Locking and Unlocking Returns

Once a return is completed, you may lock it so that subsequent calculations and changes to the Company Information will not affect the return. A user cannot type a new value into any of the fields on a locked return and changes made to any of the input schedules will not carry to the locked return. This ensures that the information on a return that has been previously submitted to a taxing authority will not change. Once a return is locked, a yellow padlock will appear on the return's icon in the Active Tree.
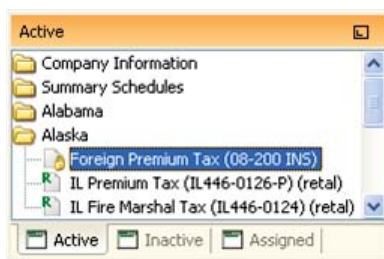
If a user has the appropriate permissions, they may still add stamps, sticky notes, pencil marks, and references to a locked return. This allows users to annotate and comment on returns during the review process.

Steps to Lock a Return

1. Open the desired return in the jurisdiction to be locked.

2. Click on the Tools menu and select the Lock Return option

You may also right click on the return from the navigation tree and select the Lock Return option from the menu.

Unlock Current Return

You may unlock any previously locked return as needed. Unlocking a return, will cause the yellow padlock icon will disappear and enable you to access any field on the return, calculate, or write general information.

Steps to Unlock a Return

1. Open the locked return

2. Click on the Tools menu and select the Unlock Return option.

You may also right-click on the appropriate return in the Active Tree and select the Unlock Return option from the menu. Unlocking a return will cause that return to recalculate based on the current information in the input schedules. If the return was previously filed, the original data may be affected when the return is unlocked.

To lock/unlock multiple returns, you may highlight the desired returns in the tree using your mouse and the shift or ctrl keys. Once the items have been selected, you may right click and select lock or unlock from the sub menu.

Lock Current Jurisdiction

After completing returns for any state, the entire jurisdiction may be locked. Click on Tools and select Lock Current Jurisdiction or right click on the jurisdiction folder and select the Lock option. The icon for every return in the jurisdiction will now have a yellow padlock. You cannot alter any return in the jurisdiction, but you can still view and print the returns.

Unlock Current Jurisdiction

This option allows the user to unlock a locked jurisdiction so changes and updates can be made to any of the returns within the jurisdiction. From the Tools menu, select Unlock Current Jurisdiction or right click on the jurisdiction folder and select the unlock option.

As with the individual return, unlocking a jurisdiction will cause all returns within that jurisdiction to recalculate based on the current Company Information data. If any of the returns have been previously filed, the original data may be affected.

Viewing Multiple Schedules, Returns, or Reports

You may simultaneously view any schedule, return, or report in the software. When you have more than one item open, simply right click on any item's tab and select either New Horizontal or Vertical Group from the menu. You can also drag the tab and drop the item onto the workspace below to achieve the same results.

To synchronize the scrolling so all windows scroll simultaneously, go the Windows menu and select Synchronize Scrolling.

When you are viewing a return, you can easily view the prior year return by clicking the Open Previous Year's Return button on the toolbar. View the returns side by side to compare.

You can also simultaneously view any item in any company, product, module, and year that is available to you in Premium Pro Enterprise. When switching between companies, products, years, and modules, you will be notified that you are navigating away from the current selection. You will also be asked if you want to close the open documents. Answering Yes will close all the open documents. If you select No, however, the open documents will remain open and be read-only.

When you are viewing a return, you can easily view the estimate returns for the active jurisdiction by clicking the Open Estimates button on the toolbar. You may choose to open all current year or all previous year estimate returns.

To enable a read-only document in the active window, right click on the light yellow read-only bar that is displayed across the read-only form and choose to switch to that form. This will switch to the specific company, product, module, and year to which the document belongs.
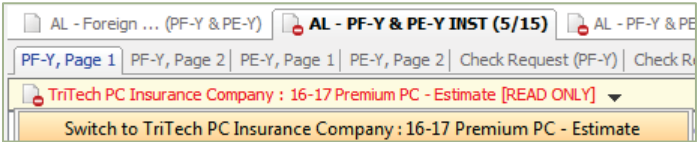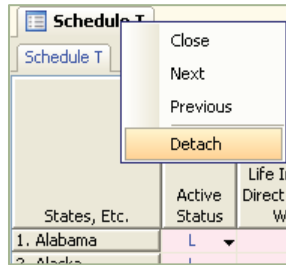
Detaching Windows

You may detach any tab (schedules, reports, returns, etc.) by right clicking on the tab and selecting detach. This allows the item to move independently of the primary Enterprise window. A detached window cannot be edited.

