

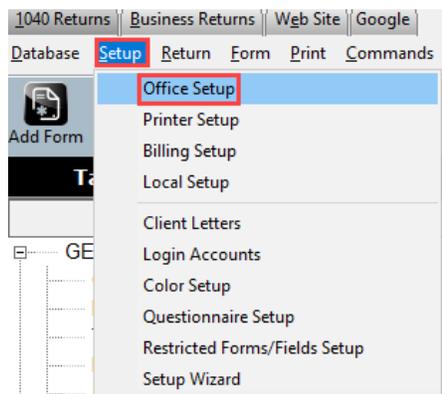
HERE'S HOW TO

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

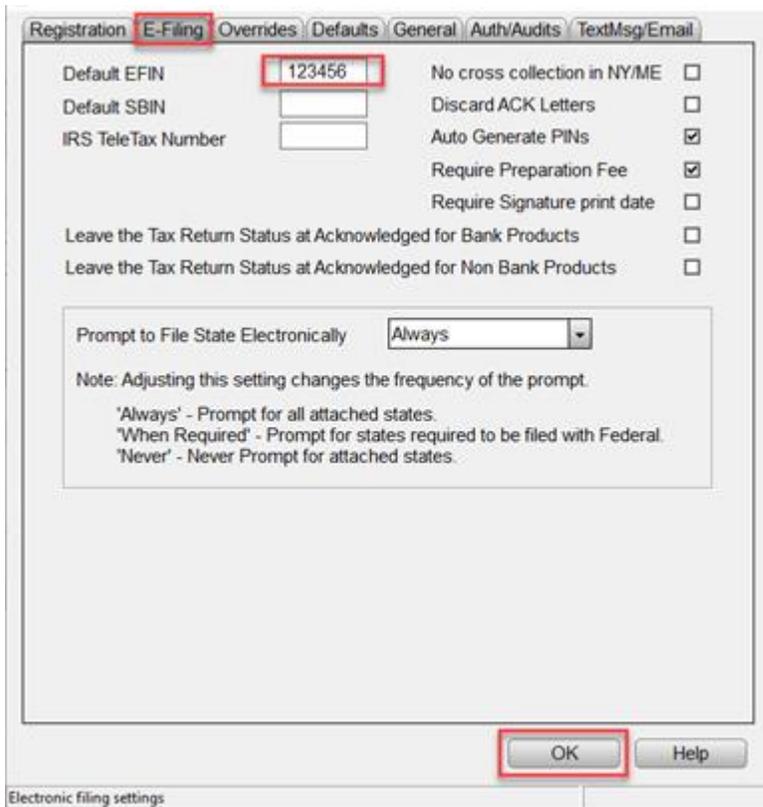
Important Note: These steps are to be completed in the software after you have enrolled with your selected banking partner

Configuring Your EFIN and Verifying Fees

1. From the menu bar click **Setup > Office Setup**.



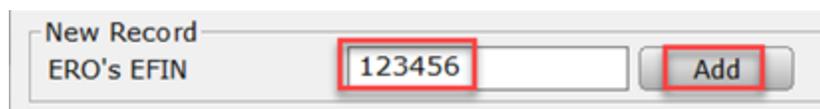
2. Click the E-Filing tab and key your **Default EFIN** then click **OK**.



3. Click **Database > 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.

The screenshot shows a form with the following fields and values:

- Self-Employed:
- Special Fee Process:
- EFIN Number: 123456
- SSN/PTIN: P12345678
- EIN: 111111111
- 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
- RAC Bank: (highlighted with a red box)

Below these fields is a section for ERO State Identification Number with two rows of State and Identification fields.

The bottom section is titled "ERO's Signature" and contains a signature field with the text "ERO Signature". Below the signature field are three buttons: "Delete Signature", "RemoteSign", and "Capture Signature". At the very bottom are buttons for "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.

This is a close-up of the bottom portion of the form from the previous image. It shows the "ERO's Signature" field with the signature "ERO Signature". Below the signature field are the buttons "Delete Signature", "RemoteSign", and "Capture Signature". At the bottom, the "Advanced..." button is highlighted with a red box, along with the "Save" and "Cancel" buttons.

