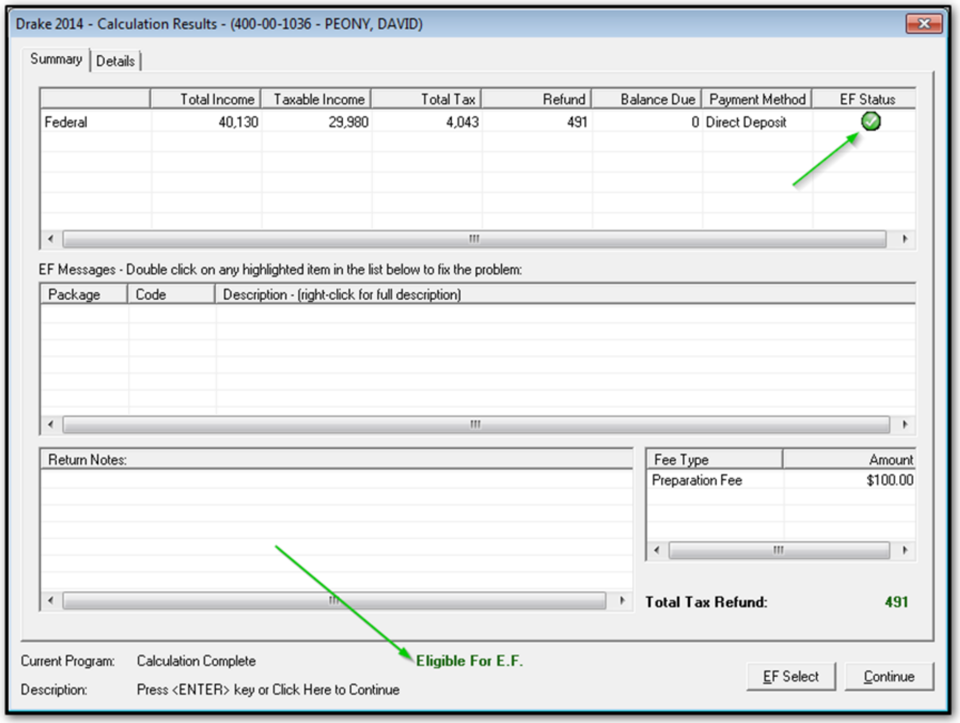
Four Steps to e-Filing

1. <u>Confirm that the return is eligible to be e-filed.</u> There are two ways in a return to determine whether it is eligible to be e-filed:

    a. On the **Calculation Results** screen.

      i. Open the return and click the **Calculate** icon at the top to display the **Calculation Results** screen.

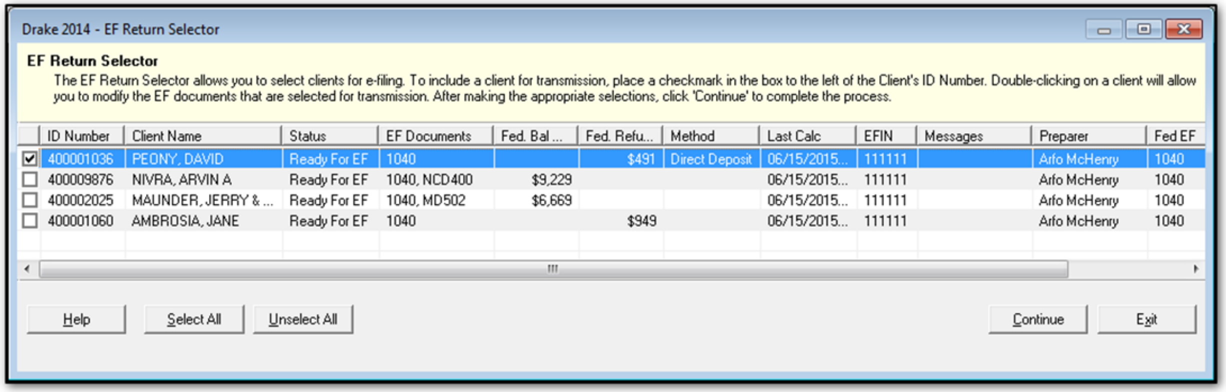
      ii. To verify e-file eligibility, review the **Eligible for EF** column and the indicator at the bottom of the screen.



