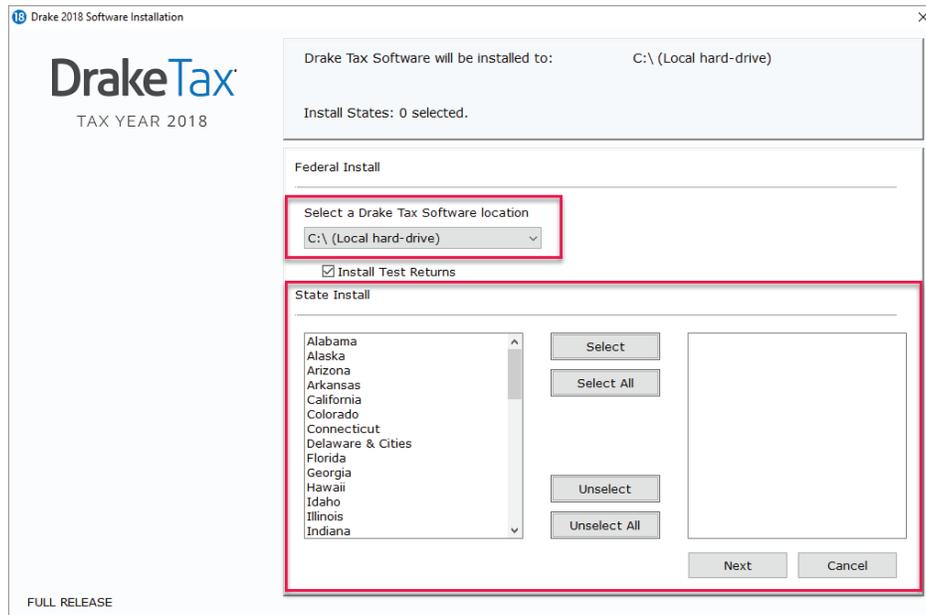


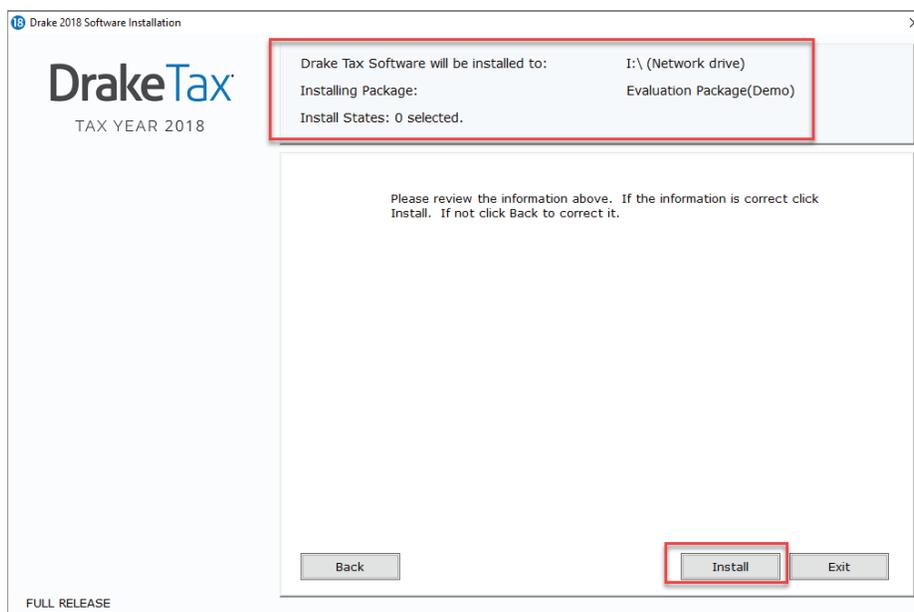
INSTALACIÓN

Instale Drake Tax desde su demo CD o desde el Download Center en línea. En la pantalla **Software Installation**, elija una locación para instalar Drake Tax, luego seleccione los estados que desee instalar desde la ventana **State Install**, elija todo lo que se aplique y click **Next** para continuar.



En la siguiente pantalla, si usted está de acuerdo con la licencia y el acuerdo de confidencialidad, marque el casillero **I accept the terms of the Drake Software 2018 License Agreement**. Luego seleccione la opción **Evaluation Version (Demo)** y click **Next**.

Revise la información en la parte superior de la pantalla Software Installation, si está correcta click **Install**.



CONFIGURACIÓN

La primera vez que usted abre el programa, se le solicitará asignar una password para el administrador. La password tiene que ser mínimo de ocho caracteres, tener una letra mayúscula, una letra minúscula, un número y un carácter especial. Confirme la password ingresada reingresándola en el campo **Repeat password**, luego click **Next**.

Drake Tax Security

Password setup for ADMINISTRATOR

All tax preparers and office personnel are required to set up and use strong passwords when accessing tax software. Strong passwords must be at least 8 characters long and contain an uppercase letter, a lowercase letter, a number, and a special character (for instance, ! @ # \$, etc.). For more information, click the Drake Tax security information link on the left-hand side of the screen.

Password
●●●●●●●● [Show password](#)

Repeat password
●●●●●●●● [Show password](#)

Password Requirements

- Minimum 8 characters
- Lowercase letter
- Uppercase letter
- Number
- Special characters / punctuation (Ex: !@#%&')
- Passwords match

[Drake Tax security information](#)

Help < Back Next > Cancel

Desde la lista desplegable seleccione una pregunta de seguridad e ingrese una respuesta. Click **Finish**.

Drake Tax Security

Security question for ADMINISTRATOR

Provide the answer to a security question in case you ever forget your password and need to reset it.

Select a security question from the list provided or type in your own

What was your kindergarten teacher's last name?

Answer
●●●●● [Show answer](#)

[Drake Tax security information](#)

Help < Back Finish Cancel

A continuación, se le presentará el **Setup Assistant**. Ingrese el número de su cuenta, EFIN y password de Drake. Esta información es necesaria para que Drake Tax se conecte con los servidores de Drake.

