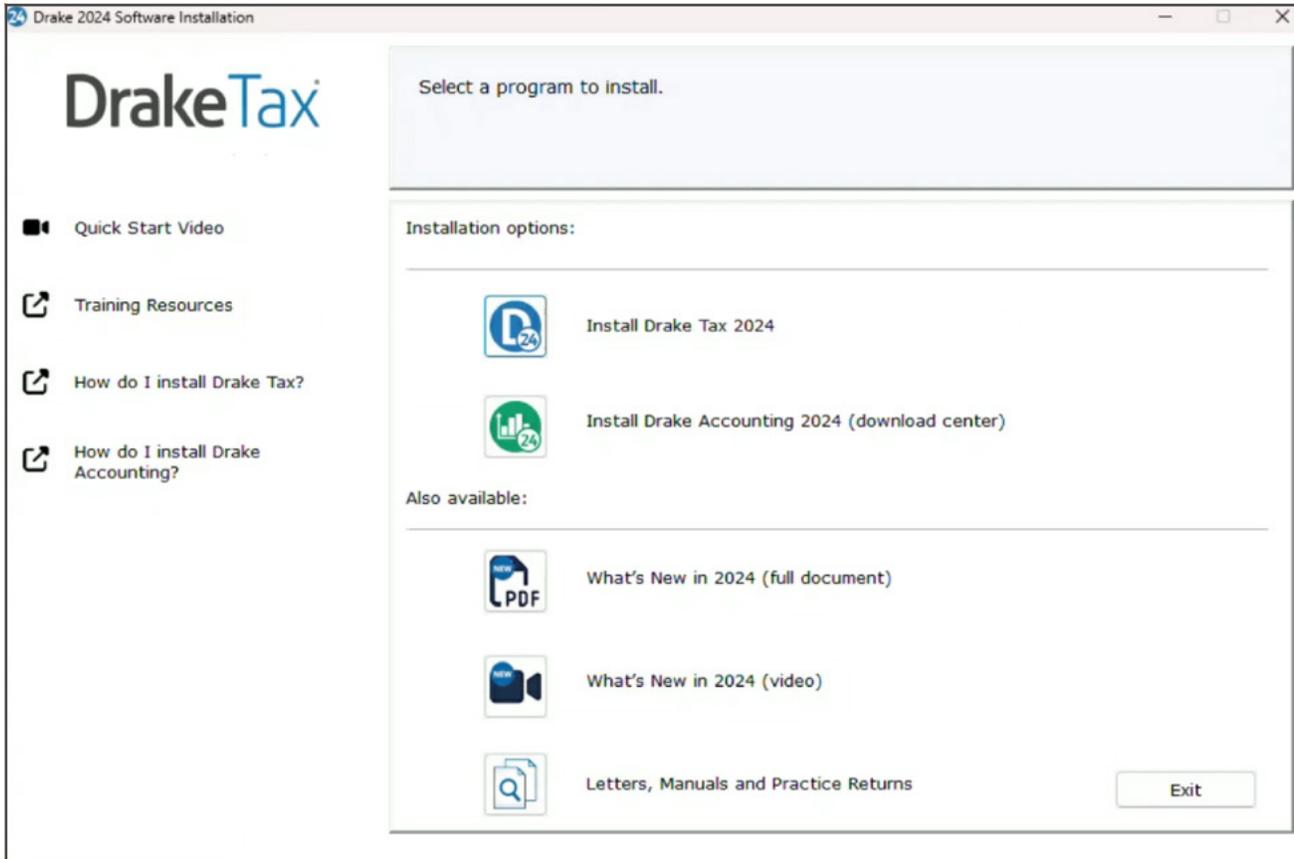


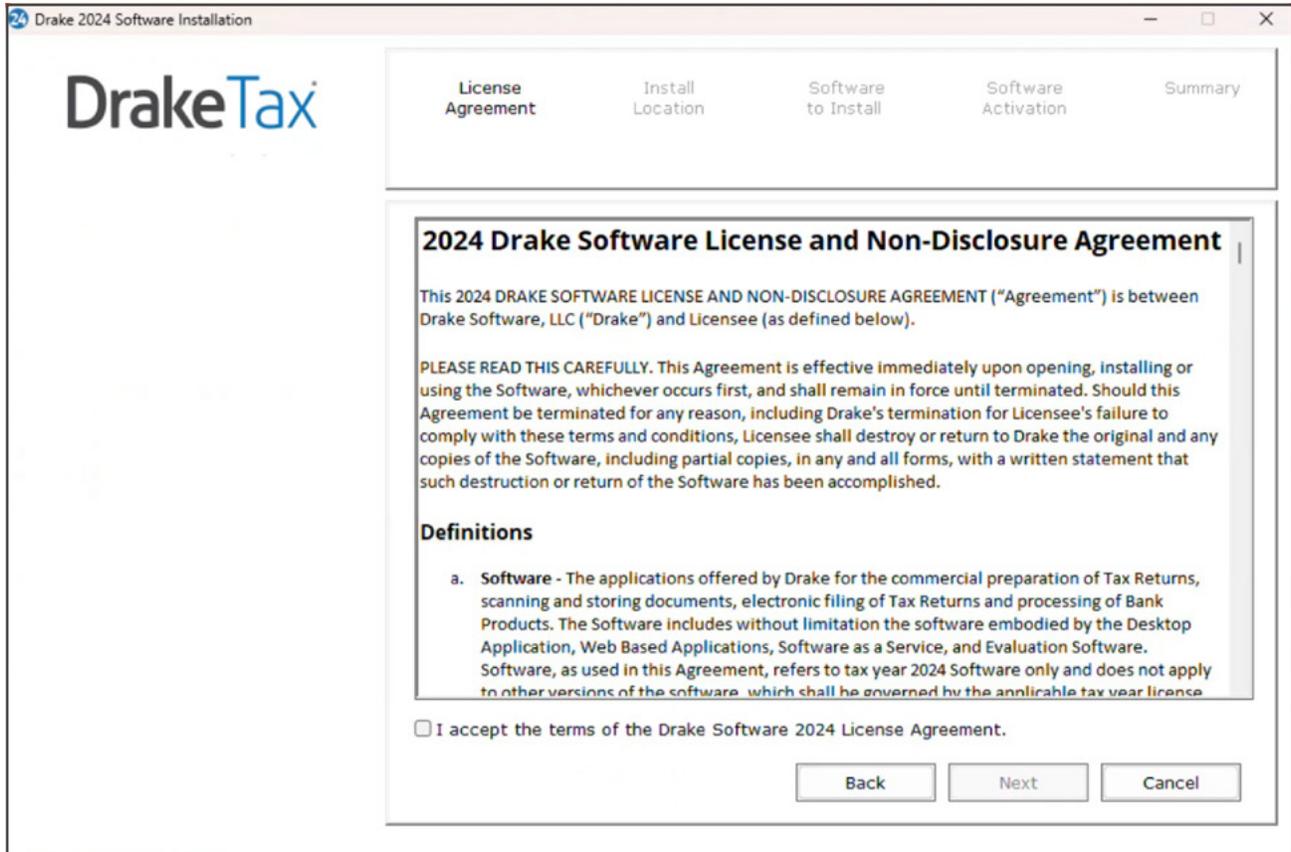
INSTALLATION

Install Drake Tax® from the email link or the Drake Software Support site ([Support.DrakeSoftware.com](https://support.drakesoftware.com) > **Downloads** > **Drake Tax**).

