

Preparer PDF Exchange Usage Agreement

Background

The York Adams Tax Bureau (“YATB”) is offering professional preparers a method to submit your client’s EIT annual final returns directly from your offices. The process will use a PDF file that is properly produced from your professional preparer’s software (i.e. Intuit Pro Series, Drake, Lacerte, etc.). Your staff will then use a third-party web-based secure file transfer system (Cisco’s ShareFile) to upload PDFs created for your clients. Our systems will receive and verify each PDF file, and you’ll be advised of all received files and any file with problems. Your staff would repeat this upload process as often as desired.

Your Responsibilities

To utilize this method of submitting information to the tax bureau:

1. You must ensure that your clients’ data is protected at all times.
2. PDFs generated by your system must include:
 - a. Facsimile of Pennsylvania’s “Generic” EIT Final Return or similar.
 - b. Supporting documentation such as W2s, military orders, schedules, etc.
3. You must maintain client-signed copies of the final returns for a minimum of five (5) years and produce copies to The Bureau when requested.
4. You must ensure that ShareFile account information given to you by YATB is protected at all times.
5. Your staff will upload only PDF files created by your professional preparer’s software.
6. You will review failure notices and address any issues noted.

Getting Started

To utilize this new filing method:

1. Complete our online registration process. This can be found on The Bureau’s website at <https://www.yatb.com>.
2. An employer department representative will contact you with information you need to log onto the ShareFile system.
3. You and/or your staff will complete returns using your professional preparer software and create a PDF with the required information. It should be put together in this manner:
 - a. FIRST PAGE MUST be the PA generic individual final return format or similar.
 - b. Next page(s) must be W2’s as provided by the taxpayer or generated by your software.
 - c. Following pages can be additional information such as schedules or other documentation that may be pertinent to the filing.
 - d. **Note** that PDFs may not be password protected or have any restrictions set for any purpose.
4. Log onto the ShareFile service and upload your PDFs.
5. You’ll receive an email with receipt or rejection information. If returns are rejected, you’ll return to the ShareFile system to see details about the rejection(s).
6. Repeat steps 3-6 as often as you like.