Si no ha registrado su demo, click **Register an account**.

Drake 2018 - Setup Assistant

E-File Setup

Enter your Drake Software account information below. These items are required to E-file test returns with Drake software. To skip this screen press Cancel below.

Do not show Setup Assistant on startup.

Don't have an account yet? [Register an account](#)

Setup Information

Account Number

EFIN

e-File Password

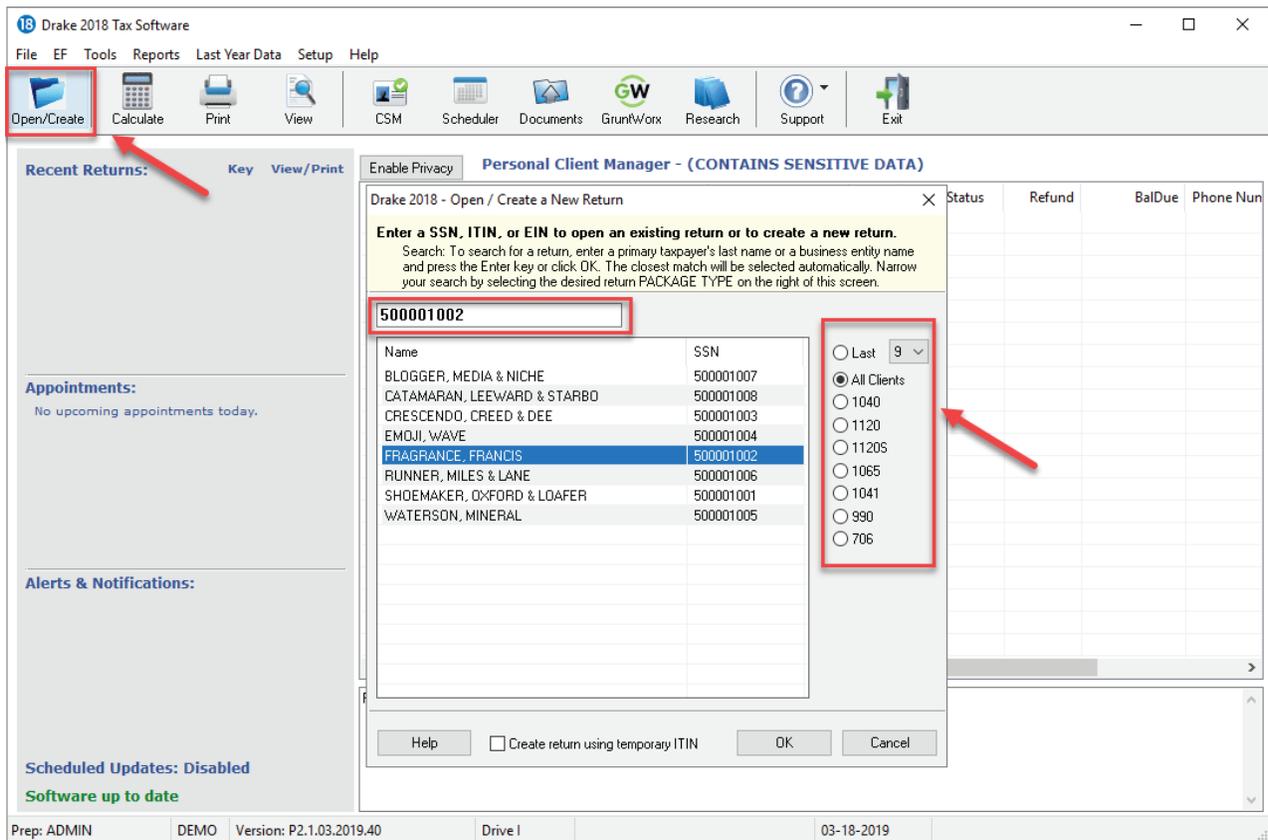
Save Cancel

ABRIENDO UNA DECLARACIÓN

Para iniciar la entrada de datos, desde la barra de herramientas click **Open/Create**.

Para abrir una declaración ya existente en Drake Tax, click el nombre desde la lista, ingrese el número de identificación del contribuyente o el apellido. Use los filtros a la derecha para mostrar las últimas nueve declaraciones, todos los clientes o busque por tipo de declaración. Para crear una nueva declaración, ingrese el número de identificación del contribuyente y click **OK**.

Para ver una declaración de práctica completa en Drake Tax, ingrese un SSN de prueba (500-00-1001 al 500-00-1008).



ENTRADA DE DATOS

Este es el **Data Entry Menu** de la declaración. Para seleccionar una pantalla de entrada de datos, click el nombre o el código de la pantalla, abreviación del estado, número del formulario o una palabra de búsqueda en el campo **Selector/Search** y presione ENTER. También puede ingresar palabras claves, frases o números para ubicar información específica dentro de la declaración.

Nota: Los nombres de pestañas y pantallas en azul indican que existe información presente.

The screenshot shows the Drake 2018 Data Entry interface. At the top, there is a title bar: "DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)". Below the title bar is a toolbar with icons for Calculate, View/Print, Split, Documents, Tax Planner, Import, CSM, Email, e-Pay, Help, and Exit. The main menu consists of several tabs: General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The "Credits" tab is currently selected. The menu items are listed in two columns. On the left, items include "1 Name and Address", "2 Dependents", "3 Income", "4 Adjustments", "5 Taxes, Credits and Payments", "ES Estimated Taxes", "2441 Child Care Credit", "W2 Wages", "W2G Gambling Income", "1099 1099-R Retirement", "DIV 1099-DIV Dividend Income", "INT 1099-INT Interest Income", "99G 1099-G Government Payment", "99M 1099-MISC Miscellaneous Income", "RRB RRB 1099-R Railroad Retirement", "SSA 1099-SSA Social Security", "PAD Preparer Notepad", "NOTE Notes about the return", and "FAQ Frequently Asked Questions". On the right, items include "A Itemized Deductions Schedule", "STAX Sales Tax Worksheet", "2106 Employee Business Expenses", "Due Diligence", "8867 Due Diligence Checklist", "DD1 Due Diligence Assistance", "DD2 Due Diligence Notes", "Electronic Filing and Banking", "BANK Bank info not set up in firm", "IDS Identification for Taxpayer/Spouse", "USE Consent to Use of Tax Return Info", "DISC Consent to Disclosure of Tax Return Info", "DD Direct Deposit/Form 8888", "PMT Electronic Funds Withdrawal", "PIN 8879/8878 e-file Signature", "EF EF Selections", "PDF PDF Attachments", "AP Protection Plus Audit Protection", and "BILL Client Adjustments". Annotations with red boxes and arrows point to various elements: "Data Entry Menu Tabs" points to the top tabs; "Screen Codes" points to the numbers and codes next to the menu items; "Active Screens" points to the blue text of the menu items; "Selector/ Search Field" points to the input field at the bottom with the placeholder text "Enter Screen, State, or Search Phrase".

