

Here's How To:

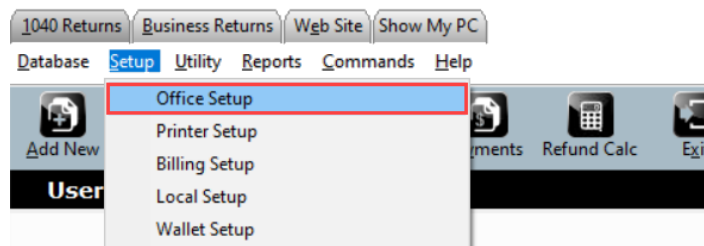


Configure Your EFIN, Add a Bank Application to Previously Created Returns and Verify Fees

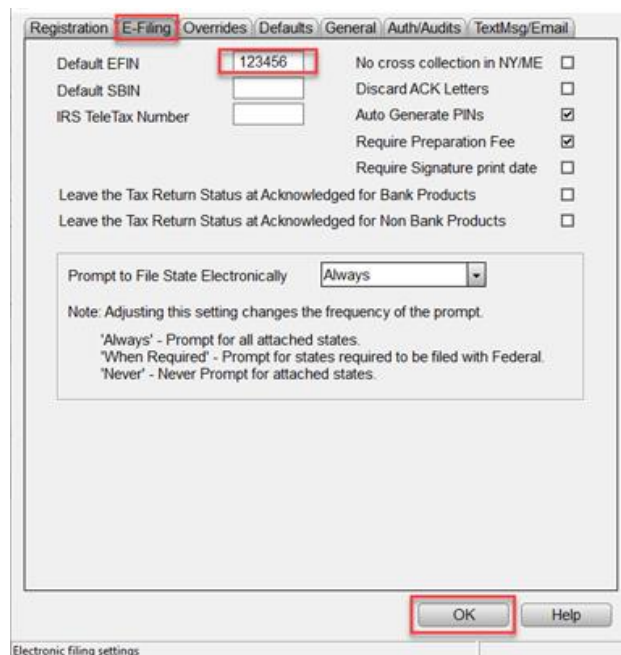
Note: These steps are to be completed in the software after you have enrolled at [EMP](#) (Enterprise Management Portal)

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.

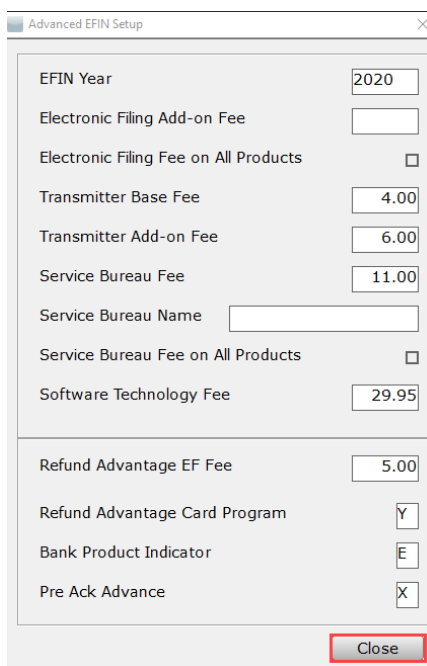
A screenshot of a data entry form for an EF Originator. The form includes fields for: Self-Employed (checkbox), Special Fee Process (checkbox), EFIN Number (123456), SSN/PTIN (P12345678), EIN (11111111), ERO's Name* (ERO NAME), Firm's Address (12 LEE ST), City (ROME), State (GA), ZIP (30165), Office Phone (7062324545), Master EFIN, Cell Phone (7062324545), Cell Phone Carrier (GO SMART), Service Bureau, Registered State of EFIN, PIN (12345), and RAC Bank (highlighted with a red box). Below these are fields for ERO State Identification Number (State 1, State 2, and Identification). At the bottom, there is a signature field with 'ERO Signature' written in cursive, and buttons for 'Delete Signature', 'RemoteSign', 'Capture Signature', 'Advanced...', 'Save', and 'Cancel'.

