

Welcome to ProSeries® Express Edition tax software

ProSeries Express Edition for Tax Year 2006 tax preparation software is designed for tax professionals who file 50 or more bank product tax returns each season and prepare a large volume of electronically-filed tax returns. ProSeries Express Edition offers:

- A fast, innovative new approach to preparing income tax returns for clients requesting bank products
- Several bank product options including Federal RALs, Federal RTs, State RTs, RAL/RT Advances, and Pre-season RAL/RT Advances that are all available for disbursement via check, direct deposit, or cash card
- Unlimited e-filing for 1040 federal returns and three individual state returns; or unlimited e-filing for 1040 federal returns and all state returns, depending on which version you've purchased

ProSeries Express Edition saves you time by allowing you to:

- Check electronic filing and bank products acknowledgements in a single step
- Find client files in HomeBase by first name, social security number (SSN), or employee identification number (EIN)
- Use ZIP Code and Employer/Payer EIN databases to speed data entry of your clients' information
- Offer the ProSeries Express Edition *Refund Infoline* (at no cost to ProSeries Express Edition customers in Tax Year 2006), a toll-free telephone number that your clients can call to check their tax refund or bank product status 24 hours a day, seven days a week
- View a client snapshot screen, color-coded data entry fields, a client questionnaire form in both English and Spanish
- Go directly from one state tax return to another state tax return (for the same client) without having to first go to the client's federal tax return

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Getting ready

Before you begin installing the ProSeries Express Edition program, you'll want to first:

- Prepare your firm for electronic filing
- Select a bank products provider and enroll in their program
- Choose unlimited use or pay-per-return use of the software
- Determine whether you want to use the software on a single computer vs. multiple computers and on a standalone basis vs. network environment
- Verify that your computer meets the minimum system requirements
- Provide other information for ProSeries Express Edition features

Preparing for electronic filing

If you want to file tax returns (or extension request forms) electronically, you must be able to connect to the Internet from the computer on which you install the ProSeries Express Edition program. In addition, **you must have an IRS-issued Electronic Filing Identification Number (EFIN).**

Applying for an EFIN

You can apply for an Electronic Filing Identification Number in one of two ways:

- **Online.** To use the IRS *e-file* application, go to <http://www.irs.gov>, select the **e-file** link, then select the **e-services** link in the **e-file for Tax Professionals** section.
- **Form 8633.** Submit IRS Form 8633, Application to Participate in the IRS *e-file* Program.

Important: You must use the version of Form 8633 dated July 2003. If you submit an earlier version, the IRS will reject your application. The IRS recommends that you submit your application at least 45 days prior to the date that you intend to begin filing returns electronically. You can find Form 8633 and information about electronic filing on the IRS Web site at <http://www.irs.gov/>.

Tip: The IRS strongly recommends that you use the online method to apply for an EFIN.

Important: You must update your EFIN if you plan to electronically file business tax returns.

You can find information about electronic filing at <http://www.proseries.com>. Select **Products & Services**, then **Electronic Filing**. If you have additional questions about electronic filing, call the IRS e-help desk at 1-866-255-0654.

State enrollment requirements

Some states require additional electronic filing enrollment paperwork. Verify the electronic filing enrollment requirements for each state where you plan to file returns electronically. You can link to each state taxing agency's Web site from

<http://www.proseries.com>. Select **Resources**, then **Tax Links**, then **State Tax Departments**, then the name of the state.

Offering Bank Products to your clients

When you file your clients' individual returns electronically, they can receive disbursements based on their expected federal refunds in the form of:

- Refund Anticipation Loans (RALs) - Check, Direct Deposit, or Cash Card
- Refund Transfers (RTs) - Check, Direct Deposit, Cash Card
- RAL/RT Advances up to \$1,900
- Pre-season RAL/RT Advances that you can offer to clients starting January 2, 2007 at 12:01 a.m. (eastern time)

Important: If you are going to offer Pre-season RAL/RT Advances, you must advise your clients that their tax returns will not be sent to the IRS until the Intuit Electronic Filing Center opens for e-filing in mid-January, 2007.

Your clients can also receive disbursements based on their expected state refunds in the form of Refund Transfers (RTs). In addition, your fees are deducted from the client's refund and deposited into your bank account electronically.

Applying for the Bank Products program

- 1 Enroll with a bank product provider (Santa Barbara Bank & Trust, Republic Bank, or First Security Bank). You can go to the **Bank Products** section of ProSeries.com web site at <http://www.proseries.com/bankproducts> to learn how to enroll.
- 2 If you plan to use Santa Barbara Bank & Trust as your bank products provider, the first time you start the ProSeries Express Edition program, you'll see an **Enroll with SBBT** dialog box that includes a link to the applicable page at ProSeries.com.

For more information about bank products, see "Offering Bank Products to your clients" on page 42.

Using the software on an unlimited basis vs. a pay-per-return basis

You can use each ProSeries Express Edition tax product and electronic filing product on an **unlimited basis**. However, you can also use the program on a **pay-per-return** basis. Here are the differences:

Unlimited basis. When you use a tax product or electronic filing product on an unlimited basis, you pay a fixed fee to purchase that product, but you don't pay a fee to print or convert returns for electronic filing (tax product), or to file returns electronically (electronic filing product).

Pay-Per-Return basis. When you use a tax product or electronic filing product on a pay-per-return basis, you don't pay a fee to purchase that product, but you must authorize payment for each return before you can print it or convert it for electronic filing, or before you can file it electronically.

Important: Service and delivery fees are separate from product purchase fees.

ProSeries Express Edition software enables you to prepare the following types of returns on an **Unlimited basis**: 1040, 1120, 1120S, 1065, 1041, and 990 federal returns, individual state returns for the states that you select, and business state returns for the states that you select.

If you want to prepare 706 or 709 federal returns, you can prepare these returns on a **Pay-Per-Return** basis.

New for Tax Year 2006. You can choose one of three “bundles” of tax products that are appropriate for your tax practice when you purchase ProSeries Express Edition. For Tax Year 2006, you can purchase a **Standard** three-state return bundle, an **Individual** bundle, or a **Premium** bundle in addition to **Pay-Per-Return** tax returns.

Important: To upgrade to a different ProSeries Express Edition bundle, call ProSeries Express Sales at **1-877-866-5232**. The product information in your customer record will be updated. Product licensing can be done automatically if your computer is connected to the Internet (which is the recommended method), or you can use the manual method for product licensing.

Using the software on one computer vs. multiple computers

How you install and use ProSeries Express Edition software depends on several factors, including the number of computers on which you want to use ProSeries Express.

One computer. If you’re going to use ProSeries Express software on one computer, install the program for stand-alone use on that computer’s hard drive. See “Installing ProSeries Express Edition 2006 software” on page 7.

Multiple computers. If you’re going to use ProSeries Express Edition software on more than one computer, you can install the program for stand-alone or network use.

- **Stand-alone use.** If each preparer maintains an independent set of clients, install the program for stand-alone use on each computer.

See “Installing ProSeries Express Edition 2006 software” on page 7 for instructions.

Important: If your firm will be filing returns electronically from more than one computer using the same EFIN on each one (and the program is installed for stand-alone use on each computer), be sure to see “Setting up the DCN counter on multiple stand-alone computers” on page 32.

- **Network use.** If preparers regularly share tasks and review returns for other preparers, install the program for network use.
 - **ProSeries Express Admin workstation.** Install the ProSeries Express shared network components to a shared drive from the computer you choose to be the ProSeries Express Admin workstation. You’ll also install and set up the program on the ProSeries Express Admin workstation at that time.

Any computer (including the network administrator’s workstation) can be the ProSeries Express Admin workstation. However, we strongly recommend that the ProSeries Express Admin workstation have an Internet connection to help ensure that you always have the latest version of your ProSeries Express tax products.

- **ProSeries Express User workstations.** Install and set up the ProSeries Express program on each additional computer that will run the program (and that will access ProSeries Express shared network components and client files from the shared drive where ProSeries Express is installed).

For instructions, see the ProSeries Express Edition Network Installation Guide that you received if you purchased ProSeries Express Edition/Network Version.

Important: If a preparer is going to prepare returns on a laptop or notebook computer that will be mobile (in a manner permitted by the ProSeries Express Software License Agreement), install ProSeries Express Edition for stand-alone use on the hard drive of that laptop or notebook computer.

Important: Make sure to use the **Copy/Backup** and **Restore** commands on the **Client File Maintenance** menu (which is accessed from the **File** menu) when “moving” client files from the network to the laptop or notebook, or from the laptop or notebook to the network.

Prepare your computer system

We suggest you review the following before installing ProSeries Express Edition software.

Internet connectivity

Having an Internet connection allows you to take advantage of ProSeries Express Edition features such as online delivery of tax products and tax product updates, product licensing, electronic filing, bank products, and the ProSeries.com Web site.

We recommend that the following computers or workstations have a valid Internet connection before you install the ProSeries Express Edition software:

- Each computer on which you will install ProSeries Express software for stand-alone use
- The ProSeries Express Admin workstation from which you install ProSeries Express Edition software for network use, because all product downloads and product updates must be done at the ProSeries Express Admin computer

Computer system requirements for stand-alone computers

Important: If you purchased ProSeries Express Edition/Network Version, see the **ProSeries Express Edition Network Installation Guide** for information about the system requirements for network servers and user workstations in a networked environment.

Make sure that each computer on which you intend to use ProSeries Express Edition software meets or exceeds the minimum requirements for all relevant components. **The minimum requirements and recommendations for ProSeries Express Edition 2006 software differ from those for ProSeries Express Edition 2005 software.**

Tip: If you want to use a plug-in utility named **Get System Info** to get information about your system, go to <http://web.intuit.com/support/sysinfo>, then follow the instructions.

The minimum requirements shown below should provide adequate performance on most computer configurations. The software may not operate as designed on systems that don't meet the minimum requirements.

For more information about how system requirements can affect the operation of ProSeries Express Edition software, go to <http://www.proseries.com/sysreq>.

Component	Recommended Requirement	Minimum Requirement
Computer	2.0 GHz or faster	500 MHz
Memory	512 MB RAM or more. More memory normally results in improved performance.	256 MB RAM. More memory may be required if you install many products and have a large number of clients.
Hard disk space	2 GB or more, depending on the number of products you install and the number of clients you have.	850 MB. More space may be required if you install many products and have a large number of clients.
Windows operating system	Windows XP (Professional or Home edition)	Windows 2000 (service pack 3 or later)

Component	Recommended Requirement	Minimum Requirement
Screen resolution	1024 x 768 or higher	800 x 600
Printer	Hewlett-Packard LaserJet Series 4 or later	Hewlett-Packard LaserJet or PCL compatible with 2 MB of printer memory. Inkjet printers not recommended for check printing. Inkjet printers perform significantly slower than laser printers with ProSeries Express Edition. GDI printers are not supported.
Disk drive	CD-ROM 24X or faster	CD-ROM 12X or faster
Internet Browser	Microsoft Internet Explorer 6.0 or later	Microsoft Internet Explorer 5.5, service pack 2 or later. (Internet Explorer 6.0 is installed if Internet Explorer 5.5, service pack 2 or later isn't already installed.)
Internet connection	High-speed Internet connection, such as T-1, DSL, or cable modem	56.6 K modem
Internet Service Provider (ISP)	An ISP is required for features that use the Internet, such as electronic filing and the online delivery of products and product updates. ProSeries Express Edition software works with most ISPs. Contact your ISP if you have a specific question.	

Important: ProSeries Express Edition software for the 2006 tax year shouldn't be installed on a computer with a Windows 2000 (service pack 2 or earlier), Windows NT, Windows 98, Windows ME, or Windows Vista operating system.

Computer performance

We strongly recommend that you do the following for each computer that will run ProSeries Express Edition software:

- Install the latest Windows operating system updates from Microsoft. Go to the Download page on the Microsoft Web site at <http://www.microsoft.com> to download the latest Windows security updates.
- Use virus-protection software to check for viruses on the hard drive. Make sure that you have the latest updates installed.
- Use anti-spyware software to check for spyware and adware on the hard drive. Make sure that you have the latest updates installed.
- Run the Windows Scan Disk and Disk Defragmenter system tools to correct any errors on the hard drive and speed up access to the contents of the hard drive.

Transferring ProSeries Express Edition 2005 client files

ProSeries Express Edition software for the 2006 tax year can transfer relevant data from ProSeries Express Edition 2005 client files (or data converted to 2005 ProSeries Express data) into new ProSeries Express 2006 client files. You can also transfer relevant data from ProSeries Professional 2005 client files and ProSeries Basic 2005 client files.

If you used ProSeries Express software for the 2005 tax year, make sure you know the location of last year's ProSeries Express client files—especially if your ProSeries Express Edition 2005 client files are stored on 3.5-inch disks or other external storage media.

Tip: The default installation location for the ProSeries Express Edition 2005 client file directory was C:\ExpWin05\05Data (if a stand-alone installation) or x:\ProNet05\05Data (if a network installation), where x represents the letter of the drive where ProSeries network components were installed, but not necessarily Drive X.

Other important data files

If you use QuickBooks® software or any other software from which you expect to import client data, make sure you know where the relevant data files are located.

Other information needed before installation

While you're setting up the ProSeries Express Edition program, you will be prompted for information about the topics in the table below. You can enter this information later as you use the ProSeries Express Edition software.

For this feature	You should know this
Access Rights	Whether or not you want to control access to certain program functions such as electronic filing and bank product processing and what the appropriate user role should be for each employee (e.g. Administrator, Power User, Tax Preparer, Data Entry).
Bank Products	Your bank products registration information, including information about the bank account where your fees will be deposited
Billing	How you want to set up ProSeries Express billing options such as standard or flat fees, hourly charges, and per-form charges
Electronic Filing	Information about the person who will be the electronic filing contact for your firm
Firm and Preparers	Basic information about your firm and the preparers who will be using the ProSeries Express Edition software.
Online Reports	Person(s) who will be acting as the Firm Administrator and the Site Administrator for your tax practice. Firm Administrators have the highest level of access to the online reporting functions.
Product Licensing	The Customer Number and Sold To: ZIP Code are printed in the Sold To: area of the packing slip (which accompanied the ProSeries Express Edition CD).
Service Bureau	Master EFIN, an Intermediate Service Provider number (SBIN), or both. Enter a Service Bureau Fee and choose which EFINs that you want to include in your Service Bureau. If you need help setting up your Service Bureau, contact ProSeries Express Edition Sales at 1-877-866-5232.