Code	Screen Name	Code	Screen Name
1	Name and Address	A	Itemized Deductions Schedule
2	Dependents	STAX	Sales Tax Worksheet
3	Income	2106	Employee Business Expenses
4	Adjustments		Due Diligence
5	Taxes, Credits and Payments	8867	Due Diligence Checklist
ES	Estimated Taxes	DD1	Due Diligence Assistance
2441	Child Care Credit	DD2	Due Diligence Notes
W2	Wages		Electronic Filing and Banking
W2G	Gambling Income	BANK	Bank info not set up in firm
1099	1099-R Retirement	IDS	Identification for Taxpayer/Spouse
DIV	1099-DIV Dividend Income	USE	Consent to Use of Tax Return Info
INT	1099-INT Interest Income	DISC	Consent to Disclosure of Tax Return Info
99G	1099-G Government Payment	DD	Direct Deposit/Form 8888
99M	1099-MISC Miscellaneous Income	PMT	Electronic Funds Withdrawal
RRB	RRB 1099-R Railroad Retirement	PIN	8879/8878 e-file Signature
SSA	1099-SSA Social Security	EF	EF Selections
		PDF	PDF Attachments
PAD	Preparer Notepad	AP	Protection Plus Audit Protection
NOTE	Notes about the return	BILL	Client Adjustments
FAQ	Frequently Asked Questions		

Return Status: In Progress Return Type: Individual Tax Return Current Package: Federal

NOMBRE Y DIRECCIÓN

Para abrir la pantalla **Name and Address**, desde el menú de entrada de datos click el nombre de la pantalla o ingrese **1** en el campo selector y presione ENTER. La pantalla **Name and Address** es normalmente la primera pantalla que se completa en una declaración nueva.

Ingrese la dirección física del contribuyente. Al ingresar el código postal automáticamente se llenarán los campos **City, State, County** y **Resident State**.

La declaración se asigna por defecto al preparador ingresado en Drake Tax. Para elegir un preparador diferente, haga una selección desde la lista desplegable **Preparer #**.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

Name and Address and General Information

Taxpayer

Filing Status: **4** Head of Household

SSN: 500-00-1005

First name: MINERAL MI:

Last name: WATERSON Suffix:

Date of birth: 09-03-1975 Age: 43 (as of 12/31/2018)

Date of death:

Occupation: SALES

Phone Number Extension

Daytime: 828-524-8020

Evening: 828-524-8020

Cell:

Best time to call: Print on return:

Fax:

Email / text msg: WATERSON@1040.COM

Dependent of another Full-time student Presidential campaign Blind

Taxpayer did not live with spouse:

Health insurance coverage: [HC](#)

Spouse

SSN:

First name: MI:

Last name: Suffix:

Date of birth:

Date of death:

Occupation:

Phone Number Extension

Daytime:

Evening:

Cell:

Best time to call: Print on return:

Fax:

Email/text msg:

Dependent of another Full-time student Presidential campaign Blind

Nonresident alien

MFS claiming spouse exemption

Spouse is not filing a return Spouse has no U.S. income

In care of: [ID Screen](#)

Mailing Address

Street address: FRESHWATER CIRCLE Apt #:

City: SANTA FE [Combat Zone](#)

U.S. ONLY State: NM ZIP: 87505 County: SANTA FE Stateside military address

Foreign ONLY Province/State: Country: Postal Code:

Resident state: 0 Resident city: School district:

Foreign Account Questions

If taxpayer has any interest in or authority over any foreign account or foreign trust, answer questions on this screen. [Foreign Accounts](#)

Otherwise check here: Answer "No" to Sch B, Part III questions

Return Options

Firm #: ES and OP codes: [ES](#)

Preparer #: 1

Data entry #: Invoice number:

ERO #: Fee override:

2210 Options

2210 Code:

2017 Fed tax:

2017 State tax:

Miscellaneous Codes

Code 1:

Code 2:

Code 3:

Code 4:

Code 5:

Record 1 of 1 Press F1 or Right-Click for Help (Screen Help)

FORMULARIO W-2

Ingrese "W2" en el campo selector y presione ENTER o click **W2** para ingresar la información del Formulario W-2. Ingrese la información del W-2 tal como aparece en el formulario actual del contribuyente. En el primer campo TS ingrese "T" (contribuyente) o "S" (cónyuge) para llenar los campos del empleado. Ingrese el EIN (Número de Identificación del Empleador). Después de haber usado este EIN una vez, los campos del empleador se llenarán automáticamente en las próximas declaraciones.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

W-2 [Additional Entries](#) [Ohio RITA](#) [Import W2](#) [Video: Entering Multiple-State W2s](#)

Form W-2 - Wage and Tax Statement

TS F Special tax treatment

State Information [IN](#) [NJ](#) [NY](#) [PA](#)

Employer information is required for e-file

EIN..... 51-0000000
 Name..... HYDRO PLANT
 Name cont.....
 Street..... 200 HYDRATION AVENUE
 City..... SANTA FE
 U.S. ONLY State ZIP
 NM 87505
 Foreign ONLY Province/State Country Postal Code
 <Click to Access>

