



Service Bureau
& Multi-Office
EMP User Guide



Service Bureau & Multi-Office EMP User Guide

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Introduction

The Enterprise Management Portal (EMP) helps ensure that your branch offices and / or Sub-sites are correctly setup and if offering bank products, enrolled with a bank and are ready to file returns when tax season starts. We have made it easy for you to setup new locations, activate prior year locations, collect bank enrollment information, manage your payment account, and review statements. We created EMP for you to use as your data collection point with 24/7 access. Our Office Management Grid provides transparent site and Bank statuses, so you can easily keep track of the enrollment progress for your locations.

Contacting Service Bureau Support

You can contact Service Bureau Support by calling 206-209-2653 or emailing us at SVBSupport@utaxsoftware.com. You will be required to enter your Master User ID number prior to being connected to Service Bureau support. The SVB Support email address is for your use only, please do not give this address to your branch offices and / or Sub-sites. If you have authorized uTax to support your locations, they can obtain support by calling 206-209-2653 or by emailing help@erosupport.com. Note: The hours shown below are subject to change.

Important Feature Reminders!

Co-Branders

In addition to prominent placement with the EMP user interface, co-branded logos are included in EMP generated emails to your Sub-Sites, for our co-branding partners who take advantage of EMP's enrollment management and software distribution services.

Sub-Site Activation

- The Bulk Activate Sub-Site page is enhanced with drop down menu's to quickly change the answer to setup questions including Company Name hyperlinks that allows the SVB/MO to jump directly into the Sub-site Configuration for other changes upon activation. You can also edit the Service Bureau and Transmitter fee(s) from a link located on the bulk-site activation page.

Office Management Grid (OMG)

- The OMG has two viewing/search modes, *Search by Sites* and *Organization View*. Refer to page 16 for more details.

Enrollment

- To improve EFIN management, unused EFINs from prior years are filtered out of view by default.


First-time Login

If you have previously logged into EMP, skip to the [Main Office Settings & Bank Enrollment](#) section below.

To login to your personalized EMP Portal:

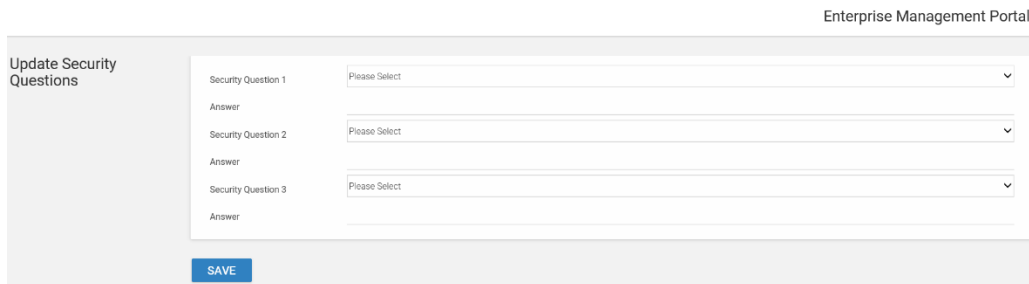
1. Navigate to: <https://emp.myempportal.com>
2. Enter your **User ID** and **Temporary Password** and then click the **Login button**.

Important Note: If you do not know your User ID or Temporary Password, refer to the email you received announcing the opening of bank enrollment and office setup, or contact Partner Support for assistance.



The screenshot shows the 'Enterprise Management Portal' login interface. On the left, there is a 'Log In' section with a 'Forgot Password' link. The main area is titled 'Log In to EMP' and contains two input fields: 'User Id' and 'Password'. Below these fields is a blue 'LOGIN' button.

3. Once logged in, answer the 3 security questions. Click **Save** to continue.



The screenshot shows the 'Enterprise Management Portal' 'Update Security Questions' page. It features three rows of security questions. Each row has a 'Security Question' dropdown menu (currently showing 'Please Select') and an 'Answer' text input field. A blue 'SAVE' button is located at the bottom left of the form.

4. You will be prompted to change your password. Once you have entered your new password, click **Update Password**.

Note: Passwords must be:

- A minimum of 8 characters in length
- Contain at least 3 of 4 of the following:
 - upper case letters
 - lower case letters
 - numbers
 - special characters
- The password will be case sensitive.

You will also be prompted to answer “password reset” questions that will be used to assist you in resetting a forgotten password.

Change Password

Password Policy: In an effort to better protect your data, uTax is increasing our website security. All passwords must now be a minimum of 8 characters in length and contain at least 3 of 4 of the following: upper case letters, lower case letters, numbers, and special characters. The password will be case sensitive. Be sure to choose a password that you can easily remember but something that cannot be easily guessed by others. You will also be prompted to answer "password reset" questions that will be used to assist you in resetting a forgotten password, if needed.

Tip: Your new 'case-sensitive' password needs the following characteristics:

- Be at least 8 characters
- Have 3 of the following 4 attributes
 - Upper case letter
 - Lower case letter
 - Number
 - Special Character

New Password

Confirm Password

UPDATE PASSWORD SKIP

Main Office Settings & Bank Enrollment

The EMP **Main Office** configuration process includes these important steps:

1. Setup and Activation of your Main Office
2. Choose to apply Default Settings for all NEW Sub-Sites and / or Branch Locations
3. Activation of new and returning Sub-sites and / or Branch Locations
4. Bank enrollment

Main Office Information and Software Identification Information

In this section, you will configure your Main Office, the office that receives returns or copies of returns and return status information from your Sub-sites.

IMPORTANT NOTE: You must first activate your Main Site before you can manage / activate your Sub-sites.

The first time you log into the EMP, you will need to verify that the information we have on file for **your office** is correct.

1. Click the **VERIFY** button to review your Main Office information.

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Main Office & Software Identification Information

Main Office Information		Software Identification Information	
Company Name	Multi Service Incorporated	EFIN	[REDACTED]
Primary Contact First Name	John	Master Identifier	[REDACTED]
Primary Contact Last Name	Sample	Master User ID	[REDACTED]
Physical Address	1234 Main Street	Transmission Password	[REDACTED]
City, State, Zip	Los Angeles, CA 90063	MytaxofficePortal.com (User Name):	
Office Phone	(323) 555-5111	MytaxofficePortal.com (Password):	
Primary Email	johnsample@yahoo.com		
Support Notification Email			
Alternate Contact	Jane Sample		

VERIFY

Note: The **VERIFY** button will transform into an **EDIT** button after you have verified your information. Click **EDIT** if changes are required after you have verified your information.

- Review the information, make necessary edits, and then click the **SAVE** button.

Office Information

Company Name *

Primary Contact First Name *

Primary Contact Last Name *

Title

Office Phone * Phone Type

Alternate Phone No Phone Type

Primary Email Address *

Same as Primary Email Address

Support Notification Email Address *

What is your preferred support language? * English Spanish

Would you like to opt-in to receive important support related alerts via text to your mobile device? *

Yes, I want to receive important support related alerts via text to my mobile device

Enter Mobile Number:

No, I do not want to receive important support related alerts via text to my mobile device

Alternate Contact #1

Alternate Contact Name

Alternate Telephone Number Phone Type

Alternate Contact #1 Email Address

EFIN

Physical Address Information

Physical Address *

Physical Address 2

Physical Zip Code * -

Physical City *

Physical State *

Mailing/Shipping Address Information

Mailing/Shipping Address Same As Physical Address

Mailing/Shipping Address *

Mailing/Shipping Address 2

Mailing/Shipping Zip Code * -

Mailing/Shipping City *

Mailing/Shipping State *

Alternate Contact #2

Alternate Contact Name

Alternate Telephone Number Phone Type

Alternate Contact #2 Email Address

SAVE
BACK

Note: Please contact your Account Manager if modifications to the **Company Name** or **Primary Contact** are required.

Main Office Configuration

Answers to these questions tell us how your company (Main office) is handling enrollment, communications, support, software distribution, and optional Sub-site default settings

3. Do you want uTax to manage the process of enrolling your Sub-sites?
 - Selecting **Yes** will:
 - Grant your Sub-sites access to the unbranded EMP to complete their enrollment application.
 - Sub-sites will receive Enrollment notifications inviting them to complete enrollment.
 - uTax Partner Support will provide support and follow up to help your Sub-sites complete their bank enrollment before tax season begins.
 - Selecting **No** will:
 - Require you to manage the enrollment process for your Sub-sites.
 - Require you to answer the following question: *Would you like your Sub-sites to complete their enrollment information online at the unbranded EMP?*
 - Answering **Yes** will allow your Sub-sites to complete their own enrollment application using the EMP after you have assigned fees and completed their configuration on the EMP.
 - Answering **No** means your Sub-sites will not receive Enrollment notifications inviting them to complete enrollment. You will be required to complete their enrollment application via the EMP on their behalf.
4. Do you want uTax to manage the process of onboarding your Sub-sites?
 - Selecting **Yes** will alert the uTax Partner Support Team to contact your **NEW** Sub-sites to assist with the installation and configuration of the prior year program, conversion of the prior year tax returns, enrolling with a bank, and the installation and configuration of the new tax program.
 - If **No** is selected, onboarding services **will not** be provided by uTax.
5. Who will provide support to your Sub-sites?
 - Select **uTax will provide support to my Sub-sites** if you want to give your Sub-sites access to the uTax Support Team to assist during tax season. **Note:** To keep your brand safe, all calls are answered, "Thank you for calling Partner Support".
 - Select **I will provide support to my Sub-sites** if you provide your own support.
 - Do you want uTax to send an unbranded email to your Sub-sites when the Tax Software becomes available (your branded Tax Software version will be sent, if applicable)?
 - Yes – Please send an unbranded email to my Sub-sites with a link to the Tax Software when it becomes available
 - No – Do NOT send an email to my Sub-sites with a link to the Tax Software when it becomes available. I will distribute the tax software to my Sub-sites.
 - Do you want Partner Support to provide a Tax Software download link to your Sub-site(s) if they call in and make a request for Partner Support to send it?
 - Yes, if my Sub-site calls in and requests Partner Support to provide them software, please send it.
 - No, if my Sub-site calls in and request Partner Support to provide them software, please do not send the software and direct the Sub-site to call me (the Main site).

6. When setting up **NEW** Sub-sites, the EMP pre-populates many configuration options (e.g., Check Print Location) with the most common default settings to save you time. Do you want to use the most common uTax pre-populated settings?
- Select - **YES – I would like to use the pre-populated default settings**, if you want New Sub-sites configured with the most common default settings.
 - Select - **NO - I want to configure my own default settings for NEW Sub-sites**. This can be helpful if you plan to create 5 or more NEW Sub-sites with similar configurations. **Reminder!** Choose this option to retain your default settings from last year.

Important Note: You will have the opportunity to adjust default settings prior to activating individual Sub-sites, regardless of how this question is answered.

If you have answered **YES**, skip to the [Default Fee Setup](#) section of this document, otherwise continue below.

7. Click the **NEXT** button to continue.

Main Office Configuration

uTax offers bank enrollment services which requires your Sub-sites to complete their bank enrollment application on an unbranded (uTax) web portal.
Please note: uTax will contact each of your Sub-sites directly to assist them in the bank enrollment process if you choose to have uTax manage enrollment on your behalf.

Do you want uTax to manage the process of enrolling your Sub-sites?

Yes, please manage enrollment for my Sub-sites
 No, I will manage enrollment for my Sub-sites


uTax offers onboarding services which allows the uTax Support team to contact your Sub-sites to assist them with installing and configuring their tax software.
Please note: Your co-branded software will be installed, if applicable.

Do you want uTax to manage the process of onboarding your Sub-sites?

Yes, please manage onboarding for my Sub-sites
 No, I will manage onboarding for my Sub-sites

Who will provide customer support to your Sub-sites?

uTax will provide support to my Sub-sites
 I will provide support to my Sub-sites

Do you want uTax to send an unbranded email to your Sub-sites when the Tax Software becomes available (your branded Tax Software version will be sent, if applicable)? 

Yes – Please send an unbranded email to my Sub-sites with a link to the Tax Software when it becomes available
 No – Do NOT send an email to my Sub-sites with a link to the Tax Software when it becomes available. I will distribute the tax software to my Sub-sites.

When setting up NEW Sub-sites, the EMP pre-populates many configuration options (e.g. Check Print Location) with the most common default settings to save you time. Do you want to use the most common uTax pre-populated settings? [Click Here](#) for more details.

YES – I would like to use the pre-populated default settings
 NO – I want to configure my own default settings for NEW Sub-sites, This can be helpful if you plan to create 5+ NEW Sub-sites with similar configurations. **Choose this option to retain your default settings from last year.**

Note: For either option, you can always make manual adjustments to any individual Sub-site. Sub-sites that worked with you last year will retain their prior-year settings, which can also be adjusted.

[PREVIOUS](#) [NEXT](#) [EXIT](#)

Configuring Default Settings

In the *Default Sub-site Configuration and Default Fee Setup* section, we ask general questions about how you want to manage your sites. The EMP will use many of your answers to pre-configure settings to save time and improve accuracy when you create new sites. **NOTE:** Prior year Default Sub-site Configuration information is carried forward from the previous year if you are a returning Partner.

Important Note: Each Sub-site can also be modified individually by you before the office is activated, allowing for unique settings and fees, which may or may not apply to specific sites you have special arrangements with.

Default Sub-site Configuration

10. How will your **new** Sub-sites send tax return data?
- Select “**All Sub-sites will transmit to the IRS via our Central Site (Transmitter)**” if most or all your new Sub-sites will send tax returns without sending them to your Main-office for review.
 - Select “**All Sub-sites will transmit to the Main Office (Feeder)**” if most or all your new sites will send tax returns to your Main-office for review.
 - Select “**Mixed**” if you want to be required to answer this question for each new Sub-site.

11. Which Affiliate Programs would you like your Sub-sites to have access to?

- Select the Affiliate Program that you would like your Sub-sites to have access to.

Note: The Sub-site can also choose to automatically add their selected ancillary products to each bank product return, including a markup amount, if applicable.

12. Do you want your Sub-sites to have the Affiliate Programs, identified above, pre-selected during their enrollment?

- Select **Yes** to pre-select the affiliate programs for your Sub-sites. **Note:** Your Sub-sites can choose not to participate in the affiliate programs you have pre-selected for them.
- Select **No** if you want your Sub-sites to make the selections themselves.

13. Who will be printing checks?

- Select **Sub-site (Return Owner)** if most of your new sites will print their own checks.
- Select **Main site (Tier Owner)** if the main site, you in most cases, will print checks on behalf of your Sub-sites.
- Select **Mixed** – If you do not want this answer pre-selected when you create a new office.