Steps to Detach a Tab:

1. Right click on the main tab of the open item and select Detach.

2. You may now move the window independently of the primary Enterprise window. You will notice that the cursor has a circle with a minus sign, indicating that you cannot edit the open item while it is detached.

Return Attachments and Links

The Return Attachment feature in Premium Pro Enterprise allows you to organize and maintain your supporting documents on a return by return basis. You can also attach items to the Company Information Schedules and the Summary Schedules.

Using the icons on the Attachment toolbar, you can choose to add folders, files, and links globally or to specific returns. You can also replace, delete, view or export (save as) the attachments and links at any time.
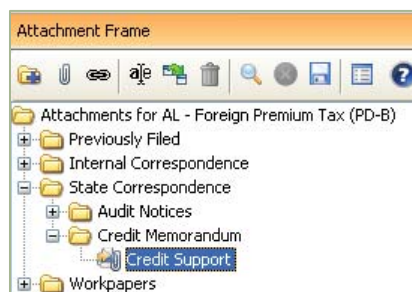
Custom Folders

Users may create custom folders to better organize their documentation. These folders will automatically rollover from year to year.

Steps to Add a Custom Folder

1. Open a state return.

2. Open the Attachment Frame.

3. Click on the folder in which you would like to add a new custom folder.

4. Click on the Add Folder icon on the Attachment Frame toolbar.

5. In the dialog box, enter a name for the new folder and click OK.

6. The new folder will appear in the Attachment window.

Attachments are used to attach static files that will not change. With this feature, you can store your state audit notices, spreadsheets, email correspondence, credit documentation or any other item that may be associated with a particular state return. Once attached, the files can be opened by clicking on the file attachment in the Attachment Frame. You can choose to view PDFs in their outside program, or you can view PDFs from within Enterprise.

To view PDFs from within the Attachment Frame in Enterprise, go to the Tools Menu and select Options. From the User Options tab, check the option under Return Attachments that says View attached PDFs in attachment frame. *Tools>Options>User Options tab*

After you attach a file, a number in parenthesis will appear next to the return name in the active tree. The number indicates how many files have been attached to the return. As you add more files, the number will increment.

Steps to Add an Attachment

1. Open a return.

2. Open the Attachment Frame by clicking on the folder/paperclip icon on the right side of the screen.

3. Highlight the desired folder within the Attachment window.

4. Select the Paperclip button the on toolbar.

5. The Attach File(s) dialog box will appear. Click Browse to locate the file you would like to attach.

6. Click Open. In the Description(s) text box, you may enter an alternative description for the file.

7. Under Add attachment(s) to, select where you would like to attach the file:

▪ Current Return attaches the file(s) to the current return only.

- All returns in current jurisdiction (Alabama) attaches the file(s) to all of the returns in that jurisdiction.
- All returns in current module (PC-Annual) attaches the file(s) to all of the returns in the current module.
- Current Return for All Companies attaches the file(s) to the current return for all companies.

8. Choose if you would like the attachments to rollover to the next product year Always, Once, or Never. If you choose Always or Once, there will be a yellow arrow on the attachment icon next to the file indicating that the file will rollover.

9. If you would like the attachments to print with the returns they are attached to, select Print Attachment(s). A print icon will appear next to the attachment indicating whether it is marked to Print (PDFs only).

10. For states that are electronically filed, you will have the option to designate if the attachment is applicable for electronic filing by checking the E-file Attachment option. You will then use the drop down box to select the associated attachment type.
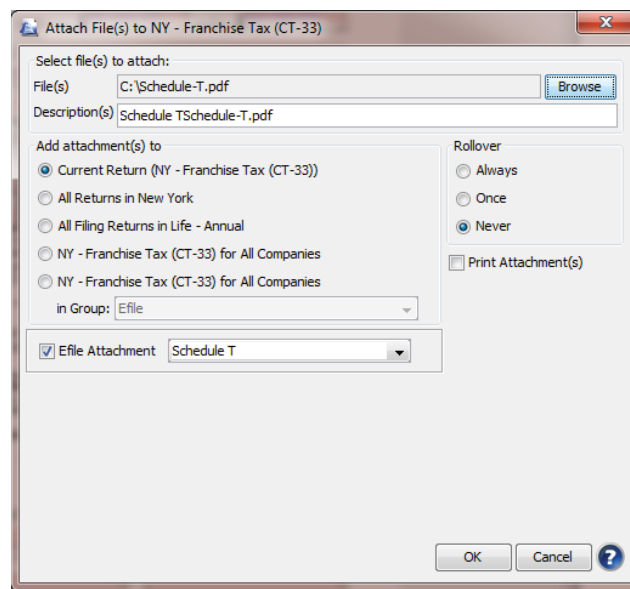
11. Click OK.

