

# 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
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:
  - i. For Worksheet View:
    - 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.

The screenshot shows the ProSystem fx® Electronic Filing software interface. On the left is a 'Navigation' pane with a tree structure. The 'Tax Authority' is set to 'Federal'. The 'Sections' list includes: 1. General, 2. Electronic Signatures, 3. Electronic Return Originator, 4. State Electronic Filing Option, 5. Explanations, Elections, and Preparer notes, 6. PDF Attachment - Required, 7. PDF Attachment - Optional, and 8. Electronic Filing Notification. Section 6 is currently selected. The main window displays the '6 - PDF Attachment - Required' section, which contains a table for adding PDF attachments. The table has the following columns: 'EF Code (Req)', 'PDF Path/ File Name', 'IRS Attachment Name', 'FS', 'ST', and 'As to Gen'. Below the table, there is a checkbox labeled 'Include PDF's with extension'. Section 7, '7 - PDF Attachment - Optional', is also visible below section 6.

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

Line	Form	Description
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-14A
2	25	A-12 D-1 DPAD-1 F-1 K-7 M-14B
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-17
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-21A
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-26
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 <b>EF-PDF1</b> 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-1

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.

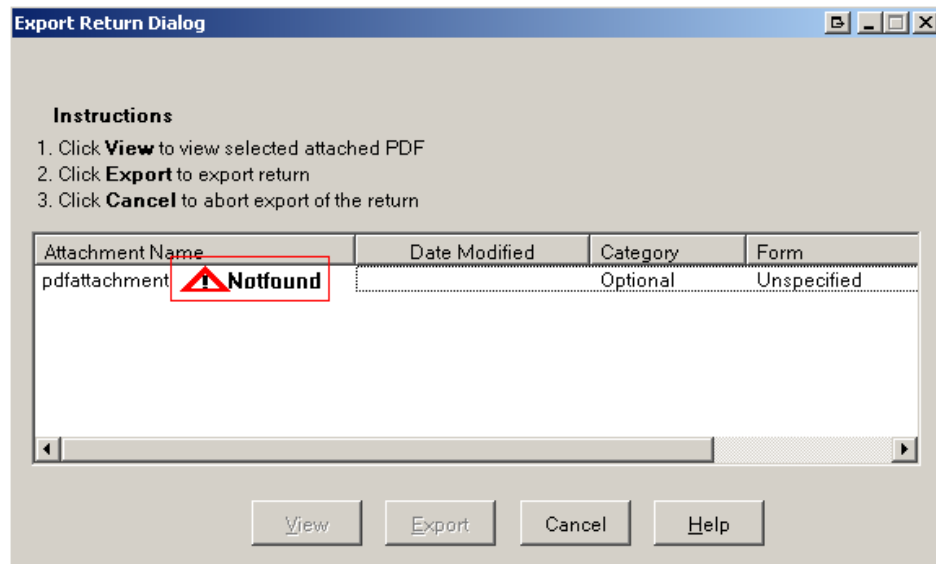
PDF Code	PDF Path/File Name	IRS Attachment Name	Entity Number	FS Code	State	City	X for All State	TS
30	31	32	175	33	34	35	36	37
38	39	40	176	41	42	43	44	45
46	47	48	177	49	50	51	52	53
54	55	56	178	57	58	59	60	61
62	63	64	179	65	66	67	68	69
70	71	72	180	73	74	75	76	77
78	79	80	181	81	82	83	84	85
86	87	88	182	89	90	91	92	93
94	95	96	183	97	98	99	100	101
102	103	104	184	105	106	107	108	109
110	111	112	185	113	114	115	116	117
118	119	120	186	121	122	123	124	125
126	127	128	187	129	130	131	132	133

- 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

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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](#)