1 Wages, tips 25000
 2 Federal tax w/h 3000
 3 Soc Sec wages 25000
 4 Soc Sec w/h 1550
 5 Medicare wages 25000
 6 Medicare tax w/h 363
 7 Soc Sec tips
 8 Allocated tips
 9 Verification Code
 10 Dep care benefit

Form 2441
 Form 8880

Employee name and address (if different from screen 1)

Name: First = MINERAL Last = WATERSON
 Street = FRESHWATER CIRCLE
 City = SANTA FE
 U.S. ONLY State ZIP
 NM 87505
 Foreign ONLY Province/State Country Postal Code
 <Click to Access>

11 Non-qualified plan
 12 Code Amount Year
 13 Statutory employee
 Retirement plan
 Sick pay
 14 Other SEHI QSEHRA

15 ST Employer's state ID number 16 State wages 17 State tax 18 Local wages 19 Local tax 20 Locality

Was this W-2 altered or handwritten? (Nonstandard) Corrected W-2 Do not update

If either spouse has an ITIN on screen 1, the TIN from the W-2 must be entered in this field.....

Record 1 of 1 Press Page Down for New Screen; Ctrl+Tab for Next Tab Press F1 or Right-Click for Help (Screen Help)

Presione PAGE DOWN para ingresar W-2s adicionales. Cuando haya terminado, presione ESC para guardar las entradas y regresar al **Data Entry Menu**.

AYUDA EN UN CAMPO

Le provee información acerca de un campo seleccionado. Existen tres maneras de tener acceso a ayuda en un campo:

- Click dentro del campo y presione F1
- Click dentro del campo y presione SHIFT+?
- Click-derecho en el campo y en el menú seleccione **Help > Help for this Field**

The screenshot shows the 'Schedule A - Itemized Deductions' screen in Drake 2018. The 'Income taxes' field (line 5) is highlighted with a red box. A help window titled 'Drake Software - Data Entry - Help' is open over this field, displaying the following text:

Real estate taxes (adjustment)

Enter the total of any real estate taxes (state, local, or foreign) paid on real estate owned that was not used for business, but only if the taxes are based on the assessed value of the property.

NOTE: This field is an adjustment field. An amount entered on this line will be combined with an amount entered in the "Real estate taxes paid" field at the bottom of screen 1098.

The help window also includes 'Copy', 'Print', and 'OK' buttons.

La barra de herramientas de entrada de datos aparece en las pantallas de entrada de datos cuando el puntero del ratón se mueve hacia la parte superior de la pantalla. Click los botones de la barra de herramientas para realizar varias funciones de manera rápida. Para cerrar la barra de herramientas, click en cualquier otro lado en la pantalla.

The screenshot shows the 'Data Entry' screen in Drake 2018. A red box highlights the data entry toolbar, which includes the following buttons: Calculate, View/Print, Refresh, Delete, Clear Flags, Previous, Next, Calculator, PY Fields, PY Data, Help, and Exit. Below the toolbar, the 'Special tax treatment' dropdown is set to 'F'. The 'Employer information is required for e-file' section shows the EIN as 51-0000000. The '1 Wages, tips' field contains 25000, and the '2 Federal tax w/h' field contains 3000.

AYUDA EN UNA PANTALLA

La mayoría de las pantallas de entrada de datos tienen **Screen Help** para proveer más información acerca de la pantalla abierta. Desde la barra de herramientas de entrada de datos click el botón **Help** o seleccione **Help** desde el menú del click-derecho.

The screenshot shows the Drake 2018 Data Entry software interface. At the top, a red box highlights the toolbar containing buttons for Calculate, View/Print, Refresh, Delete, Clear Flags, Previous, Next, Calculator, PY Fields, PY Data, Help, and Exit. A red arrow points from the Help button in the toolbar to a 'Screen Help' window that is open over the main data entry screen. The 'Screen Help' window is titled 'Drake Software - Data Entry - Help - Estimated Tax' and contains the following text:

ES - Estimated tax

Use this package to figure and pay estimated tax. Estimated tax is the method used to pay tax on income that is not subject to withholding (for example, earnings from self-employment, interest, dividends, rents, alimony, etc.). In addition, if the taxpayer does not elect voluntary withholding, you should make estimated tax payments on unemployment compensation and the taxable part of his or her Social Security benefits. See the instructions for the tax return for details on income that is taxable.

Tax Payments
General rule. In most cases, the taxpayer must make estimated tax payments if he or she expects to owe at least \$1,000 in tax for 2019 (after subtracting any withholding and credits) and the taxpayer expects his or her withholding and credits to be less than the smaller of:

- (1) 90% of the tax shown on his or her 2019 tax return
- (2) 100% of the tax shown on the 2018 tax return.

(If the taxpayer did not file a 2018 tax return or if the taxpayer's 2018 return did not cover 12 months, item (2) above does not apply.)

Exception. The taxpayer does not have to pay estimated tax for 2019 if he or she was a U.S. citizen or resident alien for all of 2017 and the taxpayer had no tax liability for the full 12-month 2018 tax year. The taxpayer had no tax liability for the prior year if his or her total tax was zero or he or she did not have to file an income tax return.

Buttons for Copy, Print, and OK are visible at the bottom of the help window.

The background data entry screen shows the 'Federal Section' and 'State and City Section' for '2018 ESTIMATED TAXES ALREADY PAID FOR THIS YEAR'. It includes fields for 'Overpayment applied from 2017' and a table with columns for 'Date paid' and 'Amount' for each quarter (1st, 2nd, 3rd, 4th).

