

# Attachments for e-Filing - Federal Individual Returns



When do I need to attach a document to a return for e-filing and how is it done?

An error message is produced when you need to attach a document to a return. An attachment may be

- A *software attachment*, one that the software identifies because of your data entry in the return. An error message notifies you that an attachment must be made.
- A *preparer attachment*, one that you identify, at your discretion, by an entry on the **PDF** screen. A discretionary entry can be a signature document, a third-party document (such as an appraisal) or a document in columnar format. Your **PDF** screen entry produces an error message that notifies you that an attachment must be made.

To clear a software attachment error -

- Errors (like 5980, referring to Form 8885, Health Coverage Tax Credit, and 5982, referring to Form 8283, Noncash Charitable Contributions) are cleared
  - By attaching the required document.
  - Or by modifying your data entry to avoid requiring the attachment.
- Alternatively, if available for the required document, a PDI indicator can be used instead of attaching the document. Since PDI indicators are available for Forms 8885 and 8283, errors 5980 and 5982 can be cleared by selecting their PDI indicators on the **EF** screen (this also removes the required document from the **PDF** screen). (Do not both attach a document and also select its PDI indicator. For information about using a PDI indicator, see **Related Links** below.)

To clear a preparer attachment error -

- Error 5951 (an incomplete **PDF** screen) is cleared by entering the information that is missing on the **PDF** screen.
- Error 5950 (wrong file extension) is cleared by entering a ".pdf" file extension as part of the **File Name** on the **PDF** screen.
- Error 5952 (how to make the attachment) is cleared by completing the attachment process.
- These three errors also can be cleared by removing your entry on the **PDF** screen.

Errors are cleared after you recalculate the return.

Here's an example of an individual return with a two software attachments and a preparer attachment. Note that

- Documents to be attached to a return must be in PDF format, a file format that you can read in Adobe Reader. If an attachment consists of multiple pages, all pages must be scanned or printed to a single, multipage PDF file.
- Instructions for making attachments are also available in error messages and on the **FAQ** screen.

View the EF\_PDF~ page to determine what needs to be attached. In this case, the two software attachments already are listed because of data entry on screens **8885** and **8283**:

Federal MESSAGES NOTES EFSTATUS EF_PDF~ 1040 A D 4684 4684.PG2 4684.PG3 8885 8283 8879 9325 Miscellaneous	EF_PDF~		(KEEP FOR YOUR RECORDS) <b>EF Attachments</b>
	Name of corporation <b>KATZEN JAMMER</b>		
	<b>Reference</b>	<b>Description</b>	<b>Filename</b>
	Form 8885 Ln 2 Inst Form 8283 Inst	Form 8885 Required Documents Art Appraisal	Form8885RequiredDocuments.pdf ArtAppraisal_01.pdf

To Add a preparer attachment.

To add a preparer attachment, return to data entry and open screen **PDF**. Enter the **Reference Source**, a **Description** and the **File Name**. The **File Name** you enter here must end with the ".pdf" extension, and it must exactly match the file name of the PDF document you want to attach.

Drake 2013 - Data Entry (400001054 - JAMMER, KATZEN)

### PDF Attachments

[Video: How to attach a PDF](#)

The IRS allows taxpayers to e-file signature documents, third-party documents, and columnar-format information. No other document or form should be attached.

Examples of allowed documents:

- Signed copy of a lease or a signed appraisal statement
- Art appraisals for noncash charitable contributions
- 263A cost calculations as determined under Reg. 1.263A-1(e)(3)

To attach a PDF document

- Convert all documents to be attached into PDF format. (Click the screen help for assistance.)
- Fill out the columns below for each document.
- View the return and open the EF message page. (One will be generated with the return.)
- Follow the attachment instructions provided on the EF message page.
- When the EF message has been cleared, the documents have been attached.

For more detailed instructions, see the FAQ or screen help.

When saving the document in PDF format, give it a distinctive file name that clearly identifies the scanned document. Use a ".PDF" extension. See the sample columns below for examples.

Reference Source	Description	File Name (must end with .PDF)
Pub. 526	Goya Painting Appraisal Stmt	GoyaPaintingAppraisalStmt.PDF
Section 472(d)	Effect of write-up to cost	LIFOEfectOfWriteUp.PDF

File Name (must end with .PDF)  
See Screen Help for IRS recommended names.

Reference Source	Description	File Name (must end with .PDF)
Pub. 526	Insurance Statement	Insurance Statement.pdf

Exit the screen. View the EF\_PDF~ page again to confirm that the preparer attachment is now listed.