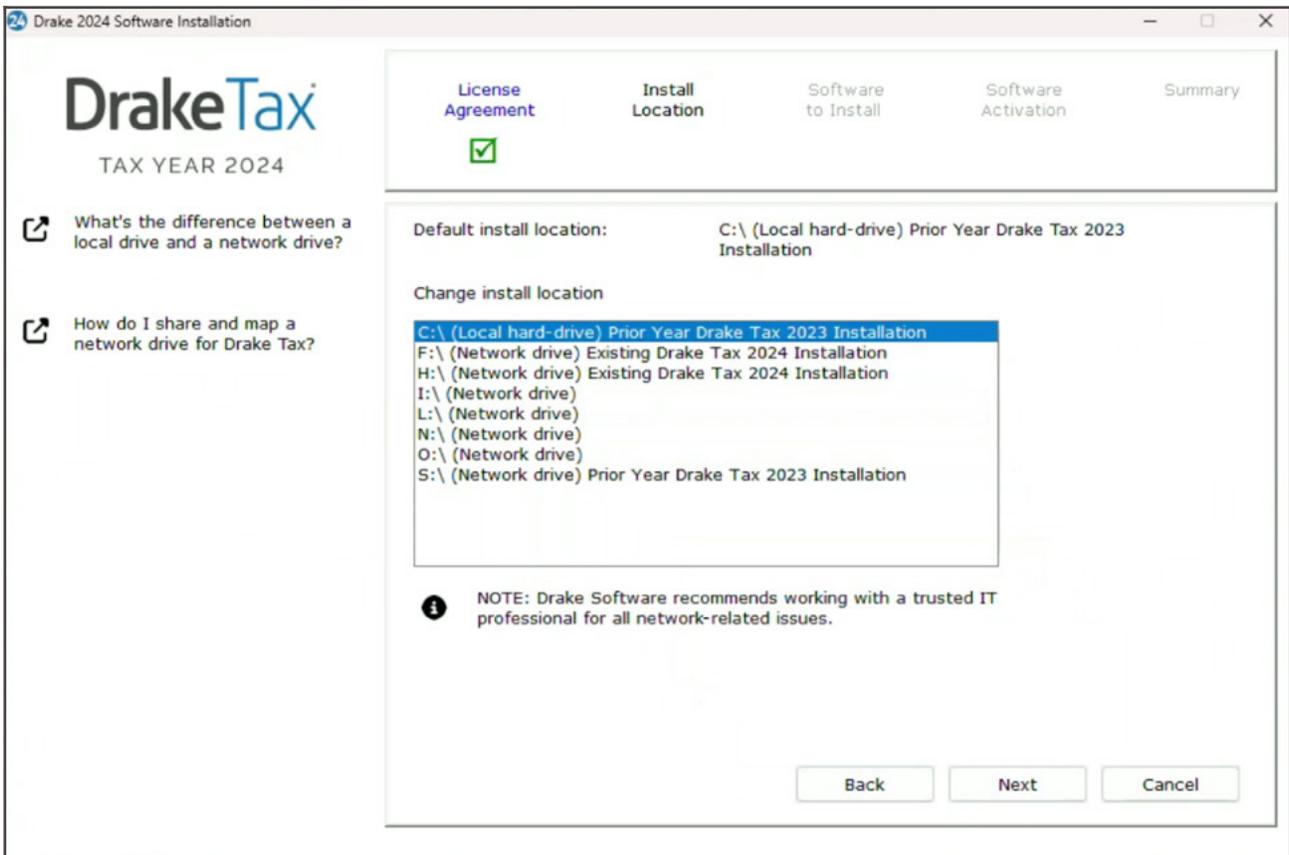
On the **Software Installation** screen, click **Install Drake Tax 2024** to begin the installation process.



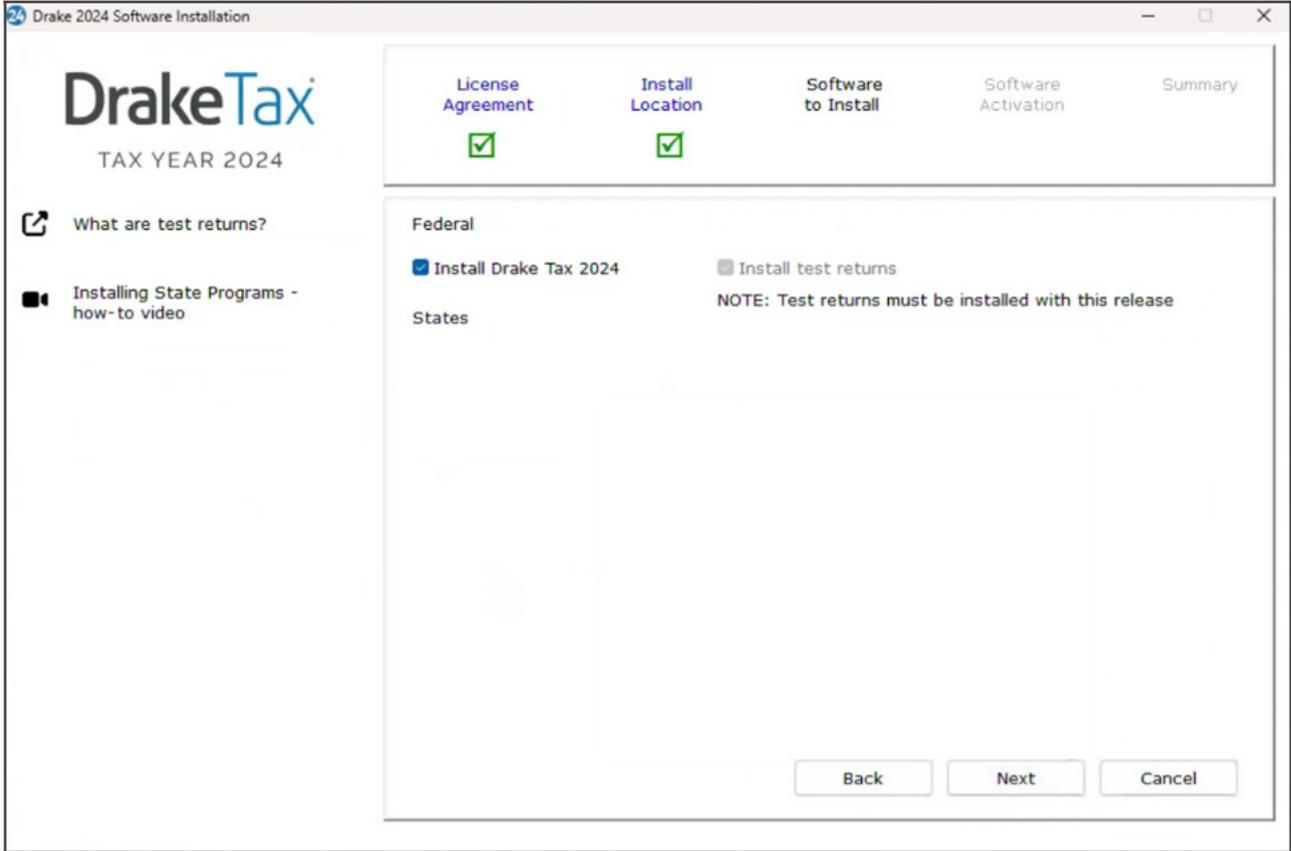
Read and accept the Drake Software 2024 License Agreement. Click **Next** to continue.



