

BATCH ESTIMATES/EXTENSIONS

Use Batch Estimates and Extensions to generate extensions and /or estimates for clients without opening the locators. You can generate federal and/or state estimates and extensions.

USING BATCH ESTIMATES AND EXTENSIONS

1. In the Browser, select **Returns Processing > Estimates & Extensions > Select Returns**.

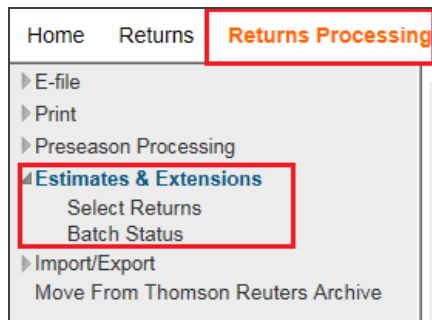


Figure 1

2. In the **Estimates & Extensions – Create Print Files** Browser screen, select the following criteria:

- account number
- tax year
- tax type
- list size limit
- list by name, client code, or return
- characters to sort by
- list by preparer, manager, or reviewer
- specific location (optional)
- specific Login ID/Group Name (optional).

Estimate\Extension - Create Print Files

Account: 2W8F
Year: [dropdown]
Type:
 1040 5500
 1041 990
 1120 706
 1065 709
 All
Limit List size to 10

Sort List by:
 Name Client Code
 Locator
And Match These First Characters of Sort Column:
Taxpayer

Assigned To:
 Preparer Partner
 Reviewer Group
 Manager
Location: (All)
Login ID/Group Name: (All)

Federal Estimates
 State Estimates
Information to print: Alpha Only

Federal Extensions
 State Extensions
Information to print: Alpha Only

Figure 2

- 3. For printing federal and/or state estimates, in the **Estimates & Extensions – Create Print Files** screen, click the check box for the **Federal Estimates** and/or the **State Estimates**.

Estimate\Extension - Create Print Files

Account: 2W8F
Year: [dropdown]
Type:
 1040 5500
 1041 990
 1120 706
 1065 709
 All
Limit List size to: 10

Sort List by:
 Name Client Code
 Locator
And Match These First Characters of Sort Column:
Taxpayer

Assigned To:
 Preparer Partner
 Reviewer Group
 Manager
Location: (All)
Login ID/Group Name: (All)

Federal Estimates
 State Estimates
Information to print: Alpha Only

Federal Extensions
 State Extensions
Information to print: Alpha Only

Figure 3

- 4. For printing federal and/or state estimates with alphabetical information only, choose the *Alpha Only* option from the **Information to Print** drop-down list.

The screenshot shows a software window titled "Estimate\Extension - Create Print Files". It contains several sections for configuring print settings:

- Account:** 2W8F (dropdown)
- Year:** (dropdown)
- Type:** Radio buttons for 1040, 1041, 1120, 1065, All, 5500, 990, 706, 709.
- Limit List size to:** 10 (dropdown)
- Sort List by:** Radio buttons for Name (selected), Client Code, Locator.
- And Match These First Characters of Sort Column:** Text box containing "Taxpayer".
- Assigned To:** Radio buttons for Preparer (selected), Partner, Reviewer, Group, Manager.
- Location:** (All) (dropdown)
- Login ID/Group Name:** (All) (dropdown)
- Federal/State Estimates/Extensions:** Checkboxes for Federal and State versions of Estimates and Extensions.
- Information to print:** Two dropdown menus, both set to "Alpha Only". The left dropdown is highlighted with a red box.

Figure 4



Estimates will not print for scanline states. Scanlines are incompatible with the manually entered data on Alpha Only forms. The manually entered data is not reflected within the scanline and therefore causes the scanline to be incorrect. Below is a list of states that contain scanlines on their estimate forms.

1065: AL, DC UBT, FL 1065, MN, RI, TN Franchise, and WI

1120: AL, GA, LA, MO, MS, NC, NJ, NY, SC, UT, and WI

1040: AL, DE, GA, LA, MO, NH, NHBT, NJ, SC, VT, and WI

1041: GA, NH, NJ, SC, and WI

5. For printing federal and/or state estimates using locator amounts and options, choose the *As Set in Locator* option from the **Information to Print** drop-down list.

The screenshot shows the 'EstimateExtension - Create Print Files' form. The 'Information to print:' dropdown menu is highlighted with a red box and set to 'As Set in Locator'. Other visible options include 'Federal Estimates', 'State Estimates', 'Federal Extensions', and 'State Extensions'. The 'Sort List by:' section has 'Name' selected, and the 'Assigned To:' section has 'Preparer' selected. The 'And Match These First Characters of Sort Column:' field contains 'Taxpayer'.

Figure 5



For 1120 and 1065 locators, if an extension amount is entered in the locator, that amount will be printed on the extension. If an extension amount is not entered, the extension will print alphabetical information only.

For 1040, 1041, and 990 locators, choose the appropriate option. The Alpha and Numeric option will print based on the amounts entered. If the Alpha Only state estimate option is chosen within the locator, estimates will not print for scanline states.

Scanlines are incompatible with the manually entered data on Alpha Only forms. The manually entered data is not reflected within the scanline and causes the scanline to be incorrect. Below is a list of states that contain scanlines on their estimate forms.

1065: AL, DC UBT, FL 1065, MN, RI, TN Franchise, and WI

1120: AL, GA, LA, MO, MS, NC, NJ, NY, SC, UT, and WI

1040: AL, DE, GA, LA, MD, MO, NH, NHBT, NJ, SC, VT, and WI

1041: GA, NJ, SC, and WI

6. For printing federal and/or state extensions, in the **Estimates & Extensions – Create Print Files** screen, click the check box for the **Federal Extensions** and/or the **State Extensions**.

