PREMIUM PRO TRAINING

PREMIUM TAX
SUMMARY SCHEDULES & REPORTS

2014 PREMIUM PRO TRAINING SEMINARS

Premium Tax Online Training (Summary Schedules and Reports)

Agenda (1:00pm – 02:30pm CT)
Topics to Discuss

- Check Request Schedule
- Summary of Taxes
- Comprehensive Summary of Taxes
- Check Request Export
- Override Report
- Audit Report
- Summary of Taxes Comparison Report
- Comprehensive Summary Report
- Sorting & Filtering Reports
- Q&A

Training Materials
Download/Print before training begins.

- Workbook Section
- Print Prerequisite-Workbook
- Interface Prerequisite-Workbook

Save Meeting Date on your Calendar
Download before training begins.

- Click here to add

Join the Meeting
Join a test meeting before training begins.

- Click here to join a test meeting
- Click here to join the training meeting

CHAPTER EIGHT

SUMMARY SCHEDULES & REPORTS

PREMIUM PRO WORKBOOK

CHAPTER EIGHT

CHECK REQUEST SCHEDULE 75

SUMMARY OF TAXES 76

COMPREHENSIVE SUMMARY 77

CHECK REQUESET EXPORT 77

OVERRIDE REPORT 78

AUDIT REPORT 79

USERS LOGGED IN REPORT 79

ACTIONS REPORT 79

COMPARISON REPORTS 80

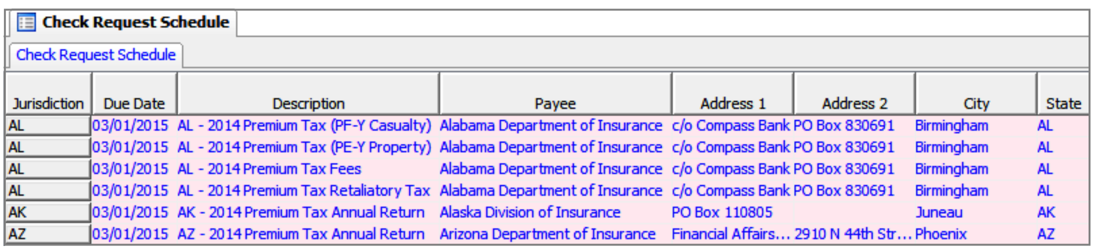
Summary Schedules

Check Request Schedule

Premium Pro Enterprise includes a Check Request page that is displayed with the associated state return. The standard form includes various items such as the payee information and the ability to input up to five G/L descriptions, account numbers, cost centers, and amounts.

The check request description also includes the state abbreviation and tax year.

The Check Request Schedule provides a convenient place for you to view all of the active check requests in Enterprise and review your amounts due. You may also use the copy and paste feature here to fill in recurring values to avoid repetitious work.



Jurisdiction	Due Date	Description	Payee	Address 1	Address 2	City	State
AL	03/01/2015	AL - 2014 Premium Tax (PF-Y Casualty)	Alabama Department of Insurance	c/o Compass Bank	PO Box 830691	Birmingham	AL
AL	03/01/2015	AL - 2014 Premium Tax (PE-Y Property)	Alabama Department of Insurance	c/o Compass Bank	PO Box 830691	Birmingham	AL
AL	03/01/2015	AL - 2014 Premium Tax Fees	Alabama Department of Insurance	c/o Compass Bank	PO Box 830691	Birmingham	AL
AL	03/01/2015	AL - 2014 Premium Tax Retaliatory Tax	Alabama Department of Insurance	c/o Compass Bank	PO Box 830691	Birmingham	AL
AK	03/01/2015	AK - 2014 Premium Tax Annual Return	Alaska Division of Insurance	PO Box 110805		Juneau	AK
AZ	03/01/2015	AZ - 2014 Premium Tax Annual Return	Arizona Department of Insurance	Financial Affairs...	2910 N 44th Str...	Phoenix	AZ

On the Check Request Schedule, you may customize the heading names on the columns labeled 1st GL Description through 5th Amount to best suit your company needs. To do this, right-click on the desired heading name and select Rename. When prompted, type in the new heading text. Once you change the column names for one company, the new headings will transfer to the Check Request pages associated with each return, as well as to all other companies you have registered in Enterprise.

Exercise 8.1

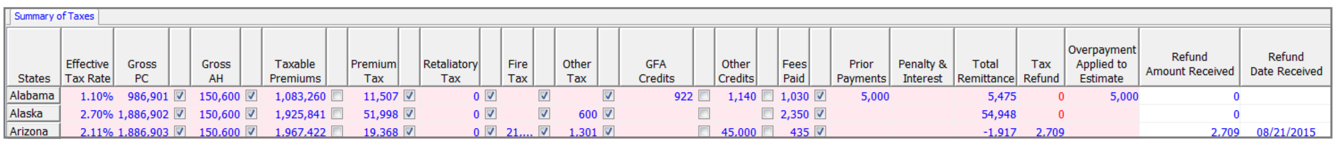
1. In the Check Request Summary, rename the 1st GL description column header to Tax Identifier.
2. Verify that the heading changed on the Check Request form.

Note that when a return is amended, there is a row in the Check Request Schedule for the original previously filed return. The row will be white and disabled to preserve the original amounts. The row for the amended filing will be pink and active.

Summary of Taxes

The Summary of Taxes pulls your Schedule T numbers for gross premiums and sources in all of the appropriate information from each return. It uses this information to calculate an effective tax rate. You can change the columns that are included in the calculation of your effective tax rate by checking or un-checking the box following the specific column. You can also use this area to see each column total for all the states. In addition, there are also columns for Overpayment Applied to Estimates and Tax Refund. This allows you to have an overview of all overpayments and refunds for all states.