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



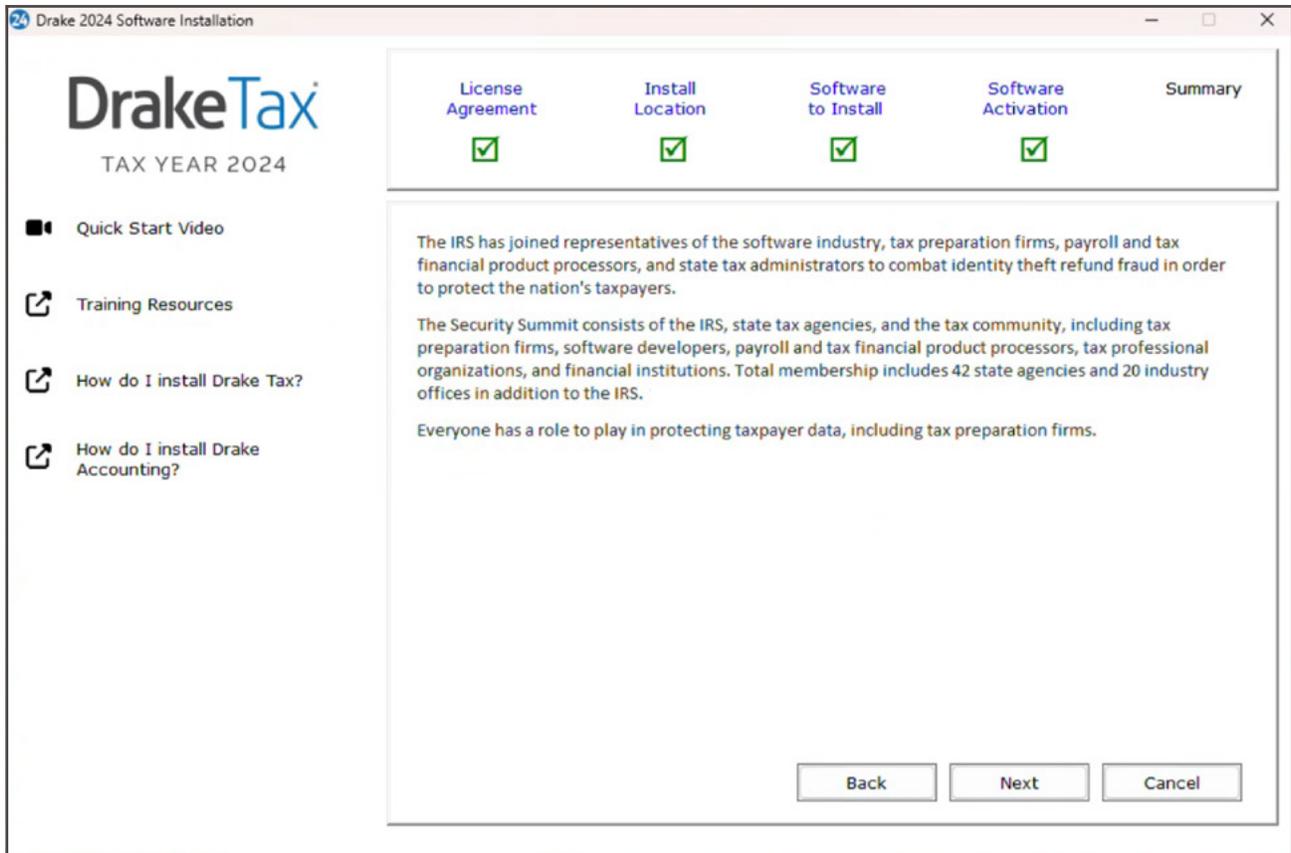
Install Drake Tax 2024 is marked by default; test returns must be installed with the preseason release and any initial Drake Tax installation. Select any desired state installs, and click **Next** to continue.



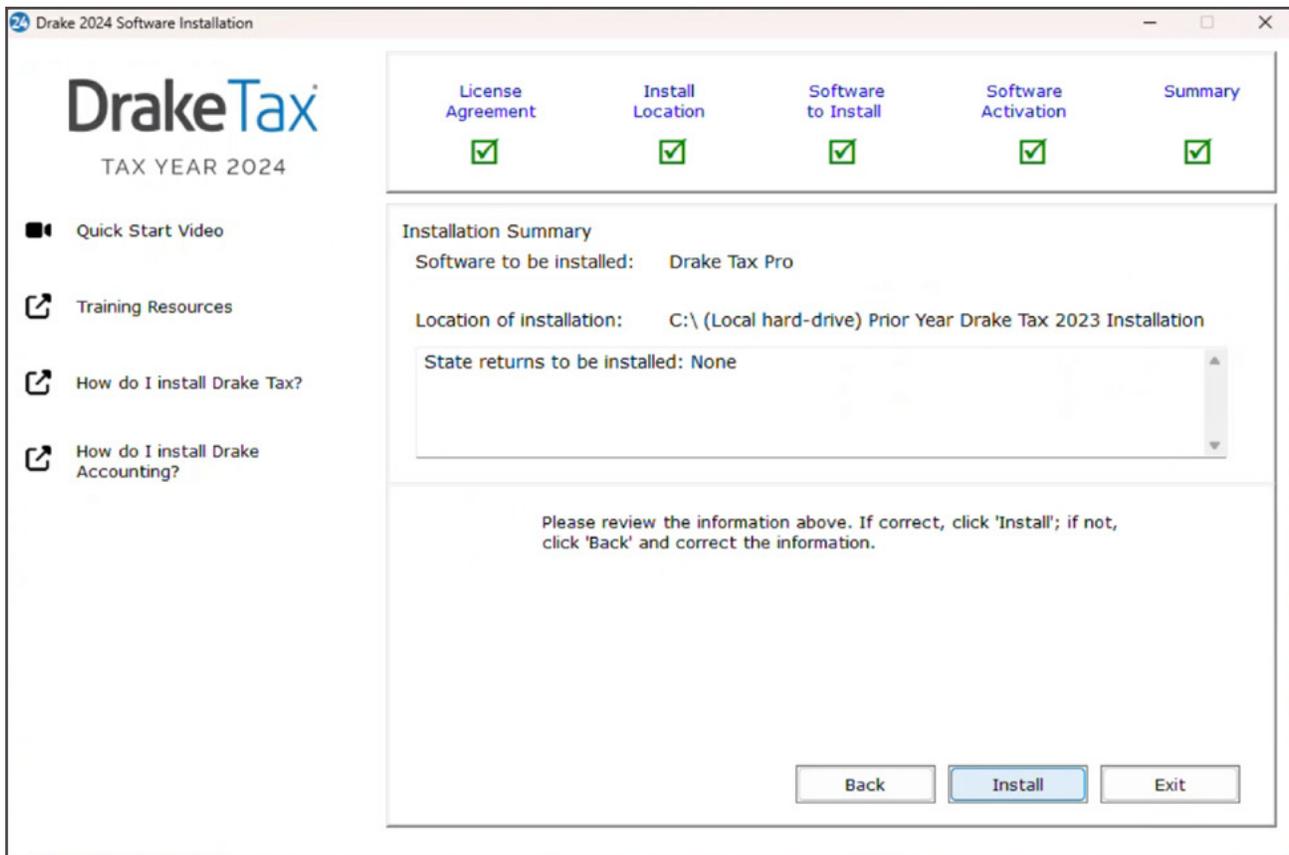
Select the applicable software version. If you have a **Licensed version**, enter your Drake Software **Account number** and **Serial number**. Click **Next**.

