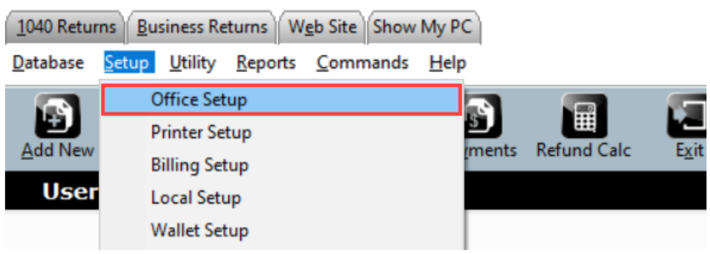
Here’s How To:

Configure Your EFIN, Add a Bank Application to Previously Created Returns and Verify Fees

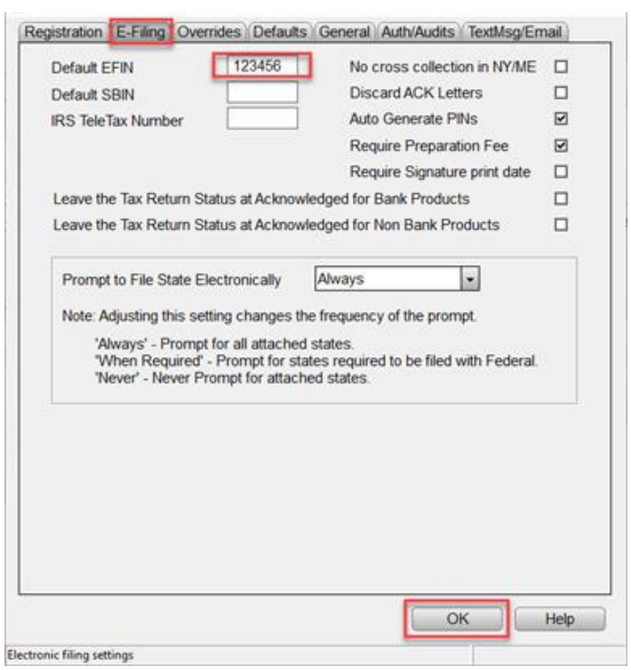
Note: These steps are to be completed in the software after you have enrolled at EMP (Enterprise Management Portal)

Configuring Your EFIN and Verifying Fees

1. From the menu click, **Setup** and select **Office Setup**.



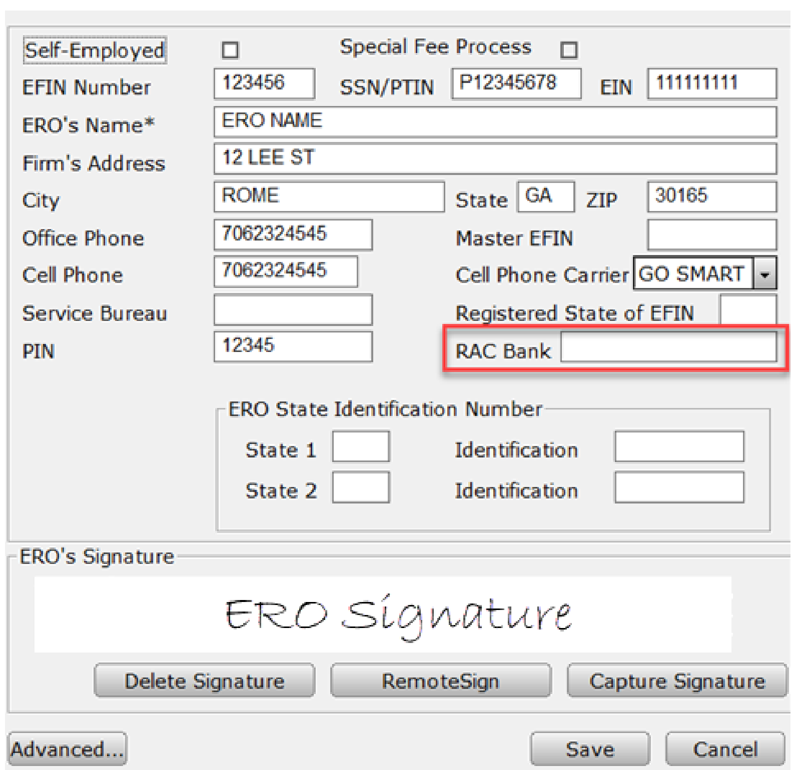
2. Click the E-Filing tab and key the **Default EFIN**, then click **OK** to save.



3. Click **Database** and select **EF Originators**.

4. Type the EFIN then click the **Add** button.

5. Complete the information. **Note:** If you want to capture Remote Signature it requires the preparers SSN/PTIN, Cell Phone, and Carrier fields.

