

ProSystem *fx*[®] Electronic Filing Quick Start Guide

Welcome to the Electronic Filing Status System!

CCH has created an Electronic Filing Status system to provide enhanced e-filing capabilities and real time status information on the Internet.

The Electronic Filing Status system provides the following abilities and much more:

- Export returns from ProSystem *fx* Tax Preparation to the Electronic Filing Status system
- Release returns over the Internet directly to taxing authorities
- Enhanced status reports and support links
- Launch the status system through ProSystem *fx* Tax Preparation to check a return's status
- Convenient 24/7 access to the Internet Electronic Filing Status system
- Send email reminders to clients who have not returned a completed Signature Form

Please refer to your ProSystem *fx* User Guide for complete instructions on the Electronic Filing Status system. If you have additional questions or need assistance, please call Customer Support at **1-800-PFX-9998**.

Attention Global *fx* Users: Please refer to the *What's New on Global *fx** link located on the Global *fx* Tax home page for information on using the Electronic Filing Status system.

GETTING STARTED WITH THE ELECTRONIC FILING STATUS SYSTEM


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 or SSO 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 ProSystem *fx* 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.

If you have not done so previously, we recommend you complete the following administrative tasks to prepare your firm and users for the start of the electronic filing season:


- Configure Office Manager for Electronic Filing preferences
- Grant user rights in Office Manager to export returns from Tax Preparation to the Electronic Filing Status system
- 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.

Office Manager Configuration

The first step in preparing for e-filing processing is to configure the Office Manager application. Be sure ProSystem *fx* Tax v. 2014.01000 (or later) is installed on your system. We recommend the firm administrator complete the following steps as supervisory access is required in order to link your ProSystem *fx* Tax user IDs with your SSO User IDs:

1. Access Office Manager.
2. Select **Configure Applications > Communications > Configure**, and confirm the return sequence range and Electronic filing DCN sequence numbers are present.
3. Select **Configure Applications > Tax Preparation > Configure > "Office Group" > Electronic Filing Options**, and review your options for Individual, Partnership, Corporation, S Corporation, Fiduciary, Employee Benefit Plan, and Exempt Organization for each office group.
4. For users who have been given access to Tax Preparation, you may provide the ability to automatically release returns to the taxing authorities.
 - a. Select **Configure Staff**.
 - b. Select the desired user and click **Setup**.
 - c. Select the **User** tab.
 - d. Check **Electronic filing - Enable release of return(s) to taxing authority** in the *Tax Preparation functional rights* section and click **OK**.

 **Note:** For all users (including those with supervisor access), the default status of this box is cleared. Repeat these steps for each Tax Preparation user who will release returns to the taxing authority.

Administrator - Configuration of Staff and Rights Assignment for the Electronic Filing Status System

Staff members with access to ProSystem *fx* Internet applications and services are configured and managed through a web application called Configure Staff. If the ProSystem *fx* Tax administrator has not established an SSO User ID, contact your ProSystem *fx* account administrator or call Customer Service at **1-800-739-9998** for assistance.

To copy ProSystem *fx* Tax user IDs to Configure Staff and grant rights to the Electronic Filing Status system, do the following:

1. On the Office Manager menu, select **Help > ProSystem *fx* on the Web > Electronic Filing Website**. The Login page displays.
2. Enter your SSO user ID and password and click **Login**.
3. Once in the Electronic Filing Status system, select **Configure Staff**.
4. 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.
5. 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 that the imported information meets the field requirements (e.g., field lengths, supported characters). Some information may require editing.

6. 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 will import and display information from corresponding fields in ProSystem *fx* Tax.
7. 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.
8. If your firm is using customized groups, select one from the *Group* drop-down list.

9. Enter additional user contact information as needed.
 10. Click **Next**. The *Licensing/Product Access* page displays listing products for which your firm is licensed.
 11. 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, do not select anything and click **Next**.
 12. On the *Functional Rights* page, click the **Expand/Collapse** arrow located next to the *Electronic Filing Status* section to display a list of options for which you can grant functional rights.
 13. Select one or more of the following options:
 - ◆ Release returns to taxing authority
 - ◆ Delete returns from status system and also change the status of returns to "paper filed"
 - ◆ Stop returns from being transmitted to taxing authority
-  **Note:** For each functional right, a Group and Staff column display. 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 only grant functional rights for product options this member has not already acquired from his or her assigned group.
14. Repeat steps 6 through 13 for all applicable users. The new staff member will be displayed in the *Web Users* list and temporarily removed from the *Application Users* list.
 15. Click **Close**. You are returned to the Staff home page.

Administrator - Linking ProSystem fx Tax Desktop Users to SSO User IDs

This Office Manager option allows you to link your local ProSystem fx Tax desktop users to their SSO User ID, which eliminates the need for the user to log in to SSO when accessing the Electronic Filing Status system from the desktop.

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

1. On the Office Manager menu, select **Tools > Link SSO Users for Electronic Filing Status**. The *Login to Internet* dialog displays.
2. Enter your SSO User ID and Password and click **Login**. The *Link an SSO User* dialog displays, listing 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.

