

2022 ERO Program Compliance Training

NEW CLIENTS – BANK PRODUCT | REFUND TRANSFER

Compliance Exam

In order to start the compliance exam, you will need to log in to the bank dashboard with your email and password. You will be able to set this up once you are added to the bank site as a user. If you are not a user yet, please request this to your office owner.

The screenshot shows the login interface for 'TAX PROFESSIONALS'. At the top left is the TPG logo, and at the top right are links for 'Products' and 'Help'. A prominent orange banner contains the text: 'To login below you must be enrolled for 2021 with an approved software provider. Click here to view 2020 information.' Below this banner is a blue box with the text 'TAX PROFESSIONALS'. Underneath, there are two input fields: 'Email' (with 'EFIN/P-Center/Username/Email' as a placeholder) and 'Password or PIN #' (with 'Password/Temporary PIN' as a placeholder). Below the password field are two radio buttons: 'ERO/Business Partner' (which is selected) and 'Service Bureau'. A large orange 'SIGN IN' button is positioned below the radio buttons. At the bottom of the form area, there is a link that says 'Need Login Help?'.

Once you are logged in, in the dashboard you will find the following options on the image, please make sure that you are opted-in for the programs marked by the arrow. If you are not opted-in, please click on the program and follow the instructions.

Program Opt-In Status:						
CREDIT/DEBIT CARD PAYMENTS	AUTO COLLECT	MARKETING PRO	GREEN DOT PREPAID VISA CARD	TAX PRO ADVANCE	FAST CASH ADVANCE	DIRECT MAIL
AVAILABLE SIGN UP	OPTED-IN	AVAILABLE OPT IN	OPTED-IN	NOT AVAILABLE	FULLY APPROVED (FCA EARLY FCA) ⓘ	NOT AVAILABLE
	↑		↑		↑	

To take the compliance exam, you will see above the opted-in programs the steps to finish your set up. Please confirm the information needed and take the exam.



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AVAILABLE	OPTED-IN	AVAILABLE	OPTED-IN	NOT AVAILABLE	FULLY APPROVED (FCA EARLY FCA)	NOT AVAILABLE
SIGN UP		OPT IN				

FCA (Fast Cash Advance) Opt-In

To opt-in for the Fast Cash Advance, you will need to click over the program opt-in. A new page will populate and you will scroll down to the check boxes at the end of the page. You will check the boxes marked on the image below.

I want TPG to send email reminders to clients that are pre-qualified to receive Fast Cash Advance*

The deadline to opt-in to Fast Cash Advance has expired

Fast Cash Advance ←

Attract and retain more clients with a refund advance of \$500-\$6,000. Advances available the first day of filing through Feb. 28.

Offer Early Fast Cash Advance for an additional fee.

The deadline to opt-in to Early Fast Cash Advance has expired

Early Fast Cash Advance not available without Fast Cash Advance.

Early Fast Cash Advance ←

Attract and retain more clients with a refund advance of \$500-\$6,000. Offer advances before tax season for an additional fee. Advances start Jan. 2.