Installing ProSeries Express Edition 2006 software

You install ProSeries Express Edition software from the first ProSeries Express CD that you receive. Each subsequent ProSeries Express CD contains the latest version of each ProSeries Express tax product that's currently available. (For details about each ProSeries Express CD, see "Software service and delivery information" on page 46.)

Note: You can also download the ProSeries Express Edition software from the My Proseries.com web site at <http://www.myproseries.com>.

Important documents

- **Packing slip.** The packing slip that accompanied the ProSeries Express Edition CD contains your **Sold To: ZIP code** and **Customer Number**, which you will need during the initial installation of the program.
- **Release Notes.** Read the printed Release Notes and any other material that accompanied the ProSeries Express CD.

THE RELEASE NOTES MAY CONTAIN, AMONG OTHER THINGS, ADDITIONAL LICENSING TERMS THAT GOVERN THE USE OF THE PROSERIES EXPRESS EDITION SOFTWARE AND RELATED SERVICES.

When you run the ProSeries Express installation program, select each ProSeries Express tax product that you expect to use for the 2006 tax year. The installation program installs each tax product that you selected, provided the tax product is on the ProSeries Express CD. The ProSeries Express Edition User's Guide is also installed.

Installing ProSeries Express Edition software for stand-alone use

Important: If you're installing ProSeries Express Edition software for network use, refer to the installation instructions in the **ProSeries Express Edition Network Installation Guide**.

To install ProSeries Express Edition software on a computer for stand-alone use:

- 1** Close all open applications and turn off any virus-protection utilities on the computer.
- 2** Insert the ProSeries Express Edition CD into the appropriate drive.
Don't remove the CD from the drive until you finish installing products.
- 3** In the **ProSeries Express Installation** dialog box, select **Tax Preparation**.
If the **ProSeries Express Installation** dialog box doesn't open automatically:
 - a.** Go to the Windows taskbar, select **Start**, then select **Run**.
 - b.** In the **Run** dialog box, type X:\CDSETUP (where X represents the letter of the drive containing the ProSeries CD), then click **OK**.
 - c.** In the **ProSeries Express Installation** dialog box, select **Tax Preparation**, then continue to Step 4.
- 4** In the **Welcome** dialog box, click **Next** when you're ready to continue.
- 5** A **System Warning** dialog box opens if your computer doesn't meet the minimum system requirements for the ProSeries Express 2006 software. (For more information, see "Computer system requirements for stand-alone computers" on page 5.)

If the **System Warning** dialog box opens, read the information, then do one of the following:

- Click **Cancel** to exit the installation program, then correct the situation(s) identified in the **System Warning** dialog box. After your computer meets the minimum system requirements for the ProSeries Express 2006 software, start the installation procedure with Step 1.
- Check the box indicating that you understand you may not receive technical support for issues you may encounter while using the ProSeries Express program, then click **Next** to continue to Step 6.

Important: We strongly recommend that you click **Cancel** and correct the situation(s) identified in the **System Warning** dialog box. For information about how system requirements can affect the operation of ProSeries Express, go to <http://www.proseries.com>.

- 6** In the **Software License Agreement** dialog box, read the ProSeries Express License Agreement to understand the scope of your rights to use ProSeries Express software.
 - Select **I accept the terms of the license agreement** if you agree to accept all the terms of the ProSeries Express License Agreement, then click **Next** and continue to Step 7.

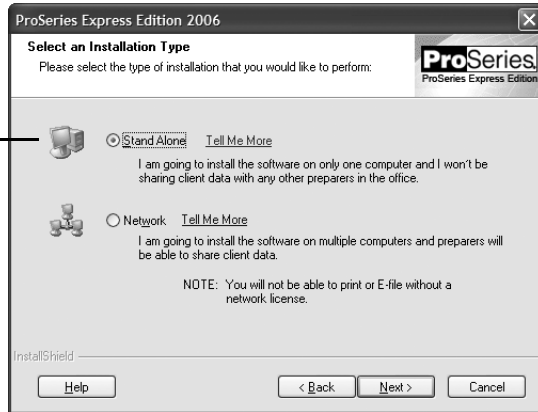
- If you don't agree with the terms of the license agreement, select **I do not accept the terms of the license agreement**, then click **Cancel** and exit the installation program.

Important: If for any reason you find the terms of the ProSeries Express License Agreement unacceptable, *do not install the software*. Contact ProSeries Express Customer Service for a refund instead.

- 7** In the **Select an Installation Type** dialog box, select **Stand Alone**, then click **Next**.

Stand Alone is the default selection.

If you select Network, see the ProSeries Express Edition Network Installation Guide.

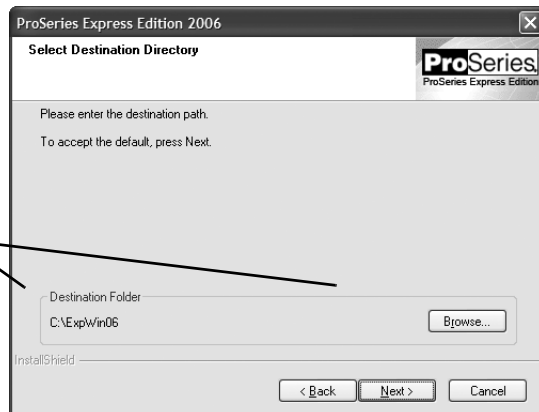


- 8** In the **Select Destination Directory** dialog box, do one of the following:

- Click **Next** if you want to install ProSeries Express Edition software in a \EXPWIN06 directory on the drive that's shown in the dialog box. (That drive will be C: or the drive on which last year's ProSeries Express Edition software was installed.) Proceed to Step 10.
- Click **Browse** if you want to install ProSeries Express Edition software to a different drive or directory. Continue with Step 9.

Click Browse if you want to install your ProSeries Express products on a drive other than the drive that's shown.

See Step 9 for additional instructions.



- 9** In the **Select Folder** dialog box, take the following steps:

- a. Select the drive where you want to install ProSeries Express software.
- b. After selecting the drive, type the folder name EXPWIN06 in the **Folder name** field so that it opens after the drive you selected, then click **OK**.

EXPWIN06 directory. For best results, use EXPWIN06 as the name of your 2006 ProSeries Express directory. Don't install ProSeries Express software to the root of a drive.

- c. When prompted to create the EXPWIN06 directory in the location that you've specified, click **Yes**.
- d. When you return to the **Select Destination Directory** dialog box, click **Next**. Continue with Step 10.

10 In the **Tax Year 2006 Product Selections** dialog box, select the products that you expect to use for the 2006 tax year, then click **Next**.

Tip: If you used ProSeries Express Edition software for the 2005 tax year, the products that were installed last year may already be selected.

Select state products.

This section explains how to use this dialog box.

Select federal products.

At least one federal product must be selected.

Tip: If you select a state product, be sure to select the corresponding federal product.

Tax Year 2006 Product Selections

Instructions

Select the products that you plan to use this year in order to see if they are available for download.

Products not available now will be downloaded when available during future server connections or from future CD's.

Federal Products

- 1040
- 1120
- 1120S
- 1065
- 1041
- 706
- 709
- 990/990EZ
- 1040 NR

State Products

	1040	1120	1120S	1065	1041		1040	1120	1120S	1065	1041
AL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
AR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
AZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
CA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
LLC-568	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
CD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
CT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
DC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
DE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
FL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
GA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
HI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
IA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
IL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
KS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
KY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
LA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Pass-Through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
ME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
M1PR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
(MN Property Tax)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
MT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
ND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
NE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
NH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
NJ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
NM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
NY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
OH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Pass-Through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
OK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
OR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
PA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
RI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
SC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
TN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
TX	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
UT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
VA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
VT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
WI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Multi-State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
WV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Help Back Next > Cancel

Tip: Every ProSeries Express Edition tax product for 2006 is shown in this dialog box, including products that may not be available yet. Select all ProSeries Express tax products that you intend to use this tax season. You can install additional products later, as described in "Keeping your ProSeries Express Edition tax products up-to-date" on page 46.

11 If any of the products you selected aren't on the CD, you'll see the **Installation Note** dialog box. Review the list of products that will be installed later.

12 In the **E-mail Alert Registration** dialog box, click **Accept** or **Decline**, depending on whether you accept the terms of the E-mail Alerts system, then click **Next**.

Tip: E-mail alerts inform you when the products you selected for installation become available or are updated. E-mail alerts also inform you about support issues, and include information relevant to your ProSeries Express products.

13 Review the **E-mail Alert Selection on Multiple Computers** dialog box, then click **OK**.

14 In the **Installation Details** dialog box, review all the information, including the disk space information, then click **Next**.

The installation program installs all available ProSeries Express Edition tax products that you selected, then verifies that all applicable files were installed correctly. Continue with Step 15.

Installation Failed dialog box. If you see this dialog box, a product was not installed properly. Click **Help** to find a possible solution, then click **Exit** to exit the installation program.

15 Additional components. Wait while additional components, such as any necessary fonts, Internet Client software, the ProSeries Express Edition User's Guide, and ProSeries Express Product Licensing components are installed. Dialog boxes and progress bars keep you informed.

16 Internet Explorer. If Microsoft Internet Explorer 5.5, service pack 2 or later isn't installed on your computer, the installation program installs Internet Explorer 6.0 before continuing. ProSeries Express Edition software requires portions of Internet Explorer 5.5, service pack 2 or later to run properly.

Important: If the installation program installs Microsoft Internet Explorer, you are prompted to restart your computer. After the computer restarts, the installation program will finish the ProSeries Express installation procedure.

17 Restart Windows message. Restart your computer if you are prompted to do so.

If the installation program doesn't resume after you restart the computer, start the ProSeries Express program by double-clicking the **ProSeries Express Edition 2006** shortcut icon on your Windows desktop. The Connected Customer Wizard will begin automatically. Go to "Setting up the ProSeries Express Edition program" on page 13.



18 Setup Complete. In the **Setup Complete** dialog box, click **Finish**, then continue with Step 19.

We recommend that you leave the check mark in the **Launch ProSeries Express** option.

19 If the Launch ProSeries option was selected: The Connected Customer Wizard begins automatically. Proceed to "Setting up the ProSeries Express Edition program" on page 13.



If the Launch ProSeries option wasn't selected: You return to the **ProSeries Express Installation** dialog box. Click **Exit** to return to the Windows desktop.

20 After you return to the Windows desktop, start the ProSeries Express program by double-clicking the **ProSeries Express Edition 2006** shortcut icon. The Connected Customer Wizard begins automatically.

21 Continue with "Setting up the ProSeries Express Edition program" in the next section.

How to choose state products for the Standard Bundle

Use the **Choose State Licenses** dialog box to choose your state products for the Standard product bundle you purchased when:

- Your ProSeries Express Edition software is licensed
- Your ProSeries Express Edition license includes a three-state suite, and
- You've licensed less than three states of a three-state license bundle that you purchased

Make sure that you select the state product(s) that you want to license. You can use the drop-down lists in the **Select your States to license** area to select an individual or business state product. You can license up to three individual or business state products for unlimited use.

You can click **OK** to proceed with licensing the state products that you selected, or click **Cancel** to return to the ProSeries Express Edition program.

Licensing ProSeries Express Edition software products

Product licensing is a system that licenses your ProSeries Express tax software to your firm. It's important to note that product licensing is required before you can print returns or file returns electronically, or create PDF files that contain returns. Products that aren't licensed for unlimited use can be used on a Pay-Per-Return basis.

Product licensing uses your Customer Number and Sold To: ZIP code with information in Intuit's records to deliver the following to your ProSeries Express tax software:

- An unlimited-use license for each ProSeries Express Edition tax product and ProSeries Express Edition electronic filing product that you've purchased for Unlimited use—even if those products haven't been installed yet (except 706 and 709 products)
- Your firm's name and address

You can license the ProSeries Express Edition product using the **Online** method or the **Manual** method. For most ProSeries Express Edition users, product licensing occurs online automatically.

Licensing a product online

During installation, the ProSeries Express Edition Connected Customer Wizard performs product licensing online automatically when:

- You install ProSeries Express tax software for stand-alone use on a computer that has an Internet connection
- You install ProSeries Express tax software for network use from a computer (referred to as the ProSeries Express Admin workstation) that has an Internet connection

Important: When ProSeries Express Edition software is installed for network use, product licensing must be initiated from the **ProSeries Express Admin workstation**. Product licensing information is shared by all computers that have been set up as ProSeries Express Edition workstations. See the ProSeries Express Edition Network Installation Guide for more information.

Licensing a product manually

When you click the "Product Licensing Required" message, you'll see a **License Products** dialog box that includes two options: **Online (Recommended)** and **Manual**. Select **Manual**, then click **OK**.

- 1 Verify your Customer Number and ZIP code.
- 2 Enter your firm's name and address. (This information must match the information contained in Intuit's records.)
- 4 Contact Intuit using one of three methods. After you provide the Key Code that was generated, you will receive a unique Licensing Code from Intuit.
- 5 Enter the Activation Code, then click OK.

Note: Be sure to read “Updating your firm’s product licensing information.”

Updating your firm’s product licensing information

Update your firm’s product licensing information when:

- You purchase additional ProSeries Express tax products or additional ProSeries Express electronic filing products for Unlimited use, or
- You purchase ProSeries Express Edition/Network Version, or
- The software or an Intuit ProSeries representative instructs you to update your product licensing information

If either of these situations occur, go to the **Tools** menu, select **License Products**, select **Online** or **Manual**, then click **OK**. If you chose **Online**, simply wait for the product licensing procedure to conclude. If you chose **Manual**, just follow the instructions in the **License Products** dialog box.