FIRMANDO LA DECLARACIÓN

Ingrese "PIN" en el campo selector o click en la pantalla **8879/8878 e-file Signature** para abrir la pantalla **PIN**. Ingrese la **PIN signature date** o presione Alt+D para ingresar automáticamente la fecha actual. Luego proceda a ingresar el **ERO's PIN signature**. El PIN del contribuyente y del cónyuge (si se aplica el caso) se generan automáticamente.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

Signature Page for Paperless PIN Returns [Video: Using a PIN in Drake](#)

PIN signature date..... 04-15-2019 ERO's PIN signature..... ●●●●●

Under penalties of perjury, I declare that I have examined this return ... ; For a full version of the ERO's jurat, press F1 in the PIN field. By entering your PIN, you (the ERO) are stating that you have read and agree to the full version of the jurat.

Taxpayer's PIN signature..... 02279 Taxpayer entered: Identity Protection PIN.....
Spouse's PIN signature..... Spouse entered: Identity Protection PIN.....

Under penalties of perjury, I declare that I have examined this return ... ; For a full version of the taxpayer's jurat, press F1 in the PIN field. By entering your PIN, you (the taxpayer/spouse) are stating that you have read and agree to the full version of the jurat.

Select Form: 1040 (default) 4868 with payment 2350 9465 56

Direct Debit Consent

Direct Debit Consent

I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal entry to the financial institution account indicated for payment of my federal taxes owed on this return and/or a payment of estimated tax. I further understand that this authorization may apply to future federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). In order for me to initiate future payments, I request that the IRS send me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than two (2) business days prior to the payment (settlement) date.

I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

Form 2350/9465 Only	Taxpayer	Spouse
Prior Year AGI.....	<input type="text"/>	<input type="text"/>
Prior-year PIN.....	<input type="text"/>	<input type="text"/>

Press Page Down for New York E-File/Direct Debit Authorization and Ohio Perjury Statement Acceptance

New Screen Press F1 or Right-Click for Help (Screen Help)

PROGRAMAS DE ESTADO & CIUDAD

Drake Tax produce declaraciones estatales usando la información ingresada en las pantallas del federal. Para modificar o agregar información adicional desde las pantallas del federal, ingrese el código del estado en el campo selector y presione ENTER o seleccione el estado desde la pestaña **States**.

The screenshot shows the Drake Tax software interface. The window title is "DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)". The interface includes a toolbar with icons for Calculate, View/Print, Split, Documents, Tax Planner, Import, CSM, Email, e-Pay, Help, and Exit. Below the toolbar is a tabbed menu with the following tabs: General, Income, Adjustments, Credits, Credits, Taxes, Health Care, Other Forms, Foreign, Miscellaneous, and States. The 'States' tab is selected, and a red arrow points to it. The main area displays a list of states in three columns:

AL	Alabama	KY	Kentucky	NV	Nevada
AR	Arkansas	LA	Louisiana	NY	New York
AZ	Arizona	MA	Massachusetts	OH	Ohio
CA	California	MD	Maryland	OK	Oklahoma
CO	Colorado	ME	Maine	OR	Oregon
CT	Connecticut	MI	Michigan	PA	Pennsylvania
DC	Washington, DC	MN	Minnesota	RI	Rhode Island
DE	Delaware	MO	Missouri	SC	South Carolina
FL	Florida	MS	Mississippi	TN	Tennessee
GA	Georgia	MT	Montana	TX	Texas
HI	Hawaii	NC	North Carolina	UT	Utah
IA	Iowa	ND	North Dakota	VA	Virginia
ID	Idaho	NE	Nebraska	VT	Vermont
IL	Illinois	NH	New Hampshire	WI	Wisconsin
IN	Indiana	NJ	New Jersey	WV	West Virginia
KS	Kansas	NM	New Mexico		

Below the list of states, there are three entries:

- STEX State Extensions
- STX2 Amount Paid with State Extension
- 99K 1099-K Third Party Payments

At the bottom of the interface, there is a text input field containing "VA", which is highlighted with a red box. Below the input field, the status bar shows: Return Status: In Progress, Return Type: Individual Tax Return, and Current Package: Federal.

En el menú de entrada de datos de cada estado se encuentran formularios disponibles. Para mayor información acerca del acceso a los programas de estado y ciudad, refiérase al **2018 Drake Tax User's Manual**.

DRAKE 2018 - Data Entry (500001005 - WATERSON, MINERAL) - (CONTAINS SENSITIVE DATA)

Calculate View/Print Split Documents Tax Planner Import CSM Email e-Pay Help Exit

General Credits Other

1 Demographic Info - Residency/Filing Status
2 Demographic Info - Additional Information

ADD Additions to Income
SUB Subtractions from Income
DIS Verification of Disability Income
763 Misc items of the NR
ITEM Itemized/Standard Deductions
DED Other Deductions
CSPD College Savings Plan Deduction
LTCW Long Term Care Worksheet
PMT Payments
PEN Penalties and Interest
USE Sales and Use Tax Worksheet
VAC College Savings Plan Contributions
VAC2 Voluntary Contributions
VAK1 K1's Received
EXCP Part-Year Resident Exemption Exception
FED Schedule FED - Federal Schedule Info

Taxpayer/Spouse Split Information
AGI VAAGI Wks-(Taxable Income/Adjustments/AGI)
SCHED VA Sch D Wks-(Capital Gains/Losses)
VA4797 VA 4797 Wks-(Other Gains/Losses)
SCHE VA Sch E Wks-(Rents, Royalties, etc...)
FDC VA Fixed Date Conformity
PRNT FDST Worksheet Suppression

Electronic Filing
PHWR Paid Tax Preparer Hardship Waiver Request

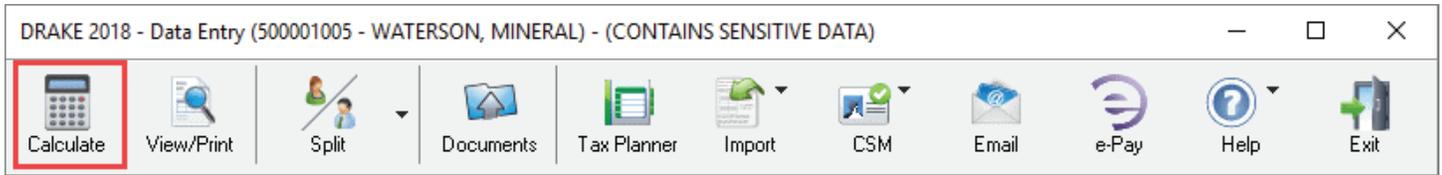
FAQ Frequently Asked Questions

Enter Screen, State, or Search Phrase

Return Status: In Progress Return Type: Individual Tax Return Current Package: Virginia

RESULTADOS DE CÁLCULO

Para calcular una declaración desde entrada de datos, click el botón **Calculate** en el menú de entrada de datos, en la barra de herramientas de cualquier pantalla de entrada de datos o presione CTRL+C.