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.



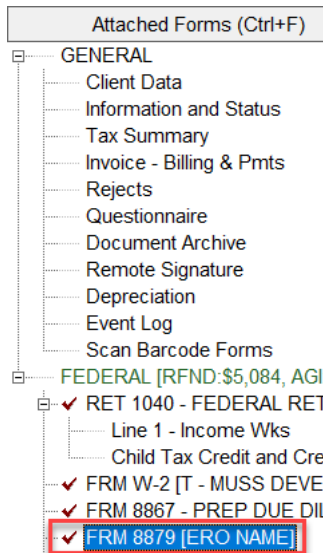
7. The fees will display. **Important Note:** If the fees shown are not accurate, contact Partner Support BEFORE transmitting your first tax return.



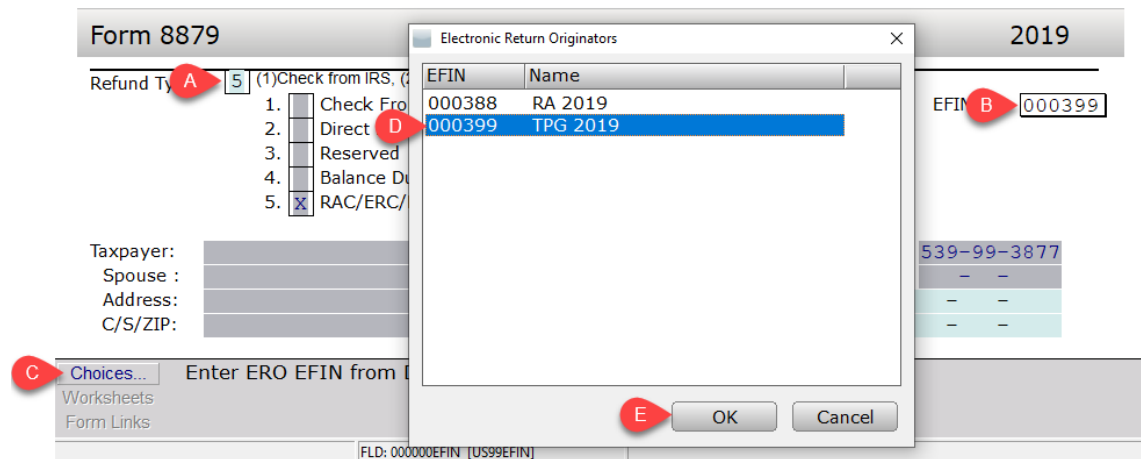
Add a Bank Application to Previously Created Returns

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.

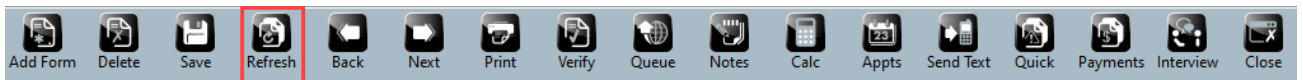
1. In the **Attached Forms** list **Double Click** the **FRM 8879**.



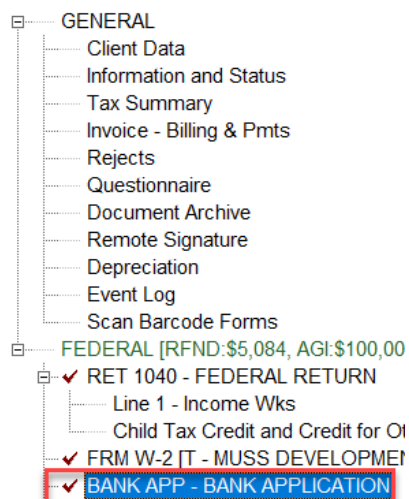
2. (A) Set the **Refund Type** to **5**; (B) **Click** inside the **EFIN** field; (C) **Click** the **Choices** button; (D) **Select** the desired **EFIN**; (E) **Click** **OK**.



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.