The screenshot shows the 'Drake 2024 Software Installation' window. The title bar reads 'Drake 2024 Software Installation'. The main content area is divided into two sections. The top section is a progress bar with five steps: 'License Agreement', 'Install Location', 'Software to Install', 'Software Activation', and 'Summary'. The first three steps are marked with green checkmarks, indicating they are completed. The 'Software Activation' step is currently active. Below the progress bar, there are two radio button options: 'Licensed version' (selected) and 'Evaluation version (trial)'. Under 'Licensed version', there is a text input field for 'Account number' and a four-digit 'Serial number' input field. At the bottom right of the window, there are three buttons: 'Back', 'Next', and 'Cancel'. On the left side of the window, there is a sidebar with the 'DrakeTax' logo and 'TAX YEAR 2024'. Below the logo, there are two links: 'Look up your account number, EFIN, e-file password, and serial number' and 'How to find my account number?'.

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



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



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

Drake 2024 - Software Activation



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

Account Number:

Serial Number:

SETUP

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

Drake Tax Security 2024

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 2024

Security question for ADMINISTRATOR

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

[Drake Tax security information](#)

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

Answer
[Show answer](#)

[Help](#) < Back **Next >** Cancel

MULTI-FACTOR AUTHENTICATION

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

Drake Tax Security 2024

Multi-Factor Authentication (MFA)

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

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

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

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

[Drake Tax security information](#)

Enter authenticator code for ADMINISTRATOR

I choose to OPT OUT of enabling MFA at this time

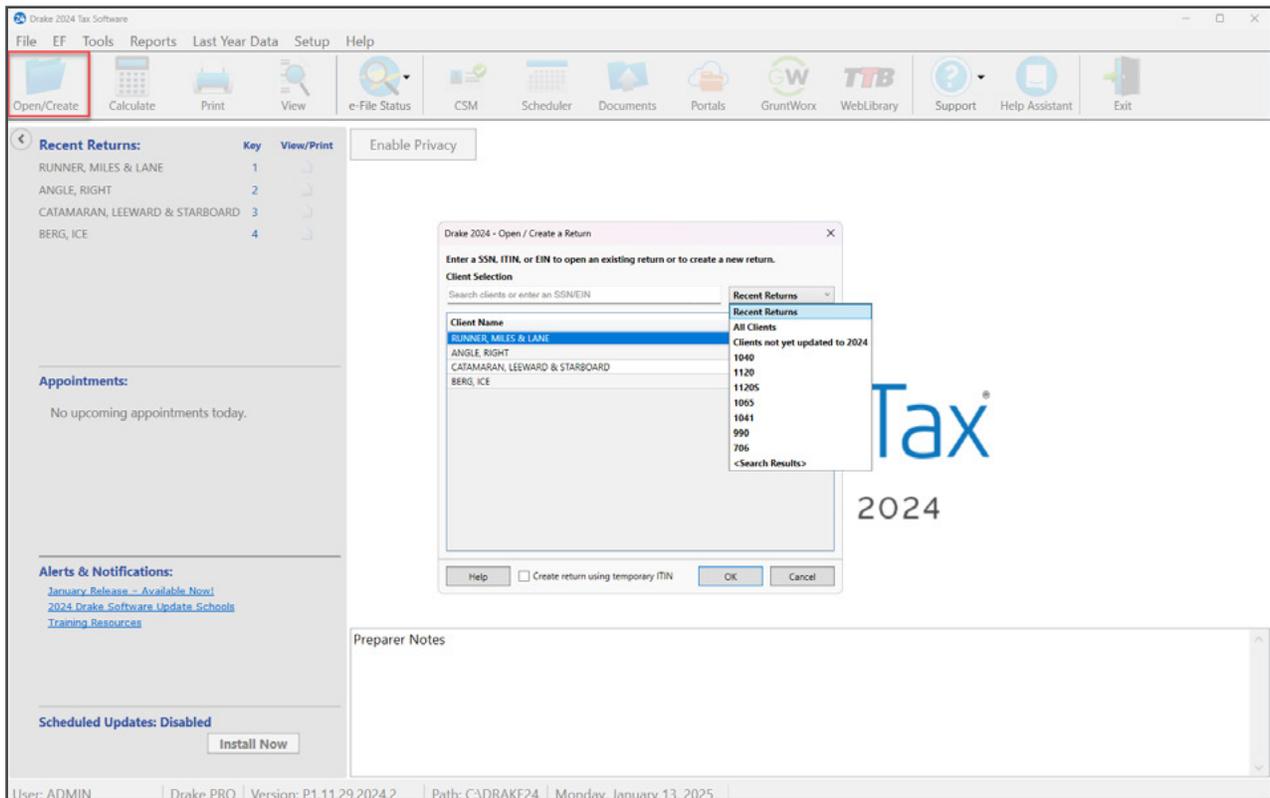
Help < Back Finish Cancel

OPEN A RETURN

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

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

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



DATA ENTRY

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

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

The screenshot shows the Data Entry Menu interface with several key components highlighted by red boxes and arrows:

- Data Entry Menu Tabs:** A horizontal menu at the top with tabs for General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The 'Miscellaneous' tab is highlighted in blue.
- Screen Codes:** A list of screen codes on the left side, including 1 (Name and Address), 2 (Dependents), 3 (Income), 4 (Adjustments), 5 (Taxes, Credits, and Payments), 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 (SSA-1099, Social Security), PAD (Preparer Notepad), NOTE (Notes About Return), and FAQ (Frequently Asked Questions). The 'W2' code is highlighted in blue.
- Active Screens:** A list of active screens on the right side, including A (Itemized Deductions Schedule), STAX (Sales Tax Worksheet), 2106 (Employee Business Expense), Due Diligence (8867, DD1, DD2), Electronic Filing and Banking (BANK, IDS, USE, DISC, DD, PMT, PIN, EF, PDF), AP (Protection Plus Audit Protection), and BILL (Client Adjustments). The 'IDS' and 'PIN' screens are highlighted in blue.
- Selector Field:** A text input field at the bottom left with the placeholder text 'Enter Screen, State, or Search Phrase'.

