

Drake Software Classroom Training

Drake Documents and SecureFilePro™ Webcast

Course Description: This 4-hour webcast covers the ins and outs of Drake Documents and SecureFilePro. Upon completion of this webcast you will be able to:

- Understand the benefits of using Drake Documents and SecureFilePro to streamline and secure workflow and digital storage
- Know how to access, customize, and use Drake Documents to electronically store files and create a paperless office
- Recognize how Drake Documents is integrated with Drake Tax and SecureFilePro
- Use SecureFilePro to work remotely with clients to prepare tax returns from start to finish, and customize SFP to meet your needs
- Know when to use SecureFilePro Guest Exchange
- Differentiate between two electronic signature options; either in-person with a signature pad or online using SecureFilePro
- Use SecureFilePro to backup Drake Tax, Drake Documents, and other files on your system

Course Fee: \$79.00.

How to Register: Log in to <https://Support.DrakeSoftware.com> and select **Training Tools > Classroom Training** from the menu on the left side of the web page. Refer to the **FAQs** on the web page for detailed instructions and frequently asked questions.

CPE Facts:

Affiliation*	CPE Awarded	Delivery Method / Course Format	Field of Study	Course ID #	Sponsor ID #
NASBA	4	Internet Based	Computer Software Applications	N/A	103137
CTEC**	0	N/A	N/A	N/A	N/A
IRS	4	Online / Group	Federal Tax Law	FQTGU-T-00318-19-O	FQTGU
TX State Board of Accountancy	4	Internet Based	Computer Software Applications	100275	002921

*Individuals with other professional credentials should check with their state licensing board or accrediting organization to determine if this program meets their continuing education requirements.

**CTEC does not allow credit to be awarded for courses that cover tax software topics.

Course Level: Basic

Prerequisites/Advance Preparation: There are no required prerequisites other than a general knowledge of Drake Software.

Course Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or e-mail. Refunds will not be granted by phone. There will be no refund for those who complete the course. For more information regarding the refund policy or to address concerns/complaints regarding this course please contact the Drake Education Department at (828) 524-8020 or Education@DrakeSoftware.com or visit www.DrakeETC.com.



Drake Software is an IRS qualified sponsor of continuing professional education.



Drake Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Drake Software is registered with the Texas State Board of Public accountancy as a CPE sponsor. This registration does not constitute an endorsement by the Board as to the quality of our CPE program.