EF_PDF~	(KEEP FOR YOUR RECORDS) <b>EF Attachments</b>	
	Name of corporation <b>KATZEN JAMMER</b>	
	<b>Reference</b>	<b>Description</b>
	Form 8885 Ln 2 Inst Form 8283 Inst Pub. 526	Form 8885 Required Documents Art Appraisal Insurance Statement

Reference	Description	Filename
Form 8885 Ln 2 Inst	Form 8885 Required Documents	Form8885RequiredDocuments.pdf
Form 8283 Inst	Art Appraisal	ArtAppraisal_01.pdf
Pub. 526	Insurance Statement	Insurance Statement.pdf

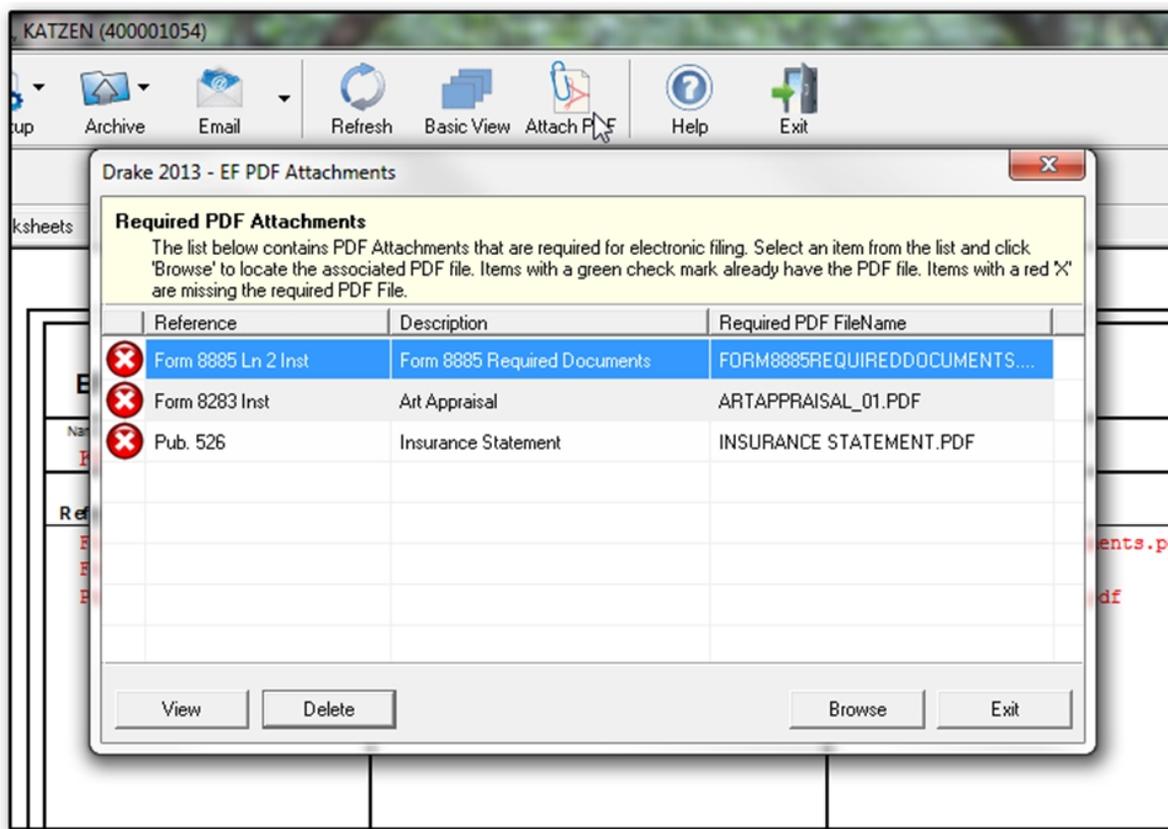
Create the documents to be attached.

Create, name and save the PDF documents indicated on the EF\_PDF~ screen. Confirm that the names exactly match the **Filename** shown. Note the location where each document is saved so you can find it easily.