Setting up the ProSeries Express Edition program

The first time that you start the ProSeries Express Edition program, the Connected Customer Wizard helps you set up the program if there’s a valid Internet connection.

Network. The ProSeries Express Edition program should start from the ProSeries Express Admin workstation the first time. Don’t set up other workstations to run the program until you’ve set up ProSeries Express from the ProSeries Express Admin workstation.

Internet connection

If the computer has an internet connection, the Connected Customer Wizard performs the following important tasks:

- **Internet Connection.** Connects via the Internet to an Intuit Internet server containing customer information.
- **Firm information.** Retrieves the name and address of your firm from the Intuit Internet server.
- **E-mail address.** Retrieves your firm’s e-mail address from the Intuit Internet server.
- **Product licensing.** Licenses your ProSeries Express tax software to your firm, based on your Customer Number, ZIP code, and information in the customer database on the Intuit Internet server.

- Products you've purchased as Unlimited are licensed as Unlimited.
- All other products are licensed as Pay-Per-Return.
- **Network version.** See the ProSeries Express Edition Network Installation Guide for network installation information.

Important: Product licensing information is **not** printed on the packing slip. For more information, see "Licensing ProSeries Express Edition software products" on page 12.

- **Product updates.** Checks for updates to the products that were installed from the ProSeries Express CD, then downloads and applies the relevant updates, if any.
- **New products.** Checks for products that you selected for installation that weren't installed from the ProSeries Express CD, then downloads and installs those products, if any.

Tip: If you need to edit information that the Connected Customer Wizard retrieves from the Intuit Internet server, you can do that in the ProSeries Express Edition program later. Go to "Using the Connected Customer Wizard" on page 14.

Using the Connected Customer Wizard

When the Connected Customer Wizard starts, go to:

- Step 1 if the computer doesn't have a valid Internet connection
- Step 2 if the computer has a dial-up Internet connection
- Step 3 if the computer has a valid, non-dial-up Internet connection

1 If the computer doesn't have a valid Internet connection, a dialog box explains the benefits of being connected.

- If you think you might be able to establish a valid Internet connection, click **Yes** to run the Internet Connection Setup Wizard.

After you establish a valid Internet connection and return to the Connected Customer Wizard, continue with Step 2.

- If you know you won't be able to establish a valid Internet connection now, click **No** to exit the Connected Customer Wizard.

The ProSeries Express program starts automatically. Proceed to "Setting up ProSeries Express Edition options" on page 17.

Tip: To establish a valid Internet connection at a later time, go to the ProSeries Express **Help** menu and select **Internet Connection Setup**.

2 If the computer has a dial-up Internet connection, you are prompted to connect to the Internet if the computer isn't currently connected. After you connect to the Internet, continue with Step 3.

3 In the Connected Customer dialog box, click **Choose Products to Install** if you want to view the products that you selected to install, or if you want to select additional products for installation.

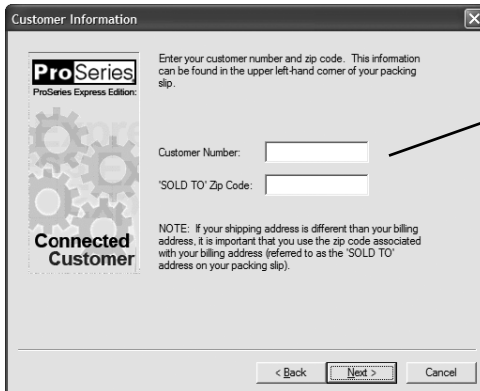
Click **Next** in the **Connected Customer** dialog box when you're ready to continue to Step 4.



Click here to view the Tax Year 2006 Product Selections dialog box.

Click Next to continue.

- 4** The **Customer Information** dialog box opens so you can enter or verify your Customer Number and ZIP code. That information is printed in the Sold To: area in the upper-left corner of your ProSeries Express packing slip.



These numbers should match the Customer Number and ZIP code printed in the Sold To area of your packing slip.

A different Customer Number and ZIP code might appear in the Ship To area of your packing slip.

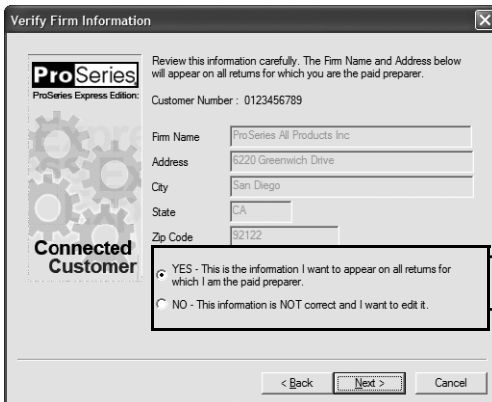
- 5** Click **Next**. You'll see a **Progress** dialog box that keeps you informed about what the Connected Customer Wizard is doing:

- The Connected Customer Wizard adds a check mark when it successfully completes a task.
- If the Connected Customer Wizard is unable to complete a task, you'll see an "X" instead.



- 6 Click **Next** after the Connected Customer Wizard finishes the setup tasks.
- 7 Review the information in the **Verify Firm Information** dialog box. This is the information that we have on file for your firm (based on your Customer Number and ZIP code).

Important: Review this information carefully. The ProSeries Express Edition program prints this information on all returns prepared by your firm.

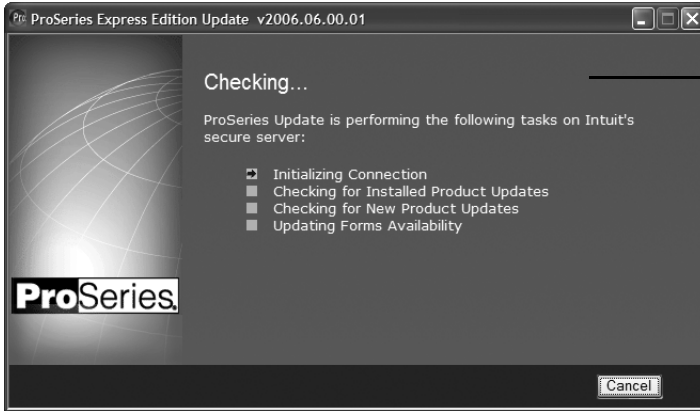


YES if your firm information is correct.

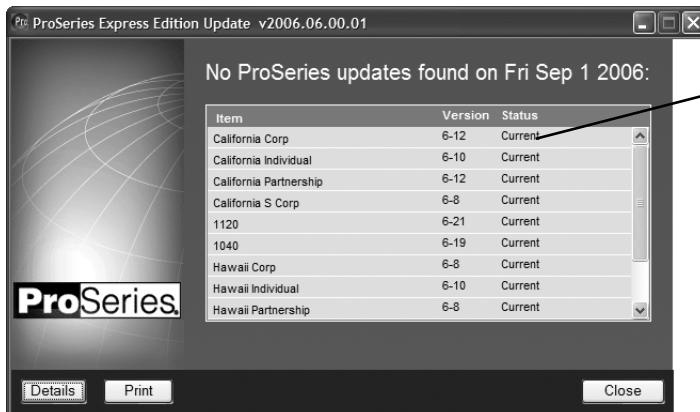
NO if you want to enter or edit your firm information.

- 8 Click **Next**.
 - If you selected **Yes**, you see the **Verify EMail Address** dialog box. Skip to Step 11.
 - If you selected **No**, you see the **Enter Firm Information** dialog box. Continue with Step 9.
- 9 In the **Enter Firm Information** dialog box, enter or edit your firm's name and address, then click **Next**.
- 10 In the **Product Licenses** dialog box, verify that you have the correct ProSeries Express Edition software licenses and any additional firm information.
- 11 In the **Verify EMail Address** dialog box, enter or verify your e-mail address, then click **Next**.
- 12 The **Sending Changes to Server** dialog box keeps you informed about what the Connected Customer Wizard is doing. When it's done, click **Continue**.

- 13 The ProSeries Express Edition program checks for any new product releases and product updates.



The ProSeries Express Edition program checks for product updates, then...



...displays the status of the product updates.

- 14 If there are new products or product updates to download, wait while the Connected Customer Wizard downloads and installs those new products and product updates.
- 15 When the Connected Customer Wizard finishes, the **Prior Year Settings Transferred** dialog box opens or the Options Setup Wizard begins so you can set up various ProSeries Express Edition options. Go to “Setting up ProSeries Express Edition options” next.

Setting up ProSeries Express Edition options

Set up ProSeries Express options by simply going to the **Tools** menu and choosing either **Options** or **Options Setup Wizard**, as described in this section.

Using the Options dialog box

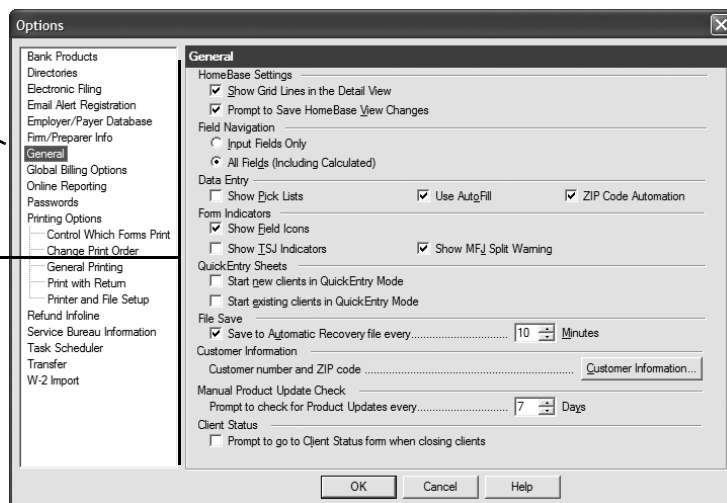
You can use the **Options** dialog box to select or change all program options, including those that you cannot select or set up using the Options Setup Wizard.

- 1 From the **Tools** menu, select **Options**.

The **Options** dialog box opens with **General** selected (in most situations).

- 2 Click the other selections on the left side of the **Options** dialog box to see the different categories.

When you click a selection on the left side of the Options dialog box, that category of options opens in the right side of the dialog box.



- 3 Press ENTER or TAB, or use your mouse to move to new fields.

- 4 To get help, click the **Help** button.

- 5 After you finish making selections, click **OK** to save them.

Using the Options Setup Wizard

Using the Options Setup Wizard is the easiest way to set up ProSeries Express options. This section describes some of the ProSeries Express Edition features that you can set up using the Wizard.

- 1 From the **Tools** menu, select **Options Setup Wizard**.

- 2 When the Options Setup Wizard starts, the first dialog box you see welcomes you to the Options Setup Wizard. Continue to click **Next** after setting up options in subsequent Options Setup Wizard dialog boxes.

Most Options Setup Wizard dialog boxes are self-explanatory. However, the next sections discuss the following topics in some detail.

- “Entering firm and preparer information” (see page 19)
- “Setting up multiple preparers with EFINs” (see page 19)
- “Installing ProSeries Express on more than one computer” (see page 19)
- “Entering bank products registration information” (see page 21)
- “Entering global billing information” (see page 21)
- “Selecting a printer” (see page 22)
- “Registering for bank products through Santa Barbara Bank & Trust and Refund Infoline” (see page 22)

- 3 Click **Finish** to save the options that you selected.

Entering firm and preparer information

You enter information about your firm in the **Firm/Preparer Information** dialog box. If you completed the Connected Customer Wizard described on page 14, you'll see your firm's name and address in the gray area of the **Firm Information** section.

Tip: If you don't see your firm's name and address, you'll retrieve that information from an Intuit Internet server later, as explained in "Licensing ProSeries Express Edition software products" on page 12.

Enter other information about your firm in the fields below the gray area. If the firm will be filing returns electronically, be sure to enter the firm's Electronic Filing Identification Number (EFIN).

You'll use this dialog box to set up firm information, multiple EFINS, and electronic filing contact information.

- 1 Verify that your firm's name and address have been retrieved from an Intuit Internet server.
- 2 Enter other information about your firm.
- 3 Enter the firm's EFIN and the first and last name of the electronic filing contact person.
- 4 Enter preparer and ERO information including multiple EFINS in this section. Use the scroll bar to add more EROs or additional firms.

ProSeries Express Setup Wizard

Firm/Preparer Information

Firm Information

Firm Name: ProSeries All Products Inc Firm #: 1
Address: 6220 Greenwich Drive
City: San Diego State: CA ZIP Code: 92122

Employer ID (EIN): Foreign Country:
Phone: Print phone number on return? Yes No
Fax: Firm E-mail:

For MN, NM, OR Firms Only: State ID:
Electronic Filing Only: Electronic Filing Identification # (EFIN): 999999 (See Help)
Efile Contact Name (First) (Last)

Preparer / Electronic Return Originator (ERO) Information

Preparer Code Associated with Firm # Print name in structure.asp?

To enter or modify your Firm Name and Address, click Edit. Enter other Firm and Preparer information directly on this form. Edit...

< Back Next > Cancel Help

Tip: To move to new fields, press ENTER or TAB, or use your mouse.

Enter information about the firm's preparers, including tax preparers with their own electronic filing identification number (EFIN). There's room to enter information for many preparers. If preparers will be filing returns electronically, enter Electronic Return Originator (ERO) information in this section also. If the ProSeries Express program transferred preparer information from last year's ProSeries Express Edition program, just edit the information as necessary.

Tip: For information about any field in the **Firm/Preparer Information** dialog box, right mouse click the field, then select **About <Field>** in the pop-up menu.

Setting up multiple preparers with EFINS

ProSeries Express Edition software allows your firm to electronically file tax returns using more than one electronic filing identification number (EFIN). With multiple EFIN capability, your firm can transmit tax returns and receive acknowledgements for each tax preparer's EFIN simultaneously as long as the tax preparer is a member of the firm. Enter each preparer's information separately in the Preparer/ERO Information section.

