

Thank you for choosing



Detailed Download Instructions

This guide will provide detailed download instructions for the latest version of
Essential Forms™ + SoCal Region County Forms Package.

If you have any questions throughout the process, feel free to contact
Customer Service at (800) 232-3400.

Details

Essential Forms

Version: 4.4.14.8	Date Published: 01/01/2026
File Name: efinstaller.exe	File Size: 131 KB

Major updates to Essential Forms are scheduled in January and September, with additional updates typically released periodically throughout the year.

SoCal Region County Forms Package

File Name: socal.exe	File Size: 518 KB
-----------------------------	--------------------------

Updates to the county forms are distributed automatically throughout the year whenever there is a change to a form or a new form added.

System Requirements

- *Supported Operating Systems:* Windows 8.1, Windows 10, Windows 11
- *Disk Space:* 300 MB available space on hard drive
- *Internet connection:* Required to receive automatic updates
- *Network:* Each copy of Essential Forms is shipped ready to run on a network or as a stand-alone application. Note that with a shared database, by default a customer subscription provides access to the data by only one user at a time. Should you desire more users to be able to access shared data simultaneously on your network, please contact CEB Customer Service at 1-800-232-3444.

Installation Instructions

Step 1 – Download Essential Forms

You **must** download the latest version of Essential Forms before downloading your county forms package.

1. To start the download, click the **Download Essential Forms™** button near the top of the download page, under **Step 1**.
*Note: Some browsers such as Google Chrome, as well as Windows Security, may prevent third-party applications from downloading. If your browser displays a message “this type of file is not commonly downloaded and may harm your computer” or similar, click **Keep** or **Run Anyway** to allow the download.*
2. Once downloaded, the **efinstaller.exe** application file should appear in your **Downloads** folder.
To navigate to your Downloads folder, hold the Windows logo key + E on your keyboard, then select **Downloads** from the list in the far-left column, or type **File Explorer** in the search box on your Windows taskbar.
3. Double-click **efinstaller.exe**.
4. Click through the security prompts to install the application:
 - a. You should get a prompt asking you to make changes to your computer from University of California, Los Angeles. Click **Yes**.
 - b. You may get a prompt asking you to make changes to your computer from Unknown Publisher. Click **Yes**.
 - c. You may get a Windows SmartScreen prompt saying it “prevented an unrecognized app from starting.” Click **More Info**, then click **Run anyway**.
5. The **Essential Forms Setup** window will launch. Click **Next** and follow the setup instructions. Once setup has completed, click **Finish**.
6. Double-click the **Essential Forms icon** on your desktop to launch the application (or navigate in File Explorer to your **C:/Program Files(x86) > CEB > Essential Forms** folder and double-click **efwin32.exe**).

Note: For quick and easy future access, pin the application to your taskbar. When the application is open, you will see the Essential Forms icon appear at the bottom of your screen on the taskbar. Right-click the icon in the taskbar and select “Pin to taskbar.” Now, when you want to launch it in the future, simply single-click on the Essential Forms icon in the taskbar.

Step 2 – Download SoCal Region County Forms Package

1. To download the county forms, click the **Download SoCal Region County Forms Package** near the top of the download page under Step 2.
*Note: Some browsers such as Google Chrome, as well as Windows Security may prevent third-party applications from downloading. If your browser displays the following message, “this type of file is not commonly downloaded and may harm your computer,” or something similar, click **Keep** or **Run Anyway** to allow the download.*

2. Once downloaded, the **socal.exe** application file should appear in your **Downloads** folder.
To navigate to your Downloads folder, hold the Windows logo key + E on your keyboard, then select **Downloads** from the list in the far-left column, or type **File Explorer** in the search box on your Windows taskbar.
3. Double-click **socal.exe**.
4. A Setup window will launch.
5. Essential Forms will display the following prompt: "Essential Forms has detected update(s) for forms module(s): <list of counties with updates> in the following location: <path specific to your computer> Install update(s) Yes or No." Click **Yes**.
6. A prompt will then display: "You have successfully installed the following forms module(s):" followed by a list of counties. The prompt asks if you have any additional forms to install. Click **No**.
7. Essential Forms will display the following message: "Essential Forms must be restarted before these changes take effect. Essential Forms will now close." Click **OK**.
8. Essential Forms will close and reopen on its own, then display the following message on the bottom-right of the screen: "Updates are ready to install—Essential Forms updates have been downloaded to your computer. Please **restart** Essential Forms to apply the updates." Click **OK**.
*Note: It may take a few minutes for this prompt to appear – please be patient. If you do not receive the prompt to update, right-click on the **Essential Forms icon** in your system tray on the right end of the Windows taskbar and choose **Check for Updates**.*
9. Manually close and re-open Essential Forms.
10. Essential Forms will display the following prompt again: "Essential Forms has detected update(s) for forms module(s): <list of counties with updates> in the following location: <path specific to your computer> Install update(s) Yes or No." Click **Yes**.
11. A prompt will then display "You have successfully installed the following forms module(s):" followed by a list of counties. The prompt asks if you have any additional forms to install. Click **No**.
12. Essential Forms will display the following message: "Essential Forms must be restarted before these changes take effect. Essential Forms will now close." Click **OK**.
13. Essential Forms will close and reopen on its own. In the **Forms Library** tab, you should now see additional counties available as their own folder.

Need help installing? We're here for you!

Call us

CEB Customer Service can be reached at **(800) 232-3444**
Monday-Friday, 7:30am-5:00pm (PST)

Email us

Customer_Service@ceb.ucla.edu

Chat with us

Send us a message through **Intercom Chat**—the blue circle message icon found at the bottom-right of all CEB.com pages