

ProSystem fx[®] 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

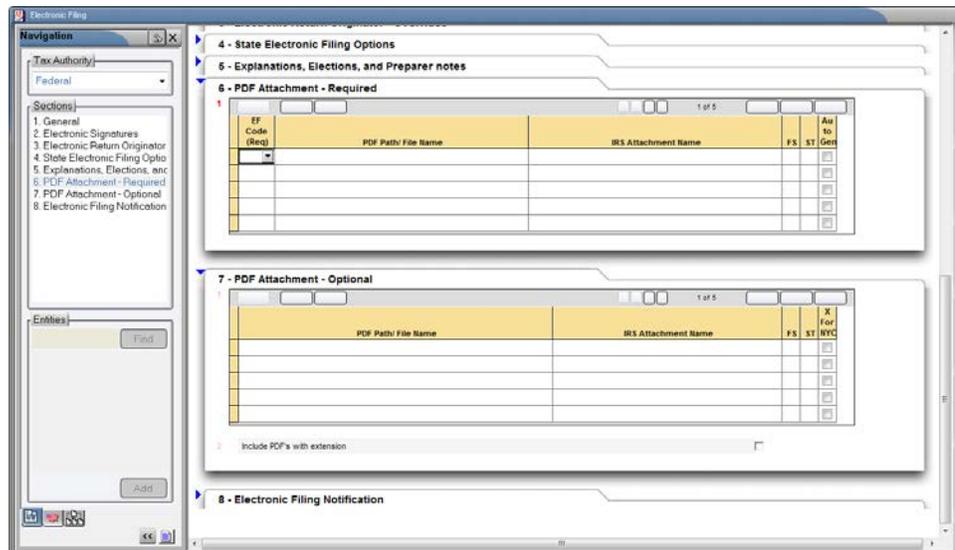
PDF documents can now be submitted with the following electronically filed returns. Use the Worksheet or Interview Form as shown in this table:

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
1120S	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

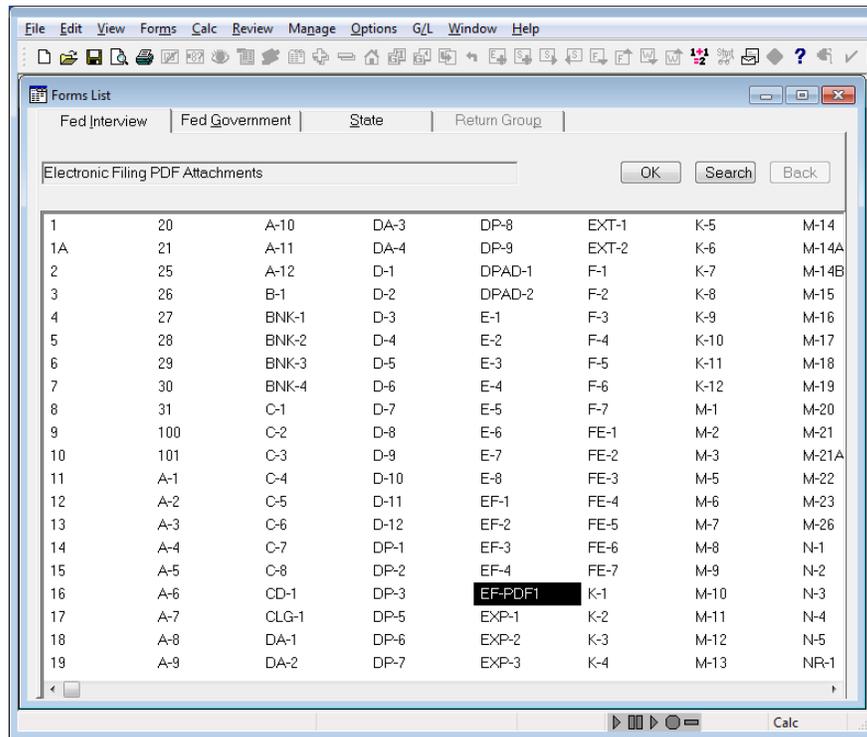
 **Note:** Form 1041 attachment is Wisconsin only