14. Which banks would you like your Sub-sites to partner with?

- Select the bank(s) you want to make available to your Sub-sites for enrollment.
Note: If TPG is selected, you will be prompted to answer the following check printing question: How will your Sub-sites print their TPG Checks?

15. Click the **NEXT** button to continue.

Default Sub-site Configuration Settings

How will your new Sub-sites send tax return data?

All Sub-sites will transmit to the IRS via our Central Site (Transmitter)
 All Sub-sites will transmit to the Main Office (Feeder)
 Mixed - Some Sub-sites will transmit to the IRS via our Central Site (Transmitter) and some will transmit to the Main Office (Feeder)

Which affiliate programs would you like your Sub-sites to have access to? [?](#)

Audit Allies Protect

Do you want your Sub-sites to have the affiliate programs, you identified above, pre-selected during their enrollment? [?](#)

Yes No

Who will be printing checks?

Service Bureau (Master) Sub-site (Return Owner) Main site (Tier Owner) Mixed - will select who will print checks upon Sub-site Activation

Which banks will you allow your Sub-sites to partner with? [?](#)

<input checked="" type="checkbox"/> TPG ?	How will your Sub-sites print their TPG Checks? <input type="radio"/> All Sub Sites will print checks online from TPG's website. <input checked="" type="radio"/> Let the Sub-sites choose their check printing preference. <input type="radio"/> All Sub-sites will print checks from within the tax software.
<input checked="" type="checkbox"/> Republic Bank ?	
<input checked="" type="checkbox"/> Refund Advantage ?	

Default Fee Setup

This is where you will manage your **default Service Bureau (SVB) Fee and Transmitter Fee**. These fees will be deducted from each funded bank product return. The fees you enter here are set as the default fees when you create new Sub-sites.

This section shows the **Transmitter Fee, Technology Fee, the uTax SVB Fee, and the Federal/State e-File fees** listed in your uTax agreement. **Note:** For compliance reasons, the **Technology Fee and Transmitter Fee** have been exchanged with each other, however the combined total of these two fees remains unchanged.

Default Fee Setup and Configuration

uTax & Transmitter Fees

Bank Product Fees	Amount	e-File Fees Amount	Amount
uTax Service Bureau Fee	\$ 10 ?	uTax State e-File Fee	\$ 0
Transmitter Fee	\$ 25.95	uTax Federal e-File Fee	\$ 0
Technology Fee	\$ 4	CPTS Technology Fee (EF Only) ?	\$ 4

This next section is where you set default fees to appear in your NEW Sub-sites for each bank. It is also where you will manage whether you want to allow your Sub-sites to include add-on amounts of their own (in addition to your add-on amounts, and the uTax fee).

18. Would you like to set Default Fees for your Sub-sites?

- Selecting **Yes** will prompt you to enter your default fees.
 - Enter the amount you want to set as the default fee for your Sub-sites, for each bank. **Note:** The SVB fee for each Sub-site can be individually customized by you before each site is activated.

Tip: If your SVB fee varies amongst your sites, we suggest that you enter the most common amount.

- Selecting **No** will require you to enter a **Service Bureau and Transmitter Fee** for each new office you create.
19. Do you want to allow your Sub-sites to add on to the **Service Bureau Fee** during enrollment?
- Selecting **Yes** will:
 - Allow your Sub-sites to include their own add-on amount on top of your SVB and the uTax fee.
 - Selecting **No** will:
 - Configure the EMP so your Sub-sites are not able to include their own add-on amount on top of your SVB and the uTax fee.
 - Click **NEXT** to continue to the next page.
20. Do you want to allow your Sub-sites to add on to the **Transmitter Fee** during enrollment?
- Selecting **Yes** will:
 - Allow your Sub-sites to include their own add-on amount on top of your Transmitter Add-on and the Transmitter Fee.
 - **Admin Fees will apply**
 - Selecting **No** will:
 - Configure the EMP so your Sub-sites are not able to include their own add-on amount on top of your Transmitter Add-on and Transmitter fee.
 - Click **NEXT** to continue to the next page.
21. Do you want to allow your Sub-sites to collect a **Bank Product e-File Fee** during enrollment?
- Selecting **Yes** will:
 - Allow your Sub-sites to include the Bank Product e-File Fee to each tax return that includes a bank product.
 - **Admin Fees will apply**
 - Selecting **No** will:
 - Configure the EMP so your Sub-sites are not able to collect a Bank Product e-File Fee.
 - Click **NEXT** to continue to the next page.
22. Do you want to apply the **Technology Add-On Fee** that you entered above to both your Prior Year and New Sites (All Sites)?
- Selecting **Yes** will:
 - Set the Technology Add-On Fee entered above for all of your sites (Prior Year and New) in EMP by default.
 - **Admin Fees will apply**
 - Selecting **No** will:
 - Apply the Technology Add On-Fee entered above to **ONLY NEW SITES**. Prior Year sites will not have the new Technology Add-On Fee applied.
 - Click **NEXT** to continue to the next page.

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23. Click the “I agree” boxes to acknowledge that you understand the Transmitter Add-On, BP e-File Fee, and Tech Add-On Fee Terms & Conditions.

This section is designed to help you set “default” Add-on Service Bureau and Transmitter Fees for your Sub-sites. **Important:** If you choose to set default fees for your Sub-sites, the fees entered on this page will carry forward only to NEW Sub-sites you activate. All Default and / or individual fees that you set for your Sub-sites **last year** will carry forward to those sites this year. **Be sure to carefully review your fees for ALL sites**, especially those individual Sub-sites that you may have assigned fee(s) different from your default fees in the prior year.

Note: If needed, you ARE able to adjust these default fees on a per Sub-site basis when you activate your Sub-site. [i](#)

Would you like to set Default Fees for your Sub-sites?

Yes No

Important Notice: The Transmitter will ADD a variable Transmitter Admin Fee based on the Add-On Transmitter Fee amount entered by you and / or any of your Sub-sites (if applicable). [Click here](#) to read the **Transmitter Add-On Service Terms and Conditions Agreement** and fee schedule. This additional fee **does NOT** apply to the Add-On Service Bureau Fee or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Important Notice: The Transmitter will ADD a variable BP e-File Admin Fee (as displayed on the right) based on the BP e-File Fee amount entered by you. [Click here](#) to read the **BP e-File Fee Service Terms and Conditions Agreement** and FEE SCHEDULE. This additional fee **does NOT** apply to the Service Bureau Add-on Fee or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Important Notice: The Transmitter will ADD a variable Tech Admin Fee (as displayed on the right) based on the Add-on Technology Fee amount entered by you. [Click here](#) to read the **Add-on Technology Fee Service Terms and Conditions Agreement** and FEE SCHEDULE. This additional fee **does NOT** apply to the Service Bureau Add-on Fee or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Please enter your default fees below for each bank displayed.

TPG	Refund Advantage	Republic Bank
*Enter your Service Bureau Add-on amount <small>(Maximum Available: \$95.00)</small> i	*Enter your Service Bureau Add-on amount <small>(Maximum Available: \$95.00)</small> i	*Enter your Service Bureau Add-on amount <small>(Maximum Available: \$95.00)</small> i
Base Service Bureau Fee: \$10	Base Service Bureau Fee: \$10	Base Service Bureau Fee: \$10
Total Service Bureau Fee: \$15.00	Total Service Bureau Fee: \$15.00	Total Service Bureau Fee: \$15.00
*Enter your Transmitter Add-on amount <small>(Maximum Available: \$150.00)</small> i	*Enter your Transmitter Add-on amount <small>(Maximum Available: \$150.00)</small> i	*Enter your Transmitter Add-on amount <small>(Maximum Available: \$150.00)</small> i
Transmitter Fee & Transmitter Admin Fee: \$26.95	Transmitter Fee & Transmitter Admin Fee: \$26.95	Transmitter Fee & Transmitter Admin Fee: \$26.95
Total Transmitter Fee: \$31.95	Total Transmitter Fee: \$31.95	Total Transmitter Fee: \$31.95
*Enter your Technology Add-on amount <small>(Maximum Available: \$11.00)</small> i	*Enter your Technology Add-on amount <small>(Maximum Available: \$11.00)</small> i	*Enter your Technology Add-on amount <small>(Maximum Available: \$11.00)</small> i
Technology Add-on Fee & Technology Admin Fee: \$6.00	Technology Add-on Fee & Technology Admin Fee: \$6.00	Technology Add-on Fee & Technology Admin Fee: \$6.00
Total Technology Fee: \$13.00	Total Technology Fee: \$13.00	Total Technology Fee: \$13.00
Technology Fee: \$4	Technology Fee: \$4	Technology Fee: \$4
TPG Bank Fee: \$39.95	Refund Advantage Bank Fee: \$39.95	Republic Bank Bank Fee: \$39.95
Total Fee per Bank Product: \$103.90	Total Fee per Bank Product: \$103.90	Total Fee per Bank Product: \$103.90

Do you want to allow your Sub-sites to add on to the Service Bureau Fee during enrollment? [i](#)

Yes No

Do you want to allow your Sub-sites to add on to the Transmitter Fee during enrollment? [i](#)

Yes No

Do you want to allow your Sub-sites to add a BP e-File Fee amount during enrollment (Admin Fees Apply)? [i](#)

Yes No

Do you want to apply the Technology Add-on fee that you entered above to both your Prior Year and New Sites (All Sites)? [i](#)

Yes No

By checking this “I Agree” box, you acknowledge that you have read, understand and agree to the Transmitter Add-On Service Terms & Conditions. [i](#)

By checking this “I Agree” box, you acknowledge that you have read, understand and agree to the BP e-File Fee Service Terms & Conditions.

By checking this “I Agree” box, you acknowledge that you have read, understand and agree to the Tech Add-on Service Terms & Conditions.

Please note: The Add-on fees listed above will be collected by uTax and will be paid to you according to the terms of your uTax License Agreement. Default fees only apply to New sites upon their activation and can be adjusted on a per site basis.

Fee Payment

Fee Reimbursement Account

We request this information to ensure that your add-on amounts are processed and delivered to you timely and accurately. All Add-on amounts associated with Service Bureau Fees, Transmitter Fees, iProtect Mark-up Amounts, and any other credits, including any Add-on amounts collected on behalf of Sub-sites, will be credited to the Main site account according to the terms of your uTax Agreement. Any charges and/or outstanding balances will be applied against the credit amounts before deposit.

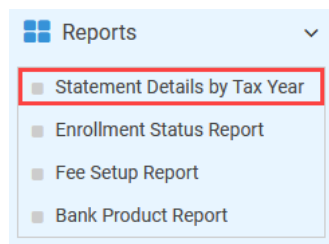
Important Note: Completion of the **Payment Information** section is required for your Main Site.

Payment Information

Each tax season, uTax processes invoices for e-Filed returns that did not include a Bank Product and/or for any outstanding Balance Due on Accounts that is carried forward into the next tax season, including the Cash Saver program. We request payment information to ensure that these invoices can be processed timely and accurately.

Your account will only be charged if a balance exists after add-on amount reimbursement credits are applied (if applicable), per payment terms as stated in your uTax Agreement.

Note: By completing this information, you are authorizing uTax Software to charge the account that is designated for any remaining balance. You will receive statements from uTax for your records. Statements are also available for viewing in EMP by clicking **Statement Details by Tax Year** under the **Reports** menu, illustrated below. If you have any questions, please contact your Account Manager at 844-440-UTAX (8829).



24. Enter your bank account information in the **Fee Reimbursement Account** and **Payment Information** sections. **Important Note:** Completion of the **Payment Information** section is required for all uTax partners.
25. **Do you want uTax to always use this payment method below to collect E-Filing charges? Select Yes or No.**
26. **Select** the check box that authorizes uTax, LLC to electronically credit your account and to electronically debit your account to correct erroneous credits.
27. Click **NEXT**.

Fee Payment / Update Account(s)

Fee Reimbursement Account

Enter the bank account information where your Fee Reimbursements will be deposited by uTax.

All Add-on amounts associated with Service Bureau Fees, Transmitter Fees, and/or Protect Markup Fees, and any other credits, including any Add-on amounts collected on behalf of Sub-sites, will be credited to the Main site account per the terms of your License Agreement. **Any charges and/or outstanding balances will be applied against the credit amounts.** To expedite the payment of credit balances to our partners, payments will be sent electronically via ACH directly to your bank account.

Bank Name *

Name on Deposit Account * ACCT Type *

Bank Routing Number (RTN) * Confirm Bank Routing Number (RTN) *

Bank Account Number (DAN) * Confirm Account Number (DAN) *

I authorize uTax Software, LLC, to electronically credit my account (and if necessary, to electronically debit my account to correct erroneous credits).

Payment Information

Enter the account information to be used as your Payment Method on file.

uTax requires a designated Payment Method for any outstanding balances. Outstanding balances may include e-File fees, deferred software payments, marketing services, or other amounts owed to uTax.

Add on amounts collected on your behalf from Bank Products will offset any outstanding balances, where applicable.

Select Credit Card ACH/EFT

uTax e-Filing Fees Summary

e-File Fees	Amount
uTax Federal e-File Fee	\$ 0
uTax State e-File Fee	\$ 0

Do you want uTax to always use this payment method below to collect E-Filing charges? Note: By selecting "No", your projected Add-on Funds must be sufficient to cover anticipated E-Filing charges. uTax will first apply any Add-on Funds or Credit Balance toward any E-Filing invoices.

Yes – Always use my Payment information below for any E-Filing charges incurred.

No – First use my Add-on Funds (or Credit Balance) for any E-Filing charges incurred, then use my Payment information below.

Copy From

Bank Name *

Name on Deposit Account * ACCT Type *

Bank Routing Number (RTN) * Confirm Bank Routing Number (RTN) *

Bank Account Number (DAN) * Confirm Account Number (DAN) *

I authorize uTax Software, LLC to charge the ACH/EFT listed above for any outstanding balance on my account according to my license agreement.

[PREVIOUS](#) [NEXT](#) [SUBMIT](#) [EXIT](#)

Summary and Activation

This section displays the configuration options you selected throughout the Setup process. After activation of your Main Site, you will be able to manage your Sub-sites from the **Office Management Grid (OMG)**.

Review the information, if necessary, by clicking on the tabs. Click the **ACTIVATE** button when you are satisfied with the information.