La ventana **Calculation Results** muestra el ingreso total del contribuyente, el ingreso sujeto a impuestos, el monto total del reembolso fiscal, balance adeudado, método de pago y la elegibilidad de la declaración para ser transmitida electrónicamente.

La columna **EF Status** muestra un círculo verde por cada declaración que es elegible para ser transmitida electrónicamente. Un círculo rojo indicará que la declaración no está elegible para ser transmitida y tiene una página de mensajes de error de transmisión electrónica.

Los mensajes de transmisión electrónica se muestran en el centro de la ventana **Calculation Results**. Revise los mensajes de error dando un click-derecho en cada mensaje para poder leer la descripción completa del problema. Si un mensaje de error está de color azul, doble-click y lo llevará a la pantalla de entrada de datos que contiene el error. Todos los problemas identificados tienen que ser corregidos para que la declaración sea elegible para ser transmitida electrónicamente.

The screenshot shows the 'DRAKE 2018 - Calculation Results - (500-00-1005 - WATERSON, MINERAL)' window. It has a 'Summary' tab selected. A table displays tax data for 'Federal' and 'VA760' categories. The 'EF Status' column shows red 'X' icons for both rows. Below the table, a section titled 'EF Messages' lists three error messages with their respective codes and descriptions. At the bottom, there are 'Return Notes' and a 'Fee Type' table showing a 'Preparation Fee' of \$0.00. The 'Total Tax Refund' is \$7,829. A 'Continue' button is visible at the bottom right.

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	25,000	7,000	0	6,741	0	Receive Check	✘
VA760	25,000	20,140	412	1,088	0	Receive Check	✘

EF Messages - Double click on any highlighted item in the list below to fix the problem:

Package	Code	Description - (right-click for full description)
VA	9074	THE PIN entered on the PIN screen does not match what is in the...
VA	9346	On the Federal IDS screen, a Driver's license or State ID was...
VA	307	VA Electronic Filing NOT Allowed...

Return Notes:
VA Low Income Calculation NOT Allowed: Family AGI = \$25,000 Poverty Guideline = \$16,460

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Refund: 7,829

Current Program: Calculation Complete **SEE MESSAGE PAGE**
Description: Press <ENTER> key or Click Here to Continue Continue

Una vez que todos los errores de transmisión electrónica hayan sido corregidos y la declaración sea elegible para poder ser transmitida electrónicamente, estará disponible para ser elegida durante el proceso de transmisión electrónica.

DRAKE 2018 - Calculation Results - (500-00-1005 - WATERSON, MINERAL)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Meth...	EF Status
Federal	25,000	7,000	0	6,741	0	Receive Check	
VA760	25,000	20,140	412	1,019	0	Receive Check	

EF Messages - Double click on any highlighted item in the list below to fix the problem:

Package	Code	Description - (right-click for full description)

Return Notes:

VA Low Income Calculation NOT Allowed: Family AGI = \$25,000 Poverty Guideline = \$16,460

Fee Type	Amount
Preparation Fee	\$0.00

Total Tax Refund: 7,760

Current Program: Calculation Complete **Eligible For E.F.**

Description: Press <ENTER> key or Click Here to Continue Continue

VER E IMPRIMIR UNA DECLARACIÓN

En cualquier momento durante la entrada de datos, click **View** o presione CTRL+V para ver la declaración. Todos los formularios generados en la declaración estarán listados en un formato tipo árbol en el panel izquierdo.

Click "+" para expandir y el "-" para colapsar las categorías.

Marque los casilleros o use las teclas de flechas para moverse a través de los formularios. El formulario elegido se mostrará en el panel de visualización.

Click la cabecera de una categoría para seleccionar todo el grupo de formularios o seleccione formularios específicos. Presione CTRL+P para imprimir todos los formularios seleccionados o sólo el formulario mostrado en el panel de visualización. Presione CTRL+Q para una impresión rápida del formulario que se encuentra en el panel de visualización.

En este ejemplo, una impresión rápida imprimirá el Formulario 1040.

Para cerrar el modo View/Print y regresar a entrada de datos, presione CTRL+E o desde la barra de herramientas click **Data Entry**.

The screenshot displays the Drake 2018 View/Print Client Return software interface. The window title is "Drake 2018 View/Print Client Return | WATERSON, MINERAL (500001005) - (CONTAINS SENSITIVE DATA)".

Toolbar: Located at the top, it includes icons for Data Entry, Print, Setup, Documents, eSign, Email, Refresh, Basic View, Help, and Exit. A red arrow points to this area with the label "Toolbar".

Select Forms to View/Print: Below the toolbar, there are navigation buttons and a search icon.

Form Category Tabs: A row of tabs includes "All Forms", "Sets", "EF", "Federal", "Worksheets", "Miscellaneous", "Notes/Messages", and "Virginia". A red arrow points to these tabs with the label "Form Category Tabs".

Forms, Schedules, & Worksheets Generated for Return: A tree view on the left side lists various forms and schedules, including "Federal", "Messages", "Notes Page", "EF Status", "Form 1040", "Schedule 1", "Schedule 4", "Schedule 5", "Schedule C-EZ", "Schedule SE", "Schedule EIC", "Form 8812", "Form 8867", "Miscellaneous", "EIC Due Diligence Assist", "Due Diligence", "Form 8879", "Form 9325", "Tax Computation", "Wks EIC", "Wks EIC B", "Wks 8812", "QBI Simple Wks", "QBI Explanation", "Wks CARRY", "Folder Cover Sheet", "Filing Instructions", "Engagement Letter", "Result Letter", "Privacy Policy", "Bill", "Summary", "Comparison", "Virginia", "VA MSG", "VA NOTES", "VAINST", and "VA 750". A red arrow points to this list with the label "Forms, Schedules, & Worksheets Generated for Return".

