

How to Sign-Up for Pay-by-Refund

–ProSeries Users

1. Enroll Through ProSeries Options Set-up Wizard – Select Pay-by-Refund in the Options Set-up Wizard in your TY15 ProSeries software. If you’ve already completed set-up, the Options Set-up Wizard is accessible from the Help menu in ProSeries. After selecting Pay-by-Refund you will be directed to enroll with one of our participating banks (see below). Enter your name, e-mail address, and EFIN and submit your enrollment to the bank. This enrollment lets the bank know you are an authorized ProSeries user and that an application is coming.
2. Apply With Selected Bank – Next, the Options Set-Up Wizard will direct you to the web site of the bank you selected where you will complete and submit your application. You can also access the application on the bank’s web site via the bank enrollment links in the table below. The bank will be in contact with you regarding your application.

–Lacerte and Intuit Tax Online Users

1. Apply for an Account with Refund Advantage – Apply for an account with Refund Advantage via the link below. Refund Advantage is the sole banking partner for Lacerte and Intuit Tax Online.

Bank Information

Intuit is partnering with 4 banks to provide efficient processing and distribution of your client’s refund. After the bank you select receives the refund from the IRS, the funds will be distributed according to the Pay-by-Refund instructions. The tax pro receives his fees, the bank will keep the setup fee, and the client will receive the balance of their refund via the disbursement method selected.

Partner Bank	Santa Barbara (TPG)	Refund Advantage	Republic Bank	River City Bank
Bank Info (from banks’ web sites)	Santa Barbara Tax Products Group (TPG) serves consumers nationwide with tax-related financial products and services that are fairly priced and satisfy consumer need.	Refund Advantage is a service owned and operated by Fort Knox Financial Services Corporation. Refund Advantage’s primary focus is providing the ERO with solutions to help the tax season run smoother.	Republic Bank & Trust Company was founded in 1982 and has over \$3 billion in assets and over 40 retail banking centers. With over 15 years of experience Republic is one of the leading national providers of Refund Transfers (RTs).	Heading into their 29th tax season, River City Bank has endured while many other banks product providers have come and gone. River City understands what it takes to create successful banking partnerships with valued tax professionals.
Bank Enrollment	https://pro.sbtpg.com/index.aspx	https://www.refund-advantage.com/easyenrollment.aspx?mt=5	https://enrollment.republicrefund.com/	http://www.rcbrl.com/EROenrollment.aspx
Compatible tax products	ProSeries	ProSeries, Lacerte Intuit Tax Online	ProSeries	ProSeries
Federal refund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State refund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Disbursement Options				
- Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Direct Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Am/Ex Serve®	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Prepaid Card	Green Dot Card	FasterMoney Prepaid Card	NetSpend Prepaid Card	Elevate Prepaid Card
Walmart Direct2Cash	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Software Integration				
- Appl, Forms & Disclosures	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Check Printing	<input checked="" type="checkbox"/>	Avail at bank’s web site	Avail at bank’s web site	Avail at bank’s web site
- Status Reporting	<input checked="" type="checkbox"/>	Avail at bank’s web site	Avail at bank’s web site	Avail at bank’s web site