Columns for Refund Amount Received and Refund Date Received were also added to the Summary of Taxes. These columns are for reporting purposes only. !NEW

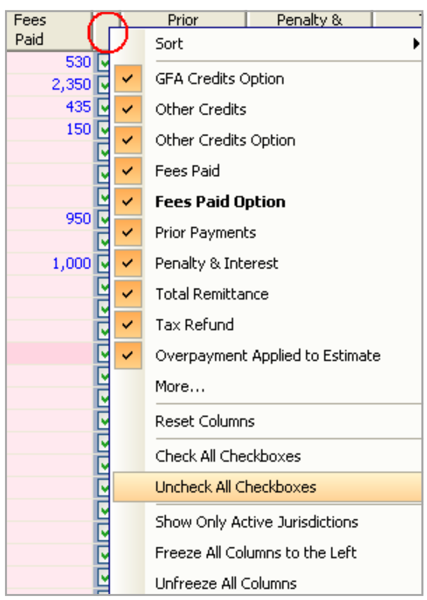


Summary of Taxes

States	Effective Tax Rate	Gross PC		Gross AH		Taxable Premiums		Premium Tax		Retaliatory Tax		Fire Tax		Other Tax		GFA Credits		Other Credits		Fees Paid		Prior Payments	Penalty & Interest	Total Remittance	Tax Refund	Overpayment Applied to Estimate	Refund Amount Received	Refund Date Received
Alabama	1.10%	986,901	☑	150,600	☑	1,083,260	☐	11,507	☑	0	☑		☑		☑	922	☐	1,140	☐	1,030	☑	5,000		5,475	0	5,000	0	
Alaska	2.70%	1,886,902	☑	150,600	☑	1,925,841	☐	51,998	☑	0	☑		☑	600	☑		☐		☐	2,350	☑			54,948	0		0	
Arizona	2.11%	1,886,903	☑	150,600	☑	1,967,422	☐	19,368	☑	0	☑	21,...	☑	1,301	☑		☐	45,000	☐	435	☑			-1,917	2,709		2,709	08/21/2015

By default, the Summary of Taxes lists all the states, but you have the option of only displaying your active states. To do so, right-click on any of the column headings in the schedule and select Show Only Active Jurisdictions. If you wish to have all states displayed again, you can turn the option off.

You can check or uncheck the options for an entire column. To do so, select the column by clicking in the header above the check boxes. Then right-click on a selected check box and choose Check All or Uncheck All Checkboxes.



Comprehensive Summary of Taxes

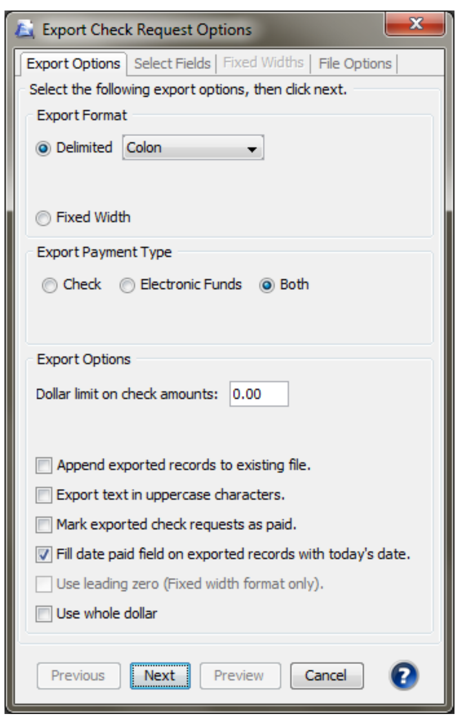
The Comprehensive Summary of Taxes totals the data from each of the company specific Summary of Taxes. This provides you with an overview of your total premium taxes, fees and credits for all states and companies.

Check Request Export

Our Check Request Export feature allows you to export the information in the Check Request Schedule to an ASCII file that can then be imported into your accounts payable system. *Tools>Export Check Request*

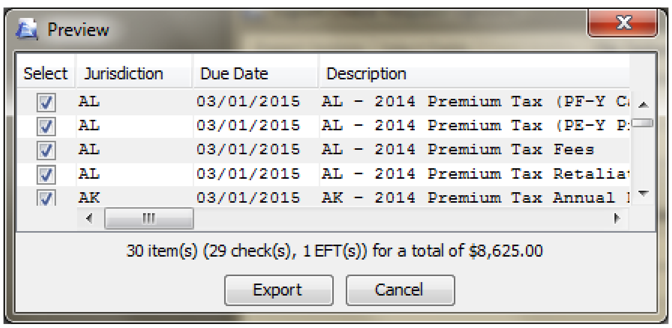
Steps to Export Check Requests

1. Go to the Tools Menu and select Export Check Request.
2. Choose the Export Format (Fixed Width or Delimited). If you choose the fixed width option, you can specify a field length for each field to be exported on the Fixed Widths tab. For the delimited method, choose the character to be used to separate each field from the Delimited dropdown box.
3. Now select your preferred export options. You may choose to append exported records to an existing file, export the data in all uppercase letters to fill in the date paid field for exported records with the current date, and export amounts as whole dollars. You may also mark the exported check requests as paid. This prevents check requests from being exported on multiple occasions and eliminates duplicate records. When using the fixed width format, there is also an option to export leading zeros. Select Next.



4. Choose which fields you would like to export. Select Next.
5. If you are using the Fixed Width method, you may now set the widths. Select Next.
6. Once you have finished setting up the file structure, select the file to export the information to by clicking the Browse button.
7. Enter a Due Date or Approval Date Range for the desired check request information. Click on the down arrow in the From and To fields to select a date.
8. Select Preview to review the items that will be exported. By default, all items will be selected. You may uncheck any items you do not wish to export. You may also right-click on the Select column heading and choose to Select All Checkboxes or Deselect All Checkboxes in the Preview window.
9. Below the export items, there is a line that shows the total number of records included, and the total dollar amount of the records you have selected to export.

