

# ProSystem *fx*<sup>®</sup> Electronic Filing

#### Welcome to ProSystem fx Electronic Filing!

This reference guide walks you through attaching a PDF file to a return for e-filing. Review this guide, and if you have any questions, call Customer Support at **1-800-PFX-9998**.

### ATTACHING A PDF FILE TO A RETURN FOR E-FILING

PDF documents can now be submitted with the following electronically filed returns. Use the Worksheet or Interview Form as shown in this table:

IRS Form	Worksheet View for PDF Attachment (General > Electronic Filing)	Interview Form for PDF Attachment
1040 (MeF)	Section 8 - PDF Attachment	EF-PDF1
1041	Section 6 - PDF Attachment(WI Only) - Optional	EF-PDF1
1120	Section 6 - PDF Attachment - Required Section 7 - PDF Attachment - Optional	EF-PDF1
11205	Section 6 - PDF Attachment - Required Section 7 - PDF Attachment - Optional	EF-PDF1
1065	Section 5 - PDF Attachment - Required Section 6 - PDF Attachment - Optional	EF-PDF1
990	Section 6 - PDF Attachments - Specific Forms Section 7 - All Other PDF Attachments	EF-PDF1
5500	Section 2 - PDF Attachment	PDF-1

**Note**: Form 1041 attachment is Wisconsin only

Do the following to attach one or more PDFs:

- 1. Review the IRS's or DOL's list of required PDFs to determine if these forms or schedules are in the return.
- 2. Review the return to determine if there is anything else that should be sent as supporting information.
- 3. Do either of the following:
  - For Worksheet View:
    - i. Do one of the following:
      - From View > Worksheet Menu/Tree, select Electronic Filing on the General tab.
      - □ From View > Full Window Worksheets List, select **Electronic Filing** under General.
    - ii. Select the section based on which return you are filing, and whether or not the PDF is required. See the previous table for selections.

doral	- Explanations, Elections, and Preparer notes	
term ·	6 - PDF Attachment - Required	
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		195

Forms List	,	,			1		
Fed Inte	rview   Fed <u>G</u>	jovernment	<u>S</u> tate	Return Grou <u>p</u>			
Electronic	Electronic Filing PDF Attachments OK Search Back						
1	20	A-10	DA-3	DP-8	EXT-1	K-5	M-14
1A	21	A-11	DA-4	DP-9	EXT-2	K-6	M-14
2	25	A-12	D-1	DPAD-1	F-1	K-7	M-14
3	26	B-1	D-2	DPAD-2	F-2	K-8	M-15
4	27	BNK-1	D-3	E-1	F-3	K-9	M-16
5	28	BNK-2	D-4	E-2	F-4	K-10	M-13
6	29	BNK-3	D-5	E-3	F-5	K-11	M-18
7	30	BNK-4	D-6	E-4	F-6	K-12	M-19
8	31	C-1	D-7	E-5	F-7	M-1	M-20
9	100	C-2	D-8	E-6	FE-1	M-2	M-21
10	101	C-3	D-9	E-7	FE-2	M-3	M-21
11	A-1	C-4	D-10	E-8	FE-3	M-5	M-22
12	A-2	C-5	D-11	EF-1	FE-4	M-6	M-23
13	A-3	C-6	D-12	EF-2	FE-5	M-7	M-28
14	A-4	C-7	DP-1	EF-3	FE-6	M-8	N-1
15	A-5	C-8	DP-2	EF-4	FE-7	M-9	N-2
16	A-6	CD-1	DP-3	EF-PDF1	K-1	M-10	N-3
17	A-7	CLG-1	DP-5	EXP-1	K-2	M-11	N-4
18	A-8	DA-1	DP-6	EXP-2	K-3	M-12	N-5
19	A-9	DA-2	DP-7	EXP-3	K-4	M-13	NR-

For Interview Form, click Form **EF-PDF1** (PDF-1 for 5500) on the Fed Interview tab.

If both required and optional attachments are accepted, the section for entering Specific Forms is at the top of the page, and the section for All Other PDF Attachments is at the bottom of the page.

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forms List											
Fed Interview Fed Government State Return Group											
Form EF-PDF1 Sheet 1											
1040 EF-PDF1 ELECTRONIC FILING PDF ATTACHMENTS 2013								013			
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PDF Code	81	PDF Path/File	Name	IRS Attachment Name	Entity Number	FS Code	State	City	X for All State	TS 37	
PDF Code	31 39	PDF Path/File	Name	IRS Attachment Name	Entity Number 175 176	FS Code 33 41	State	City	X for All State	TS 37 45	
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- 4. For a required PDF, enter the EF Code, or double-click in the *EF Code* field and select the code from the list. The attachment name will populate.
- 5. For an optional PDF attachment, enter the IRS or DOL attachment name.

- 6. Double-click or press F4 in the PDF Path/File Name field. The browse window displays.
- 7. Browse to the file location.
- 8. Double-click the file or select **Open** to attach the file.

**Note**: The PDF document must be available from the machine that you are trying to export the return from, otherwise the following error will occur:

Export Return Dialog			B_D×
Instructions 1. Click View to view selected attach 2. Click Export to export return 3. Click Cancel to abort export of the	ed PDF e return		
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To correct this error, the specified location must be available on the computer exporting the return to Electronic Filing. The drive must be mapped on the workstation exporting the file and cannot be password-protected. We recommend the PDF documents be located in a folder on the root of the drive where ProSystem *fx* is installed. The preparer must adhere to the guidelines set by the IRS or DOL found below to avoid rejection of the return.

9. Select **FS** and **ST**, as needed. Specific information for states that use the "FS" and "State" boxes is included in the states' instructions.

#### Notes:

- The total size of all PDF files attached to one electronic return submission cannot exceed 1 GB (1 GB is approximately 5,000 pages).
- Multiple PDF files may be submitted, but no one PDF file can exceed 60 MB (approximately 500 pages).
- A separate file must be created for each form type included as PDF (for example, one file for Forms 926, one file for Forms 982).
- If any one form type exceeds the 500-page limit, multiple PDF files should be created for the same form (for example, if a corporation is required to file 600 Forms 926, there should be two PDF files - each fewer than 500 pages).
- All PDF files must have a unique name.

## Allowable forms within the PDF Format

For guidelines regarding forms that may be attached to the XML portion of the electronic return as a PDF file, refer to the following information from the IRS Web site:

Modernized e-File (MeF) User Guides & Publications