Wolters Kluwer
CCH

ProSystem *fx* Electronic Filing

How to Set Up Office Manager

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Configuring Electronic Filing

Getting Started with Electronic Filing

The Electronic Filing Status system is Internet-based; therefore, desktop users need a valid ProSystem *fx* Internet user ID established to use this system. ProSystem *fx* Internet user IDs are commonly referred to as Single Sign-On IDs. Single Sign-On (SSO) allows users to log in to multiple ProSystem *fx* Internet applications using the same user name and password. Once a valid SSO ID is established and proper application rights are granted, users can access the Electronic Filing Status system as well as other ProSystem *fx* Internet applications such as Tax Notebook Toolkit, online permission keys, and secured areas of the CCH Customer Support Web site on a 24/7 basis. Your firm administrator can create SSO users and grant access to these Internet applications through the Configure Staff application.

We recommend you complete the following administrative steps now to prepare your firm and users for the start of the electronic filing season.

- Configure Office Manager for 2014 Electronic Filing preferences.
- Grant user rights in Office Manager for Tax Preparation.
- Convert your ProSystem *fx* user IDs to SSO IDs to facilitate easy access to the Electronic Filing Status system.
- Permit user access to the Electronic Filing Status system using the Configure Staff application.
- Link your desktop user IDs to your newly converted SSO IDs in Office Manager.

  Note: You must have user sign-on enabled on your desktop installation and each user ID must have a password.

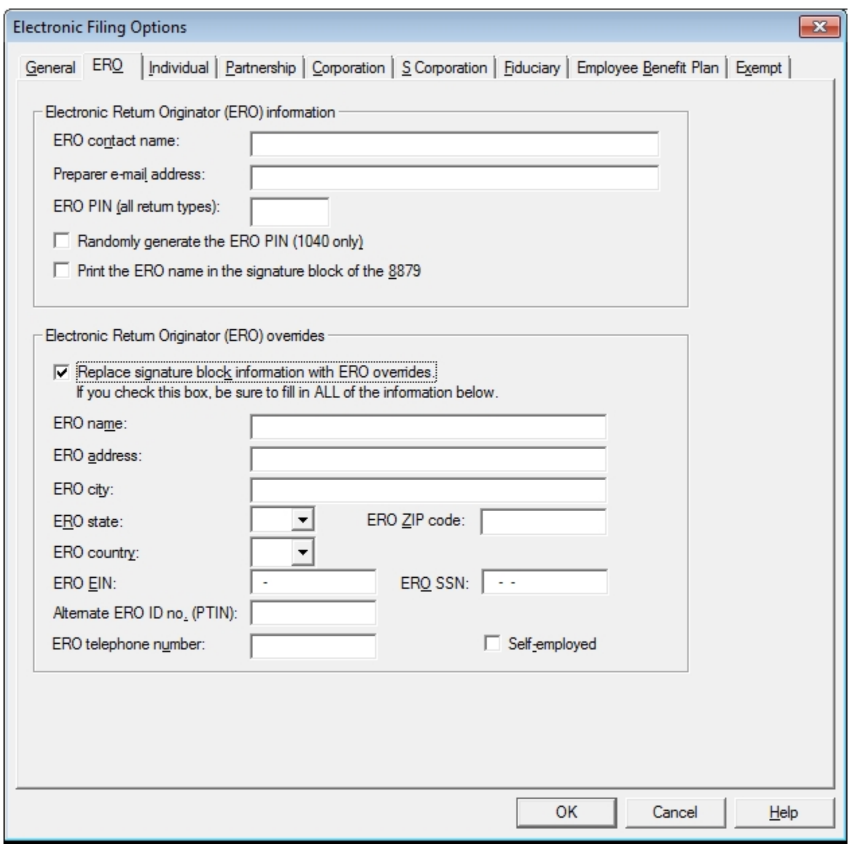
Setting Default Electronic Filing Options

(Office Manager > Configure Applications > Tax Preparation)

ProSystem *fx* Tax allows you to reduce data entry time by configuring default electronic filing settings for Individual, Partnership, Corporation, S Corporation, Fiduciary, Exempt Organization, and Employee Benefit Plan. The settings are office group specific.

Use this procedure to set default electronic filing options.