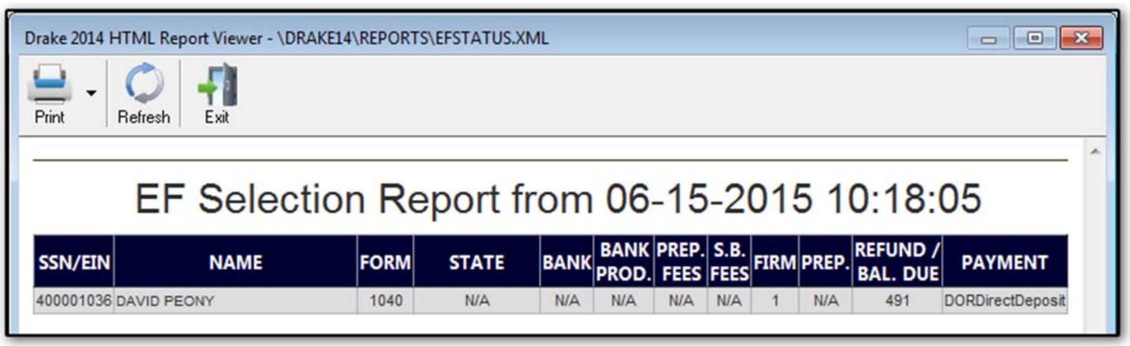
    b. On the EFSTATUS page in View. Open the return and click the **View** icon at the top. In View, select the EFSTATUS page. The name of the page differs between return packages (example: EFSTATUS, 1120EF, 1065EF, etc). Review the EFSTATUS page. It states exactly what would e-file, if you were to e-file the return at that time. (*Note* - this page is produced only if **Print EF status page** is selected at **Setup > Options > EF** tab).

2. Select the return for e-filing. From the Drake Home window, open the **EF** menu and click **Select Returns for EF**. The **EF Return Selector** screen shows all returns that have been calculated recently. Any returns that are eligible to be e-filed have a check box to the left side. The **EF Documents** column shows what will be transmitted.

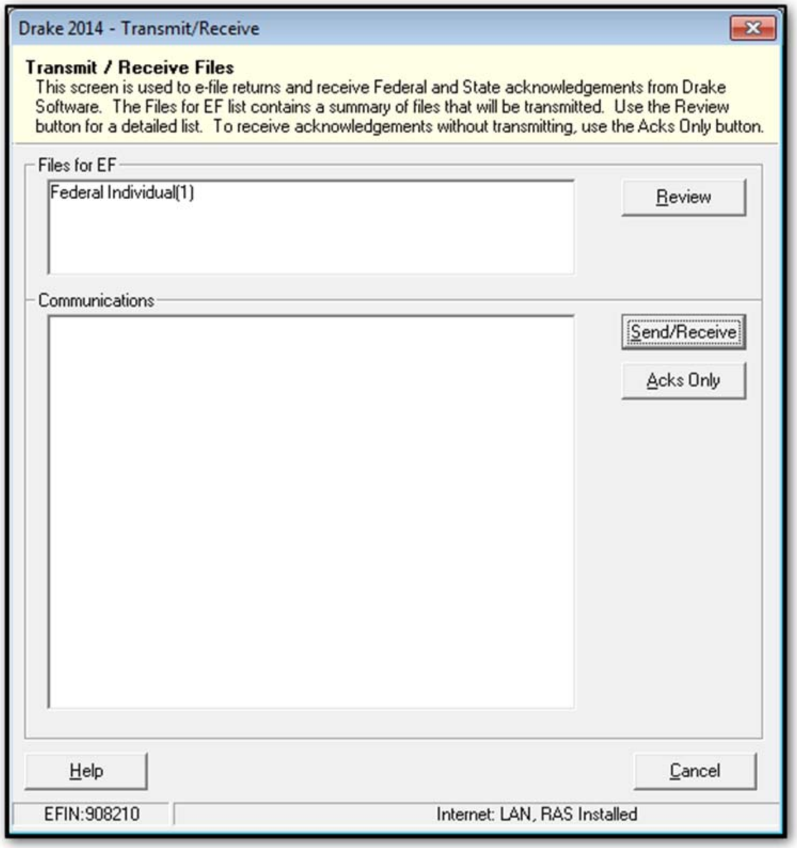
   a. Mark any eligible return that you want to send by clicking the check box to the left of the return.



