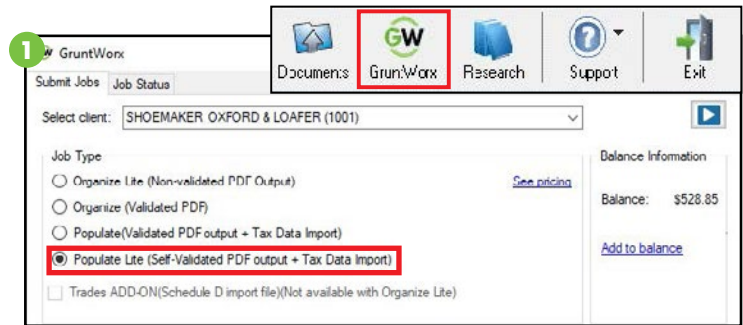


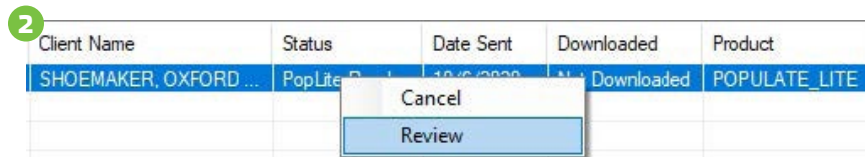
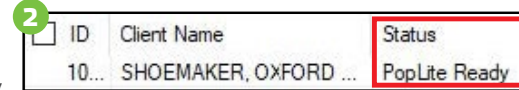
1 Submit Populate Lite Job

- Launch Drake Software.
- Select the **GruntWorx** icon in the toolbar.
- Submit Populate Lite job.



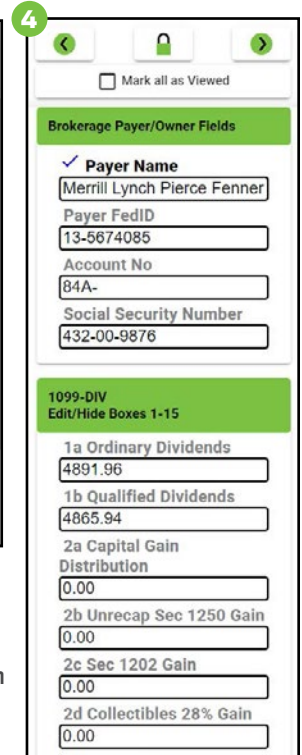
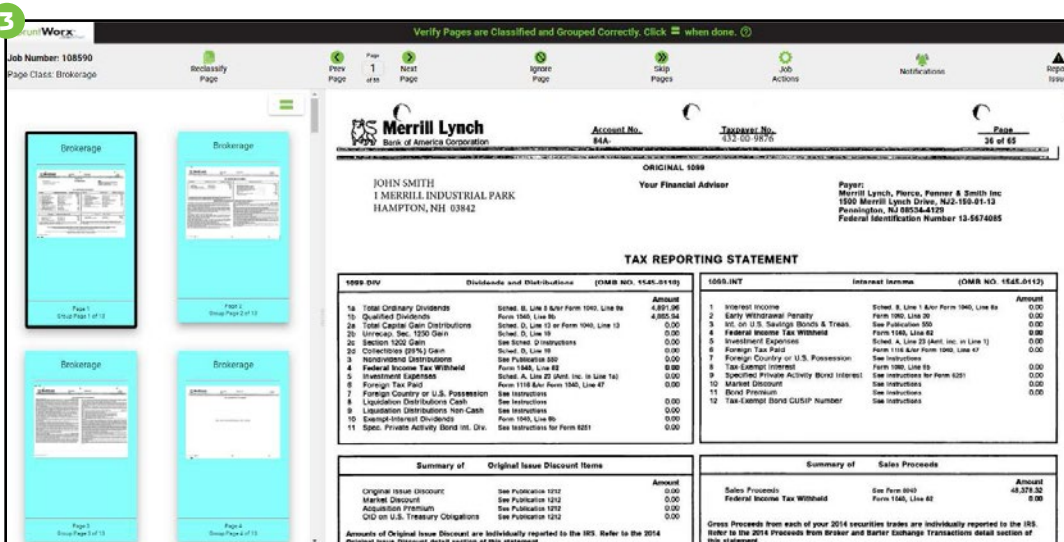
2 Access Job

- Once a job has been submitted, it shows on the **Job Status** tab of the GruntWorx application with a status of **Pending**.
- Once the pages have been processed through GruntWorx, the status changes to **Pop Lite Ready**.
- Right-click on the client's row and select **Review** to access the Populate Lite job.