You may also add attachments by dragging and dropping from your computer or from Outlook. To do so from your computer, hit the restore down button on the Enterprise window so that you can view other windows on your screen. Expand the appropriate jurisdiction folder so that returns and worksheets are displayed in the tree. From your computer desktop, navigate to the file that you wish to attach. Press and hold the right mouse button when you select the file, then drag the cursor over the appropriate return in the Enterprise tree and release the mouse button. When the Attach File(s) dialog appears, follow steps 5-10 from the steps above.

For Outlook attachments, open the return to which you wish to add an attachment. Expand the Attachment Frame so it is visible in Enterprise. You may wish to pin the Attachment Frame to keep it from disappearing. Hit the Restore Down button on the Enterprise window and resize the window so that you can view other windows on your screen. To attach a complete email to a return, open Outlook so that your email list is displayed. Resize the Outlook window so that both it and the Enterprise window are visible. Drag the email you wish to attach over to the appropriate folder in the Attachment Frame in Enterprise and drop it. After the Attach File(s) dialog appears, follow steps 5-10 from the steps above.

To save an attachment from Enterprise, you may drag and drop files from the attachment frame to a location on your computer. You may also drag and drop files from the attachment frame directly to an email message.

Steps to Add Multiple Attachments at Once

1. Follow steps 1-5 above.

2. After you click browse, click on the first file you would like to attach. Then press 'Ctrl' on your keyboard and click on any additional files you would like to attach. When all of your files are selected, click Open.

3. Under Add attachment(s) to, select where you would like to attach the file.

4. Choose if you would like the attachments to rollover to the next product year Always, Once, or Never. If you choose Always or Once, there will be a yellow arrow on the attachment icon next to the file indicating that the file will rollover.

5. If you would like the attachments to print with the returns they are attached to, select Print Attachment(s). A print icon will appear next to the attachment indicating whether it is marked to Print (PDFs only).

6. Click OK.

Steps to Print Directly to the Attachment Frame

You may print attachments directly to the attachment frame. This feature allows you to print an item, such as a credit worksheet or return, directly into the attachment frame of another return.

1. Open both the item you want to attach and the item you want to attach it to.

2. While viewing the item you want to print, go the Print to PDF dropdown and choose Attach Return to or Attach Page to.
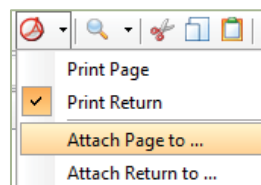
3. Choose the item you want to attach the PDF to.
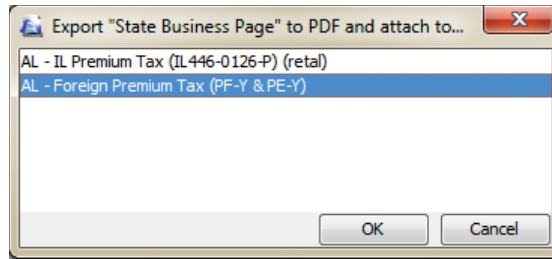
4. The Attachment dialog box will appear. Choose your desired options and select OK.

5. The item you printed will now be in the Attachment Frame as a PDF.
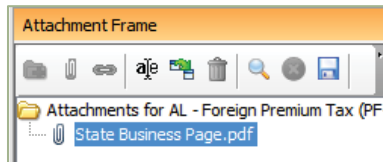
Adding Links

Links can be attached to returns allowing you to view documents and folders that are continuously updated. If you revise a linked document or folder, when you click on the link in Enterprise, it will take you to the newly updated file or folder. Linked documents will open outside of Enterprise in their respective programs (Word, Excel, Adobe, etc.).

The steps to add a Link are the same as adding an attachment (above). Simply click on the link icon instead of the attachment icon on the Attachment Frame tool bar. The steps to add a linked folder or document are the same as adding an attachment. Simply click on the link icon instead of the attachment icon on the Attachment Frame toolbar. A link icon will be displayed next to the link.

If you move or delete a file or folder that is linked, a broken link icon will display next to that link indicating that the file or folder it is pointing to does not exist. You must relink the broken link.

File Details

After you attach a file, you may later change the attachment's file details in order to have it Print with returns or Rollover to the next year. The File Details also list who attached the file along with a time and date stamp.