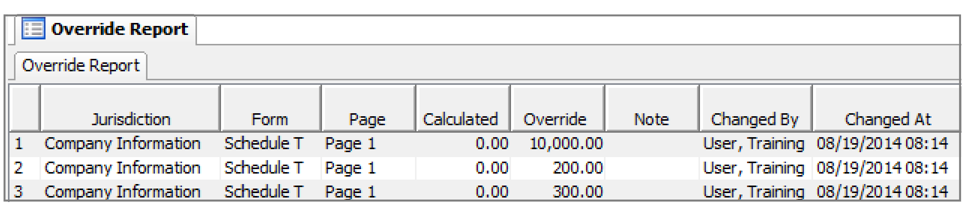
   If you have the EFT field included in the fields to export (see step 4), you will also see a breakdown of the number of checks and the number of EFTs included in your export file. When ready, hit Export to transfer the data. !NEW



Reports

Override Report

The first item listed under the Report Menu is the Override Report. This report will display a detailed listing of any overridden fields. The entry consists of the jurisdiction, form description, page description, calculated value, override value, user ID, and the date and time of when the override was made. The notes column allows you to include an explanation for the overridden value. *Report>Override Report*



	Jurisdiction	Form	Page	Calculated	Override	Note	Changed By	Changed At
1	Company Information	Schedule T	Page 1	0.00	10,000.00		User, Training	08/19/2014 08:14
2	Company Information	Schedule T	Page 1	0.00	200.00		User, Training	08/19/2014 08:14
3	Company Information	Schedule T	Page 1	0.00	300.00		User, Training	08/19/2014 08:14

This report is an effective way to review and track any changes that you made on the returns. With the Override Report, double-clicking on an entry will not only display the designated page of the return but it will also highlight the specified field where the override was made.

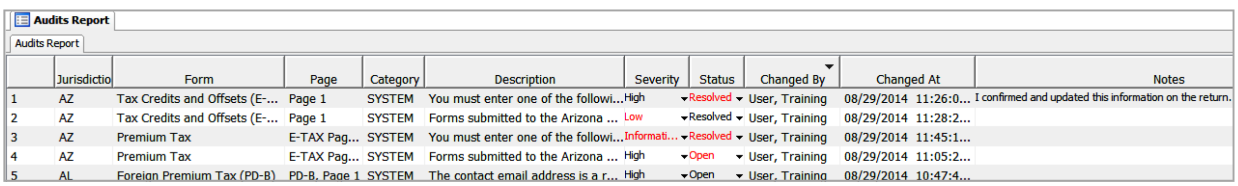
Exercise 8.2

1. Double-click on an item in the Override Report.
2. Remove the override on the return.
3. Refresh the Override Report.

Audit Report

The next report under the Reports Menu will alert you to any items that need to be addressed before processing and completing a state return. These alerts may include such items as state specific ID numbers, required fields, or important state statutes regarding a return's calculations. *Report>Audit Report*

This report has been redesigned to mirror the information on the jurisdiction specific Audit Frame. The report now includes columns for category, severity, status, changed by, changed at, and notes. !NEW


Audits Report

Audits Report

	Jurisdictio	Form	Page	Category	Description	Severity	Status	Changed By	Changed At	Notes
1	AZ	Tax Credits and Offsets (E-...	Page 1	SYSTEM	You must enter one of the followi...	High	Resolved	User, Training	08/29/2014 11:26:0...	I confirmed and updated this information on the return.
2	AZ	Tax Credits and Offsets (E-...	Page 1	SYSTEM	Forms submitted to the Arizona ...	Low	Resolved	User, Training	08/29/2014 11:28:2...	
3	AZ	Premium Tax	E-TAX Pag...	SYSTEM	You must enter one of the followi...	Informati...	Resolved	User, Training	08/29/2014 11:45:1...	
4	AZ	Premium Tax	E-TAX Pag...	SYSTEM	Forms submitted to the Arizona ...	High	Open	User, Training	08/29/2014 11:05:2...	
5	AL	Foreign Premium Tax (PD-B)	PD-B, Page 1	SYSTEM	The contact email address is a r...	High	Open	User, Training	08/29/2014 10:47:4...	

Please see Chapter 7 for more information on audits and the new Audit Frame.

Users Logged In Report

This report will list all users currently logged into the application. View this report before downloading files from the Update Center. Updates should only be applied when all users have exited the software. You can also send an email to the users by clicking the Email Users button on the bottom of the report. This will generate a message stating "Please logout of Premium Pro Enterprise so the software can be updated." *Report>Users Logged In*

Actions Report

The Actions Report tracks various actions performed in the software such as when filings are locked, unlocked, amended, and e-filed. Each action includes the related jurisdiction and return, which user performed the action, and a time and date stamp.

Actions Report

Actions Report

	Action	Jurisdiction	Return	Description	User	Date/Time
1	Locked a Return	Arizona	Premium Tax		User, Training	08/19/2014 11:33:13 AM
2	Changed Status	Arizona	Report of Annual Workers' Compensation	Status changed from No Status to Being Prepared	User, Training	08/19/2014 11:33:17 AM
3	Changed Status	Arkansas	Foreign Premium Tax (AID AC PC-T)	Status changed from No Status to Being Prepared	User, Training	08/19/2014 11:33:25 AM

The Actions Report tracks and records:

- when filings are locked and/or unlocked
- when filings are amended
- successful and failed efile submissions !NEW
- e-file submission IDs (if applicable)
- when a jurisdiction or return is deactivated !NEW
- changes to the preparer statuses of returns !NEW
- changes to company and jurisdiction options
- when user defined entry templates in Calendar have been deleted along with whether or not any changes have been made to their rollover status !NEW
- changes to the severity of an audit !NEW

Summary of Taxes Comparison Report

The Summary Comparison report allows you to compare values in the Summary of Taxes in the current year to values in the prior year.