Installing ProSeries Express on more than one computer

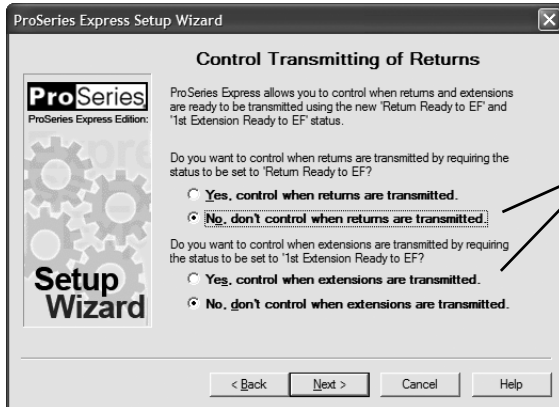
If you are installing the stand-alone version of ProSeries Express Edition software on more than one computer, it's recommended that you assign a different Declaration Control Number (DCN) on each installation of the ProSeries Express Edition software that you have in your office. If ProSeries Express Edition software detects client tax returns with duplicate DCNs, you cannot transmit the returns to the Intuit Electronic Filing Center.



Type any number to change the DCN for the ProSeries Express Edition software installed on this computer.

Controlling electronic filing of tax returns

When a return or extension is ready to be transmitted, it should have the status “Return Ready to EF” or “1st Extension Ready to EF.” You can require that returns have this status before transmitting them using the **Control Transmitting of Returns** dialog box.



Choose a status when returns and extensions are to be transmitted

Taxpayer electronic signature PIN for electronic filing

You can choose to have the ProSeries Express Edition program generate a taxpayer personal identification number (PIN) for the purpose of IRS electronic signatures when electronically filing a client’s income tax return.

If you want the ProSeries Express Edition program to generate a taxpayer PIN, select **Yes, automatically generate taxpayer PINs**. The program assigns the last five digits of the taxpayer’s social security number as the taxpayer PIN for IRS electronic signatures.



Choose whether you want the program to generate taxpayer personal identification numbers (PINs)

Entering bank products registration information

Enter your firm's electronic filing information and bank information in the **Bank Products Registration Information** dialog box.

You entered your firm's EFIN and EIN in the Firm/Preparer Info dialog box.

You must provide an EIN or a SSN, but you're not required to provide both numbers.

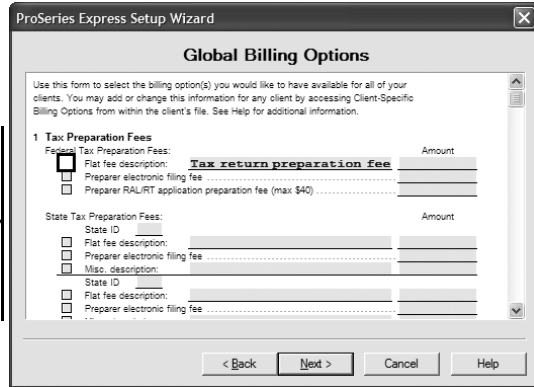
The Fax field can be blank.

Entering global billing information

Use the **Global Billing Options** dialog box to set the billing options that you want to use for all clients. Many billing options are available. If the ProSeries Express Edition program transferred global billing information from last year's ProSeries Express Edition program, just edit the information as necessary.

Global Billing Options has seven sections:

- Tax Preparation Fees
- Hourly Charges
- Per Form Charges
- Miscellaneous Fees and Adjustments
- Discount
- Sales Tax
- Standard Paragraph



Important: For detailed information about any field in the **Global Billing Options** dialog box, right mouse click the field and select **About <Field>** in the pop-up menu.

Selecting a printer

Use the **Select a Printer** dialog box to choose a specific printer in your office where you want to print tax forms, client letters, labels, and refund checks for bank products.



Select the Change button to choose a printer for printing tax forms, client letters, labels, and refund checks.

Registering for bank products through Santa Barbara Bank & Trust and Refund Infoline

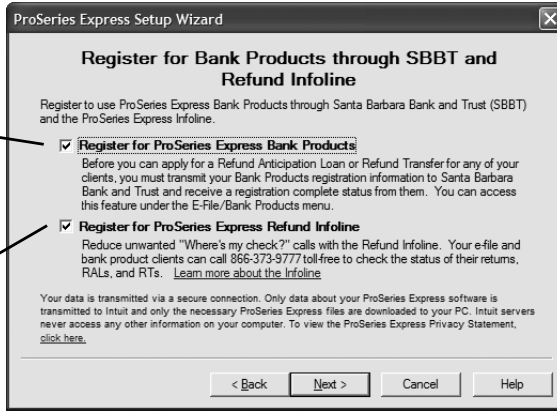
Use the **Register for Bank Products through SBBT and Refund Infoline** dialog box if you want to use Santa Barbara Bank & Trust as your bank products provider. Select the **Register for ProSeries Express Bank Products** check box to transmit your bank products registration information to Santa Barbara Bank and Trust and receive a registration complete status message from them.

Important: You must register with Santa Barbara Bank & Trust before attempting to transmit your first client's bank product return for TY06.

Select the **Register for ProSeries Express Refund Infoline** to register for Refund Infoline. For more information about Refund Infoline, see "More about Refund Infoline" on page 44.

Select this check box to register for bank products through Santa Barbara Bank & Trust

Select this check box to register for ProSeries Express Refund Infoline.



Tip: The Intuit Electronic Filing Center opens for registration on or about December 1, 2006.

Completing the Setup Wizard

When the Options Setup Wizard finishes, you'll see a **Congratulations!** dialog box.



Click Finish to complete the Options Setup Wizard.

Setting up Access Rights

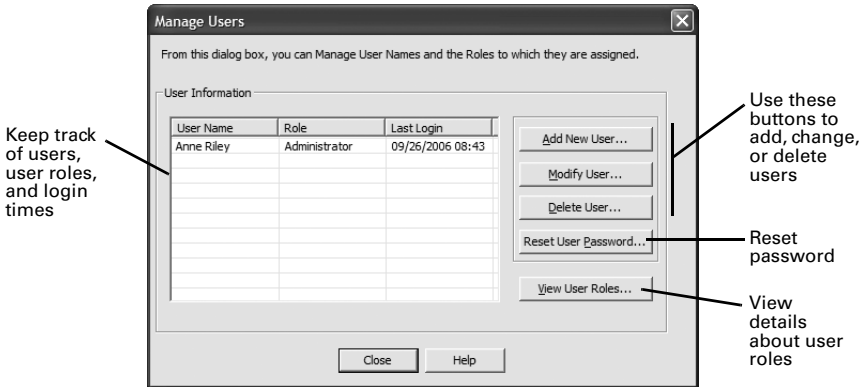
When the Options Setup Wizard completes, you can select Access Rights option to lock certain program functions such as printing or electronic filing to prevent unauthorized use. If your firm enables Access Rights, each user must enter a valid User Name and Password in a **ProSeries Login** dialog box every time he or she starts the program.

If you are the owner or manager of the tax firm, you'll need to determine what areas of the program you want to block or grant access to.

To set up Access Rights

- 1 Create an **Administrator Role** (for yourself) and select a password for the administrator (you).

- 2 Make sure that you follow the onscreen instructions in the Access Rights Setup Wizard.
- 3 You'll use the **Manage Users** dialog box to add, change, or remove users. You can also reset passwords and view user roles.



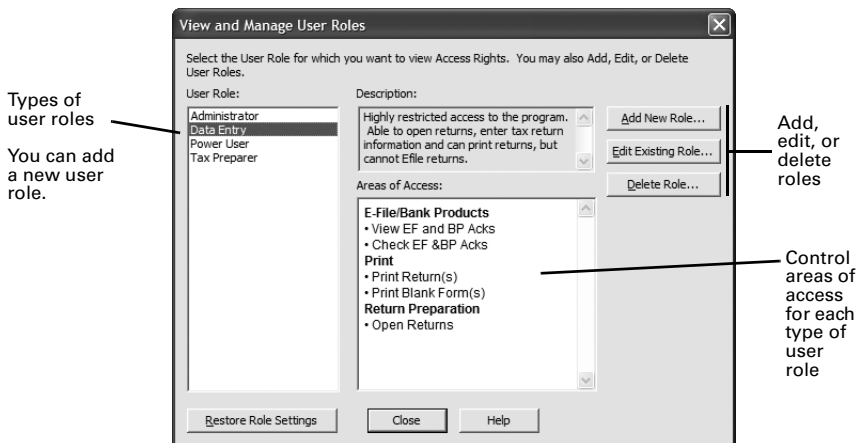
Important: If you are an Administrator, you'll need to include a hint so that if you forget or misplace your password, you'll have a way to remember it. A hint for a password can be a short, easy-to-remember phrase such as "name of dog." If you don't remember your hint, you will not be able to access the program, and you'll need to contact ProSeries Express Edition Technical Support at 1-800-557-5798.

To view and manage user roles

You also need to assign user roles to each additional user that you enter.

- 1 Click **View User Roles**.
- 2 In the **View and Manage User Roles** dialog box, click **Add New Role** and assign a role for each user listed.

You can return to this dialog box later to view the types of user roles and the areas and the access rights assigned to each user.



3 When you have finished assigning or managing user roles, click **Close**.

Note: The ProSeries Express Edition program's pre-defined user roles are **Administrator**, **Power User**, **Tax Preparer**, and **Data Entry**.

Don't Enable Access Rights. If you choose not to enable the Access Rights feature, a second Access Rights dialog box asks whether you want to add a password to protect the feature so that no one can enable it in the future. We strongly recommend that you add a password so no one can activate the feature inadvertently.

Setting up other ProSeries Express Edition features

Use the information in the following table to set up these ProSeries Express Edition features.

To do this	Do this
Bank Products. Apply for bank products so you can offer RALs, RTs, and other bank product services to your clients.	Go to the Bank Products section of ProSeries.com to learn how to enroll. To register in-product, go to the Tools menu, select Options , then select Bank Products .
Billing clock. Activate the billing clock so it tracks the time you spend on each return.	Go to the Tools menu, select Billing , then select Billing Clock .
Billing rates. Set billing rates for the forms and schedules of a specific type of return.	Go to the Tools menu, select Billing , then select Rates Per Form .
Client template. Enter data that applies to all your clients who file a specific type of federal return.	Go to the Tools menu and select Edit Client Template .
Internet connection. Set up an Internet connection so you can use ProSeries Express connectivity features.	Go to the Help menu and select Internet Connection Setup .
Invoices. View or edit the standard invoice for a specific type of return.	Open a return of that type, go to the Tools menu, select Billing , then select View Invoice or Edit Invoice .
Letters. View or edit the standard client letter or standard recipient letter for a specific type of return.	Open a return of that type, go to the Tools menu, select Letters , then select View Client Letter or Edit Client Letter .
Licensing. License your ProSeries Express tax products so you can print and file returns electronically.	Go to the Tools menu, select License Products , then select Online or Manual . (We recommend that you select Online.)
Online Reporting. View online business reports to monitor your firm's tax preparation activity through a secure internet connection.	Go to the Reports menu, select Online Reports , then select View Online Reports to build and view reports, or select Transmit Report Data Now to upload report data to your secure My ProSeries.com account.
Pay-Per-Return. Add funds to a Pay-Per-Return account so you can print and file returns electronically (for products you're using on a pay-per-return basis).	Go to the Tools menu, select Pay Per Return , then select Increase Account Balance .
Refund Infoline. Allows your clients to retrieve the status of their e-filed return or tax refund using a toll-free telephone number.	Go to the Tools menu, select Options , then select Refund Infoline .

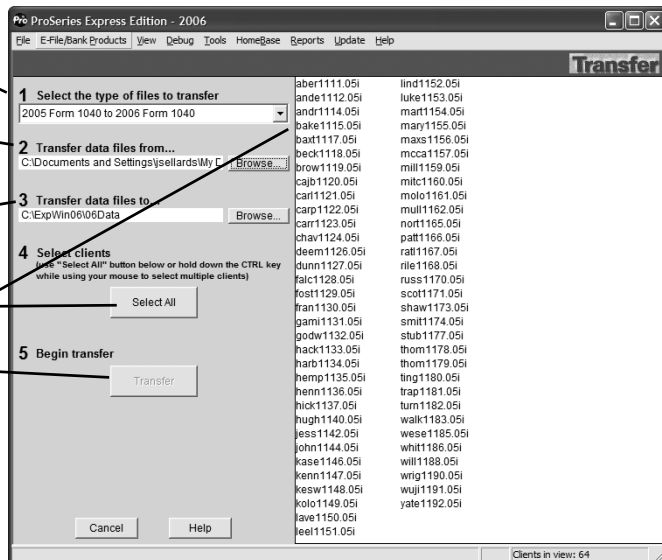
To do this	Do this
Slip sheets. Select options for slip sheets to use with envelopes and presentation folders.	Go to the Tools menu and select Global Slip Sheet Options .
W-2 Instant Data Entry. Enables a service that imports your client's W-2 information into an open tax return.	Go to the Tools menu, select Options , then select W-2 Import .

Transferring data from ProSeries Express 2005 client files

When you complete the Options Setup Wizard, you are asked if you want to transfer last year's client files. Transferring client data is a simple way to start your clients' ProSeries Express Edition 2006 client files using the relevant data in their ProSeries Express Edition 2005 client files.

If you used ProSeries Express Edition software last year, click **Yes** to go to the **Transfer** window, then do the five steps listed on the left side of the **Transfer** window.

- 1 Select the type of transfer you want to perform from the list of alternatives.
- 2 Select the location of your existing client files.
- 3 Select a location for the new client files.
- 4 Select the client files that you want to transfer data from, or click the **Select All** button.
- 5 After you've selected one or more clients, click **Transfer**.



Important: When transferring client data on a network, you must select the directory where your ProSeries Express Edition 2006 client files are being saved. This directory is set from the ProSeries Express Admin workstation during the Options Setup Wizard (or in the **Directories** section of the **Options** dialog box).