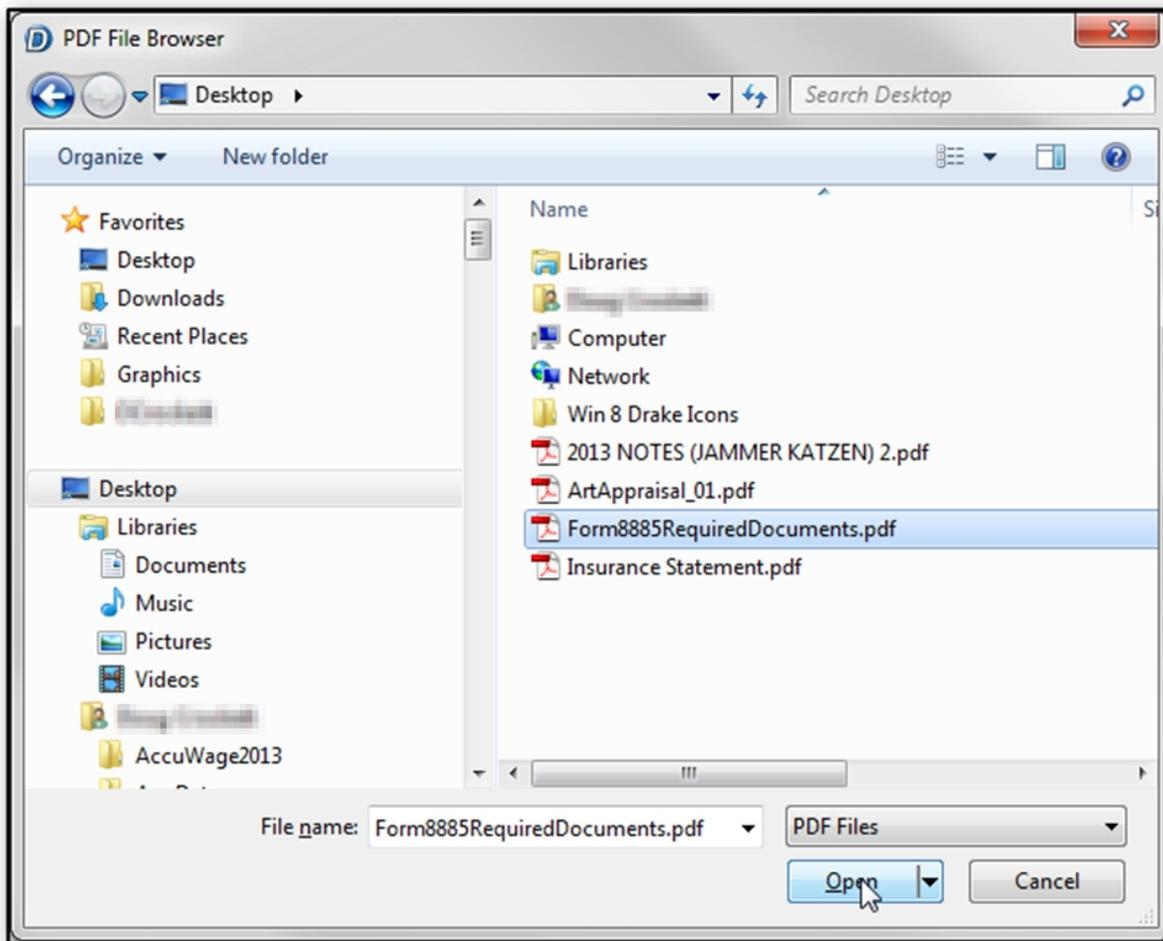
Make the attachments.

View the return and click the **Attach PDF** button on the tool bar to open the **EF PDF Attachments** dialogue box. The "X" indicates the attachments that have not yet been made.

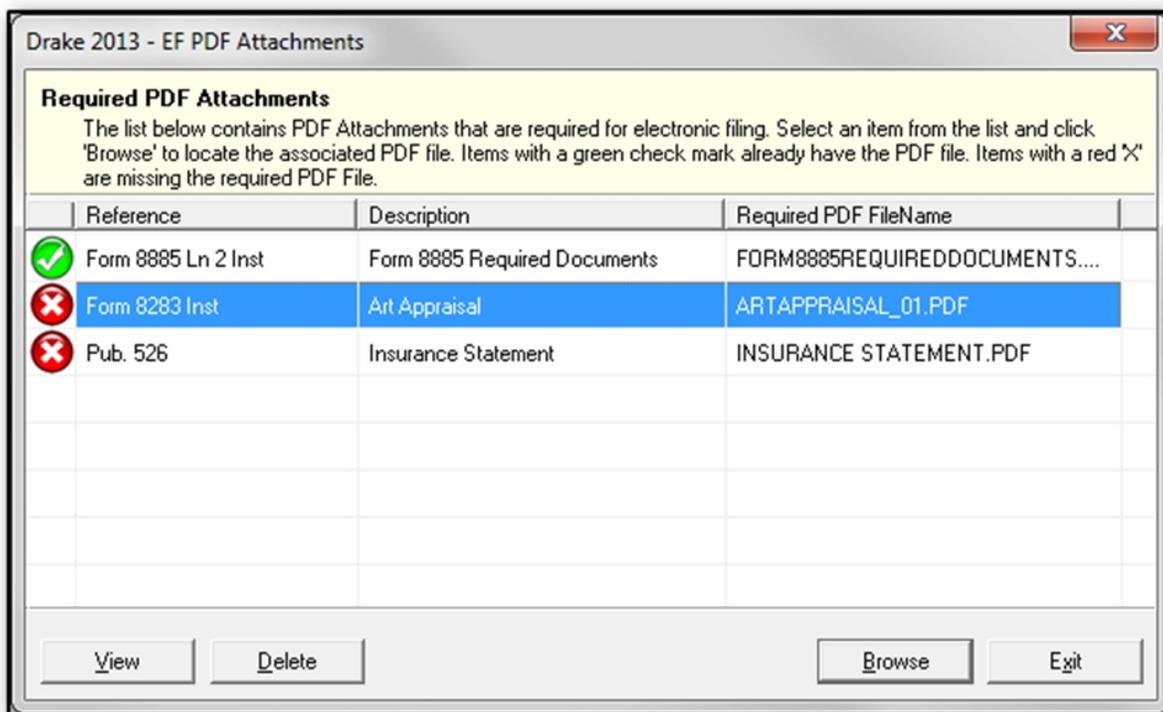
Select the first document and click **Browse**.



Navigate to the location where the first document is saved, select the document and click **Open**.



You are returned to the **EF PDF Attachments** dialogue box. Confirm the check mark that indicates the document is attached.



Repeat this process for the remaining attachments. When a check is displayed for all attachments, the process is complete. Associated errors are cleared when you recalculate the return.