Steps to View or Change Attachment File Details

1. Click on an attachment in the Attachment Frame.

2. Click on the File Details icon on the Attachment Frame tool bar.

3. The Details dialog box will appear. Check if you would like the file to Print, or select if you would like the file to Rollover Always, Once, or Never. Then click OK.

Amending Returns

Users may amend any filing within the software and maintain an electronic version of all previous submissions. When a user opts to amend a return, Premium Pro Enterprise will create a PDF of the selected filing and list it the Previously Filed folder in the Attachment Frame. Any supporting documentation selected in the Printing Options will also be included in the original filing PDF that is created.
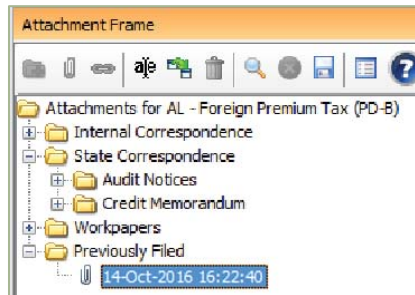
The user may then modify the current return in the active window. A new check request is generated with the amended filing. After the return is amended, a green checkbox will appear next to the form in the active form tree.
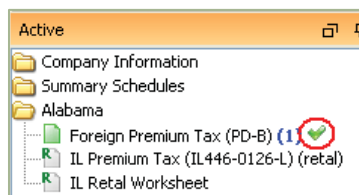

Steps to Create an Amended Return

1. Highlight the desired return in the Active list.

2. From the Actions Menu, select "Amend Return" or right click on the return and select Amend.

3. Click Yes to proceed.

4. A pop-up message will appear to notify you that the process was successful.

Return Instructions

To review the return instructions, open a return and then click the Return Instructions icon on the far right side of your screen. If there are no instructions for the return that is currently open, there will be a red X through the return instructions icon.
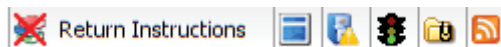
You may also go to the Help menu and select Return Instructions or press Ctrl + R while a return is open and this will bring up the appropriate state instructions as well.

Preparer Notes

Preparer Notes provide an organized area to make notes for individual returns or entire jurisdictions. These notes can be added to any schedule or return in Premium Pro and can serve as important reminders.

To add a preparer note, load a form or return. Click the Preparer Note icon on the far right side of your screen to load the preparer note interface. The first tab allows you to create a note for the entire state or jurisdiction. The second tab is return specific and notes entered here will only display for that specific return. You may type or copy text to the note. The information will automatically be saved and will be available the next time you open that particular return.

Once you have entered data, the Preparer Note icon will change color from blue to red. A red Preparer Note icon will always indicate that a preparer note exists. All notes entered will rollover from year to year.

You may also create preparer notes for the Company Information and Summary Schedule areas. You may create a single note for each area, as well as specific notes for each schedule.

Also, you may add preparer notes to multiple companies across multiple jurisdictions or returns at the same time using Jurisdiction Preparer Notes and Return Preparer Notes.

Steps to Add Multiple Return or Jurisdiction Specific Preparer Notes

1. From the active tree, load a return within a jurisdiction to which you would like to add a note.

2. Click on the Preparer Notes icon on the right side of the screen.

3. Click on the jurisdiction tab within the Prepare Notes interface (Alabama in the picture), then click on the note editor button at the top left of the interface.
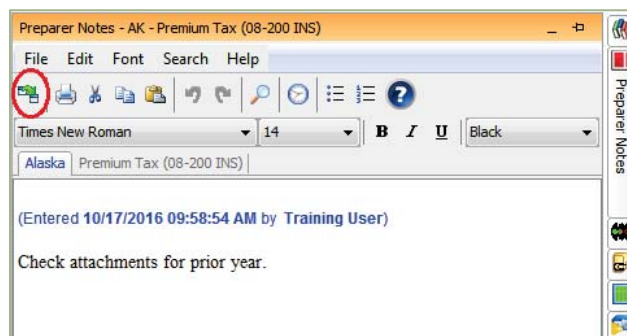
4. A Multiple Notes dialog box will appear. Type your note in the white note box area.
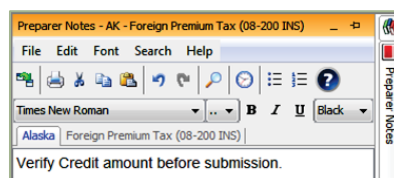
5. Select:

    a. The first option if you would like the note to be applied to all of the active jurisdictions for the current company. OR

    b. The second option if you would like the note to be applied to only the selected jurisdiction for all of your companies. (In the picture, the note will be applied to Alabama for all of your companies that have Alabama activated.)