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. Repeat steps 2 through 5 for any additional desktop IDs you want to link.
7. Click **Close** when you have finished linking IDs.


You have now completed the configuration process. The following information describes how users will use this Electronic Filing Status system.

Transmitting Returns to the Electronic Filing Status System

Creating an Electronic File

Any user exporting an electronic file must have Internet access. Once you designate a return for electronic filing and complete data entry on the return, do the following to create an electronic file:

1. Calculate the return.
2. Check the return's diagnostics to ensure that the return qualifies for electronic filing. If it does not qualify, use the diagnostics to determine the reasons for disqualification. If the return qualifies, it is ready for release.
3. Select **File > Export > Electronic Filing > Return (or Extension)**. The *Select Return(s) for Export* dialog displays.

 **Note:** The system verifies the following:

- ◆ **Files can be located.** PDF files must exist in the same locations that were specified when the files were attached. The message "PDF file not found" displays immediately after the end of the name if a PDF file is not located.
 - ◆ **Files are in valid PDF format.** Attached PDF files must be created using PDF producing software; otherwise, the message "Invalid PDF format" displays in the *Comments* column.
4. Select the Units>Returns to be filed.
 5. If a PDF file is attached to the return, the *Export Return* dialog displays. Click **Export**.

 **Notes:**

- ◆ The *Export* button is available only when no PDF files are missing.
- ◆ The Electronic Filing Status system includes a PDF icon at the end of the return ID (in the Return ID column), if the return has PDF files attached.


6. If any signature documents are required, the *Electronic Filing Options* dialog displays. Select one of the following:
 - ◆ **Export to electronic filing only.** Bypasses printing and continues the electronic filing process.
 - ◆ **Export to electronic filing and print.** Prints the documents and continues the electronic filing process.
7. Click **OK**.

The *Upload Returns* dialog displays.
8. Select your connection type from the drop-down list.
9. Select one of the following options:
 - ◆ **Upload and hold.** Uploads the selected return to the Electronic Filing Status system and holds it for manual release to the taxing authority.
 - ◆ **Upload and release to tax authority.** Uploads the selected return to the Electronic Filing Status system and automatically releases the return to the taxing authority. You must have proper permissions to select this option.
10. Click **Start**. An IRS or DOL formatted file is created and uploaded. Signature documents are printed, if required.


Using the Electronic Filing Status System

To access the Electronic Filing Status system from your local ProSystem *fx* Tax system, do one of the following:

- Click the **Electronic Filing Status** desktop icon located in the ProSystem *fx* program group.
- From within Tax Preparation, click the **Electronic Filing Status** icon on the Tax Preparation toolbar, or select **Manage > Electronic Filing Status**. You can add this icon to your toolbar by going to Options > Customize Toolbar.

 **Note:** This application is not available to ProSystem *fx* Laptop systems.

To access directly from the Internet, launch your Web browser and enter the following URL:
efile.prosystemfx.com.

 **Note:** You must have a minimum resolution of 1024 x 768 to view the Electronic Filing Status system properly.

Viewing the Return's e-filing Status

You must first upload the return to the Electronic Filing Status system from Tax Preparation to view the return's status. To view an e-filed return's status, search for the return on the *e-filing Status* tab of the Electronic Filing Status system. You can search for multiple returns or a single client.

Releasing Returns to the Taxing Authority

If you did not choose the *Upload and release to tax authority* option when creating the electronic file, do the following in the Electronic Filing Status system to release returns to the taxing authority:

1. Click the **Release Return(s)** tab. Only returns with a current status of *Ready to Release by Customer* are listed on this tab.
2. Search for the return by selecting the applicable search criteria.
3. Select **Go**.
4. Select the returns to release by selecting the box to the left of the return, or click **Select All Displayed**.
5. Scroll down to the bottom of the page and select **Release to Taxing Authorities**.
6. The *Release Returns* dialog displays, confirming your selections. Verify that these are the returns to release and select **Release Selected Return(s)**.
7. Click **OK** on the confirmation dialog.

Electronic Filing Status Support Site

The Electronic Filing Status system provides direct links to the support.cch.com Web site. By clicking on the available tabs, you will be redirected to the appropriate Product Support page.

- **Quick Look.** Access a complete list of tax products for Federal, State, and City returns for different types of electronic filing, such as consolidated, combined, extensions, and magnetic filing.
- **Support.** Search our Knowledge Base for additional information.
- **Federal/State Reference.** Look-up information for the e-file coordinator for each taxing authority, as well as other general e-filing information.
- **Forms Release Status.** Look-up information for the forms for each taxing authority, such as form number, anticipated release available, and the current form status.

The following guides are also available, within the support.cch.com Web site:

- Quick Start Guide
- Guide to e-filing

- Deadline Guide
- Consolidated Electronic Filing Quick Start Guide
- Attaching a PDF to a Return
- Office Manager Setup Guide

To access the guides, do the following:

1. Select the **Product Support** tab.
2. Select the **Top Products** tab.
3. Select **ProSystem fx Tax**.
4. Under Related Products, select **Electronic Filing**.
5. Select the **Guides** tab.