Activate This Site

Main Office Info. Main Office Configuration Default Sub-site Configuration Settings Default Fee Setup Fee Payment / Account Update(s)

Main Office Information	
Company Name	XXXXXXXXXX
Primary Contact First Name	XXXX
Primary Contact Last Name	XXXX
Physical Address	XXXXXXXXXX
City, State, Zip	XXXXXXXXXX
Office Phone	XXXX-XXXX
Primary Email	XXXXXXXXXX
Support Notification Email	XXXXXXXXXX
Alternate Contact	XXXXXXXXXX

Software Identification Information	
EFIN	XXXXXXXXXX
Master Identifier	XXXX
Master User ID	XXXX
Transmission Password	XXXXXXXXXX

Account Manager's Info	
Name	XXXXXXXXXX

EDIT PREVIOUS NEXT ACTIVATE

After activating your Main-site , a pop-up window will appear if you are enrolling with a bank. Click the **ACTIVATE/ENROLL** button and skip to Step 2 in the [Bank Enrollment](#) section of this document. If you are not ready to proceed with enrollment, click the **EXIT** button.

Your default configurations are complete. Would you like to Activate your site and complete your Main site Enrollment, if applicable?

ACTIVATE / ENROLL EXIT

Managing Sub-sites

Office Management Grid

The EMP Office Management Grid (OMG) gives you visibility throughout the setup and enrollment process by providing you with status and details about your Sub-sites. From the OMG, you can view all your Sub-sites, create new ones, and activate individual prior year sites. **Note:** Skip to the [Bulk Activate Sub-sites](#) section of this document for instructions about how to activate multiple prior year sites at once.

The OMG has two viewing/search modes, *Search by Sites* and *Organization View*. The default is *Organization View*. In this view, Sub-sites are organized in a hierarchy. This view is especially helpful if you have a Sub-site that has Sub-sites of their own, because the hierarchy will be evident in the OMG.

Click the *Search by Sites* button to filter the OMG or search for a Sub-site. See the [Searching and Filters](#) section of this document for more information.

Viewing Your Sub-sites

- **Status** – displays the current year activation status for the “Sales Year”.
 - **Not Active** – means that you have not *Activated* this site for the upcoming tax season
 - **Active** – means that you have *Activated* this site for the upcoming tax season. Activated sites can enroll with a bank through EMP when configured to do so. Activation may also include on-boarding services by the Support Team for New Sub-sites if you have chosen to take advantage of that service.
 - **Review** – you have either created a new Sub-site and are waiting for the User ID/Password to be created OR you have edited an existing Sub-site and saved the information without activating the site.
 - **Hold** – means that you have placed the site on Hold. Sites are not able to transmit tax returns when placed on Hold.
- **Company** – will display the Company Name of your Sub-site. By clicking on the Company Name, you can open the Sub-site record to make edits or changes to their Sub-site Configuration, and most importantly, **ACTIVATE** them.
- **Parent ID** – Sub-sites with a User ID in the Parent ID column are sites underneath that (parent) Sub-site.
- **User ID** – displays the User ID assigned to the Sub-site
- **Contact** – displays the first and last name of your Sub-site’s contact person
- **EFIN** – contains the 6-digit EFIN number assigned to this site. Note: If the EFIN is BOLD, you can hover over the EFIN and see any additional EFINs that have been associated to this site.
- **Software Type** – The *D* designation means the site is configured to use the standard 1040 *Desktop* program. *M* is used when the site is using *MSO*. *H* is used when the site is using the *Hosted* program.
- **Transmit Type** – displays whether your Sub-site submits tax returns directly to the Central Site (T = Transmitter) or to you (F = Feeder).
- **Selected Bank** – displays the bank that was selected during the Sub-site’s enrollment. **Note:** Hover your cursor over this field to view the status of multiple bank applications that have been created for this EFIN.
- **Submission Date** – displays the date that the bank enrollment application was submitted to the bank.
- **Enrollment Status** – displays the current bank status for the selected active bank. **Note:** Hover your cursor over the Enrollment Status to see the selected bank.
- **Total SVB Fees** – displays the **total combined SVB fee**, which is the sum of the uTax SVB fee, your SVB add-on amount, and any additional SVB add-on amounts entered by your Sub-sites. **Note:** Hover your cursor over this field to display a breakdown.
- **Total Trans Fees** – displays the total Transmitter Fees, which includes the Transmitter Fee, the Technology Fee, Add-On Technology Fees and if applicable, your SVB/MO Transmission Add-on Amount, and your Sub-sites Transmissions Add-on Amounts, and any applicable Admin Fees. **Note:** Hover your cursor over this field to display a breakdown.
- **BP e-File Fee** – displays the Bank Product e-File amount that was submitted to the bank.
- **Doc/EF Fee** – displays the Documentation Fee (TPG) or the EF Fee (RBT) assigned to this site from within the bank app.
- **Action** – Click on the word **Action**:
 - From your Main site to:
 - Reset Password

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- Add a Desktop Site (MSO site, Hosted site if applicable)
 - From your Sub-site:
 - Reset Password
 - View Archive
 - Hide Site
 - Removes this Sub-site from your view. This can be used for sites that are not using your services for this upcoming tax season.

Office Management

Show Hidden Sites SEARCH BY SITE(S)

Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Selected Bank	Bank App Subm.Date	Enrollment Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	BP e-File Fee	DOC / EF Fee	Action
Active	-				D		TPG	09/21/2021 15:12	Unsuccessful	≡			0.00	0.00	ACTIONS ▾

Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Selected Bank	Submission Date	Enr. Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	BP e-File Fee	DOC / EF Fee	Action
Active					H	F			Not Started	≡					ACTIONS ▾
Not Active					D	F			Not Started						ACTIONS ▾
Not Active					D	T			Not Started						ACTIONS ▾

Searching and Filters

While it is possible to search and filter your Sub-sites while the OMG is configured in *Standard View*, it is recommended that you switch to *Filter View* prior to doing so. Searching or applying filters while in *Standard View* may yield inconsistent search results if one or more of your Sub-sites has Sub-sites of their own.

Important Note: Each time you log into EMP, the OMG is configured for *Standard View*. When in *Standard View*, the **Filter View** button is present so you can easily switch to **Filter View** mode. When in *Filter View* mode, the **Standard View** button is shown so you can switch back to *Standard View* if necessary.

Searching the OMG

1. If necessary, switch to the *Search by Sites View* by clicking the **SEARCH BY SITE(S)** button.

Office Management

Show Hidden Sites SEARCH BY SITE(S)

Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Selected Bank	Bank App Subm.Date	Enrollment Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	BP e-File Fee	DOC / EF Fee	Action
Active	-				D		TPG	09/21/2021 15:12	Unsuccessful	≡			0.00	0.00	ACTIONS ▾

2. **Type** your search string in the search box and then **Select** the appropriate radio button, shown below.

Office Management

Search: User ID Company Name EFIN EFIN by Owner Contact Name Telephone Number

Note: When searching by EFIN, use the **EFIN by Owner** radio button to narrow the result to the Sub-site that submitted the EFIN to the bank. Search using the **EFIN** radio button to return results for all sites configured to use that EFIN.

3. Click the **SEARCH** button to initiate the search.

Office Management

Search: User ID Company Name EFIN EFIN by Owner Contact Name Telephone Number

Status Site type Bank Partner Enrollment Status Software Type Transmit Type

All Selected All Selected All Selected All Selected All Selected All Selected **SEARCH** **RESET**

Filtering the OMG

Filtering is useful for refining the sites displayed on the OMG based on certain criteria. For instance, with filtering it is possible to show only sites that have a *rejected* bank application or have selected *Republic* as their bank. Furthermore, it is possible to combine filters. For example, filters could be configured so the OMG only displays sites that are both *Rejected* and have selected *Republic* as their Bank Partner.

1. Switch to *Filter View* by clicking the **Filter View** button.

Office Management

Search: User ID Company Name EFIN EFIN by Owner Contact Name Telephone Number

Status Site type Bank Partner Enrollment Status Software Type Transmit Type

All Selected All Selected All Selected All Selected All Selected All Selected **SEARCH** **RESET** **FILTER VIEW**

2. Click *one or more* of the filter **drop-down boxes** and select *one or more* of the **options** within each drop-down.

Status Site type Bank Partner Enrollment Status Software Type Transmit Type

Active All Selected All Selected All Selected All Selected All Selected **SEARCH** **RESET**

Show 10 entries

Status	Company	User ID	Contact	Selected Bank	Bank App Subm.Date	Enrollment Status	View/Edit Enrollment	Total SVB Fee
No records.								

Select all
 None
 Refund Advantage
 Republic Bank
 TPG

3. Click the **SEARCH** button to apply the filter.

Status	Site type	Bank Partner	Enrollment Status	Software Type	Transmit Type		
All Selected	All Selected	2 selected	Rejected	All Selected	All Selected	SEARCH	RESET

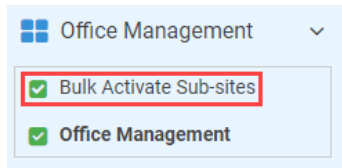
Bulk Activate Sub-sites

With the Bulk Activate Sub-sites feature you can now activate multiple **prior-year** Sub-sites at a time, instead of individually. **Note:** See the [Activating a Prior Year Site from the OMG](#) section below for instructions about how to activate Sub-sites individually.

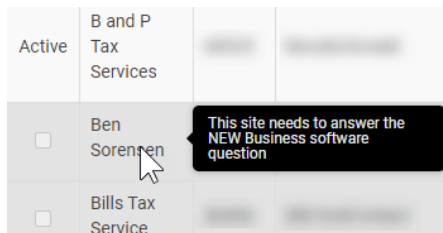
Notes:

- Not all Sub-sites are eligible for bulk activation. For instance, Sub-sites borrowing an EFIN are not eligible for bulk site activation until the EFIN is submitted for enrollment (by the EFIN owner), and in some cases accepted by a bank.
- It is recommended that you first enroll sites, individually or via Bulk Activate Sub-sites, whose EFINs are used by more than one site. Doing so will ensure that the Sub-sites are eligible for Bulk Activate Sub-sites.

1. To use the feature, click on **Bulk Activate Sub-sites** on the Office Management menu.



Prior year Sub-sites are shown in the grid. Sites previously activated for TY2020, and those eligible for bulk site activation, are shown in white. Sites ineligible for bulk activation are shown in gray. **Note:** Hover your cursor over the Company Name field on an ineligible Sub-site to view the reason why the site is ineligible for bulk activation.



- a. To **Search** for an office, simply begin typing your search term in the search box. The search feature will return results in real-time using the data available in each of the columns in the grid. For example, typing 64 will filter the grid to show only offices where the combination of 64 exists, whether that combination exists in a User ID, EFIN, Company Name, etc.

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- b. By default, the **Filter by** feature is set to *Prior Year Active Sites*. Selecting *All sites* will display prior year sites that were not activated last year.
- c. By default, the sort feature is set to *Show sites by ERO type*. To show sites by hierarchy instead – within your organizational groups, select *Show sites by Hierarchy*. **Note:** This is useful if a sub-site has a sub-sites(s) of its own.

Bulk Activate Sub-sites

To activate multiple Sub-sites at a time using the Bulk Activate Sub-sites function, first carefully review / verify the line item information for each site, specifically the fees, and if all information is accurate, mark the checkbox in the left **Status** column. If any information displayed for a site is inaccurate, return to the **Office Management Grid** to update / activate the site. Only sites that are **not** grayed out are eligible to be activated.

Important Note: Grayed out sites have an issue that needs resolving which is displayed by hovering over the **Company Name**. Some issues can be easily resolved so you can return to the Bulk Activate Sub-sites screen to complete activation, while others will require you to return to the **Office Management Grid** to update and activate the site.

Search:

Filter by: Prior Year Active Sites Sort by: Show sites by ERO Type

Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Office Type	Business Software	Banks Available	Affiliates Available	Access to SVB Fee	Access to Tran Fee	Access to BP EF Fee	Checkpoint Location	Total SVB Fee (TPG/RA/RB)	Total Tran Fee (TPG/RA/RB)
<input type="checkbox"/>					D	F	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/30.00	36.95/36.95/32.95
<input type="checkbox"/>					D	F	SVB-MO	No Business So...	ALL	iProPPlus	Yes	Yes	Yes	Service Bureau	12.00/12.00/12.00	32.95/32.95/32.95
<input type="checkbox"/>					D	T	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	T	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	12.00/12.00/12.00	32.95/32.95/32.95
<input type="checkbox"/>					D	F	SVB-MO	No Business So...	ALL	Add	Yes	Yes	Yes	This site	13.00/18.00/13.00	36.95/47.95/36.95
<input type="checkbox"/>					D	T	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	F	SVB-SO	No Business So...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	T	SVB-SO	Returns Unlimit...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	T	SVB-MO-SO	Returns Unlimit...	ALL	iProPPlus	Yes	Yes	Yes	Service Bureau	18.00/18.00/35.00	47.95/47.95/43.95

ACTIVATE ALL MARKED SITES

2. Place a **checkmark** in the *Status* column of each eligible site you want to activate and then click the **ACTIVATE ALL MARKED SITES** button.

Bulk Activate Sub-sites

To activate multiple Sub-sites at a time using the Bulk Activate Sub-sites function, first carefully review / verify the line item information for each site, specifically the fees, and if all information is accurate, mark the checkbox in the left **Status** column. If any information displayed for a site is inaccurate, return to the **Office Management Grid** to update / activate the site. Only sites that are **not** grayed out are eligible to be activated.

Important Note: Grayed out sites have an issue that needs resolving which is displayed by hovering over the **Company Name**. Some issues can be easily resolved so you can return to the Bulk Activate Sub-sites screen to complete activation, while others will require you to return to the **Office Management Grid** to update and activate the site.

Search:

Filter by: Prior Year Active Sites Sort by: Show sites by ERO Type

Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Office Type	Business Software	Banks Available	Affiliates Available	Access to SVB Fee	Access to Tran Fee	Access to BP EF Fee	Checkpoint Location	Total SVB Fee (TPG/RA/RB)	Total Tran Fee (TPG/RA/RB)
<input type="checkbox"/>					D	F	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/30.00	36.95/36.95/32.95
<input type="checkbox"/>					D	F	SVB-MO	No Business So...	ALL	iProPPlus	Yes	Yes	Yes	Service Bureau	12.00/12.00/12.00	32.95/32.95/32.95
<input type="checkbox"/>					D	T	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	T	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	12.00/12.00/12.00	32.95/32.95/32.95
<input type="checkbox"/>					D	F	SVB-MO	No Business So...	ALL	Add	Yes	Yes	Yes	This site	13.00/18.00/13.00	36.95/47.95/36.95
<input type="checkbox"/>					D	T	SVB-MO	Return Biz PPR...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	F	SVB-SO	No Business So...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	T	SVB-SO	Returns Unlimit...	ALL	iProPPlus	Yes	Yes	Yes	This site	13.00/13.00/13.00	36.95/36.95/36.95
<input type="checkbox"/>					D	T	SVB-MO-SO	Returns Unlimit...	ALL	iProPPlus	Yes	Yes	Yes	Service Bureau	18.00/18.00/35.00	47.95/47.95/43.95

ACTIVATE ALL MARKED SITES

3. The following message will appear upon successful activations.

Selected Sites Activated Successfully

Activating a Prior Year Sub-site from the OMG

The following instructions show you how to activate Sub-sites **individually** (vs using the Bulk Activate Sites feature described earlier). Most answers are already pre-configured based on last year's office configuration.