6. Press Save. The note will be applied only to the tax year and module you are currently in.

Preparer Signature Tool !NEW

The Preparer Signature Tool allows you to place a stamp of the preparer's signature on returns. This tool is intended for use by paid preparers on returns that specifically allow such signatures.


Steps **to** add a Preparer Signature Stamp to a Form

1. Open a return and view the desired page.

2. Click the Preparer Signature icon on the standard toolbar or go the Tools menu and select Comment & Markup then Signature.

3. Click on the desired area (preparer signature line) to place the preparer signature stamp on the form.

Once the signature is visible on the page, it is available for anyone to view and print along with the form. However, only you and the admin user can delete or move your signature. Right click on your signature to choose to delete or move your signature.

In order to enable the Prepare Signature Tool, you must first agree to the Prepare Signature Authorization statement found under *Tools>Options>User Options*.

By checking the checkbox, you agree that the signature and initials are the electronic representation of your signature and initials for all purposes when used on documents within Premium Pro Enterprise, including tax, fees, assessments and other miscellaneous filings – just the same as a pen-and-paper signature or initial.
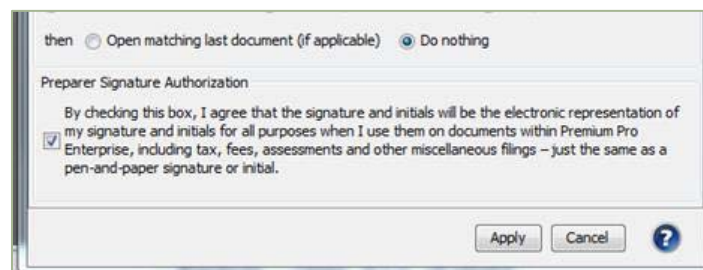
The signature stamp is the name of the logged in user. You cannot change the name on the stamp. You may change the font, font size, background color and font color by clicking on the icon dropdown and choosing to Edit Preparer Signature.
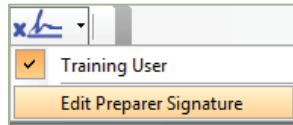
You may revoke authorization to use your signature on the returns by going to *Tools>Options>User Options* and unchecking the authorization checkbox. A popup warning will state that you will no longer be able to add a preparer signature to returns and all previously placed signature stamps will remain on any form you placed them on.

State Contact and Filing Information

If you have any questions regarding the state return or need additional assistance with the required filings, you may view the State Filing Information.

This page links directly to the State Filing Info Schedule in the Company Information Area. It includes state specific information, such as due dates, contact information, links to state websites and applicable statutes, form specifications, and other important items.

This form can also be used as a checklist or cover sheet for your state filings. Users may enter their own company specific entries as well. This screen is accessible by clicking on the icon on the far right side of your screen.

There are separate State Filing Info tabs for annual and estimate returns to accommodate varying information for the different filings. Next and Previous buttons located on the State Filing Information toolbar allow you to easily scroll through jurisdictions.

Tax Planning

Specific state form and regulation changes are communicated to users through the Premium Pro Enterprise Release Notes. Clicking on the traffic light icon located on the far right side of the screen, will display detailed changes, notes, and important information pertaining to that state.
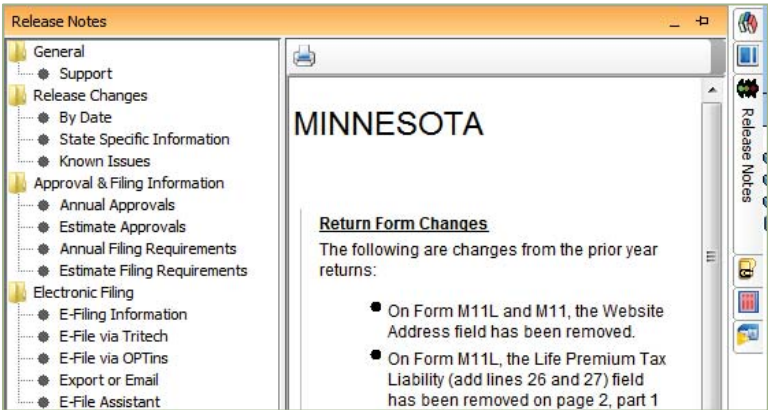
The color of the traffic light icon signifies the degree of changes for a given state. Red indicates extensive changes and revisions, yellow represents moderate changes, and green indicates little or no change in the actual state return. This icon is also linked to the Release Notes section of the Help File system so

that the software will display any specific corrections and important notes that pertain to the state as well.

Audit Frame

The Audit Frame provides an easy way to view important items that may need to be addressed before processing and completing a return. Return audits are now available via the Audit Frame. Audits alert you to items that need to be looked at prior to filing a return.