Steps to the View Summary Comparison Report

1. Set an allowable variance percentage. The row will be highlighted if any item is over this amount in the report. Go to *Tools>Options>User Options tab*. Then choose the percentage under Summary of Taxes Comparison Allowable Percentage. Click Apply.
2. Open the report. From the Report Menu select View Summary Comparison Report. *Report>View Summary Comparison Report*

Summary of Taxes Comparison

Summary Comparison

States	Previous Taxable Premiums	Current Taxable Premiums	Change in Taxable Premiums	% Change Taxable Premiums
Alabama	1,015,510	1,034,200	18,690	1.84%
Alaska	586,400	587,100	700	0.12%
Arizona	897,605	793,500	-104,105	-11.60%

3. You may right-click on the column headings to choose which columns you would like to display. Uncheck a column name if you do not want it to be visible on the report. Choose More for more column choices.

Exercise 8.3

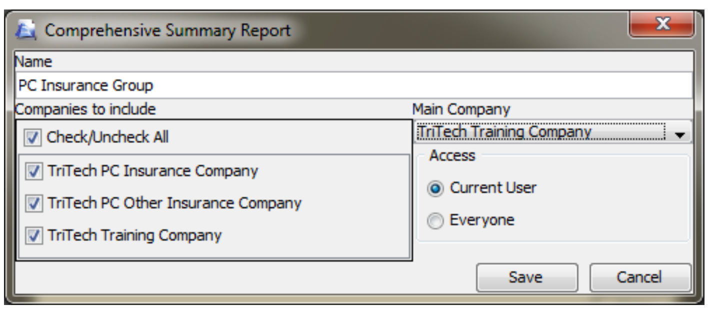
1. Change the allowable percentage for the Summary Comparison Report to 10%.
2. Open the Summary Comparison Report and select to only display the columns for Gross Premiums.

Comprehensive Summary Report

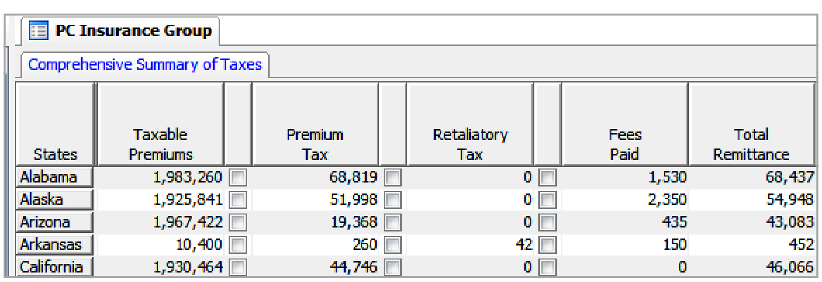
The Comprehensive Summary Report allows you to choose which companies you want to see a Comprehensive Summary of Taxes for. You can create multiple reports that contain different sets of companies.

Steps to Access the Comprehensive Summary Report

1. Go to the Report Menu and select Comprehensive Summary Report. *Report>Comprehensive Summary Schedule/Report*
2. A dialog box will appear. Select New.
3. Enter a name for the group of companies.
4. Select the companies to include in the current report.



5. Select the Main Company. The software will use this company's Summary of Taxes options (inclusion of items in determining the effective tax rate) for all companies in the group.
6. Choose if you would like to make the report accessible to everyone or only accessible to the current user.
7. Click Save.
8. Highlight the report and then select Open to view it.


PC Insurance Group

Comprehensive Summary of Taxes

States	Taxable Premiums	Premium Tax	Retaliatory Tax	Fees Paid	Total Remittance
Alabama	1,983,260	68,819	0	1,530	68,437
Alaska	1,925,841	51,998	0	2,350	54,948
Arizona	1,967,422	19,368	0	435	43,083
Arkansas	10,400	260	42	150	452
California	1,930,464	44,746	0	0	46,066

Sorting and Filtering Reports

You can sort and filter reports so that you can easily access the specific information you are looking for at any given time. You may sort all columns in all reports by ascending or descending order by right-clicking on the column header you wish to sort and selecting Sort.

You may filter number columns in reports to display items that are within certain value ranges. Once the report is open, right-click on the column heading for the number column you wish to filter, and then select Filter.

It is important to note that the total line will not be affected by filters. The total will always remain the same, regardless of the filters that are applied to the report.

The process to sort and filter reports is the same as it is for schedules. Please refer to Chapter 4 for more information.

Note: Filters applied on reports are retained when you close the report, unlike schedules which do not retain filters on close.

Freezing Report Columns

You can freeze columns so that they are visible when you scroll your screen to the right. To freeze a column, right-click on the desired column heading and select Freeze All Columns to the Left. When you scroll, the frozen column and all columns preceding the frozen column will always remain in view. The order of the frozen columns cannot be modified. To unfreeze columns, right-click on any column heading and choose Unfreeze All Columns.

INTERFACE AND USER OPTIONS

CHAPTER THREE

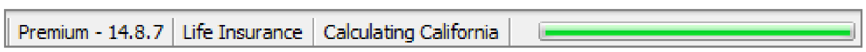
MENU TOOLBAR 19
STANDARD TOOLBAR 19
ENTERPRISE TOOLBAR 22
DOCKABLE FRAMES 23
USER OPTIONS 23

Title Bar

The title bar at the top of the screen includes the name of the application (Premium Pro Enterprise) and the version number of the program files currently installed.

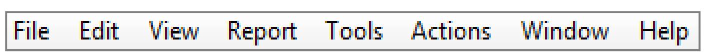
Status Bar

The status bar at the bottom of the screen displays various information about the application, such as the current task the software is performing, the product specific version number, and current company type.



Menu Toolbar

The Menu Toolbar includes the File, Edit, View, Report, Tools, Actions, Window, and Help Menu options.



