

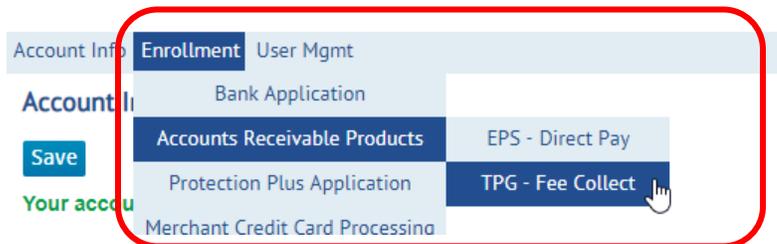
Drake Software Enrollment Process for TY 2020 Fee Collect Program

1. Go to the Enterprise Office Manager (EOM) at <https://eom.drakesoftware.com/>



2. Login with your Drake Username and Password
3. Verify all information on the Account Information page and click on "Save" at the bottom of the screen. You must do this step before you can proceed to the Bank Application.
4. To go to the TPG Fee Collect bank application, hover over Enrollment > Accounts Receivable Products and then select "TPG - Fee Collect."

Enterprise Office Manager



5. At this point, you will see a breakdown of all of our banks with product offerings and pricing and then underneath this section, you will see the "Application for TPG Fee Collect."

6. If not already selected, make TPG your active bank.

EFIN 100304		Active Bank	View App
Bank	Application Status		
EPS Financial	I Incomplete	<input type="radio"/>	<input type="radio"/>
Republic Bank & Trust	I Incomplete	<input type="radio"/>	<input type="radio"/>
Santa Barbara Tax Products Group	P	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Refund Advantage	I Incomplete	<input type="radio"/>	<input type="radio"/>
Refundo	I Incomplete	<input type="radio"/>	<input type="radio"/>

[+] Key to symbols

7. Read all information under “Application for TPG Fee Collect” and click in the box if you want to apply for Fee Collect.

Application for TPG Fee Collect

 Print

Fee Collect program (There will be a \$15.00 fee that will be collected from the tax preparation fees that will be shared with SBTPG.)

- You are enrolling in the Fee Collect program with SBTPG. There will be a \$15 fee that will be collected from the tax preparation fees that will be shared with SBTPG.
- Disbursement is limited to ACH or a Green Dot Prepaid Visa [®] Card
- Only valid for RT (Refund Transfer) products
- No Advances
- No additional fees can be charged (Drake add-on, document prep, or franchise/network)
- SPA (Software Purchase Assistance) program is not available with Fee Collect

IMPORTANT: Compliance Training is mandatory this year for all TPG EROs. Once you receive your approval letter and password from TPG, please log on to TPG’s website at cisc.sbtpg.com and complete the training.

If you would like to enroll in the [Green Dot Prepaid Visa [®] Card Program](#), please go to TPG’s website at www.sbtpg.com and opt in for the program upon completion of your enrollment process.

If you would like to enroll in [taxpayer advance programs offered through TPG](#), please go to TPG’s website at www.sbtpg.com and opt in for the programs upon completion of your enrollment process.

8. Verify the Firm Information is correct.

- Provide Manager email
- If you are a Service Bureau, select the ‘Bank app master EFIN’ from the drop-down box
- Answer all required questions

Firm Information

Account number: 168837
Office name: SANDRA HOOPER FEE COLLECT
EFIN
Contact name: SANDRA HOOPER
Contact email: DevEmail.TPGBank21@drakes...

Manager first name SANDRA
Manager middle initial
Manager last name HOOPER
Manager email 1234@EMAIL.TEST

Bank app master EFIN

Wait to ship my supplies until after this date: 1/1/2021  Please leave blank if TPG can ship to you anytime.

Would you like to receive translated materials, if available, for your Spanish clients? Yes No
Will this EFIN be the bank-app master for other EFINS? Yes No

9. Complete the "Direct Deposit Information" section

- The 'Bank name' will be automatically populated based upon the Routing number that you key in. You may not change the bank name by typing in this field.