The Audit Frame lists all audits for the jurisdiction of the return you are viewing, grouped by return. In addition to the audit description, there are editable columns for the status of each audit (Open, Resolved, or NA) and the severity of each audit (High, Medium, Low, or Informational).

Expanding an audit will provide you with additional audit details including the page of the item in question, the category, notes, and columns to track who the audit was changed by and what time the audit was changed at. You may enter your own notes in the note field by double clicking on it.
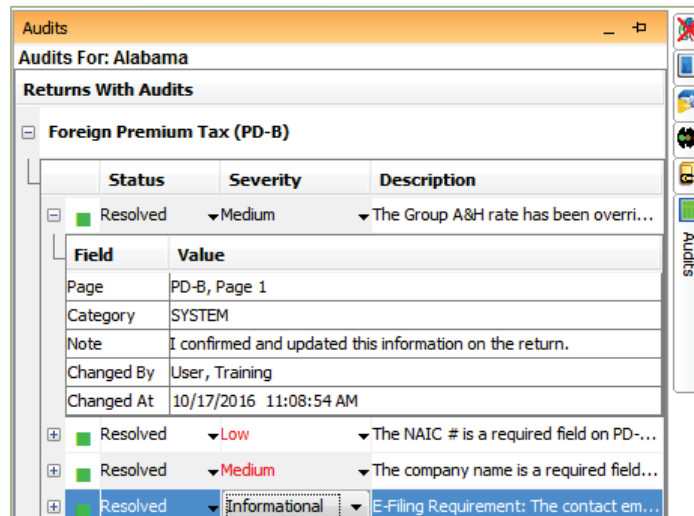
If an open audit is set to high severity, it will pop up upon opening the associated return unless you have the option selected to ignore pop up audits. The audits icon is colored coded based on the status and severity of each audit.

- Red - Open audits are high or medium severity.
- Yellow - Open audits are low or informational.
- Green - No audits exist or all audits are either marked as resolved or N/A

Custom Audits

You may enhance your internal processes by adding custom audits to your returns to make sure no details are forgotten. You can add the audit to a return for one company, or add the audit to a specific return for all companies at the same time.

Steps to add Custom Audits

1. To create a custom audit, you may select Add Custom Audit by:

    a. right clicking on the return name in the tree

    b. right clicking on the page of an open return

    c. right clicking on the return in the audit frame (if a return already has existing audits).

2. You may create or delete your own categories by clicking on the green plus or minus buttons, designate the severity from the dropdown, and enter in the description of your audit.

3. You may add the audit to the return for the current company only by selecting This Return, or you may add the audit to the return for all of your companies by selecting This Return for all Companies. You may also select a group to add the audit to the return for all companies within a specific group.

4. Select Save to create your audit.

    Your new audit will show up in the Audit Frame and in the Audit Report. To delete the audit, go to the Audit Report or Audit Frame, right click on the audit, and select Delete Custom Audit. If you applied the audit to multiple companies, then the audit will only be deleted for the current company. The audit will remain attached to the returns for the other applicable companies.

    As with automatic audits, an Open custom audit or an audit with a severity of High will be included in the pop up audits upon opening a return. Each user is responsible for monitoring the audit and changing the status and severity accordingly. By default, Admin Users and Regular Users have permissions to create and delete custom audits. The Admin User may use the Roles Wizard to create a user role and grant or deny audit permissions in the Jurisdiction Permissions. *Tools>Roles Wizard*

Typewriter Feature

The Typewriter feature allows the user to add custom text to a form by typing directly on the return. Any custom text added to a form by the user will also print.


Steps to add Custom Text to a Return

1. Open a return and view the desired page.

2. Click the Typewriter Icon on the standard toolbar or go the Tools menu and select Comment & Markup and Typewriter.

3. Click in an open area (white space) on the page to insert a field and begin typing.

To change the location of an existing typewriter field, select the field and then right click on the text and select move. Place the typewriter text in the desired location and click to affix the text to that location on the form.

To change the font and size of the text, select the desired typewriter field, right click, and choose Change Font. Or, click on the arrow next to the typewriter icon on the tool bar and select Change Typewriter Attributes.
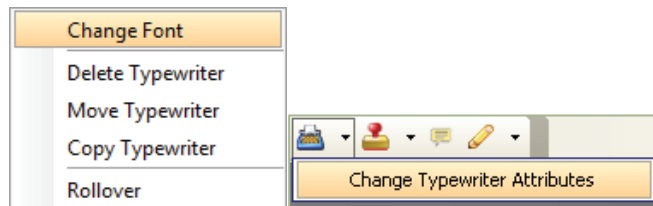
On the Font Chooser screen, you can select Arial, Courier New, or Times New Roman. You can also adjust the font size from 8 to 72.

