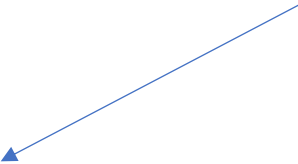


- Basic Information
- Federal Section**
- Health Insurance
- State Section
- Summary/Print
- E-file**
- 2021 Amended Return
- Your Office
- Help & Support
- Save & Exit Return

**WHEN YOU ARE READY TO CHOOSE A BANK PRODUCT, SELECT THE "EFILE" OPTION.**



## Return Details

Determine how the taxpayer wants to pay their taxes due or receive their refund.

**Return  
Details**



Fee  
Summary



Bank  
Application



Submission  
Page



ERO \*

EFIN \*

### Federal return

How would the client like to send their tax return?

Federal refund -

Select

- EPS Advance w/ Check
- EPS Advance w/ Direct Deposit
- EPS Advance w/ Card
- EPS Check**
- EPS Direct Deposit
- EPS Card
- E-file: Paper Check
- E-file: Direct Deposit
- Paper Return
- Paper Return with Direct Deposit

**CHOOSE THE REFUND  
PRODUCT FROM THE  
DROPDOWN LIST**

# How does the taxpayer want their refund?

## **“EPS Advance”**

They would like to apply for an advance to get a portion of their refund before the IRS releases it. Their fees will be taken out of their refund.

- EPS Advance w/Check: check printed in your office.
- EPS Advance w/ Direct Deposit: distributed as a direct deposit to their bank account.
- EPS Advance w/Card: distributed to the E1 Visa you issue to them.

## **“EPS”**

They do NOT want an advance. They will wait for the IRS to release their refund and want their fees taken out of the refund.

- EPS w/Check: check printed in your office.
- EPS w/ Direct Deposit: distributed as a direct deposit to their bank account.
- EPS w/Card: distributed to the E1 Visa you issue to them.

## **“Efile”**

They want to pay their prep fees upfront/today. The IRS will distribute the refund to the taxpayer directly.

- Efile Paper Check: The IRS will mail the taxpayer their refund.
- Efile Direct Deposit: the IRS will direct deposit their refund.

## **“Paper Return”**

They want to pay their prep fees upfront/today. The taxpayer will mail their return. The IRS will distribute the refund to the taxpayer directly.

- Paper Return: the IRS will mail the taxpayer their refund.
- Paper Return with Direct Deposit: the IRS will direct deposit their refund.

## Federal return

How would the client like to send their tax return?

### Federal refund

EPS Advance w/

Only transmit the state return(s)

### EPS Advance \*

Select

No Finance Charge Up to \$1000

With Finance Charge Up to \$6000

Does the taxpayer want a pre-ack advance? \*

Select

Yes

No

**IF THE TAXPAYER WANTS AN ADVANCE YOU WILL NEED TO SELECT WHICH ADVANCE PRODUCT THEY WOULD LIKE.**

### “EPS Advance”

The taxpayer has two options for the advance:

- \$1000 – No Finance Charge: The taxpayer can get up to \$1000 with no interest charges
- With Finance Charge: The taxpayer can apply for up to \$6000 with a 36% interest charge.

**IF THE IRS IS NOT OPEN YOU WILL SELECT “YES”**

# Fee Summary

Set the cost of tax preparation and services the taxpayer may purchase.

Return  
Details

**Fee  
Summary**



## Add Additional Fees / Discounts

### Fees

Audit Pro

\$29.99



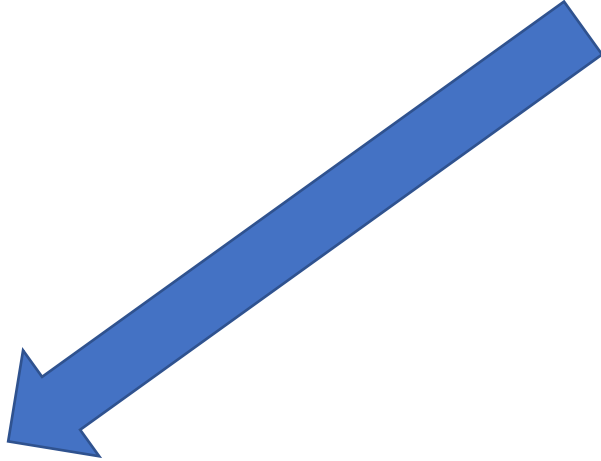
### Discounts

Coupon

-\$20.00



CLOSE



 APPLY ADDITIONAL FEES / DISCOUNTS

Fees Total:

BACK

CONTINUE

**YOU CAN ADD THE COUPON AND AUDIT PRO ON THE FEE SCREEN.**

## Bank Application

Fill out the client's application for the bank product

**CONFIRM THE TAXPAYER'S  
ADDRESS AND PHONE NUMBERS**

Return  
Details



Fee  
Summary



**Bank  
Application**



Submission  
Page



Taxpayer Residential Address

[↓ Import address from Form 1040](#)

Street Address \*

ZIP Code \*

City \*

State \*

Taxpayer Phone Number

Primary Phone Number \*

Secondary Phone Number

**SCROLL DOWN**

Taxpayer ID Information

License / ID Type \*

License / ID Number \*

Issue Date \*



Issue State \*

Expiration Date \*



Citizenship \*

Country \*

**ENTER TAXPAYER ID TYPE, ID NUMBER AND ISSUE/EXP DATES**



**SELECT CITIZENSHIP**



## Submission Page

Review the final details and transmit the return.



### TAXPAYER ELECTRONIC SIGNATURE

[Edit Signature](#)

**HAVE THE TAXPAYER SIGN  
BY SELECTING EDIT  
SIGNATURE.**

### FEDERAL RETURN

Federal refund

Return method: EPS Check

[Edit Refund Method](#)

### STATE RETURN

State refund

**N/A**

Return method: N/A

[Edit Refund Method](#)

### FORM 8879 INFORMATION

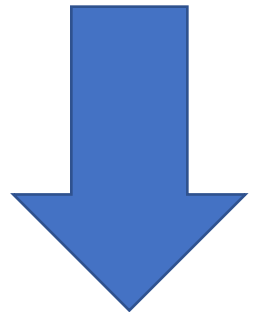
Taxpayer's Pin:

10000 [Edit Pin](#)

ERO's Pin:

55555 [Edit Pin](#)

**SCROLL DOWN**





## Transmit Return

E-file the completed tax return

Select one:

Mark tax return ready for review

Mark tax return as complete

BACK

**\* IMPORTANT \***

**1. CHECK THE BOX – MARK TAX RETURN READY FOR REVIEW**

**FINAL STEP:**

**2. CLICK SAVE & EXIT  
TO SEND THE RETURN TO  
ATS FOR REVIEW**

 **SAVE & EXIT**