Expand & Collapse Sections: A red box highlights the expand/collapse icons (plus and minus signs) next to the "Federal" and "Virginia" categories in the tree view. A red arrow points to this box with the label "Expand & Collapse Sections".

Main Form View: The right side of the window displays the "Form 1040 U.S. Individual Income Tax Return 2018". The form includes fields for Filing status, Name (MINERAL WATERSON), Social Security Number (500-00-1005), Spouse's Social Security Number, and Dependents (HUBBLE WATERSON, 400-00-5004, Daughter). It also shows the Preparer's information (John Doe, Firm Name, 123 Main St, Franklin, NC 28734) and a summary table at the bottom right with a total of 25,000.

TRANSMITIENDO UNA DECLARACIÓN

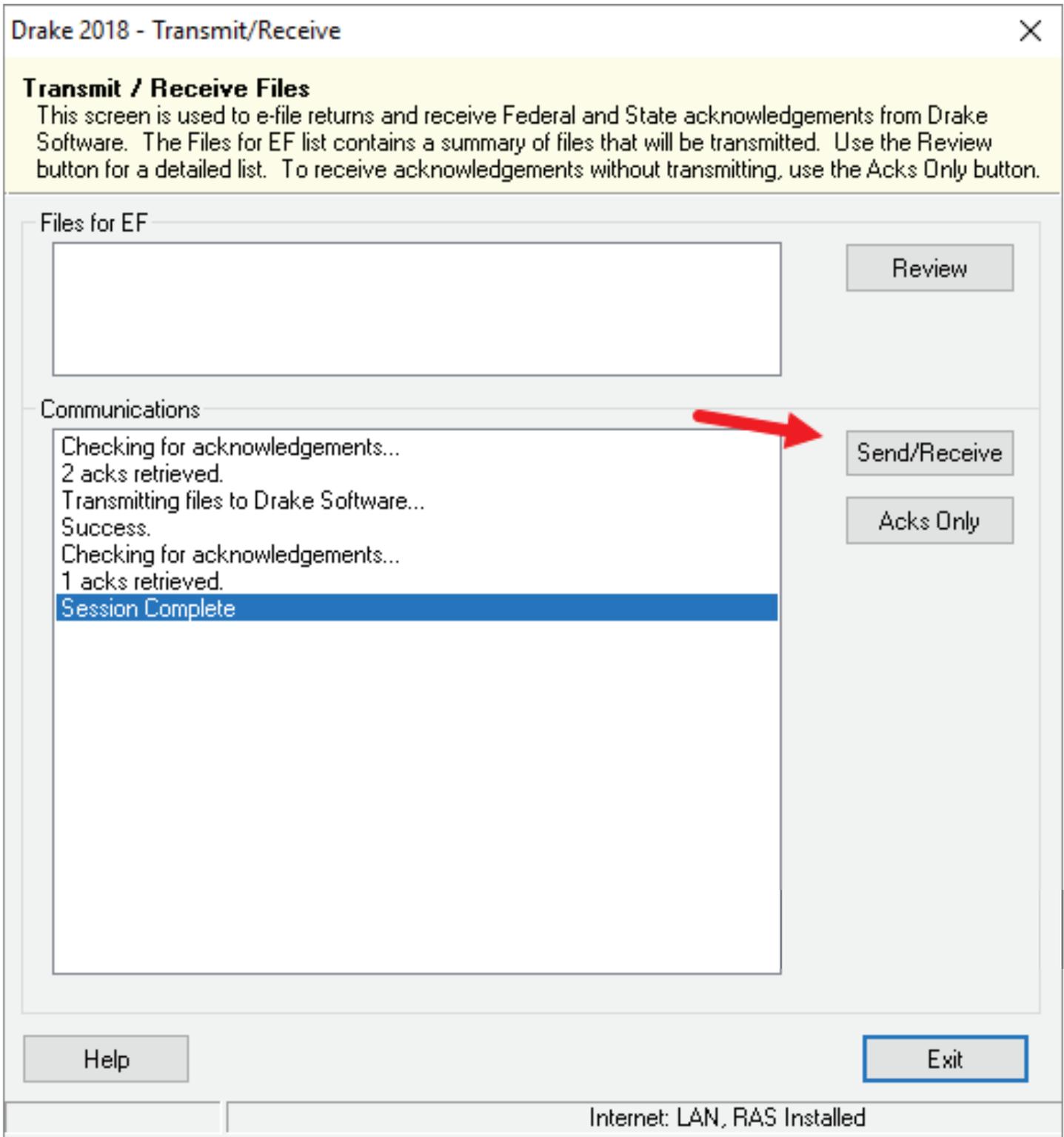
La transmisión electrónica en Drake Tax es un proceso simple de tres pasos.

- 1. Seleccionando las Declaraciones a ser Transmitidas:** En la barra de menú elija **EF>Select Returns for EF**. Marque el casillero a la izquierda de la declaración para seleccionarla y que sea transmitida electrónicamente, luego click **Continue**. El Report Viewer lista la o las declaraciones seleccionadas para ser transmitidas electrónicamente. Click **Exit**.

The screenshot shows the Drake 2018 Tax Software interface. The 'EF' menu is open, and 'Select Returns for EF' is highlighted. The 'EF Return Selector' window is displayed, showing a table of client information. The first row is selected, and a red arrow points to the selection checkbox.

