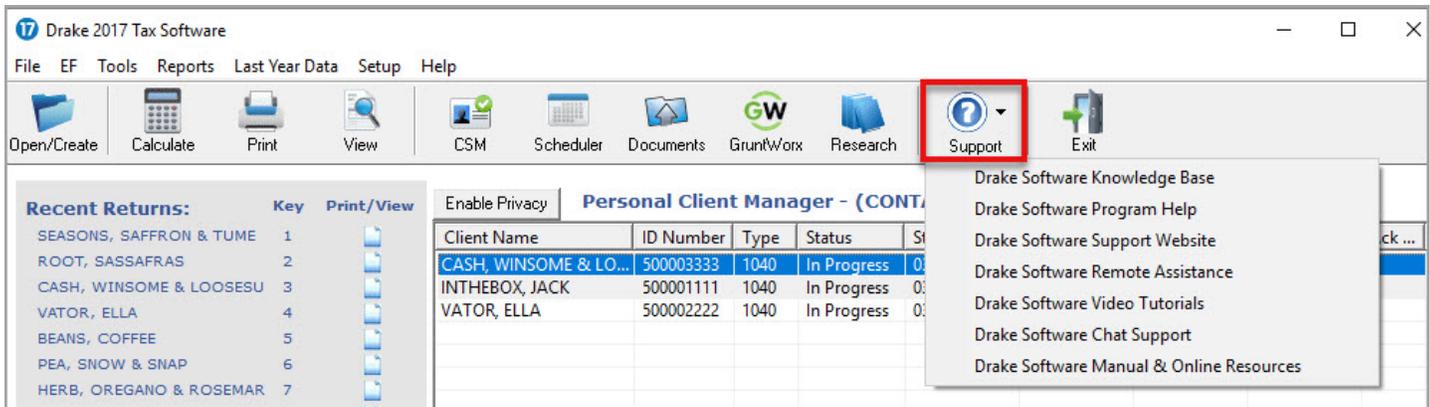
Check Information:

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

Record: 1 of 2

ACK Date: - ACK Code - [No ACK] - State: NC - State Only - TEA, MINT
 ACK Date: - ACK Code - [No ACK] - TEA, MINT

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 how-to videos on 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.

Thank you for choosing Drake Tax.

We look forward to helping you make next tax season your best ever!