When you click **Transfer**, the ProSeries Express Edition program creates a new 2006 client file for each client whose data is being transferred, then transfers the applicable data into the new ProSeries Express 2006 client file.

The **Batch Transfer Status** dialog box keeps you informed during the transfer process. When the transfer process is complete, the **Transfer Log** dialog box opens. Review the information, then click **Close** to go to HomeBase. HomeBase is discussed in "Preparing client tax returns" on page 27.

Electronic filing. If a 2005 return was marked for electronic filing, that selection is transferred to the 2006 return. If a client's 2006 federal return will be electronically filed using a Practitioner PIN instead of Form 8453, open the client's 2006 federal return, and go to the Federal Information Worksheet. In **Part VI - Electronic Filing of Tax Return Information**, scroll down to the **Practitioner PIN program** section, then click the **QuickZoom to IRS e-file Authentication Statement for applicable information** button. You'll need to retain a completed copy of Form 8879, IRS e-file Signature Authorization, that's been signed by the client.

Important: If your firm will be filing returns electronically from more than one computer using the same EFIN on each one (and the program is installed for stand-alone use on each computer), change the starting number in the DCN counter on all but one computer before opening any returns. For more information, see "Setting up the DCN counter on multiple stand-alone computers" on page 32.

Tip: For more information about transferring data from ProSeries Express Edition 2005 client files, use the Search Help feature on the Help area to find the information that you want.

Preparing client tax returns

After you complete the first-time start-up procedures, you see HomeBase. HomeBase summarizes information about your clients and client files.

The screenshot shows the HomeBase interface with the following annotations:

- Create New Client File**: Points to the 'New' button in the toolbar.
- View Client Snapshot**: Points to the 'View Client Snapshot' button in the toolbar.
- Print Client Return**: Points to the 'Print Client Return' button in the toolbar.
- Help**: Points to the 'Help' button in the toolbar.
- Click tab to see information about a specific set of clients.**: Points to the 'EF Clients' tab.
- Click a client to view a Client Summary**: Points to the client name 'Becker, David' in the list.
- Double-click a client to open the client file.**: Points to the client name 'Becker, David' in the list.
- Use the scroll bars to see all rows and columns of client information.**: Points to the scroll bars at the bottom of the client list table.
- Check the Message Center for important messages.**: Points to the 'Message Center' pane at the bottom left.
- Search Help content**: Points to the 'Search Help' pane at the bottom right.

Client Name	File Name	Home Telephone	Taxpayer E-mail Address	SSN/EIN	Client Status	Last Modified
1 Abercrombie, Kristy J.	aber1111.06i	(555) 555-1111	labercrombie@proseries.com	111-11-1111	Transferred	09/08/2006
2 Anderson, Bruce & Virginia	ander1112.06i	(555) 555-1112	bAnderson@proseries.com	111-11-1112	Transferred	09/08/2006
3 Anderson, Cristina	andr1114.06i	(555) 555-1114		111-11-1114	Transferred	09/08/2006
4 Baker, Chris & Chris	bake1115.06i	(555) 555-1115	cbaker@proseries.com	111-11-1115	Transferred	09/08/2006
5 Baster, Gregory	bast1117.06i	(555) 555-1117		111-11-1117	Transferred	09/08/2006
6 Becker, David	beck1118.06i	(555) 555-1118	dbecker@proseries.com	111-11-1118	Transferred	09/08/2006
7 Brown, Stephen	brow1119.06i	(555) 555-1119	sbrown@proseries.com	111-11-1119	Transferred	09/08/2006
8 Calbon, Henry	calb1120.06i	(555) 555-1120	hcalbon@proseries.com	111-11-1120	Transferred	09/08/2006
9 Carlson, Craig	carl1121.06i	(555) 555-1121	ccarlson@proseries.com	111-11-1121	Transferred	09/08/2006
10 Carpenter, Phil	carp1122.06i	(555) 555-1122		111-11-1122	Transferred	09/08/2006
11 Carr, Steve	carr1123.06i	(555) 555-1123	scarr@proseries.com	111-11-1123	Transferred	09/08/2006
12 Chavez, Angela &	chav1124.06i	(555) 555-1124		111-11-1124	Transferred	09/08/2006
13 Dee, Michael & Karen	deem1126.06i	(555) 555-1126	mdee@proseries.com	111-11-1126	Transferred	09/08/2006
14 Dums, Eric	dum1127.06i	(555) 555-1127	edums@proseries.com	111-11-1127	Transferred	09/08/2006
15 Felco, Christina	felc1128.06i	(555) 555-1128	cfelco@proseries.com	111-11-1128	Transferred	09/08/2006
16 Foster, Robert	fostr1129.06i	(555) 555-1129		111-11-1129	Transferred	09/08/2006
17 Franzen, Mark	fran1130.06i	(555) 555-1130	mfranzen@proseries.com	111-11-1130	Transferred	09/08/2006
18 Garing, Tony	gar1131.06i	(555) 555-1131	tgaring@proseries.com	111-11-1131	Transferred	09/08/2006
19 Godwin, John	godw1132.06i	(555) 555-1132	jgodwin@proseries.com	111-11-1132	Transferred	09/08/2006
20 Hackman, James	hack1133.06i	(555) 555-1133	jhackman@proseries.com	111-11-1133	Transferred	09/08/2006
21 Harbin, Pete	harb1134.06i	(555) 555-1134	pharbin@proseries.com	111-11-1134	Transferred	09/08/2006
22 Hemp, Anne	hemp1135.06i	(555) 555-1135	anhemp@proseries.com	111-11-1135	Transferred	09/08/2006
23 Hennum, Susan	henn1136.06i	(555) 555-1136		111-11-1136	Transferred	09/08/2006
24 Hicks, Geoff & Gail	hick1137.06i	(555) 555-1137	ghicks@proseries.com	111-11-1137	Transferred	09/08/2006
25 Hughes, David & Marie L.	hugh1140.06i	(555) 555-1140	dughes@proseries.com	111-11-1140	Transferred	09/08/2006
26 Jensen, Jay & Jane	jess1142.06i	(555) 555-1142	jjensen@proseries.com	111-11-1142	Transferred	09/08/2006
27 Johnson, Gordon & Allison	john1144.06i	(555) 555-1144	gjohnson@proseries.com	111-11-1144	Transferred	09/08/2006
28 Kaseman, Fred	kas1146.06i	(555) 555-1146	fkaseman@proseries.com	111-11-1146	Transferred	09/08/2006
29 Kennedy, Kathleen	kenn1147.06i	(555) 555-1147		111-11-1147	Transferred	09/08/2006
30 Kenwick, Shannon	kew1148.06i	(555) 555-1148	skewick@proseries.com	111-11-1148	Transferred	09/08/2006

From HomeBase, you start new client files, open existing client files, and perform a variety of other tasks involving your client files, such as electronic filing. The first time

you start the ProSeries Express program, you see client information in HomeBase only if you transferred information from last year's ProSeries Express client files. As you work on client returns, you'll see information about those clients in HomeBase.

To see information about the clients who meet specific criteria, click the applicable HomeBase View tab below the HomeBase toolbar. The ProSeries Express products that are installed determine which HomeBase View tabs are available. For example, after **ProSeries Express/1040** is installed, the following three HomeBase View tabs become available:

Click this HomeBase tab	To do this
1040	Prepare federal individual returns and state individual returns
EF Clients	All electronic filing tasks
Bank Product Clients	All bank products tasks

Tip: The ProSeries Express Edition program saves the data for a client's 2006 federal and state returns in one client file.

Summary of preparing tax returns

The following table presents a brief summary of the basic steps to prepare client tax returns. Note that many optional steps aren't included in this table.

To do this	Do this
1. Start the client's federal return from HomeBase	<p>If you transferred last year's data, click the appropriate HomeBase View tab, then double-click the client's name to open the client's file.</p> <p>If you are starting a new return, click the New Client button on the HomeBase toolbar, then select the appropriate federal product. The appropriate Information Worksheet opens.</p>
2. Prepare the client's federal return	<p>a. Enter data — Enter data into the applicable data fields. Double-click forms in the Forms Bar to see them. Import Form W-2 data when applicable.</p> <p>b. Save the data — Click the Save Client button on the toolbar often as you enter data.</p> <p>c. Review — Click the Check for Errors button on the left navigation bar to correct errors that the ProSeries Express Edition program identifies.</p>

To do this	Do this
3. Prepare the client's state return	<p>a. Go to state return — Click the Switch to State/City button on the left navigation bar, then select the appropriate state. You can also switch to another state using this button. If more than one state return is required, prepare the nonresident state returns before the resident state return.</p> <p>b. Enter data — Enter data in the applicable fields on the state forms.</p> <p>c. Save the data — Click the Save Client button on the toolbar often as you enter data.</p> <p>d. Review — Click the Check for Errors button on the left navigation bar to correct errors that the ProSeries program identifies.</p> <p>e. Prepare additional state returns — To prepare additional state returns, click the Switch to State/City button on the left navigation bar, select an applicable state, then repeat steps b through d for each state return that the client must file.</p> <p>f. Go to federal return — Click the Switch to Federal button on the left navigation bar to return to the client's federal return.</p>
4. Apply for Bank Products	<p>a. Open the RAL & RT Wks form in the Forms Bar.</p> <p>b. Enter data — Complete the RAL and RT Worksheet.</p> <p>c. Review — Click the Check for Errors button on the left navigation bar to correct errors that the ProSeries Express Edition program identifies.</p>
5. Check the client's return for errors	Click the Check for Errors button. Analyze the error report and correct any errors found.
6. Save the client's return	Click the Save Client button on the toolbar.
7. Print the client's return(s)	<p>a. Select the appropriate HomeBase View tab, then select the client in HomeBase.</p> <p>b. Click the Print Client Return button on the toolbar.</p>
8. File the client return electronically	<p>a. Make sure each return you want to file electronically is marked for electronic filing on the Federal Information Worksheet, and that it passes tax return error checking.</p> <p>b. Click the Transmit EF Return button on the toolbar.</p> <p>c. After 24 to 48 hours, click the Check EF & BP Acks button on the toolbar to receive an acknowledgement for the client's return.</p>

For more information about HomeBase, starting client returns, entering client tax return data, saving client return data, and opening previously-saved client returns, use the Search Help feature on the Help area.

Using Online Reports

Whenever you are connected to the Internet, you can view reports online that show how your tax preparation business is performing. You can also monitor your firm's operations for a single office or multiple offices.

Using the new online reports feature, you can upload selected tax return preparation information (such as the number of returns that have been electronically filed by a tax preparer) to a secure Web site every time you transmit a tax return or check for electronic filing acknowledgements. You can then view the information in report format online. You can also use Task Scheduler to transmit report data on a regularly scheduled basis to your secure account on My ProSeries.

Note: You can view electronic filing and bank product reports for a single office using the **Reports** menu.

Registering for online reports

Before you can use online reports, you must be a current ProSeries Express Edition customer and be a registered user on the My ProSeries Web site:

- 1 Go to the My ProSeries web site at <http://www.myproseries.com>.
- 2 Enter your Login Name and Password. If you are not signed up for My ProSeries, select **Subscribe Now** and follow the on-screen instructions.
- 3 When you are logged on to My ProSeries.com, go to the **Reports** section and select **Register for Online Reports** and follow the on-screen instructions.
- 4 Select the tax firm's site location(s) that will be sending report information to your account on My ProSeries.com.
- 5 Enter a **Location Name** for each site that you entered. You'll use the location name to identify the origin of the site-specific report data.
- 6 Click **Continue**.

Tip: You also can register for online reporting from the ProSeries Express Edition program. Go to the **Reports** menu, select **Online Reports**, then select **View Reports Online**.

If you are the owner of the firm, you'll register on My ProSeries.com as the **Firm Administrator** for your firm. Firm Administrators have the highest level of access and site management authority. In addition, you can assign a **Site Administrator** for your firm who can manage the online reporting access for particular office location of your firm.

Activating online reports

After you have successfully registered for Online Reports on My ProSeries.com, you must activate Online Report data transmissions from each computer that you want to use for online reporting at your firm's site(s).

You'll set up online reporting from within the ProSeries Express Edition program in the **Options** dialog box:

- 1 Go to the **Tools** menu, select **Options**, then select **Online Reports**.
- 2 In **Online Reports** options, select the **Allow reporting data to be sent to my firm's account on MyProseries.com** check box.
Important: Selecting these check boxes activates online reports.
- 3 The ProSeries Express Edition program checks to determine whether or not you are a registered user and then displays a screen to verify the online reporting administrator's firm name.
- 4 Once you confirm that each site is correctly associated with your Online Reports firm administrator's My ProSeries account, you are asked if you want to send report data so that Online Reports can be used immediately.
- 5 When you have finished activating Online Reports, click **OK**.

Important: You must complete the in-product activation for each installation of the ProSeries Express Edition software that you want to send report data. For example, if you want to send report data for three separate sites to your account on My ProSeries.com, you must activate the online reporting feature on each ProSeries Express installation at each of those sites.

Sending report data

ProSeries Express Edition software automatically sends report data each time you transmit your clients' tax returns to, or receive electronic filing acknowledgments from the Intuit Electronic Filing Center.

If you want to upload report data manually, go the **Reports** menu, select **Online Reports**, then select **Send Report Data Now**.

Important: If you are going to share or copy client data files from one office location to another location within your firm, the report data that is transmitted from any duplicated client files will be reflected in the reports that you create on your My ProSeries.com account.

Tip: You can also use Task Scheduler to schedule the transmission of your firm's tax preparation report data for online reporting. Go to the **Reports** menu, select **Online Reports**, then select **Schedule Automatic Online Report Data Updates**.

Viewing online reports

Use the **Reports** menu on the main menu bar to access your firm's online reports on the My ProSeries Web site. Go to the **Reports** menu, select **Online Reports**, then select **View Reports Online**. After you are logged on to the My ProSeries.com Web site, you can use a report building tool to choose the type of report that you want to view for your firm by location. You can also export a report to a Microsoft Excel spreadsheet.