Standard Toolbar

The Standard toolbar consists of commonly used functions.

Back/Forward

The Back and Forward buttons are used to navigate through the returns and schedules that are currently open in the active window. When reviewing a return, pressing the back arrow key on the toolbar will take you back to the prior return or schedule that was being viewed in the active window. Pressing the forward arrow key on the toolbar will advance to the next return or schedule in the active window.

Save Current Document

This function will save the changes for the current return or schedule that is being viewed.

Refresh

To refresh the display of the current report, click the Refresh button on the toolbar.

Close

The Close button is used to close only the current return or schedule that is being viewed.

Close All

This function will close all returns or schedules that are currently open.

Print Button

The Print button will print the current page being displayed or the current return in its entirety. Make the appropriate selection from the icon dropdown arrow to set the default action of the print icon.

Print to PDF

This button will print the current page being displayed or the complete current return to a PDF file. Make the appropriate selection from the icon dropdown arrow to set the default action of the PDF icon. You may also choose Attach Page to or Attach Return to in order to print a page or a complete return directly to the Attachment Frame.

Zoom

Zoom allows the user to make the return or schedule smaller or larger on the screen. Pressing the Zoom button will cause the return or schedule to appear larger. You can also click the arrow next to the icon and then select the desired percentage from the dropdown box.

Cut

This function deletes selected text from the active return and writes it to the Windows Clipboard. This command is available when you select text or data within spreadsheet cells. To quickly remove selected information from the return and place it on the Clipboard, click the Cut button on the toolbar. Once items are placed on the Clipboard, they can be pasted to any Windows compatible spreadsheet software.

Copy

This command copies selected text from the active document to the Windows Clipboard. It is available when you select text or spreadsheet cells. Once items are placed on the Clipboard, they can be pasted to any Windows compatible spreadsheet software. The layout of the rows and columns will remain the same when they are pasted to the other software.

Paste

This command inserts a copy of the Clipboard contents at the insertion point, replacing the selection (if any) with the text from the Clipboard. This command is not available if the Clipboard is empty or if the selected text cannot be replaced.

Calendar

Pressing the Calendar icon on the toolbar will load the Calendar application. This button will not be available if the Make Calendar Available To Users option has been disabled.

Open Previous Year's Return

If a return is loaded, selecting this button will load a read-only version of the prior year's return. You may go back multiple years by clicking the button again.

Open Annual Return

From the Estimate module, you may view a read-only version of the Annual return by clicking the Annual Return button on the toolbar. This button will not be active while in the Annual module.

GTS

Press the GTS button to view a read only copy of the applicable GTS schedule for the return you currently have open. If you have a PC return open, you can choose to open the GTS PC schedule, the GTS AH schedule, or both by choosing the action from the button dropdown.

Typewriter

The Typewriter function allows you to insert custom text on the active form.

Stamps

The Stamps feature allows you to insert stamps on the active form.

Sticky Notes

The Sticky Notes feature allows you to add custom notes to specific lines or sections of a form.

Pencil

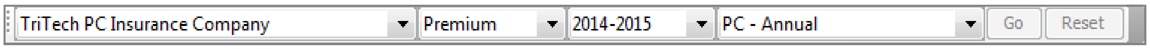
The Pencil Tool allows you to add custom markups directly to a form.

Reference

The Reference tool allows users to place custom references on returns. The Reference has a visual identifying label on the return, a place to enter notes (similar to a Sticky Note), and the ability to link to a static file or folder or an attachment in the Attachment Frame.

Enterprise Toolbar

Four dropdown boxes are located on the Enterprise toolbar that allow the user to navigate through multiple registered companies, products, years, and modules.



Company Selection

The first dropdown window allows the user to select which company to view. Click on the down arrow and then select the appropriate company.

Product Selection

This dropdown box allows the user to select the desired product.

Year Selection

This dropdown box allows the user to select the desired year.

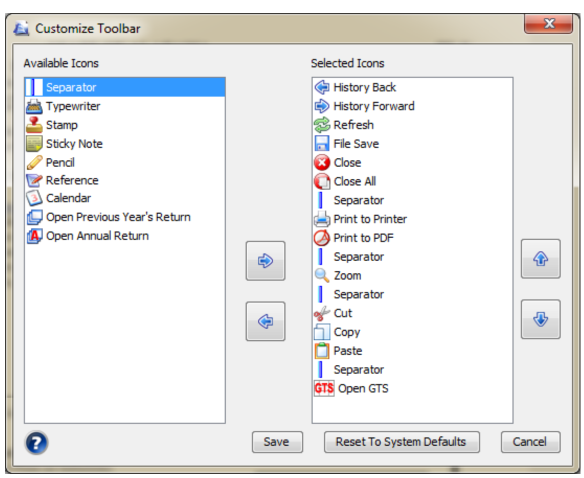
Module Selection

The final dropdown allows users to select the appropriate module. For Premium Tax, you may select GTS, Annual, or Estimate. For Municipal, you may select the desired state module. Click on the down arrow to select the desired module.

Newly selected items will be in bold text. Once you have made your selections, click the Go button to load the specified company data in the desired product, module, and year. Pressing the Reset button during the selection process will return the dropdown boxes to the current company selections.

Custom Toolbar

You may customize the standard toolbar so that only the buttons you commonly use are displayed. To do so, go to *Window>Customize toolbar*.



From here, you may use the right and left arrows to remove and add the buttons you wish to have on your toolbar. To remove an icon, select it from the Selected Icons column and click the left arrow to move the icon to the Available Icons column. The Separator icon is the thin dark line that is displayed between the buttons. It will always remain in the Available Icons column so that you may insert the separator line anywhere you wish. To add a button, select it from the Available Icons list and click the right arrow to move it to the Selected Icons column.