1. To activate a prior year Sub-site, **click** on the blue colored Company Name on the Office Management Grid.

Status	Company	User ID	Contact	EFIN	Software Type
Not Active	MOSO 12 21	60710	last, first	Applied	D

Office Information

2. Click the **Verify** button.

Sub-site Office & Software Identification Information

Sub-site Information	
EFIN	60710
Company Name	MOSO 12 21
Primary Contact First Name	John
Primary Contact Last Name	Doe
Physical Address	1234 Main St
City, State, Zip	Anytown, CA 90210
Office Phone	555-555-5555
Alternate Phone	
Primary Email	john.doe@moso.com
Alternate Contact	
Support	Yes
Enrollment	EMP
Onboarding	Yes
Software Distribution	From Support

VERIFY

Software Identification Information	
User ID	60710
Transmission Password	123456
Master ID	123456
MSO CL User ID	

Parent Account	
EFIN	60710
Company Name	MOSO 12 21
Owner First Name	John
Owner Last Name	Doe
Physical Address	1234 Main St
City, State, Zip	Anytown, CA 90210

Account Manager's Info	
Name	John Doe

3. **Edit** the information, if necessary.
Note: Each EFIN Status option is described below:

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- **Valid EFIN** – if your Sub-site has a valid EFIN that is being used by only this Sub-site or is “sharing” this EFIN with another Sub-site, then Valid EFIN should be selected. The site with the Valid EFIN designation – is considered the “owner” of the EFIN.
- **Applied** – if the Sub-site does not have an EFIN when the site is created, the EFIN status should be set to Applied. This will allow you to complete the remainder of the site setup information so that you can obtain a User ID and password.
- **Sharing** – Select “Sharing” for sites that do NOT have their own EFIN but are using an EFIN from another site within your customer base.
 - Once Sharing is selected, you will be prompted to enter the EFIN this site is using.
 - A Sub-site can only select Sharing if the Valid EFIN (they are using) has a submitted bank application.

4. Click **SUBMIT** when complete.

Sub-site Office Information

+ Additional EFIN + Add Shared EFIN

EFIN * Valid EFIN

Company Name * Sub-site

Primary Contact First Name * John

Primary Contact Last Name * Smith

Title Mrs. Phone Type Mobile

Office Phone * 555-555-8464 Phone Type Mobile

Alternate Phone No Phone Type Select

Primary Email Address * office@GMAIL.COM

Support Notification Email Address * office@GMAIL.COM

What is your preferred support language? * English Spanish

Would you like to opt-in to receive important support related alerts via text to your mobile device? *

Yes, I want to receive important support related alerts via text to my mobile device

Enter Mobile Number: 555-555-3353 555-555-3353

No, I do not want to receive important support related alerts via text to my mobile device

Physical Address Information

Physical Address * 1110 S Main

Physical Address 2

Physical Zip Code * 77088 -

Physical City * Houston

Physical State * Texas (TX)

Mailing/Shipping Address Information

Shipping Address Same As Physical Address

Shipping Address * 1110 S Main

Shipping Address 2

Shipping Zip Code * 77088 -

Shipping City * Houston

Shipping State * Texas (TX)

Alternate Contact #1

Alternate Contact Name Mary Smith

Telephone Number 555-555-9988 Phone Type Mobile

Contact Email mary@gmail.com

Alternate Contact #2

Alternate Contact Name Jack Smith

Telephone Number 555-555-3311 Phone Type Mobile


Contact Email jack@gmail.com

SUBMIT BACK

Sub-site Configuration

This section will cover some general setup questions about this Sub-site.

Note:

- If Sharing is selected for the site as their EFIN Status, several of the bank related questions do not appear
 - The  icon appears next to questions that require an answer
5. What kind of Sub-site will this office be?
- Select **Single Office (most common)** if this is a single office.
 - Select **Main Site with Sub-offices** if this office will have sub-offices under it.
- Note:** This answer is pre-configured based on last year’s office configuration.

6. How will this Sub-site send tax return data?
- Select **To the IRS via our Central Site (Transmitter)** if the Sub-site will transmit their own returns. **Note:** The Main Site / Master ID will still receive copies of these returns.
 - Select **To the Main site for Review (Feeder)** if this site will have its Main Site / Master ID review and transmit returns to the IRS via our Central Site.
Note: This answer is pre-configured based on last year's office configuration.
7. Would you like to add Business Software to this site (additional charges may apply)?
- **Yes – please add the Base Business PPR Package (\$165) to this site** – which includes 1 business return as part of the package. Cost per return after the first one is \$40 each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the offseason).
 - **Yes – please add the Business PPR5 Bundle Package (\$300) to this site** – which includes 5 business returns as part of the package. Cost per return after the 1st 5 is \$35/each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the offseason)
 - **Yes – please add the “Unlimited” Business Package (\$1,099) to this site** – (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site).
 - **No – This site does NOT want Business Software**
8. Which Affiliate Programs would you like your Sub-sites to have access to?
- Select the Affiliate Program that you would like your Sub-sites to have access.
- Note:** The site can also choose to automatically add their selected ancillary products to each bank product return, including a markup amount, if allowed.
9. Which banks would you like your Sub-sites to partner with?
- Select the bank(s) you would like to make available to your Sub-sites for enrollment.
Note: If TPG is selected, you will be prompted to answer the following check printing question: How will your Sub-sites print their TPG Checks?
10. Who will print checks for this site?
- Select **This site (Return owner)** if this site prints their own checks.
 - Select **Main site (Tier owner)** if this sites parent will print the checks.
 - Select **Service Bureau (Main site)** – if the SVB will print the checks.
11. Do you want to allow this Sub-site to add on to the Service Bureau Fee during enrollment?
- Select **YES** – if you would like to allow your Sub-site to Add on to the Service Bureau Fee during enrollment
 - Select **NO** – if you do not want your Sub-site to Add on to the Service Bureau Fee during enrollment
12. Do you want to allow this Sub-site to add on to the Transmitter Fee during enrollment?

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- Select **YES** – if you would like to allow your Sub-site to Add on to the Transmitter Fee during enrollment.
- Select **NO** – if you do not want your Sub-site to Add on Transmitter Fee during enrollment.

Note: Any Transmitter Add on amounts will incur the Transmitter Admin Fee based on the applicable tier that can be found in the Transmitter Admin Fee Agreement.

13. Do you want to allow this Sub-site to collect a Bank Product e-File Fee during enrollment?
- Select **YES** – if you would like to allow your Sub-site to collect a Bank Product e-File Fee during enrollment.
 - Select **NO** – if you do not want your Sub-site to collect a Bank Product e-File Fee during enrollment.

Note: Any Bank Product e-File fees will incur the BP e-File Admin Fee based on the applicable tier that can be found in the BP e-File Admin Fee Agreement.

14. Click **NEXT**

Sub-site Configuration

What kind of Sub-site will this office be? ⓘ

Single Office (most common) Tier Owner with Sub-offices

How will this Sub-site send tax return data?

To the IRS via our Central Site (Transmitter) To the Main Site for review (Feeder)

Would you like to add Business Software to this site (additional charges WILL apply)? ⓘ

Yes – please add the Base Business PPR Package (\$165) to this site – which includes 1 business return as part of the package. Cost per return after the first one is \$40 each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the offseason).

Yes – please add the Business PPR5 Bundle Package (\$300) to this site – which includes 5 business returns as part of the package. Cost per return after the 1st 5 is \$35/each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the offseason).

Yes – please add the "Unlimited" Business Package (\$1,099) to this site – (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site).

No – This site does NOT want Business Software

Which affiliate programs would you like this Sub-site to have access to?

Audit Allies iProtect

Which banks will you allow this Sub-site to partner with?

<input type="checkbox"/> Refund Advantage ⓘ	
<input checked="" type="checkbox"/> Republic Bank ⓘ	
<input checked="" type="checkbox"/> TPG ⓘ	How will your Sub-site print their TPG Checks? <input type="radio"/> All Sub Sites will print checks online from TPG's website. <input type="radio"/> Let the Sub-sites choose their check printing preference. <input checked="" type="radio"/> All Sub-sites will print checks from within the tax software.

Who will print checks for the site?

This site (Return Owner) Main site (Tier Owner)

Do you want to allow this Sub-site to add on to the Service Bureau Fee during enrollment?

Yes No

Do you want to allow this Sub-site to add on to the Transmitter Fee during enrollment?

Yes No

Do you want to allow this Sub-site to add a BP e-File Fee amount during enrollment (Admin Fees Apply)? ⓘ

Yes No

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Sub-site Fee Configuration

This section allows you to edit the SVB Add-on Amount and your Transmitter Add-on Amount for the site. It is preconfigured with last year's add-on amounts and fee configuration. EMP will validate the add-on and fee amounts entered to ensure they do not exceed the limits designated by the banks. **Note:** If you have selected Sharing as their EFIN status, this page will not appear.

15. Adjust the add-on amounts for each bank as needed.

16. Click the **NEXT** button to continue.

Sub-site Fee Configuration

Service Bureau Fees

Please enter the Service Bureau Fee amount for this Sub-site. ?

TPG	Maximum available for Desktop : (\$89.00)	<input type="text" value="50.00"/>	Total Service Bureau Fee: \$60.00
Refund Advantage	Maximum available for Desktop : (\$89.00)	<input type="text" value="50.00"/>	Total Service Bureau Fee: \$60.00
Republic Bank	Maximum available for Desktop : (\$89.00)	<input type="text" value="50.00"/>	Total Service Bureau Fee: \$60.00

EDIT

Transmitter Fees

Please enter the Transmitter Fee amount for this Sub-site. ?

Important Notice: The Transmitter will ADD a variable Administrative Fee based on the Transmitter Add-On amount entered by you and / or any of your Sub-sites (if applicable). [Click here](#) to read the Transmitter Add-On Service Terms and Conditions Agreement and fee schedule. This additional fee does NOT apply to the Add-On Service Bureau Fee or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

TPG	Maximum available for Desktop : (\$150.00)	<input type="text" value="10.00"/>	Total Transmitter Fee: \$36.95
Refund Advantage	Maximum available for Desktop : (\$150.00)	<input type="text" value="10.00"/>	Total Transmitter Fee: \$36.95
Republic Bank	Maximum available for Desktop : (\$150.00)	<input type="text" value="10.00"/>	Total Transmitter Fee: \$36.95

EDIT

Technology Fees

Please enter the Technology Fee amount for this Sub-site.

Important Notice: The Transmitter will ADD a variable Administrative Fee based on the Technology Add-On amount entered by you and / or any of your Sub-sites (if applicable). [Click here](#) to read the Technology Add-On Service Terms and Conditions Agreement and fee schedule. This additional fee does NOT apply to the Add-On Service Bureau Fee or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

TPG	Maximum available for Desktop : (\$11.00)	<input type="text" value="0.00"/>	Total Technology Fee: \$4.00
Refund Advantage	Maximum available for Desktop : (\$11.00)	<input type="text" value="0.00"/>	Total Technology Fee: \$4.00
Republic Bank	Maximum available for Desktop : (\$11.00)	<input type="text" value="0.00"/>	Total Technology Fee: \$4.00

EDIT

Please note: The amounts you enter in the Service Bureau fee field are in addition to the Base Service Bureau Fee, while the amount you enter into the Transmission Fee field will be in addition to the \$25.95 Transmitter fee per Bank Product. You only need to enter any Add-On amounts that you would like to collect.

PREVIOUS
NEXT
EXIT

Activation

17. Review the information by clicking the tabs across the top and then **EDIT** to modify the information.
18. Click the **ACTIVATE** button when complete.

Activate This Site

Sub-site Office Information Sub-site Configuration Sub-site Fee Configuration

Sub-site	
EFIN	
Company Name	
Primary Contact First Name	John
Primary Contact Last Name	Smith
Physical Address	1110 S Main
City, State, Zip	Houston TX, 77088
Office Phone	555-555-8454
Alternate Phone	
Primary Email	Office@gmail.com
Alternate Contact	

Software Identification Information	
User ID	
Transmission Password	
Master ID	

Parent Account	
EFIN	Not Required
Company Name	
Owner First Name	
Owner Last Name	
Physical Address	
City, State, Zip	Houston TX, 77238

EDIT **PREVIOUS** **NEXT** **ACTIVATE**

If you elected to have uTax manage the enrollment for your Sub-sites, **no further action is needed.** Partner Support will continuously send email reminders until enrollment has been submitted and our enrollment team will follow up with each site until Approved.

If you elected to manage your own enrollment, after activating your Sub-site a pop-up window will appear. If you are ready to proceed with enrollment, click the **ACTIVATE & ENROLL NOW** button and proceed to Step 2 in the [Bank Enrollment](#) section of this document. If you are not ready to proceed with enrollment, click the **ACTIVATE & ENROLL LATER** button. Return to the OMG and begin with Step 1 in the [Bank Enrollment](#) section of this document when you are ready to enroll.

Service Bureau & Multi-Office EMP User Guide

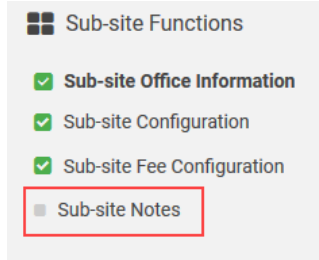
If you have confirmed the details for this Sub-site and wish to proceed to Bank Enrollment, click Activate & Enroll NOW. If you wish to activate this Sub-site and complete Enrollment later, click Activate & Enroll Later. If you do not wish to activate this site at this time, click Exit.
Please note that once activated, certain features or sections may become unavailable or restricted.



Sub-site Notes

With Notes, you can enter reminders or other information specific to this Sub-site. Notes are optional and are not visible to the Sub-site. They are saved with a date and time stamp.