Important: The most recent report data that is transmitted to your My ProSeries.com account will not be reflected in the online reports on your My ProSeries.com account until the next time report data is transmitted from the ProSeries Express Edition program.

Electronically filing tax returns

ProSeries Express Edition/Electronic Filing software is installed with ProSeries Express Edition tax products that support electronic filing. With ProSeries Express Edition software, you can file:

- Federal individual returns and extensions
- State individual returns (for 42 states)
- Federal corporation, S corporation, and partnership (1065) returns and extensions
- California corporation returns
- Massachusetts corporation, S corporation, partnership, and fiduciary returns
- Massachusetts corporation and S corporation extensions
- Michigan Single Business Tax returns
- Georgia corporation and S corporation returns
- Maryland corporation and pass through entities returns and extensions
- New York corporation and S corporation returns and extensions
- Wisconsin corporation, S corporation, and multistate corporation returns
- New York individual extensions
- Minnesota (Form M1PR) property and tax refund returns

To visit the Web site for a state's tax agency, go to <http://www.proseries.com>, select **Resources**, select **State Tax Departments** in the **General Tax Resources** section, then select the name of the state.

Important: If you don't have an IRS-issued Electronic Filing Identification Number (EFIN) yet, see "Preparing for electronic filing" on page 2.

Tip: For information about electronically filing business returns and extensions, use Search or see chapter 11, "Electronically filing an income tax return" in the ProSeries Express Edition User's Guide.

Establishing an Internet connection

To file electronically, you must be able to connect to the Internet from the computer on which the ProSeries Express Edition program is installed.

If you don't have an Internet connection, you must first sign up for service with an Internet Service Provider (ISP). After you have an ISP, go to the **Help** menu, select **Internet Connection Setup**, then follow the instructions in the dialog boxes.

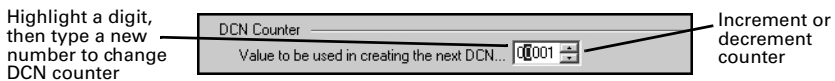
Setting up the DCN counter on multiple stand-alone computers

When ProSeries Express Edition software is installed on a stand-alone computer, the DCN (Declaration Control Number) counter is initially set at "00001." The ProSeries Express Edition program assigns that number to the first federal return that's marked for electronic filing, then increments the DCN counter by "1." As each subsequent federal return is marked for electronic filing, the program assigns the current DCN to that return, then increments the DCN counter by "1."

Changing the starting number in the DCN counter

If your firm will be filing returns electronically from **more than one** computer using the *same* EFIN on each one (and these computers are not networked), you'll need to change the starting number in the DCN counter in the ProSeries Express Edition program on all but one computer before the firm's tax preparers start to transfer or prepare tax returns.

- 1 Go to the **Tools** menu and select **Options**.
- 2 In the **Options** dialog box, select **Electronic Filing**.
- 3 In the **DCN Counter** box, highlight a digit, then type a new number that you want to use, for example, "01001."



- 4 To increment or decrement the counter, click the up or down arrows.
- 5 Click **OK** to save your changes.

By advancing the DCN counter sufficiently in the ProSeries Express Edition program on each "additional" stand-alone computer, each return marked for electronic filing will be assigned a unique DCN. For example, changing the DCN counter to "01001" on the second computer, to "02001" on the third computer, and so on.

Tip: If a computer will be using a unique EFIN, it's not necessary to change the starting number in the DCN counter for that computer.

Steps to electronically file a tax return

Follow these basic steps when filing your clients tax returns electronically.

Step 1 - Mark the return for electronic filing

- 1 Open the client's federal return, go to the Federal Information Worksheet, scroll down to **Part V - Return Preparer and Third Party Information**, then make sure that the appropriate preparer code is entered in the **Preparer Code** field.

Tip: Enter your preparer code in the **Electronic Return Originator Information** section of the **Electronic Filing Information Worksheet**. If you're acting as an ERO and filing a return for another preparer, enter that preparer's preparer code in the **Preparer Code** field.

- 2 Scroll down to **Part VI - Electronic Filing of Tax Return Information**, select the **File federal return electronically** box.

The screenshot shows the ProSeries Express Edition - 2006 software interface. The main window is titled "Federal Information Worksheet" for client "David Beck". The interface includes a menu bar at the top with options like "File", "E-File/Bank Products", "Edit", "View Forms", "Import", "Tools", "HomeBase", "Update", "Information", and "Help". Below the menu bar is a toolbar with icons for "New Client", "Open Client", "View Client Snapshot", "Save Client", "Print Client Return", "Transmit EF Return", "Go to HomeBase", "Go to EF Clients", "Go to Bank Prd", and "Help".

The main content area is divided into sections. The "Federal Information Worksheet" section shows client details for "111-11-1118" and "Federal Tax Due: \$0". Below this is a list of forms and worksheets, including "Form 1040", "Info Wks", "Client Status", "1099-MISC Wks", "St Refund Wks", "Tax Payments", "RAL & RT Wks", "Schedule A", "Misc Dedns", "Schedule B", "Schedule E Wks", "Form 2106", "Carryover Wks", "Two-Year Comp", "Tax History", "Client Billing", and "HomeBk Prod".

The "Part V - Return Preparer and Third Party Designee Information" section contains a field for "Enter preparer code from Firm/Preparer Info (See Help)" with a "QuickZoom" button. Below this are checkboxes for "Self-Prepared" and "Non-Paid Preparer". The "Third Party Designee" section includes a "Caution" note and a checkbox for "Preparer is third party designee".

The "Part VI - Electronic Filing of Tax Return Information" section features two checkboxes: "File federal return electronically" and "File state return electronically". Below these is an expanding table for "Select state(s) to file electronically:" with a "State(s)" input field.

Annotations with arrows point to the following elements:

- "Enter the Preparer Code here." points to the preparer code field in Part V.
- "Check this box to file the federal return electronically." points to the "File federal return electronically" checkbox in Part VI.
- "Check this box to file the state return electronically." points to the "File state return electronically" checkbox in Part VI.
- "Select state return(s) for electronic filing" points to the "Select state(s) to file electronically:" table in Part VI.
- "See Help if you need assistance." points to the "Help" button in the toolbar.

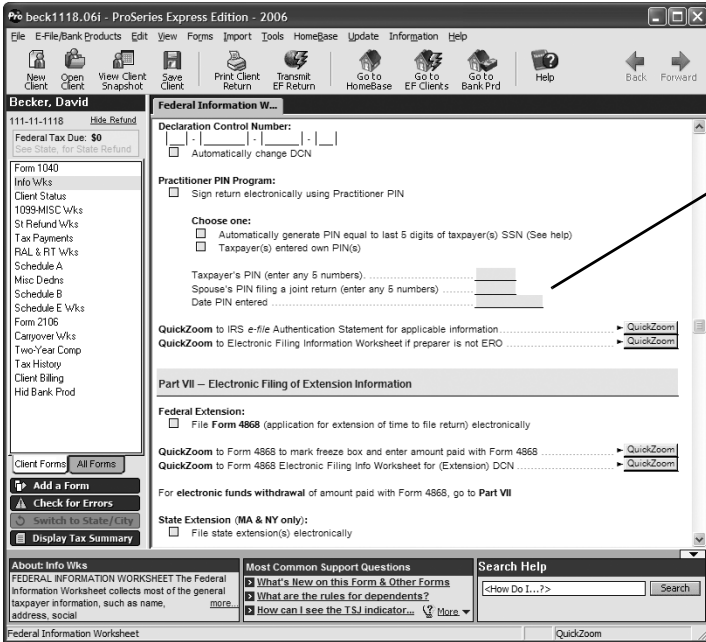
The bottom of the interface includes a "Federal Information Worksheet" footer, a "Most Common Support Questions" section with links like "What's New on this Form & Other Forms", and a "Search Help" section with a search box.

- 3 **State returns.** If you're going to file the client's state return (or returns) electronically, select the **File state return electronically** check box, then enter the appropriate information in the **Select state(s) to file electronically** expanding table.

- 4 **DCN information.** Note that the program assigns a DCN to the client's return(s).

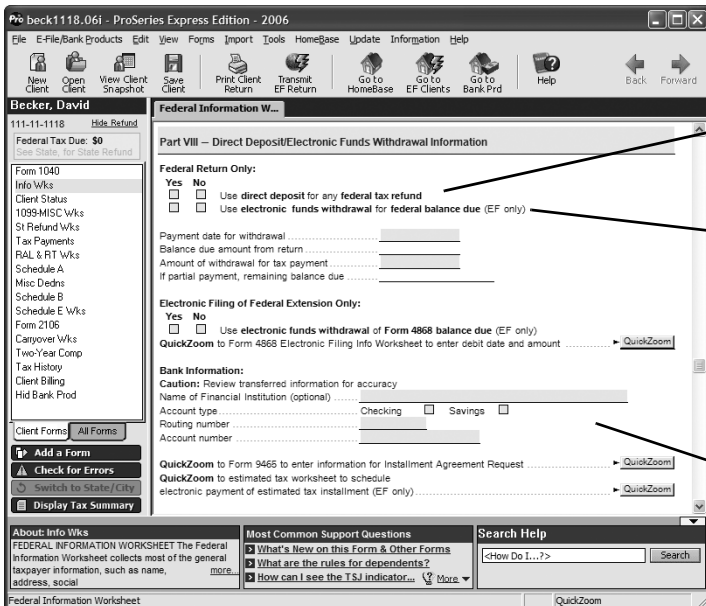
PIN information. If you're participating in the IRS' Practitioner PIN program and the client wants to use PINs, complete the appropriate fields in the Practitioner PIN Program section.

QuickZooms. When applicable, use the QuickZoom buttons to go to the appropriate worksheet(s) and/or statement.



Enter information for the Practitioner PIN Program.

5 Direct Deposit/Direct Debit. If the client wants their refund deposited directly into their account or the balance due withdrawn from their account, complete **Part VIII - Direct Deposit/Electronic Funds Withdrawal Information.**



Check to use direct deposit of any federal refund.

Check to use electronic funds withdrawal of a federal balance due.

Be sure to complete the rest of Part VIII.

- 6 Enter all other relevant information in the **Part VIII — Additional Federal Return Information** section.

Step 2 - Prepare the client's return(s) for electronic filing

- 1 Complete the client's federal return.
- 2 Complete the Electronic Filing Smart Worksheets on the client's Form W-2, 1099-R, W2-G, and 1099-G worksheets (if applicable).
- 3 **RAL or RT.** If you're participating in the ProSeries Express/Bank Products program and the client wants a Refund Anticipation Loan or Refund Transfer, complete the applicable parts of the RAL & RT Worksheet.
For more information, see "Offering Bank Products to your clients" on page 42.
- 4 Click the **Switch to State/City** button on the left navigation bar. If more than one state product is installed, select an appropriate state in the **Go to State/City** dialog box.
Tip: If the client must file more than one state return, prepare the client's resident state return last.
- 5 Complete the client's state return.
- 6 If you need to prepare additional state returns, click the **Switch to State/City** button on the left navigation bar, then select an appropriate state. Repeat these steps for each applicable state return.
- 7 Go to the toolbar and click the **Save Client** button.
- 8 Go to the left navigation bar and click the **Switch to Fed** button.



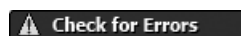
Avoiding common reasons for rejection

- Verify the client's social security number (SSN) and Date of Birth (DOB) with the Social Security Administration (SSA).
- If you're preparing a Married Filing Joint return, verify that the spouse's last name on the return matches the spouse's last name on his or her Social Security card.
- Make sure the employer's name and federal identification number on the actual Form W-2 match the information you've entered in the ProSeries Express Edition program.
- Make sure the payer's name and federal identification number on the actual Form W-2G or Form 1099-R match the information you've entered in the ProSeries Express program.
- Use the error-checking feature during data entry. Go to the **View** menu and make sure there's a check mark before **Error Alerts**.

Step 3 - Check the client's return for errors

When you complete a federal or state return, run the ProSeries Express Edition error checking feature to help you find errors in the client's return.

- 1 To review the open federal or state return, click the **Check for Errors** button on the left navigation bar.
- 2 Analyze the error report, and fix all errors that are identified.
- 3 Click **Recheck** to check the return for errors again.



- 4 Not using PINs.** If you're not participating in the IRS Practitioner PIN program, review Form 8453 in the client's federal return. (If you're participating in the IRS Practitioner PIN program, you don't need to file Form 8453 with the IRS.) Also review the electronic filing paperwork form in the client's state return, if applicable. Review the form(s) and return(s) with the client.

Tip: The ERO PIN is used as an electronic signature. An ERO PIN can be any five digits (except all zeros). You enter your PIN in the **Firm/Preparer Info** section of the **Options** dialog box.

- 5 Using PINs.** If you're participating in the IRS Practitioner PIN program and the client wants to use a PIN, open the Federal Information Worksheet. In **Part VI - Electronic Filing of Tax Return Information**, scroll down to the **Practitioner PIN program** section, then click the **QuickZoom to the IRS e-file Authentication Statement** button. When the IRS *e-file* Authentication Statement opens, make sure the check box at the top is selected, then complete the remainder of the form.

For more information, click the **Help** button while the IRS *e-file* Authentication Statement is open on the screen. Review the form and the return(s) with the client.

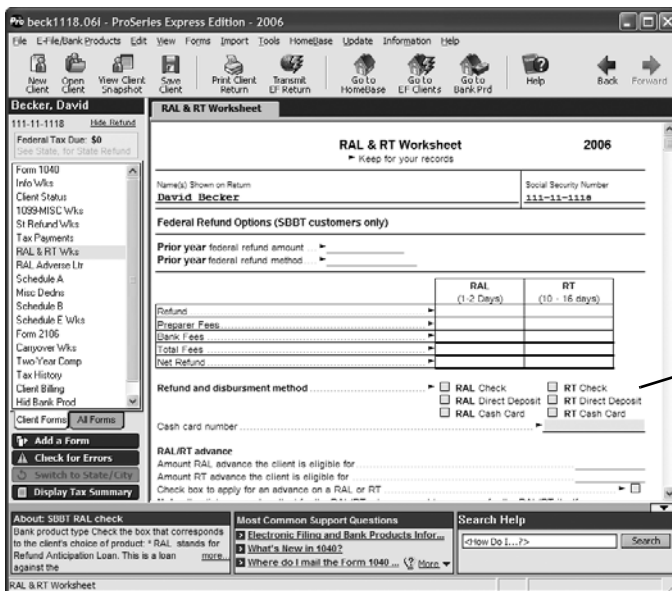


Tip: Make sure to keep a completed copy of Form 8879, IRS *e-file* Signature Authorization, that's been signed by the client.