To change the order of the icons, select the icon you wish to move and use the up and down arrows to position the icons. When finished, click Save to apply your changes. If you would like to remove any changes you made to your toolbar, click the Reset To System Defaults button, and then click Save.

Customizing Your View

From the View Menu, you can modify the software display. You may also choose whether or not to display the Standard and Enterprise toolbars by checking these on and off from the View Menu. If you wish to restore all toolbars to their default locations, you may select Reset Toolbars from the View Menu. Dockable frames are frames that may be moved and docked at various locations in the interface. By default, the dockable frames are all displayed. You may uncheck any frames you do not wish to view.

The available dockable frames are the Active Tree, Inactive Tree, Assigned Tree, Return Instructions, Preparer Notes, Filing Information, Release Notes, Feed Reader, Attachments, and Audits Frame.

To move a frame, click on the desired frame and drag it to the new location. If you wish to move all dockable frames to their default locations and sizes, you may select Reset Display To Default Settings from the View Menu.

The Window Menu allows you to further customize Enterprise by selecting a skin or color scheme for the interface.

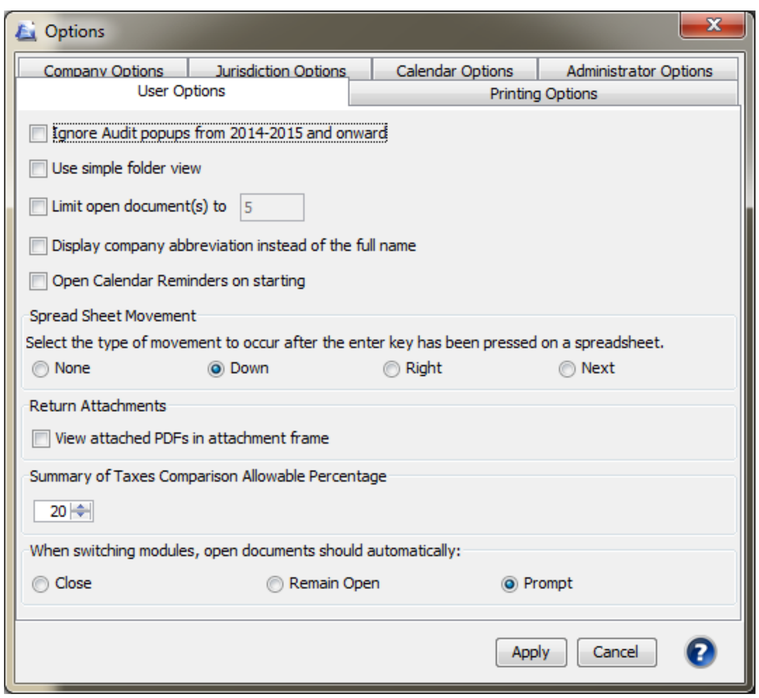
Exercise 3.1

1. Go to *View>Dockable Frames*.
2. Uncheck Display Assigned Tree. The Assigned Tree should no longer appear.
3. Select Reset Display to Default Settings to revert the changes.

User Options

From the Tools Menu, you can access options that may be set individually for each Enterprise user. *Tools>Options>User Options tab*

- Ignore Audit Popups from 2014-2015 and onward: Selecting this option will prevent any open audits with a high severity from automatically popping up when viewing a return. !NEW
- Use simple folder view: The option will collapse any set of nodes that are currently expanded in the navigation tree before expanding another set of nodes. For example: If the Company Information folder is already expanded and then you expand the Summary Schedule folder, the Company Information folder will automatically collapse.
- Limit open document(s) to: You may limit the number of documents that may be opened simultaneously in the active window.
- Display company abbreviation instead of the full name: You may choose to use the Company Abbreviation in the dropdown box on the Enterprise toolbar, as well as other areas of the software. This is the company abbreviation you entered in the Admin Tool.
- Open Calendar Reminders on starting: Calendar will automatically open upon logging into Enterprise (unless your Administrator has made Calendar unavailable to users). Calendar Reminders for due dates will be displayed in pink.
- Spread Sheet Movement: You may change the cursor movement on a spreadsheet after you press the enter key.
- Return Attachments: Choose how you would like to view PDF files that have been added as attachments in Enterprise. If selected, attachments will display in the Attachment Frame. If the checkbox is not selected, the attachments will load in a separate window.



- Summary of Taxes Comparison Allowable Percentage: Set an allowable variance percentage for the Summary of Taxes Comparison Report, which allows you to compare values in the Summary of Taxes in the current year to values in the prior year. Any item over the allowable variance percentage will be highlighted in the report.
- When switching modules, open documents should automatically: If you switch modules when you have documents open, the software prompts you to choose to close the documents or leave them open. You may turn this message off and choose to have open documents automatically Close or Remain Open automatically each time you switch modules. If you prefer to select the action each time, you can leave the Prompt option selected.

Exercise 3.2

1. Go to *Tools>Options>User Options*.
2. Check the Option to Use Simple Folder View, and then click Apply.
3. Expand the Company Information Folder in the Active Tree.
4. Expand the Summary Schedules Folder in the Active Tree.

PRINT & PRINT OPTIONS

CHAPTER TEN

PRINT ICONS 89

PRINT MENU 90

RIGHT SELECT PRINT 91

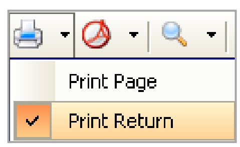
PRINT OPTIONS 93

Premium Pro Enterprise provides you with several methods to print the returns, schedules, and reports available in the software.

Print Icon

You may print any item you are viewing in the active window simply by clicking on the Print Icon on the toolbar. By default, this feature prints only the current page.

To print all pages of the current return you are viewing in the active window, click on the dropdown arrow on the Print Icon and select Print Return. Your selection will be saved, so the next time you click on the Print Icon it will print the entire return.