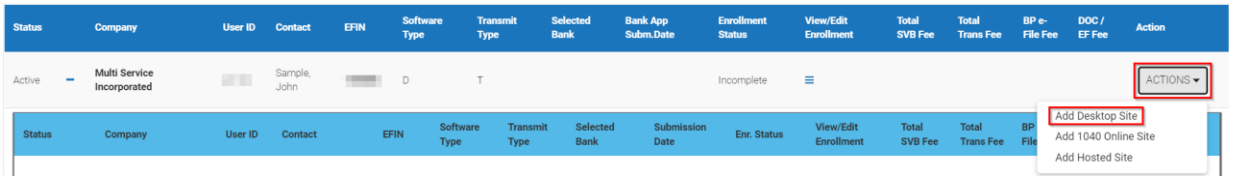
1. Click the **Sub-site Notes** option under Sub-site Functions on the left to access the notes feature.



2. Type your note and then click **SAVE** to continue. **Note:** Click the Sub-site Notes option under Sub-site Functions again to access Sub-site Notes you have previously created.

Creating a New Sub-site

1. From the Office Management Grid, click the **Actions** menu next to your Main Office, or the appropriate *Main Site with Sub-site(s)*, and then click **Add Desktop Office**. **Note:** If you have purchased MSO or the Hosted program and you want to add one of those office types, select **Add Hosted Site** or **Add MSO Site** when appropriate.



Create Sub-site Information

2. **Enter** the information in each required field.
Note: Each EFIN Status option is described below:
 - **Valid EFIN** – if your Sub-site has a valid EFIN that is being used by only this Sub-site or is “sharing” this EFIN with another Sub-site, then Valid EFIN should be selected. The site with the Valid EFIN designation – is considered the “owner” of the EFIN.
 - **Applied** – if the Sub-site does not have an EFIN when the site is created, the EFIN status should be set to Applied. This will allow you to complete the remainder of the site setup information so that you can obtain a User ID and password.

- **Sharing** – Select “Sharing” for sites that do NOT have their own EFIN but are using an EFIN from another site within your customer base. If Sharing is selected, you will be required to enter the shared EFIN. Only EFINs with submitted bank applications will be allowed to share.

3. Click the **Submit** button.

Create Sub-Site Information

EFIN Select

Company Name *

Primary Contact First Name *

Primary Contact Last Name *

Title Select

Office Phone * Phone Type Select

Alternate Phone No Phone Type Select

Primary Email Address *

Additional Support Notification

What is your preferred support language? * English Spanish

Would you like to opt-in to receive important support related alerts via text to your mobile device? *

Yes, I want to receive important support related alerts via text to my mobile device

No, I do not want to receive important support related alerts via text to my mobile device

Physical Address Information

Physical Address *

Physical Address 2

Physical Zip Code * -

Physical City *

Physical State * Alabama (AL)

Mailing/Shipping Address Information

Shipping Address Same As Physical Address

Shipping Address *

Shipping Address 2

Shipping Zip Code * -

Shipping City *

Shipping State * Alabama (AL)

Alternate Contact #1

Alternate Contact Name

Telephone Number Phone Type Select

Contact Email

Alternate Contact #2

Alternate Contact Name

Telephone Number Phone Type Select

Contact Email

SUBMIT

Sub-site Configuration

This section will ask some general setup questions about this Sub-site.

19. What kind of Sub-site will this office be?
- Select **Single Office (most common)** if this is a single office.
 - Select **Main Site with Sub-offices** if this office will have sub-offices under it.
20. How will this Sub-site send tax return data?
- Select **To the IRS via our Central Site (Transmitter)** if the Sub-site will transmit their own returns. **Note:** The Main Site / Master ID will still receive copies of these returns.
 - Select **To the Main site for Review (Feeder)** if this site will have its Main Site / Master ID review and transmit returns to the IRS via our Central Site.
21. Would you like to add Business Software to this site (additional charges may apply)?
- **Yes – please add the Base Business PPR Package (\$165) to this site** – which includes 1 business return as part of the package. Cost per return after the first one is \$40 each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the offseason).
 - **Yes – please add the Business PPR5 Bundle Package (\$300) to this site** – which includes 5 business returns as part of the package. Cost per return after the 1st 5 is \$35/each. (Software charges will be incurred and invoiced to the main site immediately upon

selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the offseason)

- **Yes – please add the “Unlimited” Business Package (\$1,099) to this site** – (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site).
- **No – This site does NOT want Business Software**

22. Which affiliate programs would you like this Sub-site to have access to?

- Select the affiliate programs you would like this Sub-site to see during enrollment

Note: The site can also choose to automatically add their selected ancillary products to each bank product return, including a markup amount, if allowed.

23. Which banks would you like your Sub-sites to partner with?

- Select the bank(s) you want to make available to your Sub-sites for enrollment.

24. Who will print checks for this site?

- Select **This site (Return owner)** if this site prints their own checks.
- Select **Main site (Tier owner)** if this sites parent will print the checks.
- Select **Service Bureau (Main site)** – if the SVB will print the checks.

25. Do you want to allow this Sub-site to add on to the Service Bureau Fee during enrollment?

- Select **YES** – if you would like to allow your Sub-site to Add on to the Service Bureau Fee during enrollment
- Select **NO** – if you do not want your Sub-site to Add on to the Service Bureau Fee during enrollment

26. Do you want to allow this Sub-site to add on to the Transmitter Fee during enrollment?

- Select **YES** – if you would like to allow your Sub-site to Add on to the Transmitter Fee during enrollment.
- Select **NO** – if you do not want your Sub-site to Add on Transmitter Fee during enrollment.

Note: Any Transmitter Add on amounts will incur the Transmitter Admin Fee based on the applicable tier that can be found in the Transmitter Admin Fee Agreement.

27. Do you want to allow this Sub-site to collect a Bank Product e-File Fee during enrollment?

- Select **YES** – if you would like to allow your Sub-site to collect a Bank Product e-File Fee during enrollment.
- Select **NO** – if you do not want your Sub-site to collect a Bank Product e-File Fee during enrollment.

Note: Any Bank Product e-File fees will incur the BP e-File Admin Fee based on the applicable tier that can be found in the BP e-File Admin Fee Agreement.

Sub-site Configuration

What kind of Sub-site will this office be? ¹

Single Office (most common) Tier Owner with Sub-offices

How will this Sub-site send tax return data?

To the IRS via our Central Site (Transmitter) To the Main Site for review (Feeder)

Would you like to add Business Software to this site (additional charges WILL apply)? ¹

Yes – please add the **Base Business PPR Package (\$165) to this site** – which includes 1 business return as part of the package. Cost per return after the first one is \$40 each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the off-season).

Yes – please add the **Business PPR5 Bundle Package (\$300) to this site** -which includes 5 business returns as part of the package. Cost per return after the 1st 5 is \$35/each. (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site, while Business returns will be invoiced to the main site on bi-weekly cycles during season and monthly in the off-season).

Yes – please add the **"Unlimited" Business Package (\$1,099) to this site** - (Software charges will be incurred and invoiced to the main site immediately upon selection/activation of this site).

No – This site does NOT want Business Software

Which affiliate programs would you like this Sub-site to have access to?

Audit Allies iProtect

Which banks will you allow this Sub-site to partner with?

<input type="checkbox"/> Refund Advantage ¹	
<input checked="" type="checkbox"/> Republic Bank ¹	
<input checked="" type="checkbox"/> TPG ¹	How will your Sub-site print their TPG Checks? <input type="radio"/> All Sub Sites will print checks online from TPG's website. <input type="radio"/> Let the Sub-sites choose their check printing preference. <input checked="" type="radio"/> All Sub-sites will print checks from within the tax software.

Who will print checks for the site?

This site (Return Owner) Main site (Tier Owner)

Do you want to allow this Sub-site to add on to the Service Bureau Fee during enrollment?

Yes No

Do you want to allow this Sub-site to add on to the Transmitter Fee during enrollment?

Yes No

Do you want to allow this Sub-site to add a BP e-File Fee amount during enrollment (Admin Fees Apply)? ¹

Yes No

[PREVIOUS](#) [NEXT](#) [EXIT](#)

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Sub-site Fee Configuration

This section allows you to setup your SVB Add-on Amount and your Transmitter Add-on Amount for individual sites. This is where you will assign fees to your individual sites and add your SVB add-on fee in each of the bank's fee fields. EMP will validate the fees entered so they do not exceed the limits designated by the banks.

Note: If you are not charging a SVB fee **you must enter 0**. If you are adding on to the Transmitter fee, it must be between \$2 and the maximum amount available.

16. Enter the amounts for this Sub-site. Make edits if necessary.

17. Click the **NEXT** button to continue.

Service Bureau & Multi-Office EMP User Guide

Sub-site Fee Configuration

Service Bureau Fees

Please enter the Service Bureau Fee amount for this Sub-site. [i](#)

TPG	Maximum available for Desktop : (\$89.00) <input style="width: 50px;" type="text" value="50.00"/>	Total Service Bureau Fee: \$60.00
Refund Advantage	Maximum available for Desktop : (\$89.00) <input style="width: 50px;" type="text" value="50.00"/>	Total Service Bureau Fee: \$60.00
Republic Bank	Maximum available for Desktop : (\$89.00) <input style="width: 50px;" type="text" value="50.00"/>	Total Service Bureau Fee: \$60.00

[EDIT](#)

Transmitter Fees

Important Notice: The Transmitter will ADD a variable Administrative Fee based on the **Transmitter Add-On** amount entered by you and / or any of your Sub-sites (if applicable). [Click here](#) to read the **Transmitter Add-On Service Terms and Conditions Agreement** and fee schedule. This additional fee **does NOT** apply to the **Add-On Service Bureau Fee** or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Please enter the Transmitter Fee amount for this Sub-site. [i](#)

TPG	Maximum available for Desktop : (\$150.00) <input style="width: 50px;" type="text" value="10.00"/>	Total Transmitter Fee: \$36.95
Refund Advantage	Maximum available for Desktop : (\$150.00) <input style="width: 50px;" type="text" value="10.00"/>	Total Transmitter Fee: \$36.95
Republic Bank	Maximum available for Desktop : (\$150.00) <input style="width: 50px;" type="text" value="10.00"/>	Total Transmitter Fee: \$36.95

[EDIT](#)

Technology Fees

Important Notice: The Transmitter will ADD a variable Administrative Fee based on the **Technology Add-On** amount entered by you and / or any of your Sub-sites (if applicable). [Click here](#) to read the **Technology Add-On Service Terms and Conditions Agreement** and fee schedule. This additional fee **does NOT** apply to the **Add-On Service Bureau Fee** or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Please enter the Technology Fee amount for this Sub-site.

TPG	Maximum available for Desktop : (\$11.00) <input style="width: 50px;" type="text" value="0.00"/>	Total Technology Fee: \$4.00
Refund Advantage	Maximum available for Desktop : (\$11.00) <input style="width: 50px;" type="text" value="0.00"/>	Total Technology Fee: \$4.00
Republic Bank	Maximum available for Desktop : (\$11.00) <input style="width: 50px;" type="text" value="0.00"/>	Total Technology Fee: \$4.00

[EDIT](#)

Please note: The amounts you enter in the Service Bureau fee field are in addition to the Base Service Bureau Fee, while the amount you enter into the Transmission Fee field will be in addition to the \$25.95 Transmitter fee, per Bank Product. You only need to enter any "Add-On" amounts that you would like to collect.

[PREVIOUS](#)
[NEXT](#)
[EXIT](#)

Activation

18. Review the information by clicking the tabs across the top and click **EDIT** to modify the information.

19. Click the **ACTIVATE** button when complete.

Activate This Site

Sub-site Office Information Sub-site Configuration Sub-site Fee Configuration

Sub-site	
EFIN	
Company Name	Tax Shack Too
Primary Contact First Name	Stuart
Primary Contact Last Name	Smally
Physical Address	1611 9th St Ct NW
City, State, Zip	Gig Harbor WA, 98332
Office Phone	
Alternate Phone	222-555-2222
Primary Email	ssmally@taxshacktoo.com
Alternate Contact	

Software Identification Information	
User ID	
Transmission Password	
Master ID	

Parent Account	
EFIN	
Company Name	Multi Service Incorporated
Owner First Name	John
Owner Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles CA, 90063

[EDIT](#) [PREVIOUS](#) [NEXT](#) [ACTIVATE](#)

If you elected to have uTax manage the enrollment for your Sub-sites, **no further action is needed.** Partner Support will continuously send email reminders until enrollment has been submitted and our enrollment team will follow up with each site until Approved.

If you elected to manage your own enrollment, after activating your Sub-site a pop-up window will appear. If you are ready to proceed with enrollment, click the **ACTIVATE & ENROLL NOW** button and proceed to Step 2 in the [Bank Enrollment](#) section below. If you are not ready to proceed with enrollment, click the **ACTIVATE & ENROLL LATER** button. Return to the OMG and begin with Step 1 in the [Bank Enrollment](#) section below when you are ready to enroll.

If you have confirmed the details for this Sub-site and wish to proceed to Bank Enrollment, click Activate & Enroll NOW. If you wish to activate this Sub-site and complete Enrollment later, click Activate & Enroll Later. If you do not wish to activate this site at this time, click Exit.

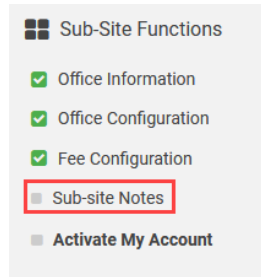
Please note that once activated, certain features or sections may become unavailable or restricted.

[ACTIVATE & ENROLL NOW](#) [ACTIVATE & ENROLL LATER](#) [EXIT](#)

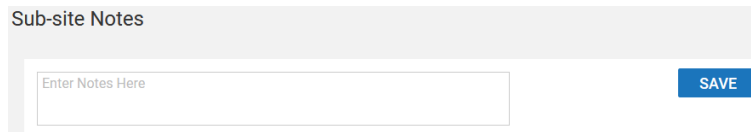
Sub-site Notes

With Notes, you can enter Sub-site specific information. Notes are not required and are for YOUR use only. Sub-sites do NOT see these notes. Notes are saved with a date and time stamp. Proceed to step 18 to add a note, otherwise skip to step 20.

16. Click the **Sub-site Notes** option under Sub-site Functions on the left to access the notes feature.



17. Click the **Save** button to continue and then click **Activate My Account** on the menu on the left.

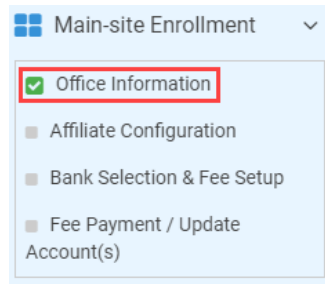


A screenshot of the 'Sub-site Notes' form. It features a text input field with the placeholder text 'Enter Notes Here' and a blue 'SAVE' button to its right.