Do the following to attach one or more PDFs:

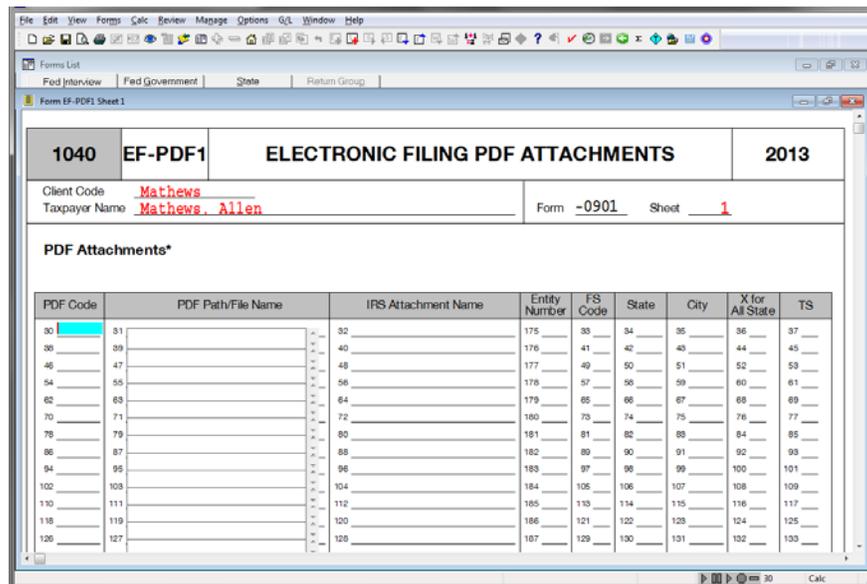
1. Review the IRS's or DOL's list of required PDFs to determine if these forms or schedules are in the return.
2. Review the return to determine if there is anything else that should be sent as supporting information.
3. Do either of the following:
 - ❖ For Worksheet View:
 - i. Do one of the following:
 - ❑ 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.



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



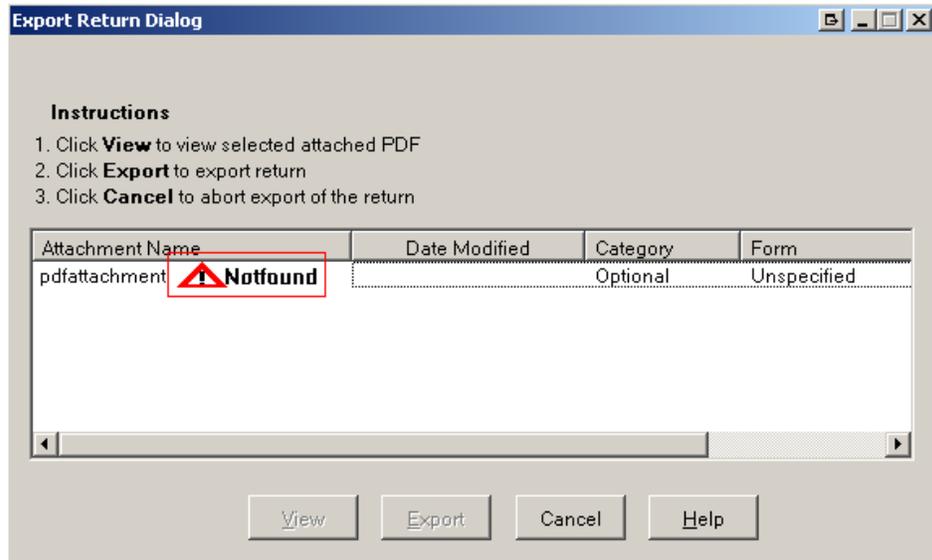
If both required and optional attachments are accepted, the section for entering Specific Forms is at the top of the page, and the section for All Other PDF Attachments is at the bottom of the page.



- 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.
- 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:



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](#)