January 4, 2016 Release

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 program. From the **Home** window's toolbar, click **Support › Drake Software Support Website**. Go to **Training Tools › Shipment Letters › State**.
- Software tools, reports, setup, and Drake Document Manager.
- The *2015 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 2015 manual to your computer, you should save a new copy from this CD. If you already have a printed version, add the addenda pages from the CD or the Support website.)
- The initial release of Client Write-Up 2016, Drake's payroll and write-up program. CWU is free to full-version tax software customers ($295 for PPR customers).

SOFTWARE INSTALLATION

1. Close all open programs on your computer and insert the 2015 Drake CD.
2. Wait for the **Drake 2015 Software Programs** window to be opened, displaying two installation options: **Install 2015 Drake Tax Software** and **Install Drake Client Write-Up 2016**.
3. Click the icon for the program you wish to install and follow the on-screen instructions to complete the installation.

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 from your packing slip must be entered on the ERO setup screen. From the **Home** window's menu bar, click **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 2015**. Scroll down and click the blue **Download** button.

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

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.

IMPORTANT DATES

- January 4, 2016:
  - Drake begins receiving 1040, 1120, 1120S, 1065, and 990 returns for 2013 through 2015
  - Drake begins receiving 1041 returns for 2014 and 2015
  - Drake begins transmitting to the CA Franchise Tax Board
  - Drake begins receiving 94X returns
- January 9, 2016: Drake begins transmitting 1120, 1120S, 1065, 990 and 1041 returns to IRS
- January 19, 2016: Drake begins transmitting 1040 returns to the IRS; customers begin receiving first IRS 1040 acknowledgements and bank acknowledgements

NEW FORMS, SCREENS, AND FEATURES

Since our initial shipment on December 2, we have added a new feature to the ACA screens: the Premium Lookup and Calculations (**PLUC**) screen. Use the tools on this screen to look up the second-lowest cost Silver plan and lowest cost Bronze plan for your clients and automatically fill the appropriate fields on Form 8965. For more information, see the "Affordable Care Act" section of Chapter 5, "Return Preparation," in the *2015 Drake Software User's Manual.*

For descriptions of other new forms, screens, and features in the program this year, read "New for 2015," on the **FAQ** screens in the various packages, or see Chapter 1, "Introduction," and Chapter 14, "New Features in Other Packages," of the manual.

VALIDATING YOUR EFIN

Because many Electronic Filing Identification Numbers (EFINs) are compromised each year to file fraudulent tax returns, a one-time verification process is required for each EFIN used in your office. If you have not already done so, submit a copy of your IRS e-file Application Summary, showing a status of "Completed," using one of the following methods:

- (*Preferred*) Email to efin@drakesoftware.com
- Fax to Compliance at (828) 349-5733
- Upload through Enterprise Office Manager (EOM) using the EFIN Mgmt. tab

Get a copy of your Application Summary by signing into your IRS e-Services account. See KB Article 11426 for detailed instructions. Call the IRS Helpline at 866-255-0654 for additional help or to request a copy of your Application Summary to be faxed to you. Call Drake Compliance at (866) 273-9032 with questions.

REGISTERING FOR ADVANCE BANK PRODUCTS

Drake's banking partners are all offering "Advance" products this year, giving you the option of offering your clients a no-cost advance against their tax refund. Distribution methods (check, debit card, direct deposit) and loan-amount limitations vary by financial institution.

Due to stipulations in certain states, Drake Software recommends that EROs planning to offer Advance products consider registering with the appropriate state regulatory authority to ensure compliance.

For more details on Drake's bank partners' program offerings, including Advance products, go to *Support.DrakeSoftware.com,* sign in, and select **Partner Programs › Bank Partners**.

> *(NOTE: This communication is not, nor should it be considered legal advice. Seek legal counsel to determine your firm's requirements to comply with all laws pertaining to your business, including the registration requirements in your state.)*

ORGANIZE LITE

GruntWorx's Organize Lite product allows you to take advantage of the Organize product with two key differences: turn-around time and price. For $99 (unlimited for one tax season) Organize Lite provides all the features and benefits of the original Organize product, minus the human data validation. With acceptable scan quality, you receive an organized, searchable PDF document in minutes, and it is stored directly in your client's folder within Drake.

As with Gruntworx's traditional Organize feature, you take a stack of client source documents and scan them as-is into a PDF file to be automatically organized for you. No organizing the documents pre-scan, and no pulling out documents that are irrelevant to the tax return. All you have to do is pull out any staples or paper clips before scanning, upload the documents to GruntWorx, and receive a PDF with those documents classified, organized, and bookmarked.

MERCHANT CREDIT CARD PROCESSING

Sign up with e-Pay to accept your customers' credit and debit cards as payment for your services. Even if you are already taking credit cards, check out the e-Pay program – it's integrated with Drake and you may be able to save some money.

To learn more, go to *Support.DrakeSoftware.com* › **Resources › E-Pay Merchant Card Processing**, or contact EPS Financial by email (*merchantsales@EPSfinancial.net*) or by phone at (844) 244-1787.

To accept a payment, click e-Pay from the **Data Entry Menu** toolbar inside a return, and either swipe a card or enter the card information.

See Chapter 6 of the *2015 Drake Software User's Manual* for more details on using this feature.

AUDIT PROTECTION

Drake is again making Protection Plus audit assistance available to you and your customers.

Your benefits include increased revenue, relief from audit headaches, and reimbursements to the taxpayer of up to $2,500 in event of a legitimate preparer error. Protection Plus's bilingual professionals work directly with your client and the IRS.

Your customers benefit by having professional help with IRS audits, denied credits, tax debt relief assistance, and IRS identity theft assistance, plus the protection of the $2,500 reimbursement for legitimate preparer errors.

Cost to the tax preparer: $0. Nothing. Cost to the taxpayer: a minimum of $39.95. You can add up to $20 to the fee to charge for your services related to this audit assistance product.

For more information about Protection Plus, go to *MyProtectionPlus.com*, or call (866) 94-AUDIT.

SECUREFILEPRO

SecureFilePro, a secure file-sharing site, allows you to send and receive documents on your own secure Web portal. Customize your email, brand your site, manage folders, and upload files. Your customers can upload files to you, download files from you, and manage their own private portal.

To sign up for SecureFilePro, go to *SecureFilePro.com and click* **Sign Up***.*

Tutorials are available at *Support.DrakeSoftware.com* › **Training Tools › Videos**.

See Chapter 13, "Suite Products," in the *2015 Drake Software User's Manual* for more information on SecureFilePro.

STAFF TRAINING

Take advantage of the following Drake tools to learn Drake Software and 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 *Drake Tax Update 2015*. 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," following, 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 2015," "Tax Law Updates," "Current Events in the Tax Industry," and "The Affordable Care Act's impact on tax preparers and taxpayers this filing season."

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**.

EARN MORE WITH DRAKE HEALTH 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. eHealth provides a gateway to more than 180 insurance carriers offering more than 13,000 plans.

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.) Drake will deposit referral earnings in your bank account (if you offer bank products) or mail a check directly to you (if you do not offer bank products).

For details, go to *DrakeHealth.com*.

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 email 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 (www.*twitter.com/drakesoftware*), Facebook (www.*facebook.com/drakesoftware*), and www.*TaxingSubjects.com*.