Bank Enrollment

The following instructions are for tax offices offering Bank Products to their clients.

1. Enrolling offices:
 - a. **To enroll your Main Office:** Under the **Main-site Enrollment** section in the left pane, click on the **Office Information** menu item.



- b. **To enroll a Sub-site:** Click the enrollment icon in the View/Edit Enrollment column for the Sub-site.

Status	Company	User ID	Contact	EFIN	Software Type	Active Bank	Submission Date	Enr. Status	View/Edit Enrollment
Active	Jack Tax Service	43178	Mullen, Jack	321456	D			Incomplete	

Office Information

2. The **Office Information** screen:

- a. **If you are enrolling your Main Office:** If the Office Information screen is accurate, click **NEXT**, otherwise click **EDIT**, make corrections, click **SAVE**, then click **NEXT**.

Office Information

Site Information

Company Name	Multi Service Incorporated
Primary Contact First Name	John
Primary Contact Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles CA, 90063
Office Phone	(323) 555-5111
Primary Email	johnsample@yahoo.com
Additional Email Address	johnsample@yahoo.com

EDIT

PREVIOUS **NEXT**

- b. **If you are enrolling a Sub-site outside of the Sub-site Activation process:**
- i. Click **VERIFY**

Office Information

Site Information

Company Name	East Side Tax and Accounting
Primary Contact First Name	John
Primary Contact Last Name	Smith
Physical Address	123 East Main
City, State, Zip	Gig Harbor WA, 98332
Office Phone	206-555-6565
Primary Email	jsmith@yahoo.com
Support Notification Email	jsmith@yahoo.com

VERIFY

- ii. Make changes if required then click **SAVE**.

Service Bureau & Multi-Office EMP User Guide

Office Information Additional EFIN

Company Name * East Side Tax and Accounting

Primary Contact First Name * John

Primary Contact Last Name * Smith

Title * Select

Office Phone * 206-555-6565 Phone Type * Select

Phone Type * Select

Primary Email Address * jsmith@yahoo.com

Support Notification Email Address * jsmith@yahoo.com

Same as Primary Email Address

What is your preferred support language? * English Spanish

Would you like to opt-in to receive important support related alerts via text to your mobile device? * Yes, I want to receive important support related alerts via text to my mobile device No, I do not want to receive important support related alerts via text to my mobile device

Alternate Contact #1

Alternate Contact #2

Alternate Contact Name * Alternate Contact Name *

Alternate Telephone Number * Phone Type * Select Alternate Telephone Number * Phone Type * Select

Alternate Contact #1 Email Address * Alternate Contact #2 Email Address *

SAVE **BACK**

iii. Click **NEXT**.

Office Information


Site Information

Company Name	East Side Tax and Accounting
Primary Contact First Name	John
Primary Contact Last Name	Smith
Physical Address	123 East Main
City, State, Zip	Gig Harbor WA, 98332
Office Phone	206-555-6565
Primary Email	jsmith@yahoo.com
Support Notification Email	jsmith@yahoo.com

EDIT

PREVIOUS **NEXT**

Affiliate Program Configuration

1. Would you like to Pre-Set Configurations for your Affiliate Program(s)? (The ERO will have an opportunity to consult with the taxpayer and remove the product before final purchase). **Note:** To view information about each one of these programs click the **Information Icon** 
 - a. Selecting **Yes**, we will configure your tax program with the settings you have chosen.

Important Note: The Mark-up Amount you specify here will be pre-set into all versions of the software associated with this site, BUT YOU WILL STILL HAVE THE ABILITY TO OVERRIDE THE AMOUNT SET ABOVE, IN THE SOFTWARE BILLING SETUP. This pre-set option is offered as a convenience, and we are not liable for any changes made to the Mark-up Amount by the software end users.
 - b. Selecting **No**, will not pre-configure your tax program with any affiliate settings. **Important Note:** Depending on your security settings, end users may be able configure these settings in their software billing setup.

2. Click **NEXT** to continue.

Ancillary Program Configuration Bank :

By participating in our Ancillary Product programs, you can offer your clients valued-added services seamlessly during the tax preparation process and have an opportunity to increase your revenue.

By selecting Yes and completing the section below, your tax software will be automatically pre-configured with the ancillary product(s) you have selected and where allowed, your markup amount(s).

Audit Allies (Base Fee \$59.95)

- Include Audit Protection at an affordable Price
- Earn Additional Revenue with Mark-Up and Rebate Opportunities
- Incentive Opportunities [see Incentive Sheet]

iPROTECT (Base Fee \$53.95)

- Protects your client from ID Theft with real time monitor tools and Helps with Restoration
- Earn Additional Revenue with Mark-Up
- Incentive Opportunities (See Incentive Sheet)
- Reasonably Priced and No Upfront Cost for Your Client

Would you like to Pre-Set Configurations for your Ancillary Product Program(s)? (Note - the ERO will have an opportunity to consult with the taxpayer and remove the product before final purchase)

Yes No

Audit Allies (Base Fee \$59.95)

Would you like to add Audit Allies to all bank product returns automatically by default? (Note - the ERO will have an opportunity to consult with the taxpayer and remove the product before final purchase)

Yes No

Please enter the Amount of Mark-up you would like to pre-set: \$ (less than \$59.95)

I acknowledge that the Mark-up Amount I specify above will be pre-set into all versions of the software associated with my account, BUT THE END USER OF THE SOFTWARE WILL STILL HAVE THE ABILITY TO OVERRIDE THE AMOUNT SET ABOVE, IN THE SOFTWARE BILLING SETUP. We offer this pre-set option as a convenience and shall not be liable for any changes made to the Mark-up Amount by the software end users.
(Note - Audit Allies Mark-up amounts are paid with tax prep fee funding to the EFIN owner bank account by Audit Allies).

iPROTECT (Base Fee \$53.95)

Would you like to add iPROTECT to all bank product returns automatically by default? (Note - the ERO will have an opportunity to consult with the taxpayer and remove the product before final purchase)


Yes No

Please enter the Amount of Mark-up you would like to pre-set: \$ (less than \$53.95)

I acknowledge that the Mark-up Amount I specify above will be pre-set into all versions of the software associated with my account, BUT THE END USER OF THE SOFTWARE WILL STILL HAVE THE ABILITY TO OVERRIDE THE AMOUNT SET ABOVE, IN THE SOFTWARE BILLING SETUP. We offer this pre-set option as a convenience and shall not be liable for any changes made to the Mark up Amount by the software end users.
(Note - iPROTECT Mark-up amounts are paid with tax prep fee funding to the EFIN owner bank account by iPROTECT).

Bank Selection & Fee Setup

In this section, you will select a bank and configure the add-on amount. This information will be sent automatically to the Central Site and to your selected bank once you have completed the EMP Enrollment process.

1. Select the bank you would like to partner with for this upcoming tax season. Click the Information icon  next to the bank for more details about their program. Select **NONE** if you do not want to enroll with a bank. If **None** was selected in step one, click **NEXT** to proceed, otherwise, continue below.

Service Bureau & Multi-Office EMP User Guide

Optional Bank Product Add-on Amounts

Service Bureau Fees

Would you like to add an additional amount that will be combined with the SVB fee below?

- Yes
 No

Please enter the additional amount you would like to collect for each funded Bank Product.

Transmitter Fees

Would you like to add an additional amount that will be combined with the Transmitter fee below?

- Yes
 No

BP e-File Fees

Would you like to collect an e-File amount for each Bank Product?
 (Admin Fee will apply)

- Yes
 No

Important Notice: The Transmitter will ADD a variable Transmitter Admin Fee (as displayed on the right) based on the **Add-On Transmitter Fee** amount entered by you. [CLICK HERE](#) to read the **Transmitter Add-On Service Terms and Conditions Agreement** and **FEE SCHEDULE**. This additional fee **does NOT** apply to the **Service Bureau Add-on Fee** or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Important Notice: The Transmitter will ADD a variable e-File Admin Fee (as displayed on the right) based on the **BP e-File Fee** amount entered by you. [CLICK HERE](#) to read the **BP e-File Fee Service Terms and Conditions Agreement** and **FEE SCHEDULE**. This additional fee **does NOT** apply to the **Service Bureau Add-on Fee** or any other fee category. Please carefully consider your options when selecting your Add-On Fee amounts and / or categories.

Important Notice: TPG will deduct an additional Processing Fee for filings which include a document preparation fee from the taxpayer refund. Please reference the TPG User Manual for additional information.

Your selected bank is : **TPG**

***Enter your Service Bureau Add-on amount:**
 (Maximum available: \$ 79)

Service Bureau Fee: \$ 20

Total Service Bureau Fee: \$ 30.00

***Enter your Transmitter Add-on amount:**
 (Maximum available: \$ 139)

Transmitter Fee & Transmitter Admin Fee: \$ 41.95

Total Transmitter Fee: \$ 51.95

***Enter your optional BP e-File amount:**
 (Min/Max available amount: \$10-\$91)

BP e-File Admin Fee: \$ 5.00

Total BP e-File Fee: \$ 25.00

****Enter your Document Preparation Fee (\$0 or \$1 - \$150):**

TPG Processing Fee: \$ 5.00

Total Document Preparation Fee: \$ 25.00

Optional TPG Check Print Fee Incentive Yes No

Select Yes if you would like to opt-in to the TPG's \$12 Taxpayer Check Fee Program. Taxpayers will be charged this fee on per Refund Transfer (RT) disbursement check. Fast Cash Advance and RT re-prints are not charged this fee. If you choose to opt-in to this program, Participating EROs will receive \$4 of each \$12 fee from TPG.

Technology Fee: \$ 4
 Total Technology Fee: \$ 4
 TPG- Bank Product Fee: \$ 39.95

Transmitter Admin Fee Schedule	
Your Add-on Amount per Bank Product	Administrative Fee
\$10.00 - \$19.99	\$4
\$20.00 - \$29.99	\$5
\$30.00 - \$39.99	\$6
\$40.00 - \$49.99	\$7
\$50.00 - \$59.99	\$8
\$60.00 - \$79.99	\$9
\$80.00 - \$90.99	\$10
\$91.00 - \$150.00	\$11

BP e-File Admin Fee Schedule	
Your BP e-File Amount per Bank Product	Administrative Fee
\$10.00 - \$19.99	\$4
\$20.00 - \$29.99	\$5
\$30.00 - \$39.99	\$6
\$40.00 - \$49.99	\$7
\$50.00 - \$59.99	\$8
\$60.00 - \$79.99	\$9
\$80.00 - \$91.00	\$10

TPG Processing Fee	
Your Document Preparation Fee per Bank Product	Processing Fee
\$0	\$0
\$1.00 - \$50.00	\$5
\$50.01 - \$100.00	\$7
\$100.01 - \$150.00	\$10

Total Fees Deducted per ACH or Debit Card Bank Product: \$175.90

Total Fees Deducted per Check Printed Bank Product: \$175.90

- I understand that the total fees listed above will be deducted from each Bank Product processed (this amount DOES NOT include Tax Preparation fees, state Bank Product Banks fees, iProtect, or Protection Plus fees).
- Agree to Bank Terms and Conditions
- By checking this "I Agree" box, you acknowledge that you have read, understand and agree to the Transmitter Add-On Service Terms & Conditions and **Transmitter Admin Fee Schedule**
- By checking this "I Agree" box, you acknowledge that you have read, understand and agree to the BP e-File Fee Service Terms & Conditions and **BP e-File Admin Fee Schedule**

Please note: Any Add-on fee entered above cannot be changed after your first return has been submitted or after E-filing has begun. Please make sure the amounts entered are correct.

*Will be paid according to your agreement.

** Will be paid upon funding, directly from your banking partner.

[PREVIOUS](#) [NEXT](#)

[EXIT](#)

- Determine if you would like to collect an additional **Add-on Amount** for one or more categories shown below.

When you add on to the **Service Bureau, Transmitter Fee, and/or BP e-File Fee**, you can collect additional add-on amounts outside of your Tax Preparation charge, as categorized on the billing schedule/bank application. Click on the icon for more information.

Bank Selection and Fee Setup


Which bank would you like to partner with for this tax season?

- None TPG Republic Bank Refund Advantage

Important Note: By utilizing any of the optional Bank Product Add-on Amounts categories, you will be requesting that the amount entered be deducted from your client's tax refund and be combined with the fees you currently pay as agreed upon in your uTax Agreement. Please note that **Admin Fees** apply to Transmitter and BP e-File Fee categories. The Service Bureau Fee category and any bank specific fee categories do not incur Admin Fees (excluding the TPG Document Prep fee).


Optional Bank Product Add-on Amounts

Service Bureau Fees

Would you like to add an additional amount that will be combined with the SVB fee below? 


- Yes
 No

Transmitter Fees

Would you like to add an additional amount that will be combined with the Transmitter fee below? 
(Admin Fee will apply)

- Yes
 No

BP e-File Fees

Would you like to collect an e-File amount for each Bank Product? 
(Admin Fee will apply)

- Yes
 No

- a. Would you like to add an additional add-on amount that will be combined with the uTax Service Bureau fee below?
- Select **Yes** to open a data entry box where you can enter an add-on amount up to the amount listed in parenthesis.
 - Select **No** if you do not want an add-on amount.

Note: The amount that you add on to your current Service Bureau fee will be what is paid to you for all **funded bank product** returns.

- b. Would you like to add an additional add-on amount that will be combined with the Transmitter fee below?

Note: The amount that you add on to the current Transmitter fee will be what is paid to you for all **funded bank product** returns.

Important Notice: The Transmitter will ADD a variable e-File Admin Fee (as displayed on the right) based on the **Transmitter Add-on Amount** entered by you. The Service Bureau Fee category and any bank specific fee categories do not incur Admin Fees (excluding the TPG Document Prep fee). Please carefully consider your options when selecting your Add-On Amounts and / or categories.

Transmitter Admin Fee Schedule	
Your Add-on Amount per Bank Product	Administrative Fee
\$10.00-\$19.99	\$4
\$20.00-\$29.99	\$5
\$30.00-\$39.99	\$6
\$40.00-\$49.99	\$7
\$50.00-\$59.99	\$8
\$60.00-\$79.99	\$9
\$80.00-\$90.99	\$10
\$91.00-\$150.00	\$11

- Selecting **Yes** opens a data entry box where you can enter an amount up to the amount listed in parenthesis.
 - Selecting **No**, means you will have no add-on amount added on to the Transmitter fee you currently pay.
- c. Would you like to collect an e-File add-on amount for each Bank Product?
- a. Select **Yes** and the BP e-File Fee section will appear.
 - i. Select one of the predefined amounts or select **Other** to key a custom amount up to the amount listed in parenthesis.
 - ii. If you select Other, the amount entered must be between \$10-\$91.