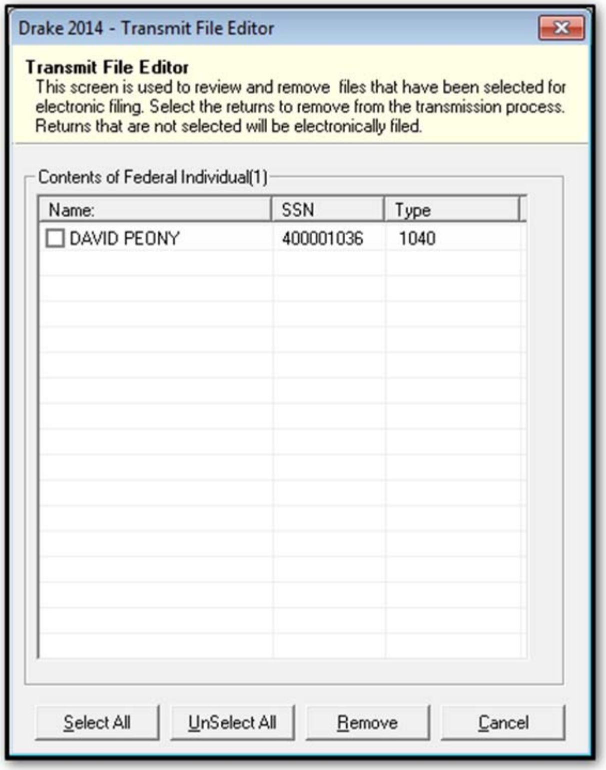
   b. Click **Continue**. The **Report Viewer** displays the EF Selection Report. Review this report to verify what you are about to e-file. You can print the report before exiting. When you exit the report, you have selected the listed returns for e-filing, but you have not yet e-filed them.



3. Transmit the return. From the Drake Home screen, open the **EF** menu and select **Transmit/Receive** to display the **Transmit/Receive** screen. The **Files for EF** pane lists transmission files that are ready for e-filing.

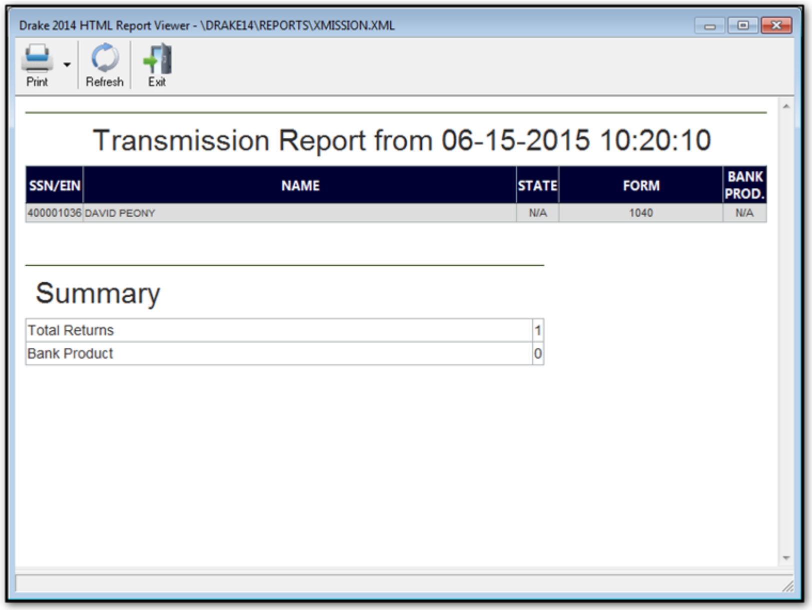


a. If you want to confirm the return name and SSN or EIN in a file, select the file and click **Review** on the right side of the T**ransmit/Receive** screen.
    i. The **Transmit File Editor** appears displaying the name and SSN or EIN of the return contained in the file. Review the screen to confirm the identity of the return. You cannot open the return here. You can select and remove it or exit to the **Transmit/Receive** screen.