To switch the action of the Print Icon back to print the current page only, simply select Print Page from the icon dropdown. You may also change the action of the icon to print the complete return by holding the CTRL key while clicking the print icon.

Print to PDF Icon

You may also print any item you are viewing in the active window to a PDF file by clicking the Print to PDF icon on the toolbar. Again, by default, this feature only prints the current page. However, you can choose to print the entire return by selecting Print Return from the dropdown arrow on the icon. You may also print the complete return by holding the CTRL key while selecting the PDF icon.

You may also choose Attach Page to or Attach Return to from the dropdown in order to print a page or a complete return directly to the Attachment Frame. !NEW

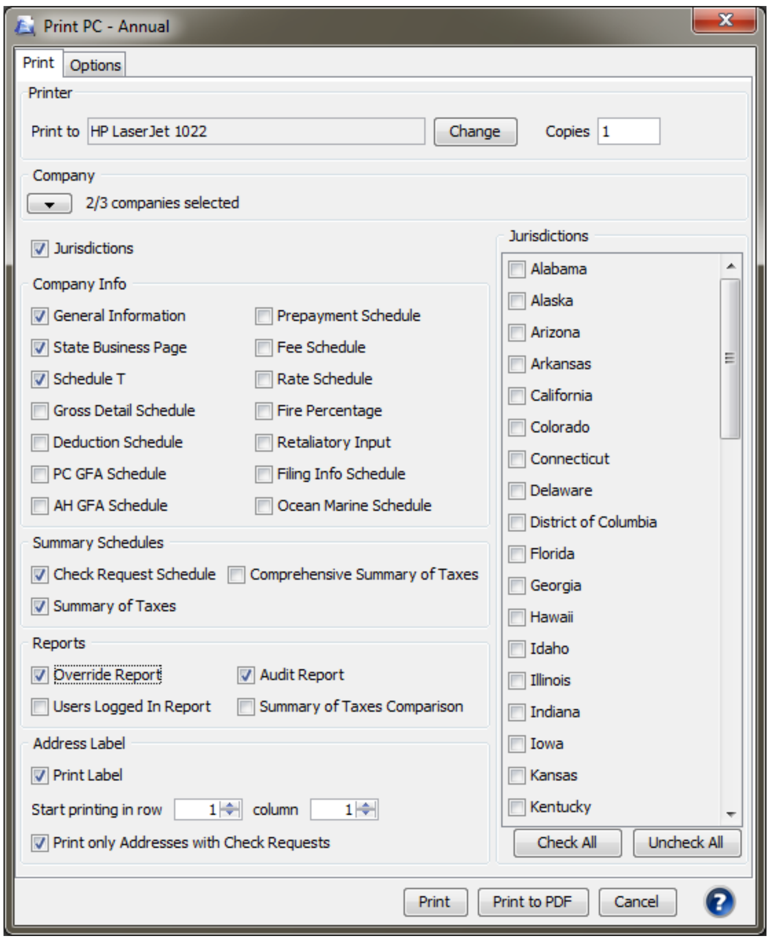
Exercise 10.1

1. View the Minnesota Annual Return.
2. Print the current page by selecting the Print to PDF icon on the toolbar.

Print Menu

The Print Menu allows you to print multiple returns, schedules, and reports for multiple companies. You may also adjust some of your print options from this location as well. From the File Menu, select Print to access the Print Menu.

The first tab of the Print Menu is organized into sections: Company, Jurisdictions, Company Information, Summary Schedules, Reports, and Address Labels.



In the Company Section, click the down arrow beside the current company name to see a listing of all available companies. Place a check mark next to the desired companies and select close.

Selecting an item in the Company Information, Summary Schedules, and Reports sections will print the selected item for the selected companies. If you choose Jurisdictions or Address Labels, the Jurisdiction Selection area on the right side of the menu will be enabled. If only one company is selected, only the active jurisdictions for that specific company will appear in the Jurisdiction Selection area. Otherwise, the Jurisdiction Selection area will list all available jurisdictions. You must select at least one jurisdiction in order for filings or labels to print. The program supports Avery 5160 labels for printing the address labels. (See also Right Select Print Labels.)

You may choose to print either all active jurisdictions or selected states. Place a check beside the desired jurisdiction. Once you have made your selections, you may go to the Options tab to verify the default items that will print with the selected jurisdictions.

Any changes made to the Options from the Print Menu are temporary and will only affect the current print job. To change the Print Options for all future print jobs, you will need to make the modifications in the Print Options via the Tools Menu. *Tools>Options>Printing Options tab*

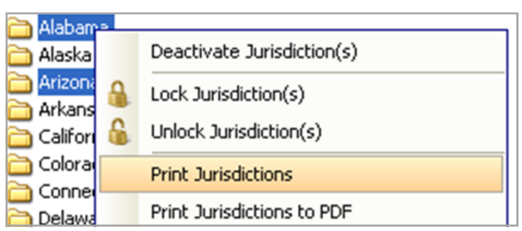
From the Print Menu, you can also change the printer and number of copies desired for the current selected items.

To print your selections to the default printer, click the Print button. You may also print the selected items to PDF by clicking the Print to PDF button on the Print Menu.

Please note that when selecting to print multiple companies, the printouts will be collated by jurisdiction.

Right Select Print

You can also print returns and jurisdictions using the right select menu. Highlight the desired return(s) or jurisdiction(s) in the Active Tree or Assigned Tree, right-click, and choose Print Returns or Jurisdictions. The selected returns will print to your default printer based on your Print Options.