Step 4 - Select a bank product

To prepare a client's return for a Refund Anticipation Loan, a Refund Anticipation Loan Direct Deposit, a Refund Transfer, a Refund Transfer Direct Deposit, or other bank product:

- 1 In the client file, open the RAL & RT Worksheet.
- 2 Select a refund method and a disbursement method.



Select a Refund method and disbursement method

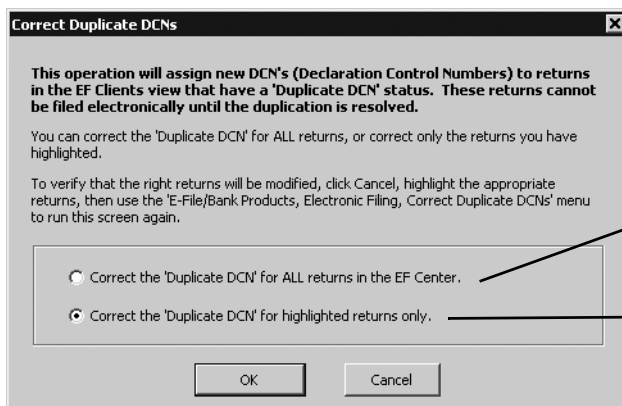
- 3 Click the **Check for Errors** button to check the return for possible errors and omissions. Fix any errors that are detected by the ProSeries Express Edition error checking feature.
- 4 Go to the toolbar and click the **Save Client** button.
- 5 When the tax return is ready for electronic filing, go to the **E-file/Bank Products** menu and select **Return Ready to EF** to update the client e-file status. You'll see a check mark next to the "Return Ready to EF" menu item.
- 6 For more information about using bank products, see "Offering Bank Products to your clients" on page 42.



Resolving duplicate Declaration Control Numbers

You cannot transmit a client's tax return or receive acknowledgments for a tax return if it contains a duplicate Declaration Control Number (DCN). When the ProSeries Express Edition program detects a duplicate DCN, you'll see a "Return Duplicate DCN" message in the **Status** column in HomeBase.

- 1 In HomeBase, click the **EF Clients** tab.
- 2 Select the **Status** column to sort all of the federal returns that display a **Return Duplicate DCN** status.
- 3 Select the client return that has a duplicate DCN.
- 4 Go to the **E-File/Bank Products** menu and select **Electronic Filing**.
- 5 Select **Correct Duplicate DCNs**. The **Correct Duplicate DCNs** dialog box opens.



Correct all returns with duplicate DCNs.

Correct the DCN for the client return that you selected.

- 6 In the **Correct Duplicate DCNs** dialog box, select **Correct the 'Duplicate DCN' for ALL returns in the EF Center** or **Correct the 'Duplicate DCN' for highlighted returns only**.
- 7 Click **OK**.
- 8 When the confirmation dialog box opens, click **Yes**.

Step 5 - Select the client return(s) to electronically file

- 1 Go to the HomeBase EF Clients view. If HomeBase is on the screen, click the **EF Clients** tab below the toolbar. If a return is on the screen, go to the toolbar and click the **Go to EF Clients** button.



The HomeBase EF Clients view presents important information about each client return that you've prepared and marked for electronic filing, including the status of each return.

New for Tax Year 2006. You can now transmit a client's tax return to the Intuit Electronic Filing Center from within an open return. When you are ready to electronically file the client's return, go to the toolbar and click the **Transmit EF Return** button.

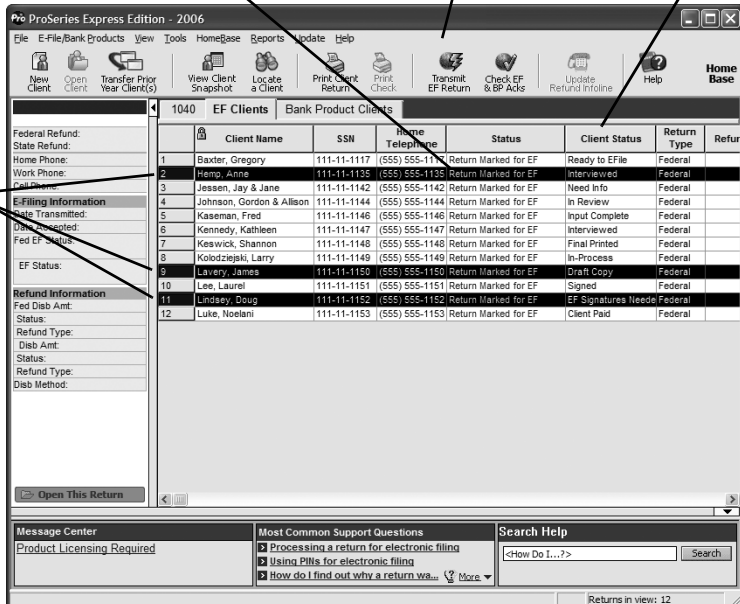
- In the **Status** column, select the returns that you want to file electronically. Each tax return that you want to electronically file should have a status of one of the following: **Return Ready to EF**, **Return Marked for EF**, or **Return Ready to Transmit**.

The status should be Return Ready to EF

Transmit EF Return button

Client Status

These returns are selected.



- To change the "Client Status" column in HomeBase, open the client's return, then open the **Client Status** worksheet on the forms bar and choose the status that applies to the client's return.
- To select consecutive client returns, select the first client return, then hold down the SHIFT key and select the last client return.
- To select non-consecutive client returns, hold down the CTRL key while you click each client return.

State returns. State returns are listed after the corresponding federal return. Select a client's federal and state returns at the same time.

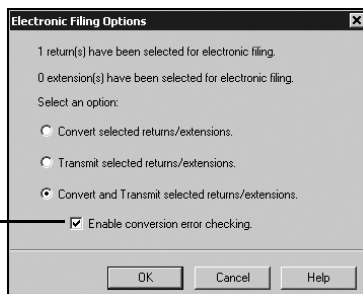
Tip: While California, Illinois, Maine, Massachusetts, and Minnesota returns do not need to be electronically filed with the corresponding federal return, it's best to do so. If a North Dakota or South Carolina return isn't filed with the corresponding federal return, it can't be electronically filed until the federal return is accepted.

Step 6 - Convert and transmit the selected return(s)

- 1 Go to the toolbar and click the **Transmit EF Return** button.
- 2 If any informational dialog boxes appear, read the information, then click **OK**.
- 3 In the **Electronic Filing Options** dialog box, select **Convert and Transmit selected returns/extensions**.



Make sure there's a check in this box.



- 4 Make sure that you select the **Enable conversion error checking** check box.

Tip: A return that cannot pass error checking usually gets rejected by the IRS. Therefore, do not disable conversion error checking unless directed to do so by a ProSeries Express Edition Technical Support Representative.

- 5 Click **OK**.

When the ProSeries Express Edition program finishes converting and transmitting the returns, the **Transmit Electronic Filing Returns/Extensions Log** opens so you can review the results.

Step 7 - Wait 24 to 48 hours, then check for acknowledgments

- 1 Go to the same computer that you used to electronically file your client's tax return (if you're working on multiple stand-alone computers).
- 2 Go to the HomeBase **EF Clients** view. If HomeBase is on the screen, click the **EF Clients** tab below the toolbar. If you are currently working on a client's return, save the file, then go to the toolbar and click the **Go to EF Clients** button.



Right-click on the client name, then click **View Electronic Filing Status History** to open the client's Electronic Filing Client Status History for the federal or state return.

Tip: There's a separate Electronic Filing Client Status History for each federal and state return. Open the Electronic Filing Client Status History for each return.

- 3 Review the Electronic Filing Client Status History and identify the most recent status of the client's federal or state return, then click **Close**.

Tip: If a client's return was rejected, the report shows why it was rejected, and how to fix the error.

- 4 If the most recent status of the return is "Return Accepted," proceed to "Step 8 - Complete the electronic filing process" on page 40.

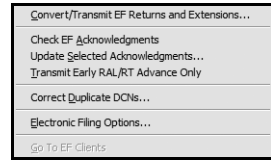
If the most recent status of the return is "Return Rejected," proceed to "Resolving a problem with a rejected return" on page 40.

If the most recent status of the return isn't "Return Accepted" or "Return Rejected," continue with Step 5.

5 Go to the **E-File/Bank Products** menu and select **Electronic Filing**.

6 From the **Electronic Filing** menu, select **Check EF Acknowledgments** to get the latest acknowledgments.

7 In the **Receive Electronic Filing Acknowledgments** dialog box, check the listing for electronic filing acknowledgments.



8 Review the information, then click **Close**. If the return was rejected, continue with "Resolving a problem with a rejected return" next.

Tip: ProSeries Express Edition software automatically checks for acknowledgments when you transmit client returns. It may take more than 48 hours to receive an acknowledgment for some federal and state returns. If you are transmitting a return with a RAL/RT Advance, it will only take a few minutes to receive an acknowledgment.

Resolving a problem with a rejected return

1 From the EF Clients view, go to the **Reports** menu, select **Electronic Filing**, select **View EF Reports**, then print a Rejected Returns report.

2 Incorrect SSN. If a return was rejected because the taxpayer's social security number wasn't correct, print the Intuit Electronic Postmark Report before correcting the social security number and resubmitting the return. This provides the original date and time of filing.

3 Fix the errors in the rejected return.

4 Make sure the corrected return passes error checking.

5 Convert and retransmit the corrected returns as explained in "Step 5 - Select the client return(s) to electronically file" on page 37 and "Step 6 - Convert and transmit the selected return(s)" on page 39.

Re-filing state returns. If you've filed a client's federal and state returns together and the federal return is accepted but the state return is rejected, in most cases you can re-file the corrected state return electronically. However, you cannot re-file corrected Hawaii returns and Oklahoma returns electronically because they can only be filed with the client's federal return. To re-file a corrected Hawaii return or Oklahoma return, you must print the return, then mail it to the appropriate state taxing authority.

Step 8 - Complete the electronic filing process

After the IRS or state taxing authority has accepted a return, take these steps to complete the filing process:

1 Go to the same computer that you used to electronically file your client's tax return (if you're working on multiple stand-alone computers).

2 Not using PINs. If you and your client are not using PINs, attach any required paper documents to Form 8453, U.S. Individual Income Tax Declaration for an IRS *e-file* Return. Do this for each return that has been accepted, then continue with Step 3.

Tip: The **Preparing Form 8453** section of the Electronic Filing Information Worksheet identifies the paper documents to attach to the client's Form 8453.

Using PINs. If you and your client are using PINs, you don't need to mail Form 8453 to the IRS. However, you may need to mail state electronic filing paperwork to the appropriate state service center. Skip to Step 4.

Tip: To determine if a client's return was filed with PINs, go to the EF Clients view and scroll across to the **PIN** column. If the return was transmitted with a PIN, you'll see a "Y" in the **PIN** column. If the return was transmitted without a PIN, you'll see an "N" in the **PIN** column.

- 3** After you've been informed the federal return was accepted, mail the completed Form 8453 to the appropriate IRS service center within the time period required by the IRS.
- 4 State forms.** After you've been informed that the state return was accepted, mail the completed state electronic filing paperwork to the appropriate state service center within the time period required by appropriate taxing authority (if the state taxing authority requires electronic filing paperwork, mail the completed state electronic filing paperwork to the appropriate state service center within the time period required after the state return is accepted).
- 5** Print Form 9325, Acknowledgment and General Information for Taxpayers Who File Returns Electronically, and give it to your client.

To print Form 9325:

- a.** Open the client's federal return.
- b.** Go to the **File** menu, select **Print**, then select **Print Selected Forms**.
- c.** Click **Choose**, select **Form 9325: General Information for Electronic Filers**, then click **OK**.
- d.** Click **Print**.

IRS refund cycle. For information about the IRS refund cycle, go to <http://www.proseries.com>, select **E-Filing**, select **How to E-File**, then select **IRS Refund Cycle**.

- 6 Balance due.** If you filed a balance-due return and your client did not elect to have their bank account directly debited, print Form 1040-V, Balance Due Payment Voucher, and give it to your client.

Federal taxes. If your client owes federal taxes, he or she must mail Form 1040-V and the payment to the IRS no later than April 16, 2007.

State taxes. If your client owes state taxes, complete the state tax payment voucher at the same time.

- 7 Getting current information.** To review common reject reasons, troubleshooting information, and frequently-asked questions from <http://www.proseries.com>, do either of the following:
 - While in the ProSeries Express EF Clients view, click the **Help** button, then click **Quick Answers**, then click **Electronic filing**.
 - While in your Internet browser, go to <http://www.proseries.com>, select **Support**, type "electronic filing" in the **Search the Knowledge Base** field, then click **Search**.

Step 9 - Complete the bank product acknowledgment process

You can manually receive bank product acknowledgments for selected clients any time, even if Task Scheduler is already scheduled to check for electronic filing-related acknowledgments.

- 1** Go to the same computer that you used to electronically file your client's tax return.
- 2** Select the **Bank Product Clients** tab.

- 3** Go to the **E-File/Bank Products** menu, select **Bank Products**, then select **Check Bank Products Acknowledgments**.

The ProSeries Express Edition program connects to the Intuit Electronic Filing Center.

