

# DrakeTax<sup>®</sup>

## Onboarding Guide

Complete the following important first steps to get up and running quickly and successfully with Drake Tax.

### 1. SET UP YOUR DRAKE ACCOUNT

Set up access to your Drake Account at [Support.DrakeSoftware.com](https://support.drakesoftware.com), where you manage your account and access software downloads, partner programs, and a wide range of resources.

[New User Account Setup](#)

### 2. WATCH THE GETTING STARTED WEBCAST

The *Getting Started with Drake Tax* webcast walks through all the onboarding steps on this list and provides best practices and tips. Sign up to attend a live session where you can ask questions or view the on-demand version on your own time. If you have less than an hour, this is time well spent!

[Getting Started with Drake Tax Webcast](#)

### 3. REGISTER YOUR EFIN WITH DRAKE

Register your EFIN by submitting your IRS e-File Application Summary to Drake. An active and valid EFIN is required for e-filing in Drake Tax.

[EFIN Registration Steps](#)

[How to get my e-File Application Summary](#)

### 4. SET UP DRAKE TAX

Install and set up Drake Tax. We recommend you set up Drake Tax on the computers or network you will use during tax season. Once installed, the **Setup Assistant** will walk you through program set up.

[Program Setup On-Demand Webinar](#)

[2023 Drake Tax Manual, page 49](#)

### 5. CONVERT FILES TO DRAKE

If you used a different tax software program in the prior year, convert those files to Drake Tax. If you need assistance or have questions during the conversion process, we have a team to help. Drake Software Conversion Support: (828) 349-5546

[Conversion Program Download](#)

[Conversion FAQs](#)

[Getting Started with Drake Tax Handbook, page 7](#)

### 6. TRAIN YOUR STAFF

Now you and your staff are ready to dive in and learn how to navigate and use the program to prepare and e-file returns. Here are some helpful resources to get you started:

[Data Entry On-Demand Webinar](#)

[Practice Returns](#)

[e-Filing On-Demand Webinar](#)

### 7. BOOKMARK IMPORTANT RESOURCES

The [Drake Community](#) is a perfect place to connect with others, get answers to your questions, and stay up to date on the latest trends and best practices in your field. Sign in with your Drake account credentials.

The [Drake Knowledge Base](#) (also known as the KB) is a searchable database of questions and answers, for assistance around the clock. Check out this KB article of [helpful onboarding links](#).

View and download PDF copies of various [Manuals and Guides](#).