ATX[™] Learning Portal

Entering Preparer and ERO Information

Set up preparers and EROs in the Preparer/ERO Manager before you begin preparing returns. ATX adds this information to each return, reducing your work.

- Use the **Preparer** tab to enter all the information the IRS requires on the return.
- Use the **Firm** tab to enter information about the business.
- Use the **E-file** tab to indicate which person is the ERO by entering the EFIN and ERO PIN.

To add a new preparer in ATX:

- 1. In Return Manager, click Preparer/ERO.
- 2. ATX displays the Preparer/ERO Manager window. Click Add New. ATX adds a new blank row.

Preparer/ERO Manager							×		
1 of 1 Preparers	Preparer Firm	n E-File							
Find: (Ctrl+F)	First Name	Middle Initial	Last Name	PTIN	Self Employed	SSN	Print Signature F		
	Megan		Caldwell	P12345678					
Clear Filters									
				<			>		
Show 10 rows per page V H Page 1 of 1 V H 1-1 of 1									
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- 3. Complete the information for each preparer.
- 4. Click the **Firm** tab to enter company information.



Preparer/ERO Manager									×
2 of 2 Preparers	Preparer Firm	m E-File							
Find: (Ctrl+F)	First Name	Middle Initial	Last Name		EIN Firm Name		Address		
	Maria		Rangel	11-	1002222	WK		225 Chastain Meadows Ct	
	Megan		Caldwell	11-	1002222	WK		225 Chastair	Meadows Ct
				۲					>
Show 10 rows per page V M Page 1 of 1 V M 1-2 of 2									
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5. Click the E-file tab to indicate at least one ERO, and enter the EFIN and ERO PIN for this preparer.

Preparer/ERO Manager	_	_	_					×
2 of 2 Preparers Find: (Ctrl+F) Clear Filters	Preparer Firm First Name Maria Megan	E-File Middle Initial	Last Name Rangel Caldwell	EFIN 992192	ERO	ERO Pin 12345		
Show 10 rows per page V M Page 1 of 1 M 1-2 of 2								
🕐 Help 🗱 Reset Current 🗱 Reset All 🗱 Adjust Preparer/ERO Settings					Add New	Delete	Export	Close

6. Repeat these steps as necessary to add all preparers.