

WHAT'S IN THIS SHIPMENT

Drake Software CD, including:

- Software for sending live transmissions to the IRS and approved states.
- Federal and state tax compliance programs. Most state forms and packages are live on this CD. Refer to your resident state shipment letter for more details. (All state letters are included on this CD in PDF form and through the software at **Help > Online Resources.**)
- Software tools, reports, setup, and Drake Document Manager.
- The *2013 Drake Software User's Manual* in electronic format. If you prefer a hard copy, you can print one from the CD or order one directly from Drake for \$25 (plus tax, shipping, and handling). To order, go to Support.DrakeSoftware.com > **Training Tools > Manuals** and click the link in the right side of the window. (**Note:** The manual on this CD contains new and revised content since the previous software release. If you have already saved a PDF version of the 2013 manual to your computer, you should save a new copy from this CD.)
- The initial release of Client Write-Up 2014, Drake's payroll and write-up program. CWU is free to full-version tax software customers (\$295 for PPR customers).

ELECTRONIC FILING

In accordance with IRS regulations, you cannot submit electronic returns to the IRS until you have received all W-2, W-2G, and 1099-R forms from the taxpayer. If the taxpayer cannot provide correct W-2, W-2G, or 1099-R forms, you may e-file the return only after Form 4852 (Substitute for Form W-2/1099-R) is completed in accordance with the use of that form. This is the only case in which information from pay stubs or Leave and Earning Statements (LES) is allowed.

Important Dates

- January 2, 2014:
 - Drake begins receiving 1040 and business returns for 2011 through 2013
 - Drake begins receiving 1041 returns for 2013
 - Drake begins transmitting to the CA Department of Revenue
 - Drake begins receiving 94X returns
- January 13, 2014: Drake begins transmitting all business and 1041 returns to IRS.
- January 13, 2014: Drake begins transmitting 94x returns to the IRS.
- January 31, 2014: Drake begins transmitting 1040 returns to the IRS; customers begin receiving first IRS 1040 acknowledgements and bank acknowledgements.

FORMS, SCREENS, AND FEATURES

- For descriptions of the latest forms, screens, and features in the program this year, read "New for 2013," on the **FAQ** screens in the various packages.
- Any Consent to Use or Consent to Disclosure documents obtained on or after January 1, 2014, must contain the mandatory language required by Rev. Proc. 2013-14. The Consent to Use and Consent to Disclosure documents in the software and on the website (Support.DrakeSoftware.com > **Resources > 7216 Sample Letters**) have been modified to contain the mandatory language provided in this procedure.

HEALTH INSURANCE REFERRAL PROGRAM

DrakeHealth is an incentive-based program that gives you an opportunity to earn revenue by referring people to affordable health insurance options through eHealth, a Drake partner and the nation's leading online source of health insurance. You receive a \$50 referral fee for each completed application for an eligible plan properly submitted to and received by eHealth. (The referral fee is for a *completed application*; it is not contingent on the purchase of health insurance.)

Getting started is simple and there is no cost to participate. Home base for this program is *DrakeHealth.com*. There you'll find everything you need to help your clients understand the tax implications of the law, including interview flow charts, calculators, letter templates, and other important information about the Affordable Care Act and the referral program.

For information on ACA calculators in the tax software and online, see "ACA Calculators" on page 224 and "Online ACA Calculators" on page 287 of the *2013 Drake Software User's Manual*.

For more details on this referral program, go to DrakeHealth.com.

DRAKE HEALTH GUIDELINES

To use and participate in the DrakeHealth referral program, the DrakeHealth.com website, and the unique account URL provided through the tax software, you agree to follow these guidelines:

- As a tax preparer, you may not perform the following functions for your clients (regarding health insurance):
 - Answer questions from your client about insurance coverage types, including deductibles, co-pays, benefits, etc., or attempt to answer any questions about the specific insurance policies, insurance companies, or coverage.
 - Assist your client directly in filling out an application for insurance. This would not preclude you from providing tax information to your client to use in filling out the insurance application without your assistance.
 - Recommend a particular policy or explain any particular benefits of one policy compared to another.
 - In general, perform any activities which may be considered "selling" insurance in your state.
- The following is a short list of acceptable activities you *may* perform:
 - Inform your client that they are required to comply with the Affordable Care Act.
 - Inform your client of the potential TAX implications of the Affordable Care Act, including estimating their Shared Responsibility Penalty and their Premium Assistance Credit.
 - Provide your client with information from their tax return which may assist them in complying with the provisions of the Affordable Care Act, such as filling out their application for insurance.
 - Explain the concepts of minimal essential coverage, and in general terms, the requirement to obtain certain levels of coverage (Bronze, Silver, etc.) in order to comply with the law.
 - Refer your clients to the DrakeHealth/eHealth link to assess their compliance with the Affordable Care Act.
- You are responsible for your compliance with all regulatory and legal requirements pertaining to your activities within this program.

SECUREFILEPRO

SecureFilePro™, an HTTPS file-sharing site, allows you to send and receive documents on your own secure Web portal. Customize your e-mail, brand your site, add folders, and upload files. Your customers can also move, copy, rename, and delete certain files and folders.