ID Number	Client Name	Status	EF Documents	Fed. Bal ...	Fed. Refu...	Method	Last Calc	EFIN	M
<input checked="" type="checkbox"/>	400006009	SALAD, CAESAR & C...	Ready For EF	1040	\$125		03/19/2019...		M

2. **Transmitiendo las Declaraciones:** Vaya a **EF>Transmit/Receive** y click **Send/Receive** para transmitir la o las declaraciones y recoger acknowledgements.



3. Procesando Acknowledgements (Acks): Finalmente, vaya a **EF>Process Acks**. Sus acknowledgements estarán registrados en su base de datos de transmisión electrónica (EF Database). Usted deberá recibir un ack "T" por una declaración de prueba (T=test).

Para revisar los detalles de la transmisión, vaya a **EF>Search EF Database**. La base de datos de transmisión electrónica es una base de datos de búsqueda, que muestra información de todas las declaraciones que han sido transmitidas electrónicamente por su oficina en el año fiscal actual. Ingrese el SSN, ITIN, EIN o el apellido y click **Go**. La base de datos mostrará información acerca de la declaración y de su producto bancario asociado, cargos, códigos de rechazo y más. Click en las pestañas para tener acceso a más información acerca de la declaración.

Drake 2018 - Search EF Database - (CONTAINS SENSITIVE DATA)

SSN/EIN/Name to Search for:

SSN: Name:

Taxpayer:

Spouse:

F1 - General Information | F2 - Bank/Direct Deposit Info | F3 - Fees/Miscellaneous Info | F4 - Reject Code Lookup

In Care of:

Address:

City St Zip:

On Behalf of:

Daytime Phone:

Evening Phone:

Cell Phone:

Reject Code:

Form I.D.:

Form #:

Seq. #:

Federal:

ACK Code: **IRS Accepted**

ACK Date:

Transmitted:

Filing Status:

Refund Amount:

Balance Due:

[Where is my refund?](#) Payment Req.:

DOB Validity:

Bank Code:

RT/Loan Status:

Check Information:

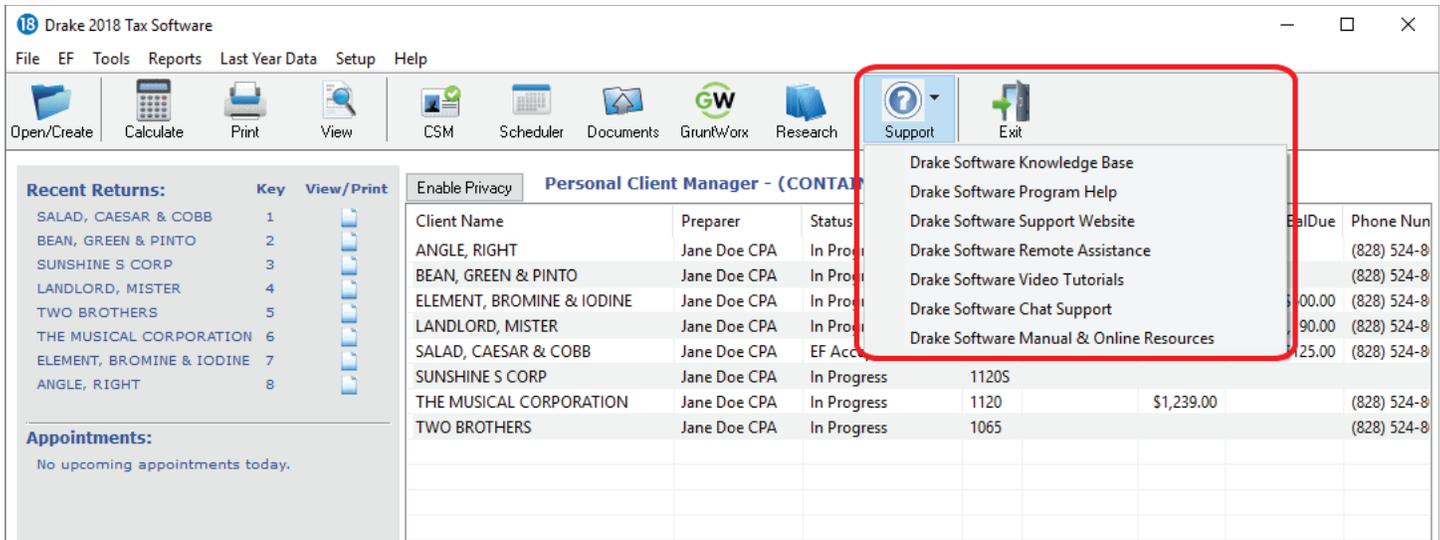
Ck	Status	Amount	Number	Prior #	Print Date	Clear Date	Ck Info	Ck Clear	Ck Type	Prod Type

Record: 1 of 2

No Search Criteria Entered.
Scanning Entire Database.

OK
F10 - Online DB
F5 - Data Entry
Exit
Help

FUENTES DE AYUDA



Drake Software le ofrece un amplio rango de fuentes de ayuda incluyendo una gran variedad en línea y también dentro del programa.

Desde la barra de herramientas de la ventana inicial de **Drake Tax** click el botón **Support** para tener acceso a muchos recursos de ayuda, incluyendo:

- **Drake Software Knowledge Base**, una fuente de referencia en línea que contiene las respuestas a preguntas comunes tanto de impuestos como del programa.
- **Drake Software Program Help**, una "Enciclopedia de Drake" de búsqueda, organizada en "libros". Incluye una opción de búsqueda, un índice de búsqueda y una lista de favoritos. El Program Help contesta muchas de las preguntas más comunes acerca del programa de impuestos.
- **Drake Software Support Website**, una página web con enlaces a todas nuestras fuentes de ayuda en línea, incluyendo Knowledge Base, Drake ETC y muchas otras páginas web muy útiles.
- **Video Tutorials**, un compendio de más de 200 videos instructivos, mostrando cómo usar Drake Tax y sus programas relacionados.
- **Manual and Online Resources**, un enlace a los manuales de Drake Tax, declaraciones de prueba, publicaciones del IRS y cartas de envío de Drake Software, todo en un formato PDF, para lectura en línea o disponible para descargarlo.