Direct Deposit Information

Name on account
Bank name Determined by routing number
Routing number
Account number
Repeat account number
Account type Checking Savings

 Clear direct deposit information

10. Complete the "Prior Year Information" section

- Fields are grayed out unless you click on the box "Provided bank products last year."

Prior Year Information

Provided bank products last year
Bank used last year No Previous Ban Prior year IRALs/RALs/RTs (count)*
Prior year EFIN Prior year funded banks volume*
 OK for Drake to send to the bank the actual numbers Drake has based on last year's e-filing?

*Prepopulated numbers are for current EFIN only.

11. To complete the “Prior Year Information” section:

- Click on “Provided bank products last year”
- Select the Bank that you used last year from the drop-down box
- Provide the EFIN that you used last year
- If you are a prior year Drake bank client, we will pre-populate your prior year numbers. If you do not agree with the numbers provided, you may enter your own data; **IMPORTANT:** If you want to send your own data to the bank, you need to **REMOVE** the check mark in the “OK for Drake to send to the bank the actual numbers Drake has based on last year’s e-filing?” If you leave this box checked, it will override your numbers and we will send the numbers in the Drake database.

Prior Year Information

Provided bank products last year

Bank used last year

Prior year IRALs/RALs/RTs (count)*

Prior year EFIN

Prior year funded banks volume*

OK for Drake to send to the bank the actual numbers Drake has based on last year’s e-filing?

**Prepopulated numbers are for current EFIN only.*

12. Verify the “EFIN Owner Information”

EFIN Owner Information

First name

SSN

Middle initial

EIN

Last name

Date of birth 

Street address (owner’s residence)

City State Zip

Primary phone

Cell phone (to receive SMS text messages)

Email address

13. Verify all information entered on the TPG screen and if everything is correct, you need to click on the BLUE link in the “Disclosures” section to access the TPG Financial Services Agreement. You must read the agreement before you can click the box indicating that you have read, understand and agree to the terms of the agreement.

Disclosures

You have selected the Fee Collect program with SBTPG. There will be a \$15.00 fee that will be collected from the tax preparation fees that will be shared with SBTPG.

CLICK THE BLUE LINK below to open the 'Santa Barbara Tax Products Group Financial Services Agreement.' You need to read the Agreement and then click the "Close" button at the bottom in order for the check box to open. You are agreeing to the terms of the Agreement when you click the box.

ERO has read, understands, and agrees to the [Santa Barbara Tax Products Group Financial Services Agreement](#)

[Current Active Bank](#) [Save and Finish Later](#) [Submit Completed Application](#)

- Once you are ready to submit your TPG Bank Application, click in the box agreeing to the terms of the Agreement and then submit your application as indicated below.

Disclosures

You have selected the Fee Collect program with SBTPG. There will be a \$15.00 fee that will be collected from the tax preparation fees that will be shared with SBTPG.

CLICK THE BLUE LINK below to open the 'Santa Barbara Tax Products Group Financial Services Agreement.' You need to read the Agreement and then click the "Close" button at the bottom in order for the check box to open. You are agreeing to the terms of the Agreement when you click the box.

ERO has read, understands, and agrees to the [Santa Barbara Tax Products Group Financial Services Agreement](#)

[Current Active Bank](#) [Save and Finish Later](#) [Submit Completed Application](#)

- Once your bank application has been submitted, you will see that it is in Pending status for Fee Collect.

EFIN	04
Bank	Application Status
EPS Financial	I Incomplete
Republic Bank & Trust	I Incomplete
Santa Barbara Tax Products Group	P Pending 10/9/2020 3:33:35 PM Fee Collect
Refund Advantage	I Incomplete
Refundo	I Incomplete

[+] Key to symbols

- Once TPG sends an enrollment response, Drake will post the status in the same section so you can keep check on the status of your account.