Note: The amount that you enter in the BP e-File fee field will be what is paid to you for all **funded bank product** returns according to the BP e-File Fee Service Terms and Conditions Agreement.

Important Notice: The Transmitter will ADD a variable e-File Admin Fee (as displayed on the right) based on the **BP e-File Add-on Amount** entered by you. The Service Bureau Fee category and any bank specific fee categories do not incur Admin Fees (excluding the TPG Document Prep fee). Please carefully consider your options when selecting your Add-On Amounts and / or categories.

BP E-File Admin Fee Schedule	
Your Add-on Amount per Bank Product	Administrative Fee
\$10.00-\$19.99	\$4
\$20.00-\$29.99	\$5
\$30.00-\$39.99	\$6
\$40.00-\$49.99	\$7
\$50.00-\$59.99	\$8
\$60.00-\$79.99	\$9
\$80.00-\$91.00	\$10

***Enter your optional BP e-File amount:**
(Min/Max available amount: \$10-\$91)

BP e-File Admin Fee:

Total BP e-File Fee:

Select

Select

\$10

\$20

\$40

\$60

\$80

Other

- Selecting **No**, means you do not want to utilize this fee category
3. Click to confirm your **understanding of fees** and to agree to the Terms and Conditions listed below and then click **NEXT** to continue.

I understand that the total fees listed above will be deducted from each Bank Product processed (this amount DOES NOT include Tax Preparation fees, state Bank Product Banks fees, iProtect, or Protection Plus fees).

Agree to Bank [Terms and Conditions](#)

By checking this "I Agree" box, you acknowledge that you have read, understand and agree to the Transmitter Add-On Service Terms & Conditions and [Transmitter Admin Fee Schedule](#)

By checking this "I Agree" box, you acknowledge that you have read, understand and agree to the BP e-File Fee Service Terms & Conditions and [BP e-File Admin Fee Schedule](#)

Please note: Any Add-on fee entered above cannot be changed after your first return has been submitted or after E-filing has begun. Please make sure the amounts entered are correct.

**Will be paid according to your agreement.*

*** Will be paid upon funding, directly from your banking partner.*

PREVIOUS **NEXT** EXIT

Fee Payment

Enter your bank account information in the **Bank Product Fee Deposit** section. Then click **NEXT**.

Note: If you are completing the enrollment application for your main site, you can also review the **Fee Reimbursement** and **Payment Information** that you completed earlier during Main-site activation.

Bank Product Fee Deposit

If you are processing tax returns at your main office, enter the bank account where you want your tax preparation fees to be deposited.

Fee Reimbursement Account

We request this information to ensure that your add-on amounts are processed and delivered to you timely and accurately. All Add-on amounts associated with Service Bureau Fees, Transmitter Fees, iProtect Mark-up Amounts, and any other credits, including any Add-on amounts collected on behalf of Sub-sites, will be credited to the Main site account according to the terms of your uTax Agreement. Any charges and/or outstanding balances will be applied against the credit amounts before deposit.

Payment Information

Each tax season, uTax processes invoices for e-Filed returns that did not include a Bank Product and/or for an outstanding Balance Due on Accounts that are carried forward into the next tax season, including the Cash Saver program. We request payment information to ensure that these invoices can be processed timely and accurately,

Your account will only be charged if a balance exists after add-on amount reimbursement credits are applied (if applicable), per payment terms as stated in your uTax Agreement.

Note: By completing this information, you are authorizing uTax Software to charge the account that is designated for any remaining balance. You will receive statements from uTax for your records. Statements are also available for viewing in EMP by clicking **Statement Details by Tax Year** under the **Reports** menu. If you have any questions, please contact your Account Manager at 844-440-UTAX (8829).

5. Enter your bank account information in the **Fee Reimbursement Account** and **Payment Information** sections. **Important Note:** Completion of the **Payment Information** section is required for all uTax partners.
6. **Do you want uTax to always use this payment method below to collect E-Filing charges? Select Yes or No.**
7. **Select** the check box in the that authorizes uTax, LLC to electronically credit your account and to electronically debit your account to correct erroneous credits.
8. Click **NEXT**.

Service Bureau & Multi-Office EMP User Guide

Fee Payment / Update Account(s)

Bank Product Fee Deposit

Enter the bank account information where your bank product fees (tax preparation, etc.) will be deposited by your selected Banking Partner.

Bank Name * Bank of America

Name on Deposit Account * Ben McDonald ACCT Type * Checking

Bank Routing Number (RTN) * XXXXX3123 Confirm Bank Routing Number (RTN) XXXXX3123

Bank Account Number (DAN) * XXXXX4321 Confirm Account Number (DAN) * XXXXX4321

Fee Reimbursement Account

Enter the bank account information where your Fee Reimbursements will be deposited by uTax.

All Add-on amounts associated with Service Bureau Fees, Transmitter Fees, and/or iProtect Markup Fees, and any other credits, including any Add-on amounts collected on behalf of Sub-sites, will be credited to the Main site account per the terms of your License Agreement. **Any charges and/or outstanding balances will be applied against the credit amounts.** To expedite the payment of credit balances to our partners, payments will be sent electronically via ACH directly to your bank account.

Copy From Select

Bank Name * Credit Union

Name on Deposit Account * John Sample ACCT Type * Checking

Bank Routing Number (RTN) * XXXXX3123 Confirm Bank Routing Number (RTN) XXXXX3123

Bank Account Number (DAN) * XXXXXXXXXXXXXXX1111 Confirm Account Number (DAN) * XXXXXXXXXXXXXXX1111

I authorize uTax Software, LLC, to electronically credit my account (and if necessary, to electronically debit my account to correct erroneous credits).

Payment Information

Enter the account information to be used as your Payment Method on file.

uTax requires a designated Payment Method for any outstanding balances. Outstanding balances may include e-File fees, deferred software payments, marketing services, or other amounts owed to uTax.

Add on amounts collected on your behalf from Bank Products will offset any outstanding balances, where applicable.

Select Credit Card ACH/EFT

uTax e-Filing Fees Summary

e-File Fees	Amount
uTax Federal e-File Fee	\$ 0
uTax State e-File Fee	\$ 0

Do you want uTax to always use this payment method below to collect E-Filing charges? Note: By selecting 'Yes', your projected Add-on Funds must be sufficient to cover anticipated E-Filing charges. uTax will first apply any Add-on Funds or Credit Balance toward any E-Filing invoices.

Yes - Always use my Payment Information below for any E-Filing charges incurred

No - First use my Add-on Funds (or Credit Balance) for any E-Filing charges incurred, then use my Payment information below

Copy From Select

Bank Name * Credit Union

Name on Deposit Account * John Sample ACCT Type * Checking

Bank Routing Number (RTN) * XXXXX3123 Confirm Bank Routing Number (RTN) XXXXX3123

Bank Account Number (DAN) * XXXXXXXXXXXXXXX1111 Confirm Account Number (DAN) * XXXXXXXXXXXXXXX1111

I authorize uTax Software, LLC to charge the ACH/EFT listed above for any outstanding balance on my account according to my license agreement.

PREVIOUS NEXT EXIT

Bank Enrollment Application

If enrollment information was available from the prior year for your selected bank, many of the fields will be auto filled for you. Please verify imported information before proceeding.

The fields that appear on your bank application vary depending on the bank you selected, but all bank applicants are required to complete the **EFIN Owner Information** and acknowledge the **Technology Fee** and **Remote Signature** sections detailed below.

1. Please complete all the required screens in the bank application, including the Remote Signature acknowledgement screen shown below, and then click **NEXT** to continue through the application.

EFIN Owner Information

The IRS automatically validates the EFIN on all transmitted returns against their records. We recommend logging into the [IRS e-services website](#) to obtain your e-File Summary Information and Tracking Number, to ensure the information you are submitting through the enrollment process matches what the IRS has on record.

1. Complete the EFIN Owner Information and then click the **NEXT** button.

Please make sure that the EFIN Owner Information below matches what appears on your IRS e-File Summary Page, accessible by logging in to e-Services.

EFIN Owner Company Name * 11-17 H

EFIN Owner Corporation Type * Sole Proprietorship

EFIN Owner Company EIN

EFIN Owner First Name * First

EFIN Owner Last Name * Last

EFIN Owner Business Title * Owner

EFIN Issued Address * 123 test dr

EFIN Issued Zip Code * 98101 -

EFIN Issued City * Seattle

EFIN Issued State * Washington (WA)

EFIN Tracking Number

EFIN Owner's Phone *

EFIN Owner's Fax

EFIN Owner's Mobile *

EFIN Owner Home Phone *

EFIN Owner's Email Address *

EFIN Owner's Date of Birth * 01/01/1980

EFIN Owner's SSN *

EFIN Owner's ID Number (DL, Government Issue ID, etc) *

EFIN Owner's ID State * Washington (WA)

EFIN Owner's Type ID * Driver's License Numbr

EFIN Owner's ID Expiration * 01012024

What is your EFIN registered under? * SSN

PREVIOUS NEXT EXIT

Technology Fee

A pass-through Technology Fee of \$4 will be assessed on ALL returns electronically filed through Central Site. In prior tax seasons, this \$4 Technology Fee was only charged to bank product returns (subject to state laws).

The Technology Fee will allow for an optional Add-On fee. Note: An admin fee will be charged by CPTS in connection with the processing of the optional Tech Fee Add-on.

Technology Fee Admin Fee Schedule	
Your Add-on Amount per Return	Administrative Fee
\$0.00	\$0
\$2.00-\$4.00	\$1
\$4.01-8.00	\$2
\$8.01-\$11.00	\$3

1. Using the Yes/No button, indicate if you wish to add-on to the Technology Fee. If you select “Yes”, enter the amount you wish to add in the “Technology Add on Amount” field. The Add-on fee limits and applicable Administrative Fees are displayed in the chart to the right of the field.

- Place a checkmark in the Fee Acknowledgement section and then click the “Next” button to advance to the Remote Signature page.

Technology Fee Add on

Would you like to Add on to the Technology Fee Field?

Yes No

Technology Add on Amount:

Tech Admin Fee Schedule	
Your Add on amount per Return	Administrative Fee
\$0	\$0
\$2.00 - \$4.00	\$1
\$4.01 - \$8.00	\$2
\$8.01 - \$11.00	\$3

Fee Acknowledgement

By checking this box, I understand and acknowledge that I will be incurring a \$ 4.00 Technology Fee per return electronically filed/acknowledged through my tax practice and that I have read and understand the [Technology Fee Terms & Conditions](#).

- Bank Products Returns – The \$ 4.00 Technology Fee will be deducted from the Taxpayers refund by your participating Bank Product Bank upon funding.
- Electronic Filing Only Returns – The \$ 4.00 Technology Fee will be charged to your Credit Card using the integrated “wallet” technology within the Tax Software.
 - A method of payment on file is required to be entered by you during software setup and / or prior to the first tax return submitted electronically.
 - This fee will appear on the Taxpayer Invoice to be collected upon completion of the tax return, within your normal collection process.

Important Reminders (please read carefully):

- Technology fees will be charged daily for Electronic Filing Only Returns by the provider CPTS E-Comm via a 3rd party payment processor.
- If the Payment Method on File in your Wallet is unsuccessful at any time, the User associated with the Wallet will receive a one-time email notification and be immediately turned off from transmitting any type of return. Remote Signature services will be automatically re-enabled once unpaid invoices are paid via the Wallet.

PREVIOUS NEXT EXIT

Please note that information submitted is validated and prepared for Enrollment submission at the end of this wizard in the last tab

Remote Signature Option

Due to the increased use of remote signature technology within the tax industry as more tax professionals provide tax preparation services without requiring the presence of the taxpayer at their office, our current integrated remote signature provider has changed their policy and is now charging to offer this service. Please note that we receive no part of the provider’s fee. Click [here](#) for more information.

- New this Year! You now have the ability to add on up to \$5.00 per signature to the Remote Signature File fee to help increase your revenue. The additional amount will be charged to your “Wallet” payment method in the software, added to the invoice for your taxpayer and will be paid back to you according to the terms of your agreement.
 - Note: In order for the Remote Signature Fee to be added to your taxpayer’s invoice, this box at the bottom of the Client Data Screen must be selected.

Remote Signature

Does the Taxpayer consent to receive and sign their documentation remotely?

Include Remote Signature charge(s) on the invoice?

- If you wish to add-on to the Remote Signature Fee, select “Yes” and then enter an amount up to \$5.00 in the field labeled “Remote Signature Add on Amount”.

- Place a checkmark in the Fee Acknowledgment field to indicate your agreement and then click the **NEXT** button.

EFIN Owner Information
Technology Fee
Remote Signature
Office Information
Business Owner Information
General Questions

Remote Signature

Remote signature technology allows a taxpayer to electronically affix their signature to tax returns. The use of remote signatures is increasing as more tax professionals provide tax preparation services without requiring the presence of the taxpayer at their office.

New this Year! You now have the ability to Add on up to \$5 per Remote Signature fee to help increase your revenue. The additional amount will be charged to the Credit Card you assign in your "wallet", added to the invoice for your taxpayer, and will be paid back to you according to the terms of your agreement.

Would you like to Add on an additional fee to the Remote Signature service?

Yes No

Remote Signature Add on Amount:

Fee Acknowledgement

By checking this box, I understand and acknowledge that if I choose to use the remote signature feature integrated within the tax software program, the following terms and fees will apply: [Click here to learn more about this feature.](#)

- A \$10.00 per SSN fee applies (e.g. a joint return with both primary and spouse using remote signature = \$20.00 total fee). If the taxpayer signature is required more than once within the return (e.g. Forms 1040, 8879, State Return), only \$10.00 will be charged per taxpayer vs per Form, including if subsequent remote signature(s) are needed on the same and / or an amended return.
- A method of payment on file is required to be entered by you during software setup and / or prior to the first remote signature request.

Important Reminders (please read carefully):

- Remote Signature fees will be charged daily** by the provider CPTS E-Comm via a 3rd party payment processor. This fee **does not apply** to taxpayer signatures obtained in-person via Signature Pad and On-Screen methods.
- If the Payment Method on File in your *Wallet* is unsuccessful at any time, the User associated with the *Wallet* will receive a **one-time email notification** and be immediately turned off from doing further remote signatures. Remote Signature services will be automatically re-enabled once unpaid remote signature invoices are paid via the *Wallet*.