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 2024 - Data Entry (500001006 - RUNNER, MILES & LANE - 400008006) - (CONTAINS SENSITIVE DATA)

Name, Address, and General Information

Taxpayer		Spouse	
Filing status.....	2 Married Filing Jointly	SSN.....	400-00-8006
SSN.....	500-00-1006	First name.....	LANE M.I.....
First name.....	MILES M.I.....	Last name.....	Suffix.....
Last name.....	RUNNER Suffix.....	Date of birth.....	11-12-1976 Age: 48 (as of 12/31/2024)
Date of birth.....	07-26-1965 Age: 59 (as of 12/31/2024)	Date of death.....	
Date of death.....		Occupation.....	HEALTH CONSULTANT
Occupation.....	TRACK COACH	Phone Number	Extension
Daytime.....	828-524-8020	Daytime.....	828-524-8020
Evening.....		Evening.....	
Cell.....		Cell.....	
Best time to call.....	Print on return.....	Best time to call.....	Print on return.....
Fax.....		Fax.....	
Email or text msg.....	MRUNNER@1040.COM	Email or text msg.....	LRUNNER@GMAIL.COM
<input type="checkbox"/> Dependent of another <input type="checkbox"/> Full-time student <input type="checkbox"/> Presidential campaign <input type="checkbox"/> Blind		<input type="checkbox"/> Nonresident alien <input type="checkbox"/> Nonresident alien treated as U.S. Resident	
<input type="checkbox"/> Taxpayer did not live with spouse.....		<input type="checkbox"/> MFS Claiming Spouse Exemption <input type="checkbox"/> Spouse is not filing a return <input type="checkbox"/> Spouse has no U.S. income	
Health insurance coverage..... HC Screen			

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

In care of.....

Mailing Address

Street..... 800 RUNNERS ROAD Apt. #.....

City..... San Francisco [Combal Zone](#)

U.S. ONLY State ZIP County CA 94104 San Francisco Stateside military address

Foreign ONLY Province/state Country Postal code Change of address from last year

Resident state CA Resident city School district

Foreign Account and Digital Asset Questions

If the taxpayer had any interest in or authority over any foreign account or trust, use the Foreign Accounts screen..... [Foreign Accounts](#) **Otherwise** select this box..... Answer "No" to Sch. B, Part III questions **No Foreign Accounts**

At any time during 2024, did the taxpayer receive (as a reward, award, or payment) or sell, exchange, give, or otherwise dispose of a digital asset (or any financial interest in a digital asset)?..... Yes No [Video Reporting Digital Assets](#)

Return Options	2210 Options	Miscellaneous Codes
Firm #.....	2210 code.....	Code 1.....
Preparer #.....	2023 federal tax.....	Code 2.....
Data entry #.....	2023 state tax.....	Code 3.....
ERO #.....		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.

The screenshot shows the 'Form W-2 - Wage and Tax Statement' entry screen in Drake 2024. The window title is 'DRAKE 2024 - Data Entry (500001006 - RUNNER, MILES & LANE - 400008006) - (CONTAINS SENSITIVE DATA)'. The interface is divided into several sections:

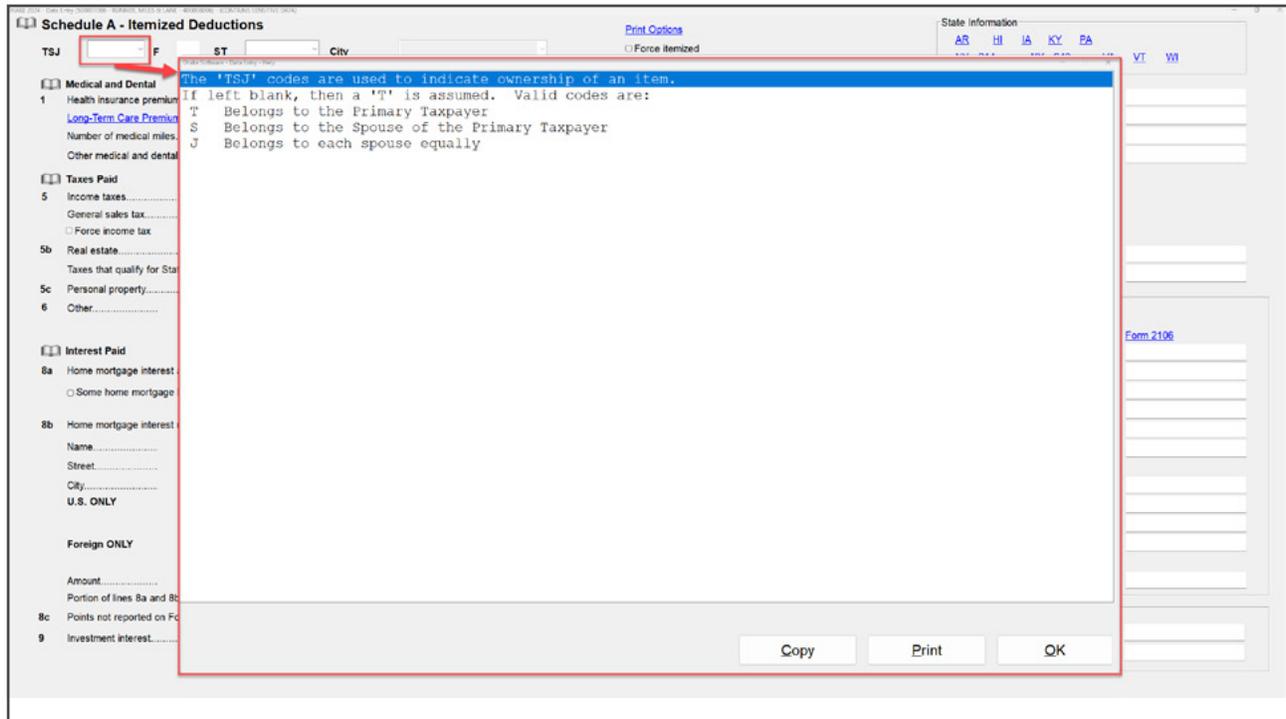
- Form W-2 - Wage and Tax Statement**: Includes a 'TS' dropdown menu (set to 'I') and a 'Special tax treatment' dropdown.
- Employer Information**: Fields for EIN (98-7654325), Name (TRACK STAR ACADEMY), Name cont., Street (123 MAIN STREET), City (SAN FRANCISCO), U.S. ONLY (State: CA, ZIP: 94104), and Foreign ONLY (Province/state, Country, Postal code).
- Employee Name and Address (if different from screen 1)**: Fields for Name (First: MILES, Last: RUNNER), Street (800 RUNNERS ROAD), City (SAN FRANCISCO), U.S. ONLY (State: CA, ZIP: 94104), and Foreign ONLY (Province/state, Country, Postal code).
- Wages and Taxes**: Fields for 1 Wages, tips (125000), 2 Federal tax w/h (15000), 3 Soc. Sec. wages (125000), 4 Soc. Sec. w/h (7750), 5 Medicare wages (125000), 6 Medicare tax w/h (1813), 7 Soc. Sec. tips, 8 Allocated tips, 9, 10 Dep. care benefit.
- State Information**: Dropdown menu with options IN, NJ, ND, NY, PA.
- Other**: Fields for 11 Nonqualified plan, 12 Code, Amount, Year, 13 Statutory employee, Retirement plan, Sick pay, 14 Other (SEHI, 8880).
- 15 ST**: State dropdown menu.
- 16 State Wages**, **17 State Tax**, **18 Local Wages**, **19 Local Tax**, **20 Locality**: Various input fields.
- Checkboxes**: W-2 altered or handwritten (nonstandard), Corrected W-2, Do not update to 2025, Agent for employer.
- Footer**: If either spouse has an ITIN on screen 1, enter the TIN from Form W-2.