3 Classify & Group

- The independent review tool will open in the user's default web browser. Once the review tool is open, in the left-hand **Thumbnail Panel**, click into each page, verify that the classification of the document is correct, rotate the page if needed, and make any grouping adjustments that are necessary.

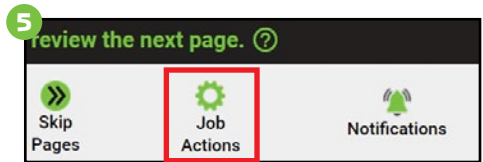


4 Review & Validate

- Review the extracted data. Verify data using the right-hand **Data Entry Panel**. Users can click into the first field on the panel and tab through the fields to verify data.
- Users can manipulate the screen to fit visual preferences, like zooming, locking or unlocking the screen, and expanding or collapsing panels.

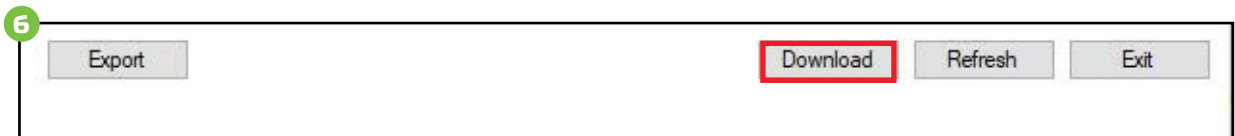
5 Send Back to GruntWorx

- Once every page has been reviewed by the user, it is ready to be sent back to GruntWorx for completion.
 - When the user tabs out of the last field on the last page of the job, the **Job Actions** menu appears.
 - ✓ **Review complete: Save and upload job** – The job returns to GruntWorx for production of a bookmarked PDF, the Diagnostics Excel Sheet (if applicable), and the Population XML file.
 - ✓ **Have us verify the job for you** – This option sends the files to GruntWorx as a Populate job, where it is validated by the US-based GruntWorx staff. Standard Populate charges apply and the turn-around time will be subject to normal wait times.
 - ✓ **Cancel and Delete Job** – This option removes the job from processing. The job will not be charged.
 - Select **Review Complete: Save and upload job**.



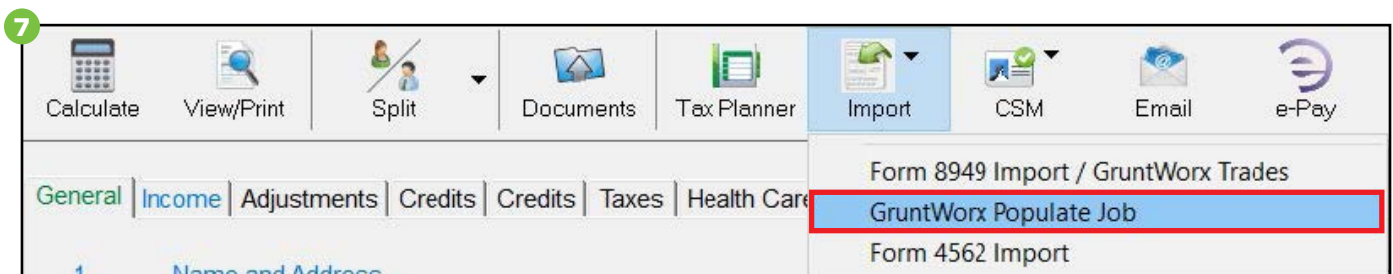
6 Download Completed Files

- Users who entered an email address at the time of submission receive a notification email when the job is ready to download. Navigate to GruntWorx from Drake Tax Software, go to the **Job Status** tab and locate desired client. Highlight the client's name and click **Download**.



7 Import into Client's Tax Return

- Open the client's return—a prompt appears saying there is a Populate job ready for import for this client.
 - If there is no prompt on the data-entry screen.
 - ✓ Click **Import** from **Data Entry Screen** toolbar.
 - ✓ Select **GruntWorx Populate Job**.
 - ✓ Click **Import**.



Tips for best scanning practices can be found here in this [video](#).

For system requirements click [here](#).

If you have any problems or need additional help, call Drake Software® at **828.349.5505** or email Support@DrakeSoftware.com.

Here is a list of all the supported forms for the GruntWorx Populate services.

- W-2
- W-2G
- 1095-A
- 1098
- 1099-MISC
- 1099-NEC
- 1099-B
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-R
- RRB-1099
- SSA-1099
- 1099-OID
- Consolidated 1099
- 1120S K-1
- 1065 K-1
- 1041 K-1