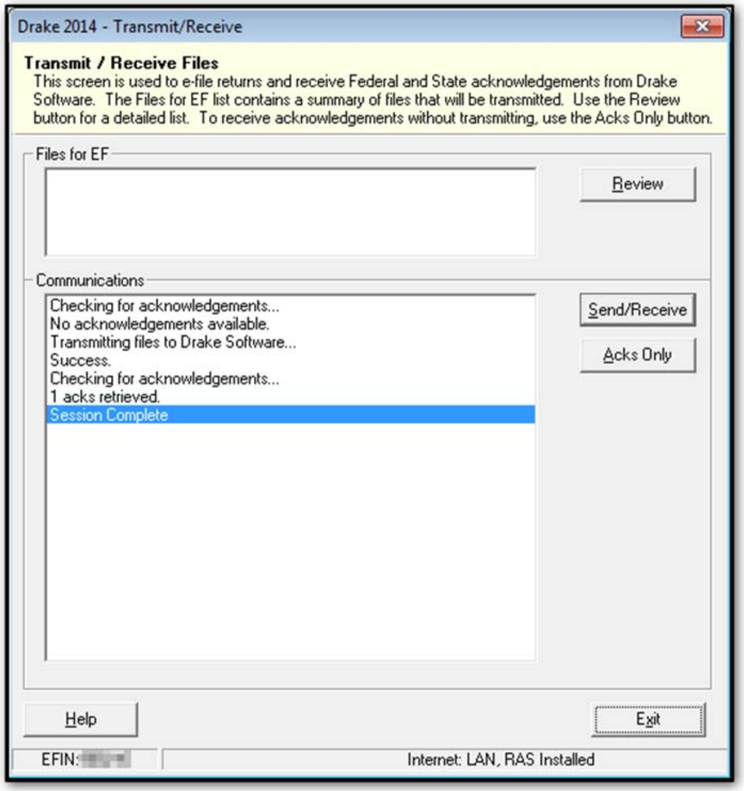


    ii. To remove a file from e-filing in this transmission, select the **Name** option box and click **Remove**.
    iii. To return to the **Transmit/Receive** screen, click **Cancel**.

b. To transmit the files, select **Send/Receive** on the **Transmit/Receive** screen. A Transmission Report is displayed identifying the returns that will be transmitted. You can print the report. Exit the report to begin transmission – transmission begins immediately when you exit.



c. During transmission, the **Communications** pane shows transmission progress. Review this carefully before exiting the **Transmit/Receive** screen. If a transmission error occurs, you will see it here. (In the example below, the software is set not to check for email during transmission.)

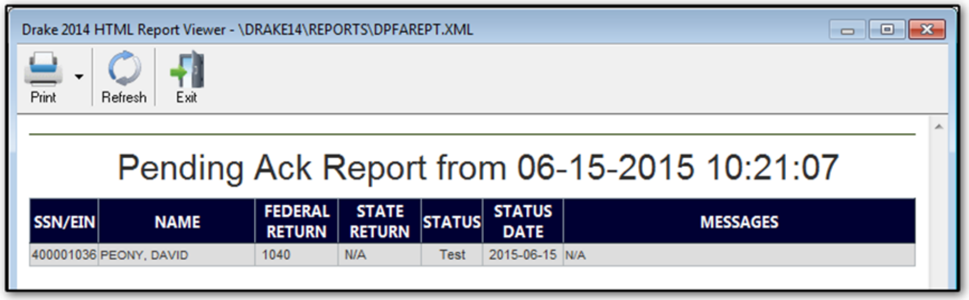


i. **Transmitting files to Drake Software… Success** indicates the returns have been transmitted successfully.
ii. **Checking for acknowledgements**.
iii. **No Acknowledgements available** or **N acks retrieved**, indicates the number of acknowledgements retrieved, if any.
iv. **Session Complete** indicates the software has ended transmission and disconnected from the Drake server.
v. Click **Exit** to leave the **Transmit/Receive** screen.

d. In the example above, there was an acknowledgement retrieved. An acknowledgement also may be retrieved during a later transmission, or by clicking **Acks Only** (to check for acknowledgements without transmitting returns).

4. Process acknowledgments. After exiting the **Transmit/Receive** screen, the final step is to process any acknowledgements that have been retrieved. This step is critical, because the software does not recognize an acknowledgment until it is processed. Processing incorporates it into a return's EF database, making it available to the software so that the return's filing status is known and any checks authorized for printing are available for printing.

    a. Open the **EF** menu, and select **Process Acks**. The **Report Viewer** appears listing the ACKs picked up. You can either print or exit this report.



Pending Ack Report from 06-15-2015 10:21:07

SSN/EIN	NAME	FEDERAL RETURN	STATE RETURN	STATUS	STATUS DATE	MESSAGES
400001036	PEONY, DAVID	1040	N/A	Test	2015-06-15	N/A

    b. You can also
        i. review previous acknowledgement reports at any time, by going to **EF > Process Acks**. If there are no acknowledgements to process, you are offered the option of reviewing old acknowledgements.
        ii. pick up acknowledgements at any time by clicking **Acks Only** on the **Transmit/Receive** screen. If you pick up **Acks Only**, process them immediately.