- 4** When the connection is complete, the Bank Products Transmission log opens, displaying any new authorizations and status messages you received.
- To print the contents of the log, click **Print Log**.
 - To close the Bank Products Transmission log, click **Close**.
 - To view detailed reasons for denial of a RAL, go to the **Reports** menu, select **Bank Products**, select **View BP Reports**, then select **Bank Product Denied RAL Report**.
 - To view details on accepted RALs, go to the **Reports** menu, select **Bank Products**, select **View BP Reports**, then select **Bank Products RAL Status Report**.
 - To view details on RTs, go to the **Reports** menu, select **Bank Products**, select **View BP Reports**, then select **Bank Products RT Status Report**.

When you're ready to print refund checks, go to the **E-File/Bank Products** menu, select **Bank Products**, then select **Print Checks**.

Refer to the next section, "Offering bank products to your clients" for more information about using Bank Products.

For detailed information about electronic filing, including information about filing business returns and corporate extensions electronically, use the Search Help feature on the Help area, then go to chapter 11, "Electronically filing an income tax return."

Offering Bank Products to your clients

When you file your clients' federal individual returns electronically, those clients may be eligible to receive a disbursement based on their expected federal refunds in the form of bank products such as Refund Anticipation Loans (RALs), Refund Transfers (RTs), and Advances on RALs and RTs.

Similarly, when you file your clients' state individual returns electronically, those clients may be eligible to receive a disbursement based on their expected state refunds in the form of Refund Transfer (RT) bank products.

When you select a bank product and disbursement method for your client, your fees are deducted from the client's refund and deposited into your bank account electronically.

You can offer bank products through Santa Barbara Bank & Trust (SBBT), which is integrated with the ProSeries Express Edition software, or you can offer bank products through First Security Bank or Republic Bank.

Tip: For more information about offering bank products through Santa Barbara Bank & Trust, First Security Bank or Republic Bank, see chapter 12, "Processing tax refunds using bank products" in the ProSeries Express Edition User's Guide, or go to <http://www.proseries.com>.

Enrolling in the Santa Barbara Bank & Trust Bank Products program

To take this step	Do this
1. Enroll with Santa Barbara Bank & Trust to participate in their bank products program.	Go to http://www.proseries.com , select Products & Services , select Bank Products , then select Enroll Now with SBBT to apply to Santa Barbara Bank & Trust.
2. Set the ProSeries Express Bank Products options.	<ol style="list-style-type: none"> Go to the Tools menu, select Options, then select Bank Products. Select the Bank Products options that you want. Click Registration Information, then enter the requested information in the Bank Products Registration Information dialog box.
3. Transmit your registration information to Santa Barbara Bank & Trust (any time after 12:00 a.m. PST on 12/1/06).	<ol style="list-style-type: none"> Go to the Bank Product Clients view. Go to the E-File/Bank Products menu, select Bank Products, then select Transmit Registration Information.
4. Check for the registration acceptance status from Santa Barbara Bank & Trust.	<ol style="list-style-type: none"> Go to the Bank Product Clients view. Go to the E-File/Bank Products menu, select Bank Products, then select Check Bank Products Acknowledgments.

Processing Bank Products

To take this step	Do this
1. Prepare the client's federal return for a bank product. If applicable, prepare the client's state return(s) for a bank product.	<ol style="list-style-type: none"> Prepare the client's federal and state return(s). Prepare the client's federal return (and state return(s) if applicable) for electronic filing. Complete the RAL & RT Worksheet in the client's federal return. Review the client's return(s) and make sure the return(s) successfully pass error checking. Print the Refund Application Loan (RAL) and Refund Transfer (RT) Application and Agreement form from the client's federal return, and have the taxpayer(s) sign it.
2. File the client's return(s) electronically.	<ol style="list-style-type: none"> Go to EF Clients view and select the client's return(s). Early RAL/RT Advances. Go to the E-File/Bank Products menu, select Electronic Filing, then select Transmit Early RAL/RT Advance Only. Only RAL/RT Advance application information is sent to the bank products provider; the client's tax return is not transmitted. RALs, RTs, RTDDs, RAL/RT Advance. Go to the E-File/Bank Products menu, select Electronic Filing, then select Convert/Transmit Returns and Extensions.
3. Receive bank product print authorizations and status messages.	<ol style="list-style-type: none"> Make sure you are using the same computer that you used when you transmitted your client's return in Step 6. Go to the Bank Product Clients view. Go to the toolbar, then click the Check EF & BP Acks button.

To take this step	Do this
4. Activate the Refund Infoline.	<p>a. Go to the Tools menu, select Options then select Refund Infoline.</p> <p>b. Select Enable your clients to receive e-file and bank product status from the ProSeries Express Refund Infoline.</p>
5. Print the client's check for a Refund Anticipation Loan or Refund Transfer. (This step isn't applicable for RAL or RT Direct Deposits.)	<p>a. If "Ready to Print" opens in the Status column of the Bank Product Clients view, select the client.</p> <p>b. Go to toolbar then click the Print Checks button.</p> <p>c. Deliver the check to the client.</p>
6. If there's a problem with a check, resolve the problem.	<p>a. Go to the Bank Product Clients view and select the client whose check is affected.</p> <p>b. Go to the E-File/Bank Products menu, point to Bank Products, then select Resolve Check Problems...</p>
7. View or print Bank Products reports.	<p>a. Go to the Bank Product Clients view and select the client returns that you want to include in the report.</p> <p>b. Go to the Reports menu, select Bank Products, then select View BP Reports.</p>

More about Refund Infoline

Refund Infoline allows you to provide your clients a toll-free telephone number that they can use to check the status of their tax return refunds and bank products at anytime. Using this feature eliminates the need to take calls from clients who call and ask "Where's my check?" regarding the status of their income tax refund. When your clients call this number, they'll have the option to hear the status of their tax refund in English or Spanish.

When your clients call the Refund Infoline, they'll hear the most up-to-date status about their tax return, such as:

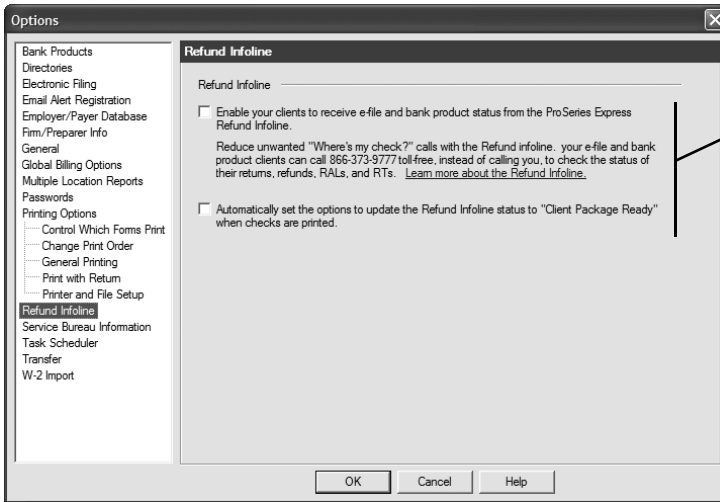
- Your refund is awaiting approval by the bank
- Your refund check is ready to be picked up
- Your cash card or direct deposit is funded
- Your tax return is pending approval by the IRS

After you've printed a client's refund check and you're ready for the client to pick up his or her return, you'll use the ProSeries Express program to send a "Client Package Ready" message to the Refund Infoline system to change the status of the client's refund. The Refund Infoline is automatically updated with client status by Intuit's electronic filing system with one exception: your clients will not hear the "Your Client Package/Check is ready" message until you tell the Refund Infoline that you are ready for the client to know this status.

Setting up Refund Infoline

You can sign up for the Refund Infoline in one of two ways: (1) you can opt-in during the Options Setup Wizard, or (2) go to the **Tools** menu, select **Options**, then select **Refund Infoline**. In the **Refund Infoline** dialog box, select the **Enable your clients to receive e-file and bank product status from the ProSeries Express Refund Infoline** check box.

You can have ProSeries Express update the "Client Package Ready" status automatically when you print your client's refund check. To do so, select the **Automatically set the options to update the Refund Infoline status to "Client Package Ready" when checks are printed** check box.



Select Refund Infoline options

Tip: You can also select (or clear) this option when you click the **Print Check** button on the toolbar.

Refund Infoline telephone number

When you meet with your clients to prepare their returns, you'll give them the toll-free **1-866-373-9777** telephone number that they can call 24 hours-a-day, seven-days-a-week to get the status of their returns.

Using Refund Infoline

When you e-file a client's tax return and then later want to update the status of his or her tax refund to "Client Package Ready," click the **Update Refund Infoline** button on the ProSeries Express Edition toolbar.



You'll probably want to update the Refund Infoline after you've printed refund checks for clients if you didn't already select the check box to update the Refund Infoline automatically in the **Options** dialog box.

In the **Update Refund Infoline** dialog box, select the check box in the "Client Package Ready" column for the clients that you want to update. You can select individual or multiple clients to update. When you are ready, click **Update**. The program then transmits the "Client Package Ready" status to the Refund Infoline system.

Select this check box to update the Refund Infoline to "Client Package Ready" status.

Update Refund Infoline

Select which clients you would like to update the Refund Infoline to "Client Package Ready" Status.

Client Package Ready	Client Name	SSN	Status	Return Type	Check Amount	Check Number
<input type="checkbox"/>	Lamb, Brad	222-33-6666	Printed	Federal	3421.00	12345686
<input type="checkbox"/>	Madrid, Winnie	222-33-4444	Printed	CAI	1640.50	12345687
<input type="checkbox"/>	Madrid, Winnie	222-33-4444	Printed	Federal	3421.00	12345688
<input type="checkbox"/>	McCarthy, Erin	222-55-6666	Printed	CAI	1640.50	12345689
<input type="checkbox"/>	McCarthy, Erin	222-55-6666	Printed	Federal	3421.00	12345690

Select All Select None Update Cancel Help

To view and confirm the client status, click the **Bank Product Clients** tab to see the "Infoline Updated" column that shows the date that the updated status was sent to the Refund Infoline system.

For more information about Refund Infoline or bank products in general, use the Search Help feature on the Help area, or select **User's Guide** in the Help Center.

Keeping your ProSeries Express Edition tax products up-to-date

You can install new products and update previously-installed products via the Internet and from ProSeries Express Edition CDs that you receive, as explained in this section. Getting tax products and updates via the Internet helps you have the most up-to-date versions of the ProSeries Express tax products that you use.

Software service and delivery information

ProSeries Express Edition software is delivered on five CDs during the tax season as shown in the following table.

ProSeries Express CD Release	Approximate ship date
Tax Release Headstart CD - Draft 1040 only	Week of November 27, 2006
Tax Release 1 CD	Week of January 5, 2007
Tax Release 2 CD	Week of February 9, 2007
Tax Release 3 CD	Week of February 22, 2007
Tax Release Archive CD	Week of April 2, 2007

Note: Actual shipping dates are subject to change.

For information on release dates and news specific to the products you purchase, log in to your personalized <http://www.my.proseries.com> page. For other information about product release dates, go to http://www.proseries.com/support/release_dates.aspx.

Getting products and updates via the Internet

We strongly recommend that you **use the Internet** to get any newly-released products and product updates. As soon as a ProSeries Express tax product or tax product update becomes available, it is posted to the Intuit Internet server.

To get tax products and updates via the Internet, go to the **Update** menu and select **Update Installed Products** to update ProSeries Express Edition products, or **Select and Download New Products** to download new ProSeries Express Edition products.

Tip: Using **Task Scheduler** provides the easiest way to get ProSeries Express tax products and tax product updates via the Internet:

- 1** Make sure that you configure Task Scheduler on each computer on which the ProSeries Express Edition program is installed for **stand-alone use**, and that you configure Task Scheduler on the ProSeries Express Admin workstation if the ProSeries Express Edition program is installed for **network use**.
- 2** Go to the **Tools** menu, select **Options**, then select **Task Scheduler** on the left side of the **Options** dialog box.
- 3** Enable the **Download New/Update Existing Products** task. (There's a check in the box before the task when it's enabled.)
- 4** If you want to change the Task Scheduler schedule, click **Modify**, then select the day(s) and times that are convenient for you.
- 5** Make sure the computer is on when Task Scheduler is scheduled to perform tasks.
Password. Task Scheduler must be able to connect to the Internet "unattended." If your Internet connection requires a password, that password must be stored and available.

Getting products and updates from ProSeries Express Edition CDs

You also can install ProSeries Express Edition tax products and tax product updates from ProSeries Express Edition CDs that you receive after you've installed the program from the first ProSeries Express Edition CD.

- 1** Insert the latest ProSeries Express Edition CD into your CD drive.
- 2** Allow the installation program to install the appropriate ProSeries Express tax products and tax product updates from that ProSeries Express CD. You can select additional products for installation from the **Tax Year 2006 Product Selections** dialog box.

Tip: The on-screen ProSeries Express Edition User's Guide will be updated, if applicable.

Network. When a ProSeries Express tax product is installed or updated on the network drive from the ProSeries Express Admin workstation, it becomes available to all workstations on which you installed and set up the ProSeries Express program.

Important: The ReadMe information for the initial release of a ProSeries Express Edition tax product identifies any forms that are not ready to be filed yet. If you print a form that can't be filed yet, the printed form includes a "DO NOT FILE" watermark. **Do not file a return if any of the printed forms includes a "DO NOT FILE" watermark.** The ReadMe information for subsequent releases of a product identifies forms that can be filed with the current release.

Using the Help Center

All three features in the Help area—Field/Form Help, Most Common Support Questions, and Search Help—open the Help Center. From the Help Center, you can get a variety of information from one, easy-to-use location.

Tip: The Help Center opens when you click the **Help** button on the toolbar.



Use Search for a specific topic in Help.

Selections on the left side of the Help Center correspond with information on the right.

Use the scroll bars to see all the information in the Help Center.

Click and drag the splitter bar to adjust the window sizes.

Help us improve ProSeries Express Edition help.

Tip: For more information about ProSeries Express Edition Help, use the Search Help feature near the top-left corner of the Help Center or on the Help area.