To sign up for SecureFilePro™, you must first set up an account. Log on to Support.DrakeSoftware.com, and from the blue menu bar, go to **Resources > SecureFilePro**.

Tutorials are available at Support.DrakeSoftware.com > **Training Tools > Tutorials**.

See Chapter 13, “Suite Products,” in the *2013 Drake Software User’s Manual* for more information on setting up and using SecureFilePro™.

STAFF TRAINING

Take advantage of the following Drake tools to learn to use Drake Software and to train your staff:

DRAKE UPDATE SCHOOL WEBINARS

See the Drake Update Schools content in webinar format. These webinars cover the same great content as the update schools: *What’s New in Drake* and *2013 Tax Law Updates*. CPE credits are available for these webinars. Go to the Drake e-Training Center at DrakeETC.com to view the dates and times for these webinars. (See “Drake ETC,” below, for details on logging in.)

DRAKE UPDATE SCHOOL DVD

If you missed the Update Schools, purchase our Update Video to view on your computer or DVD player. To order the video, go to Support.DrakeSoftware.com > **Resources > Supplemental Resources**. For only \$39.95 (plus tax and shipping), this DVD includes “What’s New in Drake,” “Tax Law Updates” and “Current Events in the Tax Industry.” CPE credits are not available for the DVD format.

DRAKE ETC

Drake’s e-Training Center (ETC) is your site for Drake Software training and Continuing Professional Education (CPE). Drake ETC offers a variety of interactive webinars, tax courses, videos, online tutorials, and practice returns, each designed to help develop your knowledge of Drake and federal tax topics. Track your progress, earn CPE credits, and print CPE certificates online.

Drake ETC’s webinars cover many Drake Software and tax-related topics, with new webinars added every month. Webinars are presented with panelists available to answer viewers’ questions during the event. CPE credits are available (no test required).

To access Drake ETC, go to DrakeETC.com. You’ll need your EFIN and Drake password to set up an account which you’ll use to log in to Drake ETC. From the ETC “Welcome” page, go to the blue menu bar and click **Webinars > Available Webinars** for a list of upcoming webinars. Keep up with webinars you’ve viewed, and with your CPE progress, at **Webinars > My Webinars**.

SOFTWARE INSTALLATION

1. Close all open programs on your computer.
2. Insert the 2013 Drake CD into the CD drive. Wait for the **Drake 2013 Software Programs** window to be opened, displaying two installation options: **Install 2013 Drake Tax Software** and **Install Drake Client Write-Up**.
3. Click the icon to **Install Drake 2013 Tax Software**.
4. Read and accept the Drake Software 2013 License Agreement. Click **Next**.
5. The **Install Drake 2013 Tax Software** and **Install State Tax Programs** options are selected by default. Clear the **Install State Tax Programs** check box if you want to install states later. Click **Next**.
6. Select the drive on which to install the software, or select **New** to install it to a new location.
 - a) Installing test returns is automatic with new installations but is optional when replacing existing Drake installations.
 - b) If this is the initial installation, you will be asked to enter your account number and the serial number from your packing slip. (Save your packing slip! You will need your serial number and account number for subsequent installations.)
7. Click **Next**.
8. If you chose **New** in Step 6, select the drive on which to install Drake. Click **Next**.
9. If you chose to install states in Step 5, select the states to install and click **Next**.
10. Select a cabinet for use with the DDM. If you choose the Archive Cabinet, select the drive where your DDM files will be stored. (Working Cabinet files are stored within the software.) Click **Next**.
11. Click **Install** and wait for installation to be completed.

REMINDER: Save your packing slip! You will need your serial number and account number when installing subsequent Drake CDs. In addition to your EFIN, your account number – *and password* – on your packing slip must be entered on the ERO setup screen along with your EFIN (**Setup > ERO**).

To retrieve a misplaced serial number, go to Support.DrakeSoftware.com, and from the blue menu bar on the left, click **My Account > My Serial Numbers**. The Drake account number and the Drake and Client Write-Up serial numbers for the logged-in EFIN will be displayed.

DOWNLOADING DRAKE SOFTWARE

The software is also available for download from the Drake Support website. Go to Support.DrakeSoftware.com, and from the blue menu bar, click **Resources > Download Center > Drake Software 2013 > Drake Software 2013**. Scroll down and click **Drake Software 2013**.

To download state programs, open Drake's tax software to the **Home** window, go to **Tools > Install State Programs**, and choose the option to install states from the Internet.

Spanish Support: Si le gustaría hablar con alguien en Español, llame al (828) 349-5500, y trataremos de conectarle con uno de nuestros agentes de apoyo que hablan Español.

Note: If you received a damaged or bad CD, contact Drake Software Support at (828) 524-8020; by fax at (828) 349-5718; or by e-mail at Support.DrakeSoftware.com. Include your name, company name, and EFIN with your request.

For the latest news and information on the tax-preparation industry, follow Drake Software on Twitter (twitter.com/drakesoftware), Facebook (facebook.com/drakesoftware), and at Taxing Subjects TaxingSubjects.com.