

Printing Returns in Drake 2016

- Make sure Tax Return Checklist is done. Calculate the return and check errors. The only ones should be related to signing a return “PIN signature required...”
- In the PIN screen enter your 5 digit number in the ERO’s PIN Signature field. Calculate the return again. Both Federal and State should have a green checkmark in the Eligible for EF column.
- In Print Mode (enhanced view), click on the Sets tab.

Print copies for client to sign (paper):

- Check EF Signature and Client
- Press Print icon, select the appropriate printer for Signature & Client copies, then print.
- If client has Earned Income credit, 8867 will print automatically with the EF signature set. This must be signed by client & preparer.
- If client has e-Collect, then 7216 disclosure and fee sheet will print for clients to sign.

Print copies for our files (pdf):

- Check client set. Also, check preparer set.
- Press Print icon, select Drake pdf printer for Client & Preparer Copies, then print.

Archive Return:

- Select Archive—Archive Client Return, enter a description “as filed” and press ok. Archived file is now saved and accessible as a pdf file in the Drake DDM.

Update Aero

- Check off “printed” task.
- Assign Aero to appropriate Front Desk to assemble/scan/contact client.