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

FIELD HELP

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

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

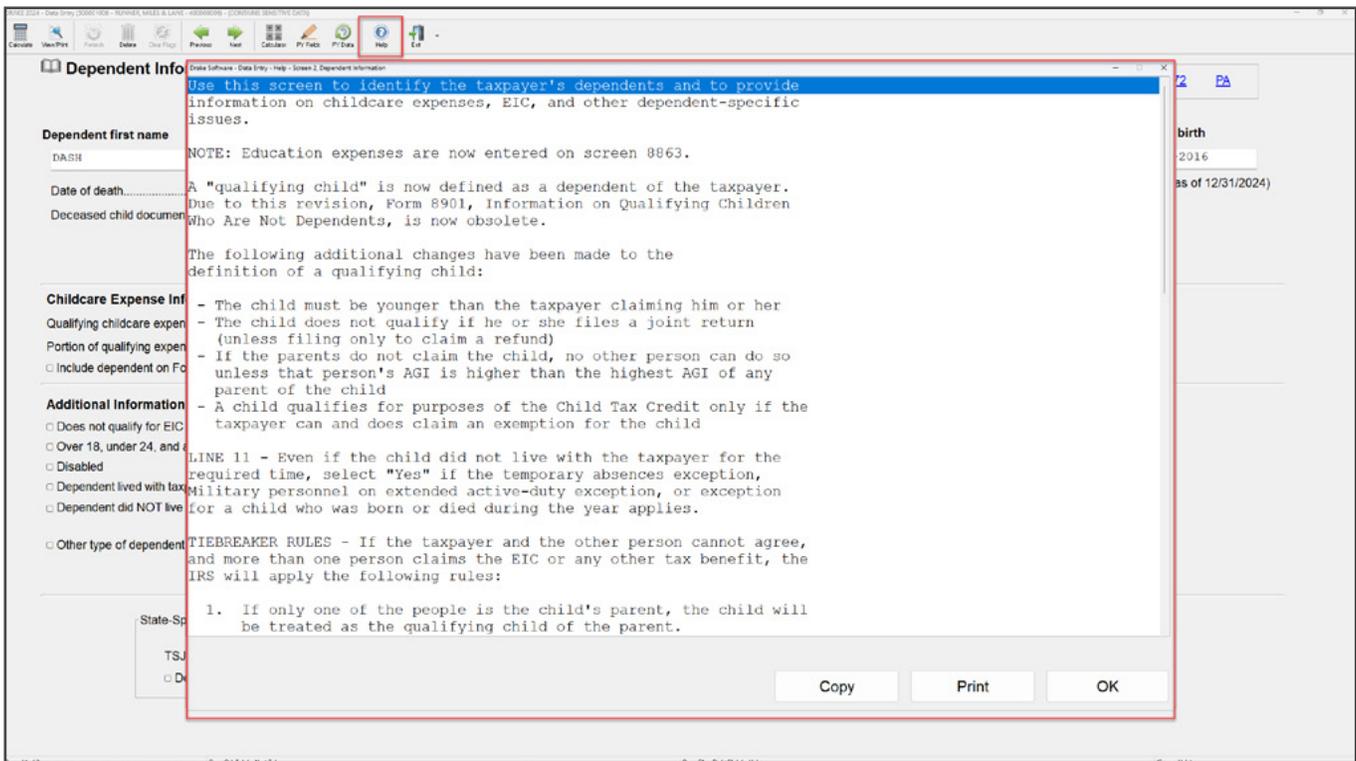


The **Data Entry Toolbar** appears on data entry screens when the pointer is moved to the top of the screen. Click the toolbar buttons to quickly perform the various functions. To close the toolbar, move your pointer away from the top of the screen.



SCREEN HELP

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



STATE AND CITY PROGRAMS

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

The screenshot shows the Drake Tax software interface. At the top, there is a menu bar with various icons for functions like Calculate, View/Print, Split, Documents, Tax Planner, Import, CSM, Email, Payments, Help, and Exit. Below the menu bar is a tabbed interface with the following tabs: General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The States tab is highlighted with a red box and a red arrow pointing to it. Below the tabs is a list of states arranged in three columns. The state 'NC North Carolina' is highlighted with a red box and a red arrow pointing to it. Below the list of states is a search field with the placeholder text 'Enter Screen, State, or Search Phrase' and a red arrow pointing to it. At the bottom of the window, there is a status bar with the following information: Return Status: In Progress, Return Type: Individual Tax Return, and Current Package: Federal.

