Electronically Filing a Return in Drake

- Make sure ELF forms for Federal and State are signed.
- If DCN starts with 049068 & signed by Sean then you will send an email to Kim@taxsense.com with the clients name letting her know the forms are signed. File the forms in the front file cabinet in folder labeled SEAN for him to pick up. These returns will be EFILED & TRACKED from the PLYMOUTH OFFICE.
- In Drake, from the EF choose "Select Returns for EF" (If client is not on list open return and calculate) verify that the refund/balance due matches the 8879. Any discrepancy notify the office manager.
- Check off returns to be sent and press Continue.
- Double-check names and if okay, press Exit.
  To send files: Go to top of home screen and select EF Transmit/Receive, a box will show up with all files selected, press Send/Receive.
- Wait for response from Drake Server. After "session complete" message, press exit.
- Check off E file Return in Solve Project Blog.

Checking Return ELF Status

- From Drake EF menu, select Search EF database.
- On right, click on F10 Online DB, enter Login (efin) and password.
- Click on Returns (upper left) and select start and end date, and run report. Check for rejected returns and advise Preparer of any rejected returns. (Can also run report again and only select "rejected" for return type to get on one list). Once rejected returns have been corrected, resubmit as above. Once return is accepted, the reject will no longer be on this report.
- When a return is accepted, move the forms from the "waiting to be accepted" folder to the "to be filed" folder.