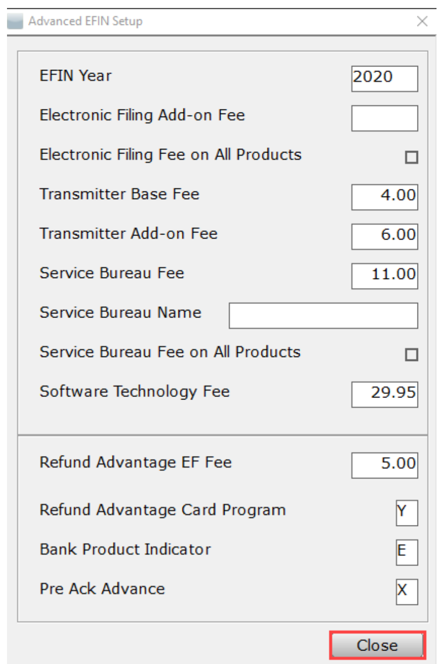


Updated 12.29.21

Important Note: If the RAC Bank field is blank, as above, the BANK APP will not populate in the return. Please call partner support (206) 209-2653 for assistance.

6. **To display your fees**, **click** the **Advanced** button.

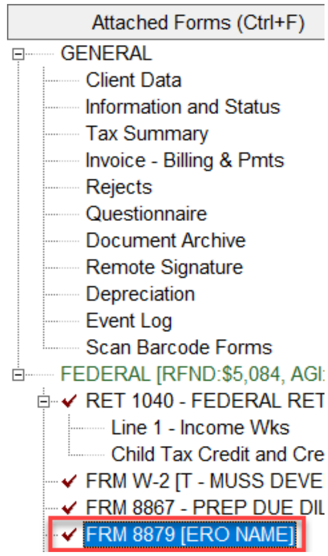
7. The fees will display. **Important Note**: **<u>If the fees shown are not accurate, contact Partner Support BEFORE transmitting your first tax return.</u>**



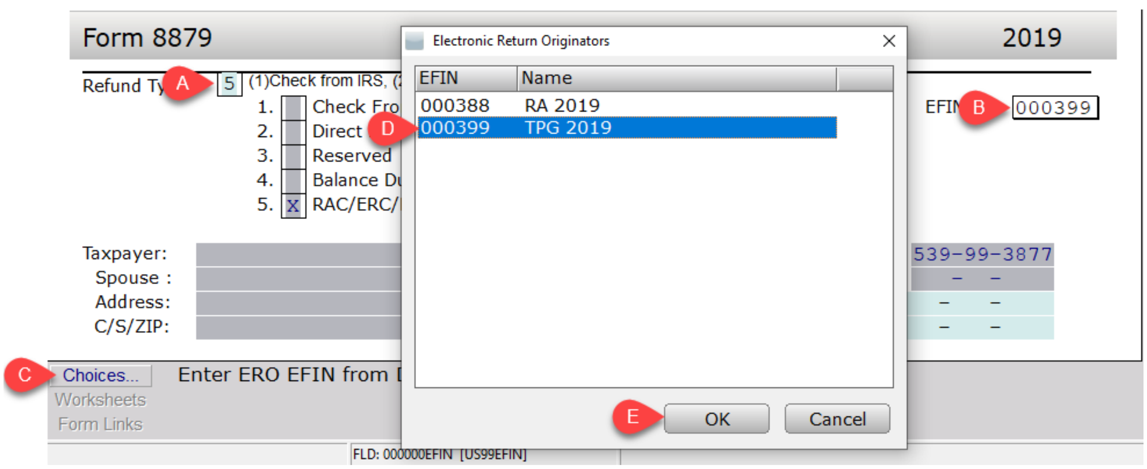
Add a Bank Application to Previously Created Returns

If you have a bank listed in RAC Bank field but are unable to add the BANK APP to the tax return, follow the steps below.

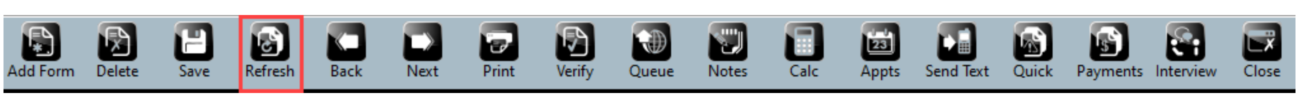
1. In the **Attached Forms** list **Double Click** the **FRM 8879.**



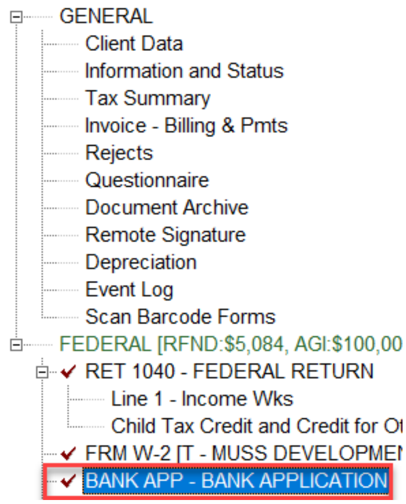
2. (A) Set the **Refund Type** to **5**; (B) **Click** inside the **EFIN field;** (C) **Click** the **Choices** button; (D) **Select** the desired **EFIN**; (E) **Click OK**.



3. In the Toolbar **Click** the **Refresh** button.



4. The **BANK APP** should appear in the **Attached Forms** list.



If you have additional questions about this information, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at support@utaxsoftware.com.

Updated 12.29.21