PREVIOUS
NEXT
EXIT

Please note that information submitted is validated and prepared for Enrollment submission at the end of this wizard in the last tab

Enrollment Summary

- Finally, review the enrollment details by clicking the tabs indicated below. If any information is incorrect, click the **EDIT** button in that section to make the change.

Enrollment Summary
EFIN :
Bank :

To review your enrollment information, click on the tabs below. If information that appears on screen is incorrect, please click the edit button to make adjustments. To return to the Enrollment Summary page after your edits, simply click on the Enrollment Summary link in the left pane. Once you have confirmed your information, click the red Submit button below.

Office Information
Affiliate Configuration
Bank Selection & Fee Setup
Bank Enrollment
Fee Payment/Account Update(s)

Office Information

Company Name	Multi Service Incorporated
Primary Contact First Name	John
Primary Contact Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles, CA 90063
Office Phone	(323) 555-5111
Primary email	johnsample@yahoo.com
Additional Email Address	johnsample@yahoo.com

Software Identification Information

EFIN	143586
Master Identifier	MCD BEN
Master User ID	37219
Transmission Password	TESTPASS

EDIT
PREVIOUS
NEXT
SUBMIT

- When you are satisfied that all your information is correct, click the **SUBMIT** button to send the information to the bank for processing.

Enrollment Summary EFIN : Bank :

To review your enrollment information, click on the tabs below. If information that appears on screen is incorrect, please click the edit button to make adjustments. To return to the Enrollment Summary page after your edits, simply click on the Enrollment Summary link in the left pane. Once you have confirmed your information, click the red Submit button below.

Office Information Affiliate Configuration Bank Selection & Fee Setup Bank Enrollment Fee Payment/Account Update(s)

Office Information	
Company Name	Multi Service Incorporated
Primary Contact First Name	John
Primary Contact Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles, CA 90063
Office Phone	(323) 555-5111
Primary email	johnsample@yahoo.com
Additional Email Address	johnsample@yahoo.com

Software Identification Information	
EFIN	143586
Master Identifier	MCD8EN
Master User ID	37219
Transmission Password	TESTPASS

EDIT **PREVIOUS** **NEXT** **SUBMIT**

After clicking SUBMIT, you should see the following “Successful Enrollment” message. If you do not receive this message and / or receive an error message, contact Partner Support at 206-209-2653

Congratulations! Your enrollment submission was successful.

EXIT

The EFIN owner should receive an email from their selected bank in approximately 48 hours containing further instructions. If the email is not received, please contact the bank.

- **TPG** – (800) 779-7228 – <https://cisc.sbtpg.com>
- **Refund Advantage** – (800) 967-4934 – <https://www.refund-advantage.com>
- **Republic Bank** – (866) 491-1040 – <https://www.republicrefund.com>

You will also receive an automatic email notification from EMP (Notifications@EROSupport.com) confirming the submission of your bank enrollment application, and again, once it has been approved.

Checking Bank Enrollment Status

After completing the bank application, you can check the status in EMP.

1. The status of your application can be found in the **Enrollment Status** column on the **Office Management Grid**.

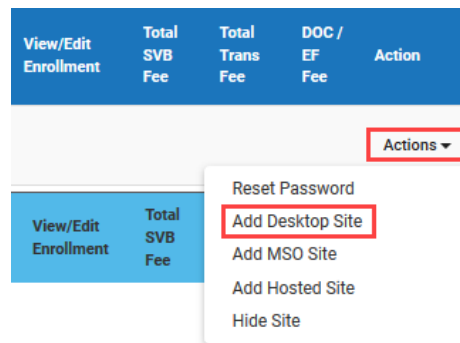
Status	Company	User ID	Contact	EFIN	Software Type	Active Bank	Bank App Subm.Date	Enrollment Status
Active	Multi Service Incorporated				D	TPG	09/14/2018 09:31	Pending

Please contact Partner Support at 206-209-2653 if you have any questions.

Service Bureau Adding Multi-Offices

Some Service Bureaus can create a multi-office “tier”. A tier is a Sub-site “main office” with a “Sub-site(s)” reporting to them, and/or sending returns to them. Follow the steps below to create a new tier.

1. Click the **Actions** button and then select **Add Desktop Site** to create the “main office”. Note: The site must be activated prior to completing this step.



2. Complete the required Sub-site Office Information, click **SUBMIT**, and then **NEXT** to continue.
3. To designate this office as a Multi-Office site (Tier), select **Tier Owner with Sub-offices** when answering *What kind of Sub-site will this office be?*

Sub-site Configuration

What kind of Sub-site will this office be? ⓘ

Single Office (most common) Tier Owner with Sub-offices

4. Answer the remaining questions and then click the **NEXT** button.
5. Complete the remaining configuration options and then **Activate** the office.

Service Bureau & Multi-Office EMP User Guide

- After the new Multi-Office site is activated, you can add Sub-sites under it by clicking the **Actions** button and then clicking **Add Desktop Site**.

Enr. Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	DOC / EF Fee	Action
Not Started					Actions ▼
Not Started					Reset Password Add Desktop Site View Archive Enable Office Management Hide Site
Not Started					

Note: Click the  icon next to the new site to view Sub-sites within the tier as indicated below.

Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Selected Bank	Submission Date	Enr. Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	DOC / EF Fee	Action	
Active				Applied	D	F			Not Started					Actions ▼	
Not Active		Parent ID	User ID	Contact	EFIN	Software Type	Transmit Type	Selected Bank	Submission Date	Enr. Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	DOC / EF Fee	Action
Not Active					D	F			Not Started					Actions ▼	
Not Active					D	F			Not Started					Actions ▼	

Sharing an EFIN

With the EMP, you can allow your Sub-sites to use an EFIN owned by a different office. To ensure an EFIN is shared properly, do the following:

- Make note of the EFIN of the office *loaning* the EFIN.

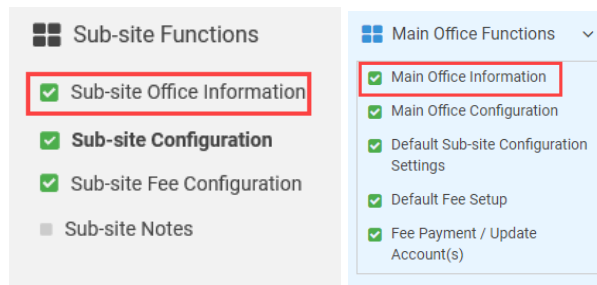
Status	Company	User ID	Contact	EFIN	Software Type	Transmit Type	Selected Bank	Submission Date	Enr. Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	DOC / EF Fee	Action
Not Active									Not Started					Actions ▼

- From the Office Management screen, open the office that will be *borrowing* the EFIN.

Active	Bens Tax Shack	
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Service Bureau & Multi-Office EMP User Guide

- From the Office Functions menu on the left, click **Sub-site Office Information** if a Sub-site is borrowing the EFIN, or **Main Office Information** if your Main site is borrowing the EFIN.



- Click the **EDIT** or **VERIFY** button.

Sub-site Office & Software Identification Information

Sub-site Information

EFIN	
Company Name	Bens Tax Shack
Business Owner First Name	Ben
Business Owner Last Name	McDonald
Physical Address	123 Main
City, State, Zip	Gig Harbor WA, 98332
Office Phone	
Alternate Phone	
Primary Email	
Alternate Contact	

EDIT

- Select **Sharing** from the EFIN dropdown menu.

Company Name *	<input type="text" value="Bens Tax Shack"/>	EFIN *	<input type="text" value="Sharing"/>
Primary Contact First Name *	<input type="text" value="Ben"/>	Enter EFIN this site is sharing *	<input type="text"/>
Primary Contact Last Name *	<input type="text" value="McDonald"/>	Physical Address Information	
Title	<input type="text" value="Select"/>	Physical Address *	<input type="text" value="1234 Main"/>
		Physical Address 2	<input type="text"/>

6. Type the **EFIN** from Step 1 in the field indicated below.

Company Name *	Bens Tax Shack	EFIN *	Sharing	
Primary Contact First Name *	Ben	Enter EFIN this site is sharing *	<input type="text"/>	
Primary Contact Last Name *	McDonald	Physical Address Information		
Title	Select	Physical Address *	1234 Main	
		Physical Address 2	<input type="text"/>	

7. Click the **SUBMIT** button.

Note: An EFIN can only be shared if the site that owns the Valid EFIN is activated and has submitted a bank application for that EFIN.

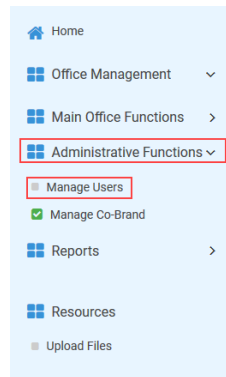
The EFIN is now shared. You can see that an EFIN is shared on the OMG, as the EFIN will have a bold letter 'S' to denote that the EFIN is one that is being borrowed (shared by the designated site). **Note:** Please allow 3 business hours for the uTax Partner Support staff to implement the change.

Test, Ben	111110 S	Not Started	MO-SO
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Managing EMP Users

It is possible to create EMP users. With this feature you can allow your manager or other staff members access to EMP, while limiting their access according to your needs.

1. From the left pane menu, click **Administrative Functions** and then **Manage Users**.



2. Click the **Plus** icon.

search user					
First Name	Last Name	Email	Username	Phone	Actions

The 'Actions' column contains a blue plus icon in a red box.

3. Enter a First Name, Last Name, Email, and Phone. **Note:** A temporary password will be emailed to the email address entered.

Add User ✕

First Name: Jack
Last Name: Mullen
Email: [Redacted]
Phone: 555-555-3321

4. Place a checkmark next to each of the modules the new user should have access to. **Note:** *Office Management, Main Office Functions, Administrative Functions, and Reports* refer to the left-hand menu items and features. *Enrollment* refers to bank enrollment applications and *Dashboard* refers to the Office Management Grid.

Add User ✕

First Name: Jack
Last Name: Mullen
Email: [Redacted]
Phone: 555-555-3321

Modules:

Office Management Main office functions Enrollment
 Administrative functions Reports Dashboard

Username: 37219_ []

SAVE

5. Type a username in the Username field and then click **SAVE**.
IMPORTANT NOTE: Your User ID and an underscore will be appended to the beginning of the username you have chosen. In the example below, the new username is *37219_jmullen*.

Add User ✕

First Name: Jack
Last Name: Mullen
Email: [Redacted]
Phone: 555-555-3321

Modules:

Office Management Main office functions Enrollment
 Administrative functions Reports Dashboard

Username: 37219_ jmullen

SAVE

Placing a Sub-site on Hold

With the EMP, you can prevent a Sub-site(s) from transmitting tax returns and discontinue support services from uTax by placing the Sub-site(s) on hold.

1. Open the sub-site to be placed on hold.
2. Click the **Site is Active** button.

Sub-site Office & Software Identification Information	
Site is Active	
Sub-site Information	
EFIN	
Company Name	Tax Shack Too
Primary Contact First Name	Stuart
Primary Contact Last Name	Smally
Physical Address	
City, State, Zip	
Office Phone	
Alternate Phone	222-555-2222
Primary Email	ssmally@taxshacktoo.com
Alternate Contact	
Support Provided By	Main site
Enrollment Completed By	Main site
Onboarding Requested by Main site	Yes
Software Distribution	Received From Main site
EDIT	
Software Identification Information	
User ID	
Transmission Password	
Master ID	
MSO CL User ID	
Parent Account	
EFIN	
Company Name	Multi Service Incorporated
Owner First Name	John
Owner Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles CA, 90063

3. **Type** the reason why this site is being placed on Hold. Include instructions for Partner Support should this office contact them. Click **YES** to put this site on hold. Click **NO** to cancel.

Are you sure you want to place this site on hold?

By placing this site on Hold, you will be restricting this site's access to transmitting tax returns and receiving customer support.

Enter description

Enter the reason here.

YES **NO**

Removing the Hold status

1. Open the Sub-site on hold.
2. Click the **Site on Hold** button.

Payment issue

Sub-site Office & Software Identification Information Site on Hold

Sub-site Information	
EFIN	
Company Name	
Primary Contact First Name	Stuart
Primary Contact Last Name	Smally
Physical Address	
City, State, Zip	Gig Harbor WA, 98332
Office Phone	
Alternate Phone	222-555-2222
Primary Email	ssmally@taxshacktoo.com
Alternate Contact	
Support Provided By	Main site
Enrollment Completed By	Main site
Onboarding Requested by Main site	Yes
Software Distribution	Received From Main site

EDIT

Software Identification Information	
User ID	
Transmission Password	
Master ID	
MSO CL User ID	

Parent Account	
EFIN	
Company Name	Multi Service Incorporated
Owner First Name	John
Owner Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles CA, 90063

- Click **YES** to complete the process or click **NO** to cancel.

Do you want to remove this site from being on hold?

By re-activating this site, you are granting permission to transmit tax returns to the filing center.

YES
NO

The Archive (Viewing Prior Year Data)

You can view prior year configuration settings by way of the Archive. Follow the steps below to access the Archive.

- Complete steps below for the office type you want to access.
 - Main Office* – Click the **User ID** and select **View Archive**.

Enterprise Management Portal ▼

				Security Questions
				Change Password
Op ate	Enrollment Status	View/Edit Enrollment	Total SVB Fee	View Archive

- Sub-site* – Click the **Actions** button, then click **View Archive**.

Service Bureau & Multi-Office EMP User Guide

Enr. Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	DOC / EF Fee	Action
Not Started					Actions ▾
Not Started					Reset Password View Archive Hide Site
Not Started					Actions ▾

2. Select the appropriate **year** and then click the **DISPLAY DATA** button.

Archived Data

Select Sales Year ▾

2019
2017
2018

DISPLAY DATA

3. Click the tabs at the top to view the information in that section.

Enrollment

Office Information | Affiliate Configuration | Bank Selection & Fee Setup | Fee Payment / Update Account(s) | Bank Enrollment

EFIN / Bank Management

Site Information	
Company Name	Multi Service Incorporated
Primary Contact First Name	John
Primary Contact Last Name	Sample
Physical Address	1234 Main Street
City, State, Zip	Los Angeles, CA 90063
Office Phone	
Primary Email	johnsample@yahoo.com
Support Notification Email	johnsample@yahoo.com

Software Identification Information	
EFIN	
Master Identifier	
Master User ID	
Transmission Password	
MSO CL User ID	

Please contact the Service Bureau Support Team at 206-209-2653 if you have any questions.