1. In Office Manager, click **Configure Applications**.
2. Select **Tax Preparation** and click **Configure**.
3. Select an office group with clients for whom you want to perform electronic filing and click **OK**. The *Configure Tax Preparation* dialog displays.
4. Select **Electronic Filing Options** and click **Setup**. The *Electronic Filing Options* dialog displays.
5. The information on the *General* tab applies to all return types. Enter the Electronic Filing Identification Number (EFIN) in the *ID number* field. The EFIN can be entered on a return-by-return basis on Interview Form EF-1 (General > Electronic Filing Worksheet).
6. Select the **ERO** tab. The information on the ERO tab applies to all return types.



In the *Electronic return originator (ERO) information* section, enter the state, ERO contact name, preparer's e-mail address, and ERO PIN. You can select *Randomly generate the ERO PIN (1040 only)* to automatically generate an e-file ERO PIN for 1040 returns. Beginning in tax years 2011 and later, you can also select to print the ERO name in the signature block of Form 8879 (was Reserved for future use 4 in 2011).

Note: Currently, the option to randomly generate an ERO PIN applies to Individual returns only.

If you want to override the signature block information, select the **Replace signature block information with ERO overrides** box to activate the fields. Fill in all the fields in the *Electronic Return Originator (ERO) overrides* section.

The *Electronic Return Originator (ERO) overrides* entered here are used in the Declaration of Electronic Return Originator (ERO) and Paid Preparer section on Federal Form 8879-PE (Partnership), 8879-C/S (Corporation/S Corporation), Form 8453-F or 8879-F (Fiduciary), and Form 8879-EO (Exempt Organization). To override the entries in Office Manager, use the worksheet General > Electronic Filing, or use Interview Form EF-2 for Partnership, Corporation, and S Corporation; Interview Form EF-1A for Exempt Organization; and Interview Form EF-1 for Employee Benefit Plan.

If there are no entries in a return or on the ERO tab, the signature block information for each office group will be used for the ERO information.

Note: For detailed information on configuring Individual, Partnership, Corporation, S Corporation, Fiduciary, Employee Benefit Plan, and Exempt Organization electronic filing options, see *Configuring Tax Preparation: Alternative Filing Options* in the Office Manager chapter of the *ProSystem fx Tax User Guide* or *Global fx Tax User Guide*.

7. Click **OK** when finished.

Assigning Staff Electronic Filing Access via Global *fx* Configure Staff

Before you can use the Electronic Filing Status system, you must be given licensing/product access (users are assigned a user license, as well as given read-only access) and functional rights. Functional rights for the Electronic Filing Status system include releasing returns, deleting returns from the status system, changing the status of returns, and stopping transmission of returns.

You can also assign these functional rights to a group. The main advantage of using groups is that when any user is assigned to a group, they automatically inherit that group's rights. For many firms, groups can provide a time-saving alternative for assigning functional rights. Staff members are not restricted to the functional rights inherited from their designated group. They can be individually assigned additional rights.

For more information, click the **Quick Start Guide** link at the top of the page in Configure Staff to view the *Configure Staff Quick Start Guide*.

Note: You must be an administrator to assign Electronic Filing access.

To set up Electronic Filing access, do the following:

1. On the Office Manager menu, select **Help > ProSystem *fx* on the Web > My Account**. Your default browser opens to the ProSystem *fx* support site.
2. Click the **Looking for ProSystem *fx* Account Services?** notice on the right side of the page.
3. Scroll down and select **Staff Access Rights**.

4. At the login prompt, enter your SSO user ID and password, and then click **Go** to access Configure Staff.

   Note: You may need to select Staff Access Rights again.

5. Select **Misc. Setup > Convert Users** from the navigation bar. The *Convert Users to Web* page displays.

   Note: If you have not previously accessed Configure Staff and selected to convert users to the web, you will be prompted to install the Global *fx* Reader Components.

   a. Click **Yes** on the *Installation of User Reader Required* dialog.
   b. Click the light yellow bar at the top of the *User Reader* installation window and select **Install ActiveX Control**.
   c. When prompted with the *Internet Explorer – Security Warning* dialog, select **Install**.
   d. Click **Finish** and **Close**.
   e. Choose **Misc. Setup > Convert Users** again to continue the copying process.

6. Click **Get List** to display a list of ProSystem *fx* Tax users.

   Note: If user sign-on is enabled in ProSystem *fx* Tax, and you are not currently logged in, you are prompted to do so. ProSystem *fx* Supervisor access level is required. The conversion import process will verify the imported information meets the field requirements (field lengths, supported characters, etc.). Some information may require editing.

