

ELECTRONIC FILING RESOURCES

ULTRATAX CS®

FASTER, SMOOTHER, AND MORE ACCURATE FILING

Apply Now to the IRS for E-Filing and be Prepared for Tax Season!

To ensure you're ready for e-filing before tax season, you should complete an IRS e-file application by **December 1, 2014**.

To participate in the IRS e-file program you must submit an application to become an authorized IRS e-file provider online at the IRS website, irs.gov/Tax-Professionals/e-File-Providers-&-Partners. Once there, click the **Become an Authorized e-file Provider** link.

The IRS will accept applications through May 31, 2015 for the 2014 tax year; however, there may be a delay of up to six weeks in processing applications. Therefore, it's important to apply well in advance of tax season. We recommend you complete the application process in the next few weeks to ensure you're approved by the beginning of tax season.

Once you've submitted your application and have been approved by the IRS, there's no need to re-apply unless you didn't file returns electronically last year, you were suspended from the IRS e-file program, or your business information has changed.

Examples of changes that need to be updated are:

- Address
- Telephone number(s)
- Firm URL or email
- Firm principals
- Responsible officials

E-Filing Application Tips

The following tips apply to tax preparers who use Thomson Reuters to transmit electronic returns. (If you're using a third-party transmitter, you should contact your vendor.)

When you apply online at

irs.gov/Tax-Professionals/e-File-Providers-&-Partners:

- In the Program's "Applying For" section, select **Electronic Return Originator**.
- You may also need to select **Intermediate Service Provider** if you plan to send electronically filed returns from other Electronic Return Originators (EROs) to the IRS on their behalf. (Review the rules for Intermediate Service Providers in IRS Publication 1345 for further guidance.)



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Important Note:

It's very important to update firm changes as they occur. The IRS can remove you from participation in the IRS e-file program if undelivered mail is returned to them, or if they're unable to contact you by phone or email. Publication 3112, IRS E-file Application and Participation, recommends that all revisions to an e-file application be done within 30 days of the change.

Also, if you plan to e-file any business or employment tax returns (940, 941, 990, 1041, 1065, and 1120) for the first time, you'll need to revise your application accordingly. All plan year 2009 and later Form 5500 returns/reports must be filed electronically. Form 5500 requires the filing of a separate online application to obtain the Personal Identification by registering on the EFAST2 website, efast.dol.gov.



Information on State Electronic Filing Requirements

For 1040 returns, all states except New Hampshire and Tennessee support e-filing. Most states require that you have been accepted to e-file with the IRS.

Contact the e-filing coordinator of the applicable state for further information. Or, view our State Electronic Filing Guide online at **CS.ThomsonReuters.com/efile**. From here, click any state to obtain taxing authority contact information as well as IRS and certain state e-filing requirements, processes, and deadlines.



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Refund Advantage

If you're planning to use the bank products offered through Refund Advantage, it's important to enroll well in advance of tax season, to allow sufficient time for you to complete the application and enrollment process. Enroll online now at **Refund-Advantage.com**.

When completing the enrollment application to use the bank products offered by Refund Advantage, in the "Current Tax Software field" enter "UltraTax CS" and in the "How do you e-file?" field, select "I file my returns through my software company or a service bureau" from the dropdown menu.

Contact Refund Advantage at **800.967.4934** for more information on the application and enrollment process.