To copy the typewriter field, right-click on the typewriter field and select Copy. You may then right-click on other areas, pages, and returns and choose Paste Typewriter.

If you'd like the typewriter field to rollover to the next product year, right-click and choose Set to rollover. If you later decide the field does not need to rollover, right-click on the field and choose deselect Rollover.

Stamps

The Stamps feature allows you to create custom stamps and add them to a form. Stamps added to a form by the user will also print, if that printing option is selected. To select this option, go to the Tools Menu, and select options. Then click on the Printing Options tab. Check the box under Reviewer Layer that says Stamps. *Tools>Options>Printing Options tab*

Steps to add a Stamp to a Form

1. Open a return and view the desired page.

2. Click the Stamp icon on the standard toolbar or go the Tools menu and select Comment & Markup and Stamps.

3. Click in an open area (white space) on the page to insert the selected stamp.

To change the default stamp, click on the down arrow next to the stamp icon on the standard toolbar. Select the desired stamp from the list of available stamps.

To delete a stamp on the form, right click on the stamp and select delete.

To change the location of an existing stamp, select the stamp and then right click on it and select move. Place the stamp in the desired location and click to affix the stamp to that location on the form.

To create a custom stamp, click on the down arrow next to the stamp icon on the standard toolbar and select Create Custom Stamp Template. On the Stamp Template Creator screen, select a name for the stamp and the stamp text. Choose a desired font, size, effect, and colors. You can also include the date and time as well as the username in the stamp. Use the copy button to create a copy of an existing stamp. Select OK to create the new stamp.

To edit or delete an existing stamp, click on the down arrow next to the stamp icon on the standard toolbar and select Edit/Delete Stamp Template. Use the drop down box on the Stamp Template Editor to select the predefined stamp you want to modify. Make the necessary changes, and select save. To delete the stamp, click the delete button and then Close.
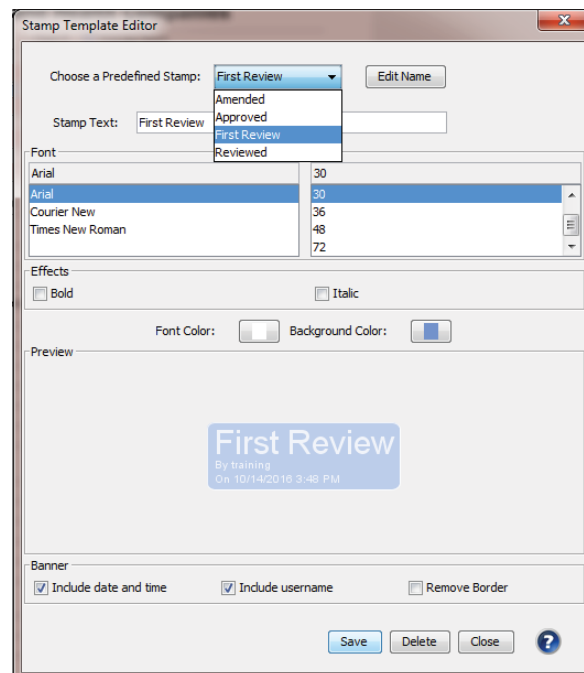
Sticky Notes

You can add "sticky notes" to any form to add custom notes to specific lines or sections of a form. Once you add a note, a yellow sticky note icon will be visible on the return in the location where you placed it. The note will contain the user ID of the person who created the note, as well as a time and date stamp. The name, date, and time listed on a sticky note is updated based on the most recent user that modifies the note.

Sticky Notes added to a form by the user will also print, if that printing option is selected. To select this option, go to the Tools Menu, and select options. Then click on the Printing Options tab. Check the box under Reviewer Layer that says Sticky Notes. The notes will print after the return before the check request and any supporting documents.

Steps to add a Sticky Note

1. Go to the Tools menu and select Comment and Markup, then select Sticky OR Click on the yellow Sticky Note button displayed on the tool bar.

2. Click on the area of the form where you would like to place the sticky note.

3. Double click on the yellow sticky note icon to expand the note.

4. Click in the center of the yellow note space and type your note.

To move the note, right-click on the note icon and select Move. Then you may click on a different area on the form to place the note.