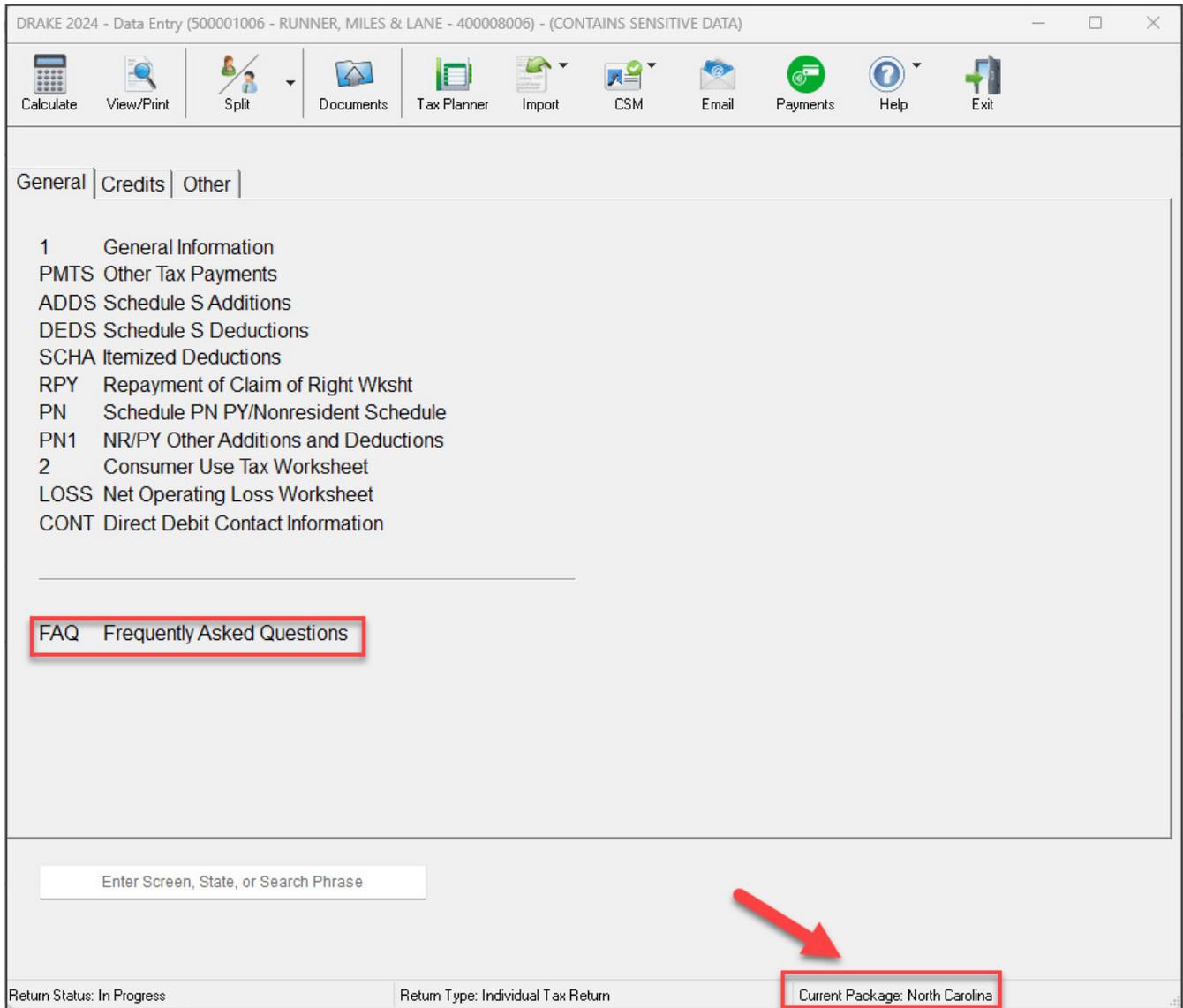
AL	Alabama	KY	Kentucky	NV	Nevada
AR	Arkansas	LA	Louisiana	NY	New York
AZ	Arizona	MA	Massachusetts	OH	Ohio
CA	California	MD	Maryland	OK	Oklahoma
CO	Colorado	ME	Maine	OR	Oregon
CT	Connecticut	MI	Michigan	PA	Pennsylvania
DC	Washington, DC	MN	Minnesota	RI	Rhode Island
DE	Delaware	MO	Missouri	SC	South Carolina
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	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: In Progress Return Type: Individual Tax Return Current Package: Federal

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



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

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

SIGN THE RETURN

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

DRAKE 2024 - Data Entry (500001006 - RUNNER, MILES & LANE - 400008006) - (CONTAINS SENSITIVE DATA)

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

PIN signature date..... 01-01-2025 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.

[Get an IP PIN](#)

Taxpayer's PIN signature..... 96931 Taxpayer entered: Identity Protection PIN.....
Spouse's PIN signature..... 40468 Spouse entered: Identity Protection PIN.....

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

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

Direct Debit Consent
 Direct Debit Consent

I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal entry to the financial institution account indicated for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than two (2) business days prior to the payment (settlement) date.

I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

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

Print filing instructions for Form 8878 and Form 8879

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

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

CALCULATION RESULTS

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



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

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

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

DRAKE 2024 - Calculation Results - (400-00-6006 - BERG, ICE) X

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	115,736	80,909	30,453	0	13,053	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	5203	MAILING ADDRESS INVALID: The "State" entered on screen 1 for the...
Federal	5635	INCORRECT DATA ENTRY: If the U.S. address entered on screen 1 (Name...
Federal	5860	INVALID ZIP CODE ON SCREEN 1: A ZIP code with an invalid character has...
Federal	190	CONFLICTING DATA: Both "U.S. ONLY" and "Foreign ONLY" address...
Federal	2261	FOREIGN ACCOUNT INFORMATION REQUIRED: Either the foreign account...

Return Notes:

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Owed: 13,053

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, eligible returns can be selected for e-file.

DRAKE 2024 - Calculation Results - (400-00-6006 - BERG, ICE)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	115,736	80,909	30,453	0	13,053	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: 13,053

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

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

EF Select Continue

VIEW AND PRINT A RETURN

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

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

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

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

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

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

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

The screenshot displays the Drake 2024 View/Print Client Return software interface. The window title is "Drake 2024 View/Print Client Return | BERG, ICC (400006006) - (CONTAINS SENSITIVE DATA)". The interface includes a toolbar at the top with icons for Data Entry, Print, Setup, Documents, Portals, eSign, Email, eFile Taxpayer, Refresh, Basic View, Help, and Exit. Below the toolbar is a "Select Forms to View/Print" section with a "Form Category" dropdown menu and a "Toolbar" button. The main area shows the Form 1040 U.S. Individual Income Tax Return for 2024. The form is partially filled out with the name "BERG" and social security number "400 00 6006". The filing status is "Single". The form is displayed in a viewing pane, and the left pane shows a tree view of forms and schedules. Red callouts highlight the "Form Category" dropdown, the "Toolbar" button, the "Expand/Collapse Sections" button, and the "Forms, Schedules, and Worksheets Generated for this return" section.

Form Category

Toolbar

Expand/Collapse Sections

Forms, Schedules, and Worksheets Generated for this return

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**.

The screenshot displays the Drake 2024 Tax Software interface. The 'File' menu is open, showing the 'EF' sub-menu with 'Select Returns for EF' highlighted. The 'Personal Client Manager' window is visible, containing a table of client returns. The 'EF Return Selector' dialog box is open, showing a list of clients with checkboxes for selection. The 'Continue' button is highlighted in the dialog box.