7. In the *Application Users* list, choose the radio button of the user to be converted and click **Add to Web**. The *Add Staff* page displays. The system imports and displays information from corresponding fields in ProSystem *fx* Tax.
8. Enter profile information in the required fields. For more information, click the **Quick Start Guide** link at the top of the page, or to receive page-specific help, click the **Question Mark** icon when present.
9. If your firm is using customized groups, select one from the *Group* drop-down list.
10. Enter additional user contact information as needed.
11. Click **Next**. The *Licensing/Product Access* page displays listing products for which your firm is licensed.
12. Do one of the following:
    - To grant view-only access to the Electronic Filing Status system, select the **Electronic Filing Status** box.
    - If you do not want this user to have access to the Electronic Filing Status system, click **Return to Staff Home** to save any changes.
13. Click **Next**. The *Functional Rights* page displays.

    To grant a user the ability to upload and release returns to the taxing authority, you must select the following options in the Tax functional rights section:

    a. Click the **Expand/Collapse** arrow located next to the *Tax* section to display a list of options for which you can grant functional rights.
    b. Select **Electronic Filing** to enable the release of returns to the taxing authority from Tax Preparation.

c. Click the **Expand/Collapse** arrow located next to *Electronic Filing Status* to display the list of product options for which you can grant functional rights.

d. Do one of the following:

   - **To select individual options**, select the box in the *Staff* column adjacent to an option for which you want to grant this user access.
   - **To select all options**, click the **Select all** link located above the listed options to give this staff member access to all of the product's features.
   - **To deselect all options**, click the **Deselect all** link located above the listed options to remove all functional rights for this user.

Note: For each functional right, a Group and Staff column are displayed. If a staff member is assigned to a group, check marks will display next to functional rights associated with that group in both the Group and Staff columns. These fields cannot be edited. You can grant functional rights only for product options this member has not already acquired from his or her assigned group.

14. Click **Next**. You will be returned to the Staff home page.
15. Repeat steps 6 through 14 for all applicable users. The new staff member displays in the *Web Users* list and is temporarily removed from the *Application Users* list.
16. Click **Close** when complete.

Linking the Desktop User ID to the SSO Staff ID

(Office Manager > Tools >Link SSO for Global Configure Staff)

In ProSystem *fx* Tax, you have the option to launch the Electronic Filing Status system from the Manage menu. To save time, if you link the desktop user ID to the SSO staff ID you will not need to enter your SSO login information to access the Electronic Filing Status system.

Note: You must log in to the desktop version of Office Manager (not Global *fx*) as a supervisor to assign the links. The local ProSystem *fx* Tax desktop user must also be configured with a password. The system will allow only a one-to-one association link. Linking several desktop users to a single SSO user is not permitted.

1. In Office Manager, select **Tools > Link SSO for Global Configure Staff**. The *Login to Internet* dialog displays.
2. Enter your SSO User ID and Password and click **Login**. The *Link an SSO User* dialog displays, which lists all desktop user IDs, including those already linked to an SSO staff ID. Unlinked desktop IDs are blank in the *Staff Name* and *Staff ID* columns.

   Note: Click the column headings to sort by that item.

3. Select the unlinked desktop user ID you want to link.
4. Click **Link User** to display the *Select an SSO User* dialog, which displays all SSO staff IDs that are not currently linked to a desktop user ID.
5. Select the SSO user ID to link.
6. Click **OK** to save your selection and return to the *Link an SSO User* dialog.
7. Repeat steps 3 through 6 for any additional desktop IDs you want to link.
8. Click **Close** when you have finished linking IDs.

Removing the Desktop User ID - SSO Staff ID Link

1. In Office Manager, select **Tools >Link SSO for Global Configure Staff**. The *Link an SSO User* dialog displays.
2. Select the desktop user ID for which you want to remove the link.
3. Click **Remove Link**.
4. Click **Yes** on the confirmation dialog to remove the link and return to the *Link an SSO User* dialog.

Printing the Desktop User ID - SSO Staff ID Link Report

1. In Office Manager, select **Tools > Link SSO for Global Configure Staff**. The *Link an SSO User* dialog displays.
2. Click **Print**. A report detailing the desktop user IDs - SSO staff ID links prints.