To delete a note, right-click on the note icon and select Delete. To minimize a note so that only the icon is displayed, double click on the yellow note icon, or double click the title bar of the expanded note, or right click on the expanded yellow note box and select Close Note. To open it again, double click on the icon. When the note is minimized and only the icon is showing, a tooltip displaying the contents of the note will appear when you hover your mouse over the icon.

To resize a sticky note, click and hold in either the bottom left or bottom right corner of the expanded note box and drag the corner to the desired size.

To copy the sticky note, right-click on the note icon and select Copy Note. You may then right-click on other areas, pages, and returns and choose Paste Sticky Note.

If you would like the note to rollover to the next product year, right-click and choose Rollover Sticky Note. The icon will then have a red arrow indicating that it is set to rollover. If you later decide the note does not need to rollover, right-click on the field and choose Unset to Rollover. If a user has the appropriate permissions, sticky notes may be added to locked returns to assist with the review process.

Pencil & Drawing Tools

The Pencil Tool feature allows the user to add custom markups directly to a form. If a user has the appropriate permissions, pencil marks may be added to locked returns to assist with the review process as well. You may choose freestyle to draw freehand, line, rectangle, oval, or arrow.

When a new drawing tool is selected from the Pencil button drop down, that tool will appear on the toolbar in place of the pencil icon. !NEW
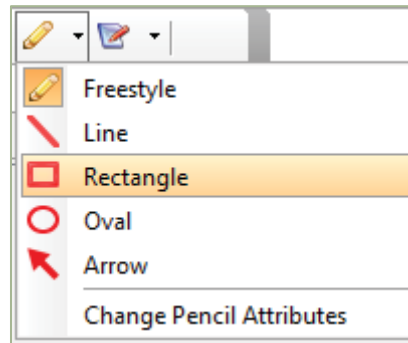
Steps to use the Pencil Tool

1. Open a return and view the desired page.

2. Click the Pencil icon on the standard toolbar. You may also go the Tools menu, go to Comment & Markup and select Pencil. (Tools>Comment & Markup>Pencil)

3. Selecting the down arrow next to the pencil icon provides you with the drawing tool. You have the option to select freestyle, line, rectangle, oval and arrow.

4. Click and hold on the page to drag the mouse pointer to draw a markup.

To delete pencil marks on a form, right click on the markings and select delete.

To change the location of an existing mark, select the marking and then right click on the mark and select move. Place the mark in the desired location and click to affix it to that location on the form.

To change the color and width of the pencil, click on the arrow next to the pencil on the tool bar and select Change Pencil Attributes.

Or right click on an existing pencil mark and select Change Attributes.

From here, you can select the Pencil Color and Width.

Reference Tool

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 to an attachment in the Attachment Frame.

Steps to create a Custom Reference Template

1. To create a custom reference template, click on the down arrow next to the reference icon on the standard toolbar, go to Reference Templates, and select Create Custom Reference Template.

2. On the Reference Template Creator screen, select a name for the reference and the reference text.

3. Choose a desired font, size, effect, and colors.

4. Select OK to create the reference template.

   To edit or delete an existing template, click on the down arrow next to the reference icon, go to Reference Templates, and select Edit/Delete Reference Templates.

   The name, date, and time listed on a reference is updated based on the most recent user that modifies the reference.

Steps to add a Reference to a Form

1. Open a return and view the desired page.

2. Click on the reference icon on the standard toolbar. Select the desired reference template by clicking on the drop down arrow.

3. Click in an open area on the page to insert the reference.

   To change the reference label or text, right click on the reference and select Edit Reference Text.

   To delete a reference on the form, right-click on the reference and select Delete Reference.

   To change the location of an existing reference, select the Reference and then right-click on it and select Move Reference. Place the reference in the desired location and click to place the reference in that location on the form.

   To add or edit a note associated with a reference, double click on the reference text to expand the note box. To close it, double click on it again. Once a note is added, a blue triangle will appear next to the reference text.

   To add or edit a hyperlink associated with a reference, right click on the reference text and select Set Link. In the link dialog box, click on the down arrow next to the browse button to specify Local

Computer/Network, Attachment Frame, or None. Browse to the desired file, folder, or link and select open. Press OK.

A link icon will appear beside to the reference text to indicate there is file associated with the reference.

The linked file can then be opened by right clicking on the reference and selecting Follow Link.

If you would a reference to rollover to the next year, right click and choose Set to Rollover. The reference text will then have a red arrow indicating that it is set to rollover. If later you decide to not rollover the reference, right click on the reference text and choose Unset to Rollover.

To copy a reference, right click on the reference and choose Copy Reference. You can then paste the reference to another spot on the page you are viewing, another page, or another return by right clicking and choosing Paste Reference.