ID Number	Client Name	Status	EF Documents	Fed. Bal ...	Fed. Rehu...	Method	Last Calc	EFIN	M	Last Change	Tran Date	Ack
400000006	BERG, ICE	Ready For EF	1040	\$12,053			01/13/2025	904071		10/10/2024 17:31:02		
500001006	RUNNER, MILES & L.	Ready For EF	1040		\$7,812		01/13/2025	904071		01/13/2025 16:34:38		
	ANGLE									10/03/2024 16:40:48		
	BEAN									01/13/2025 16:25:22		
	BEE, BU									11/25/2024 21:32:56		
	BERRY,									11/11/2024 21:02:54		
	BLOGG									09/09/2024 11:48:20		
	CATAM									09/09/2024 11:49:50		
	CRESCI									09/09/2024 11:24:34		
	DOE, J									11/11/2024 21:37:18		
	EAST, N									09/04/2024 17:41:30		
	ELEMEI									09/07/2024 14:56:42		
	EMOJI,									09/09/2024 11:25:26		
	FRAGR,									09/09/2024 11:23:10		
	HOUNI									10/29/2024 21:09:56		
	PINE, P									10/03/2024 16:48:26		
	RUNNE									09/09/2024 11:43:38		
	SALAD									09/07/2024 15:39:48		
	SHOEN									09/09/2024 11:21:30		

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

The screenshot displays the Drake 2024 Tax Software interface. The 'File' menu is open, and 'Transmit/Receive' is selected. The main window shows the 'Personal Client Manager' for client 'ANGIE, RIGHT'. A dialog box titled 'Transmit / Receive Files' is open, showing a list of files for transmission. The 'Send/Receive' button is highlighted. The status bar at the bottom indicates 'User: ADMIN', 'Drake PRO', 'Version: P1.11.29.2024.2', 'Path: C:\DRAKE24', 'Monday, January 13, 2025', and 'Clients: 23'.

Client Name	Type	Status	Started	Completed	Last Change	Tran Date	Ack
ANGIE, RIGHT	1040	New Client	10/03/2024 16:40:00		10/03/2024 16:40:48		
BEAN, GREEN & P			08:42:00		01/13/2025 16:25:22		
BEE, BUMBLE			11:12:00		11/25/2024 21:32:56		
BERG, ICE			10:35:00		10/10/2024 17:31:02		
BERRY, STRAW & E			16:09:00		01/13/2025 16:34:38		
BLOGGER, MEDIA			11:39:00		11/11/2024 21:02:54		
CATAMARAN, LEE			16:16:00		09/09/2024 11:48:20		
CRESCENDO, CREE			16:22:00		09/09/2024 11:49:50		
DOE, JOHN			15:35:00		09/09/2024 11:24:34		
EAST, NORTH & S			21:20:00		11/11/2024 21:37:18		
ELEMENT, BROMIN			15:39:00		09/04/2024 17:41:30		
EMOJI, WAVE S			11:22:00		09/07/2024 14:56:42		
FRAGRANCE, FRAN			15:55:00		09/09/2024 11:25:26		
HOUD, BASSET &			14:18:00		09/09/2024 11:23:10		
PINE, PONDEROSA			11:03:00		10/29/2024 21:09:56		
RUNNER, MILES &			14:59:00		10/03/2024 16:48:26		
SALAD, CAESAR &			16:14:00		09/09/2024 11:43:38		
SHOEMAKER, OXF			11:56:00		09/07/2024 15:39:48		
SHOEMAKER, OXF			16:37:00		09/09/2024 11:21:30		

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

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

Drake 2024 - Search EF Database - (CONTAINS SENSITIVE DATA)
✕

SSN/EIN/Name to Search for:

SSN: Name:
 Taxpayer: Spouse:
 Spouse:

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

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

Daytime Phone:
 Evening Phone:
 Cell Phone:

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

[Where is my refund?](#)

Payment Req.:
 DOB Validity:

Bank Code:
 RT/Loan Status:

Reject Information

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: 01/13 - ACK Code - R - BERG, ICE

PROGRAM HELP

The screenshot shows the Drake 2024 Tax Software interface. The top menu bar includes File, EF, Tools, Reports, Last Year Data, Setup, and Help. The toolbar contains icons for Open/Create, Calculate, Print, View, e-file Status, CSM, Scheduler, Documents, Portals, GruntWorx, WebLibrary, Support, Help Assistant, and Exit. The main window displays the 'Personal Client Manager - (CONTAINS SENSITIVE DATA)' window. On the left, there are sections for 'Recent Returns', 'Appointments', and 'Alerts & Notifications'. The central area shows a table of client information. A red box highlights the 'Support' button in the toolbar, which has opened a dropdown menu with the following options: 'What's New for Drake Tax 2024', 'Knowledge Base', 'Program Help', 'Support Website', 'Video Tutorials', 'Co-Browse', 'Chat Support', 'Manual & Online Resources', 'Custom Web Search', and 'Help Assistant'.

Client Name	Type	Status	Started
ANGLE, RIGHT	1040	New Client	10/03/2024 16:40:00
BEAN, GREEN & PINTO	1040	In Progress	12/18/2023 08:42:00
BEE, BUMBLE	1040	In Progress	10/20/2023 11:12:00
BERRY, STRAW & BLUE	1040	In Progress	10/11/2023 10:35:00
BLOGGER, MEDIA & NICHE	1040	In Progress	10/12/2023 16:09:00
CATAMARAN, LEEWARD & STARBOARD	1040	In Progress	10/11/2023 11:39:00
CRESCENDO, CREED & DEE	1040	In Progress	10/06/2023 16:16:00
DOE, JOHN	1040	In Progress	10/06/2023 16:22:00
EAST, NORTH & SOUTH	1040	In Progress	10/06/2023 15:35:00
ELEMENT, BROMINE & IODINE	1040	In Progress	11/11/2024 21:20:00
EMOJI, WAVE S	1040	In Progress	10/11/2023 15:39:00
FRAGRANCE, FRANCIS	1040	In Progress	09/04/2024 17:41:30
HOUND, BASSET & GREY	1040	In Progress	09/07/2024 14:56:42
PINE, PONDEROSA	1040	In Progress	09/09/2024 11:25:26
RUNNER, MILES & LANE	1040	In Progress	09/09/2024 11:23:10
SALAD, CAESAR & COBB	1040	In Progress	10/29/2024 21:09:56
SHOEMAKER, OXFORD & LOAFER	1040	In Progress	10/03/2024 16:48:26
SUNSHINE & COBB	1040	In Progress	10/06/2023 16:14:00
			09/09/2024 11:43:38
			09/07/2024 15:39:48
			09/09/2024 11:21:30

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 2024](#), an overview with brief descriptions of updates and enhancements to Drake Tax peripheral programs, along with changes to tax forms and tax laws made by the IRS.
- [Drake Software Knowledge Base](#), an online reference source containing answers to common tax and program questions.
- [Drake Software Program Help](#), a searchable "Drake encyclopedia," arranged in "books." Program Help includes a Search feature, a searchable index, and a Favorites list. Program Help answers many of the most commonly asked questions about the tax program.
- [Drake Software Support Site](#), a website with links to all of our online help resources, including support and training options and many other helpful webpages.
- [Video Tutorials](#), a compendium of more than 200 instructional videos showing how to use Drake Tax and related programs.
- [Manual and Online Resources](#), a link to Drake Tax manuals, practice returns, IRS publications, and Drake Software shipment letters. All resources are in PDF format, readable online, and available for download.
- **Custom Web Search**, a reference tool that allows you to search three default websites for answers—the IRS website (*irs.gov*), Drake Software's Knowledge Base (*DrakeSoftware.com/Site/*), and Drake Software's tax preparer blog, TaxingSubjects® (*DrakeSoftware.com/Blog*). It also allows you to search any other websites you wish to add.