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

Field	Value
EFIN Year	2020
Electronic Filing Add-on Fee	
Electronic Filing Fee on All Products	<input type="checkbox"/>
Transmitter Base Fee	4.00
Transmitter Add-on Fee	6.00
Service Bureau Fee	11.00
Service Bureau Name	
Service Bureau Fee on All Products	<input type="checkbox"/>
Software Technology Fee	29.95
Refund Advantage EF Fee	5.00
Refund Advantage Card Program	<input checked="" type="checkbox"/>
Bank Product Indicator	E
Pre Ack Advance	<input checked="" type="checkbox"/>

Close

Add a Bank Application to Previously Created Returns

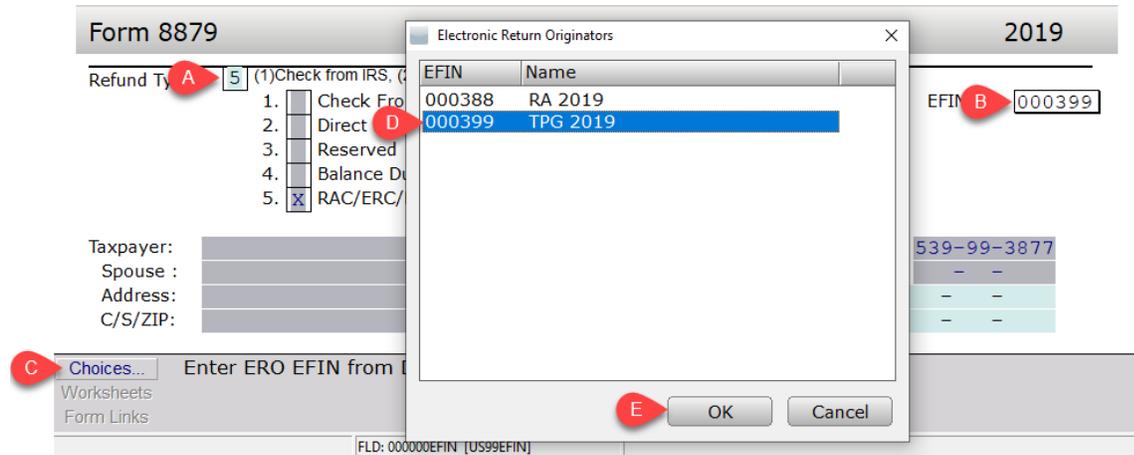
If you have a bank listed in RAC Bank field but are unable to add the BANK APP to the tax return, follow the steps below.

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

Attached Forms (Ctrl+F)

- GENERAL
 - Client Data
 - Information and Status
 - Tax Summary
 - Invoice - Billing & Pmts
 - Rejects
 - Questionnaire
 - Document Archive
 - Remote Signature
 - Depreciation
 - Event Log
 - Scan Barcode Forms
- FEDERAL [RFND:\$5,084, AGI:
 - RET 1040 - FEDERAL RET
 - Line 1 - Income Wks
 - Child Tax Credit and Cre
 - FRM W-2 [T - MUSS DEVE
 - FRM 8867 - PREP DUE DIL
 - FRM 8879 [ERO NAME]**

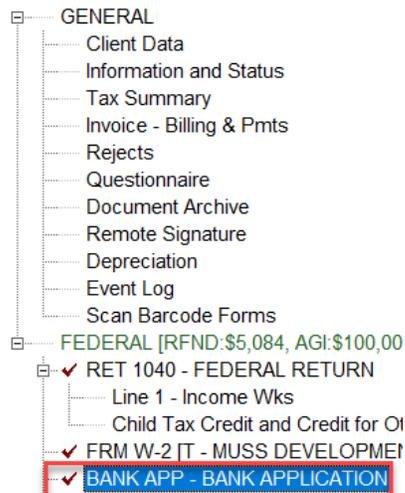
- (A) Set the **Refund Type** to 5; (B) **Click** inside the **EFIN** field; (C) **Click** the **Choices** button; (D) **Select** the desired **EFIN**; (E) **Click** **OK**.



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



- 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 help@erosupport.com.