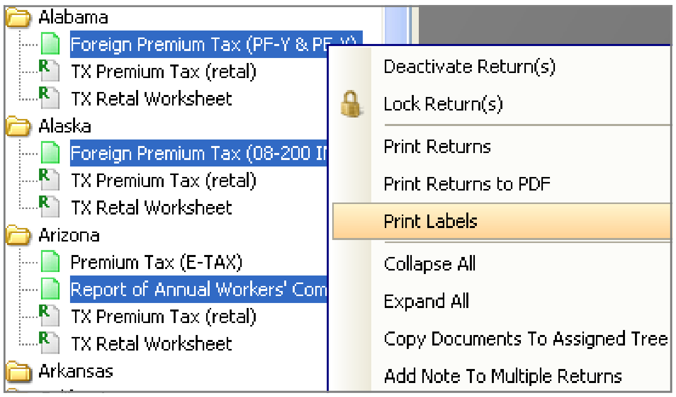
Right Select Print to PDF

You can also print to PDF using the right select menu. Highlight the desired return(s) or jurisdiction(s) in the Active Tree, right-click, and choose Print Returns or Jurisdictions to PDF. The selected returns will print to PDF based on your Print Options.

Right Select Print Labels

If you need to print address labels for specific returns all at one time, using right select to print them can be a big time saver. The program supports Avery 5160 labels.

To print labels through right select, expand the appropriate jurisdictions and highlight the desired return(s) in the Active Tree. To select multiple filings, hold down the Ctrl key on your keyboard while clicking on each return. Then, right-click on any highlighted return and choose Print Labels.

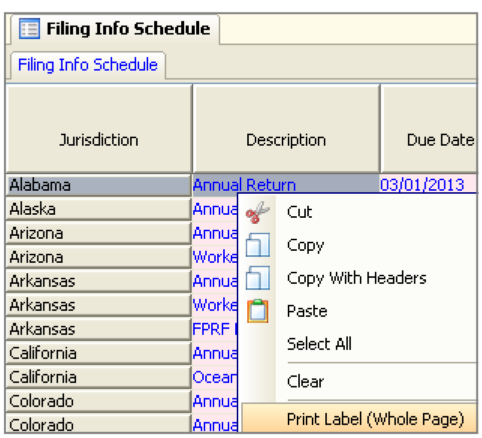


You may then choose the row and column of the label sheet you would like to begin printing on. You may also select to print address labels for only the filings that have check requests.

Labels for the selected returns will print to the default printer selected in your Print Options.

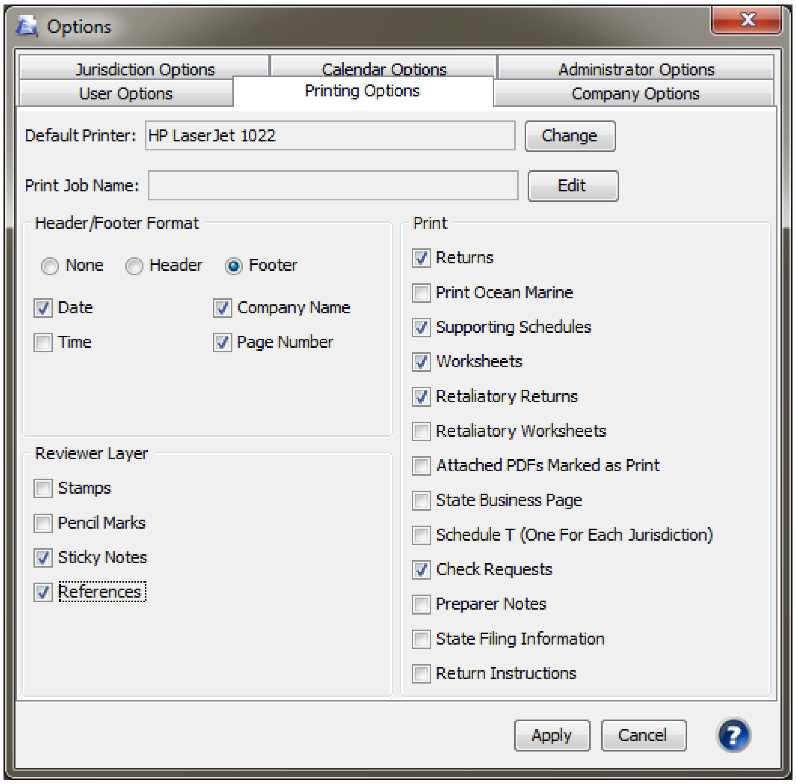
Print Full Page of Same Label

You may print a full page of a single label. To do so, go to the Filing Info Schedule, right click on the address you wish to print, and choose Print Label (Whole Page). Then press Yes to confirm that the address shown is the address you wish to print.



Print Options

The Printing Options allow you to change various printing capabilities. These options are available under the *Tools>Options>Printing Options tab*. These changes will be saved and recur with each print job. The Print Option settings are unique for each module, so you must apply new Print Options in each product for them to take effect.



Default Printer

You may change your default printer here by clicking the Change button and selecting the desired printer.

Print Job Name

You may customize the name of each print job when printing. Customizing the name will modify the name of each file printed. You may add the tax year, user name, company name, company abbreviation, current date, jurisdiction name, and/or jurisdiction abbreviation to the print job name. In addition, you may type any additional information you want to appear in the name in the print job name field.

Header/Footer Format

The company name, page number, and current date and time can be printed as a banner on each page of a return and schedule. The banner can be printed as either a header or footer.

Reviewer Layer

If you added Stamps, Pencil marks, Sticky Notes, or References to any return, you may check the corresponding checkboxes under the Review Layer if you wish to have the markups print with the returns.

Print

The Print section allows you to specify which items are printed when you choose to print a state from the Print Menu. You may choose to print the following items: State Returns, Supporting Schedules, Worksheets, Retaliatory Returns, Retaliatory Worksheets, Attached PDFs Marked as Print, State Business Page, Schedule T (One For Each Jurisdiction), Check Requests, Preparer Notes, the State Filing Information, and Return Instructions.

For Property and Casualty companies, there is also an option to print only the Ocean Marine returns. For estimate returns, you also have the option to print all quarterly filings based on the month the returns are due.