Estimate/Extension - Create Print Files

Account: 2W8F
 Year: [dropdown]
 Type:
 1040 5500
 1041 990
 1120 706
 1065 709
 All
 Limit List size to: 10

Sort List by:
 Name Client Code
 Locator
 And Match These First Characters of Sort Column:
 Taxpayer

Assigned To:
 Preparer Partner
 Reviewer Group
 Manager
 Location: (All)
 Login ID/Group Name: (All)

Federal Estimates
 State Estimates
 Information to print: As Set in Locator

Federal Extensions
 State Extensions
 Information to print: Alpha Only

Figure 6

7. For printing federal and/or state extensions with alphabetical information only, choose the *Alpha Only* option from the **Information to Print** drop-down list.

Estimate/Extension - Create Print Files

Account: 2W8F
 Year: [dropdown]
 Type:
 1040 5500
 1041 990
 1120 706
 1065 709
 All
 Limit List size to: 10

Sort List by:
 Name Client Code
 Locator
 And Match These First Characters of Sort Column:
 Taxpayer

Assigned To:
 Preparer Partner
 Reviewer Group
 Manager
 Location: (All)
 Login ID/Group Name: (All)

Federal Estimates
 State Estimates
 Information to print: As Set in Locator

Federal Extensions
 State Extensions
 Information to print: Alpha Only

Figure 7

8. For printing federal and/or state extensions using alpha and numeric information, choose the *Alpha & numeric* option from the **Information to Print** drop-down list.

The screenshot shows the 'Estimate\Extension - Create Print Files' dialog box. It contains several sections:

- Account:** 2W8F (dropdown)
- Year:** (dropdown)
- Type:** Radio buttons for 1040, 1041, 1120, 1065, All, 5500, 990, 706, 709.
- Limit List size to:** 10 (dropdown)
- Sort List by:** Radio buttons for Name (selected), Client Code, Locator.
- And Match These First Characters of Sort Column:** Text box containing 'Taxpayer'.
- Assigned To:** Radio buttons for Preparer (selected), Partner, Reviewer, Group, Manager.
- Location:** (All) (dropdown)
- Login ID/Group Name:** (All) (dropdown)
- Checkboxes:**
 - Federal Estimates
 - State Estimates
 - Federal Extensions
 - State Extensions
- Information to print:**
 - As Set in Locator (dropdown)
 - Alpha & numeric (dropdown, highlighted with a red box)

Figure 8



1065 and 1120 locators: When an extension amount is entered in the locator, the extension will print with that amount. Filing instructions and/or transmittal letters will also print for those locators that have those client documents set up. When an extension amount is not entered, the extensions forms will be generated with alphabetical information only.

1040, 1041, and 990 locators: These locators will print extensions with alphabetical information only. State extensions will not print for scanline states. Scanlines are incompatible with the manually entered data on Alpha Only forms. The manually entered data is not reflected within the scanline and will cause the scanline to be incorrect. Below is a list of states that contain scanlines on their extension forms.

1040: AL, CA*, DE, GA, MA, NH, NHBT, NJ, SC and WI

1041: AL, NH, and NJ

*The California extension forms do not have a scanline but are included in the scanline states because the State of California Franchise Tax Board does not allow manually entered amounts.

9. Click **Continue** to display a list of returns from which to create print files, or click **Get Adobe Reader**, if necessary, to download the Adobe Reader.

10. If you select **Submit**, the list of returns appears. Select the returns you wish to print, and select one of the following options:

Returns Found in Account 4717:

Select	Return	Year	Account	Type	Taxpayer Name	Client Code	Completed	Assigned Group
<input type="checkbox"/>	02888X		4717	1040	Unittest, SC AR MS R-S	AR RES-SINGLE BD		None
<input type="checkbox"/>	0389CP		4717	1040	AZ TESTING FOR, FILING INSTRUCCN	AZ 2010		None
<input type="checkbox"/>	0406CP		4717	1040	AZ TESTING FOR, NO AMT DUE TEST & AZ TESTING FOR, Spouse PY	AZ 2010		None
<input type="checkbox"/>	0414CP		4717	1040	AMT DUE TEST, AZ TESTING FOR & AMT DUE TEST, Spouse NR	AZ 2010		None
<input type="checkbox"/>	0459CP		4717	1040	EmpBusExpense, ItemDed & Spouse	Master High - 30		None
<input type="checkbox"/>	0483CP		4717	1040	Joker, Tim & Joker, susan	0101152		None
<input type="checkbox"/>	0741BV		4717	1040	Taxpayer, Joe & Taxpayer, Jane	JSEN		None
<input type="checkbox"/>	0937HB		4717	1040	Beggs, Neha	ab F4684 1040NR		None
<input type="checkbox"/>	11236E		4717	1040	Maryland, HighIncome & PartYear	MD RTR		None
<input type="checkbox"/>	1448HB		4717	1040	Beggs, Amy & Charles	ab F8863		None

10 records returned.

Figure 9

- **Submit:** Create selected print files from the list.
- **Select All:** Selects all returns in the list to create print files.
- **Deselect All:** Selects none of the returns in the list to create print files.

11. If you click **Submit**, a dialog box appears with a batch number. Be sure to make a note of the batch number, and then click **Close**.

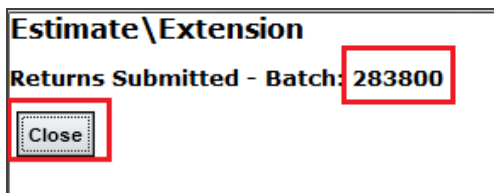


Figure 10

12. To check the status of the batch, click **Batch Status** from the menu.

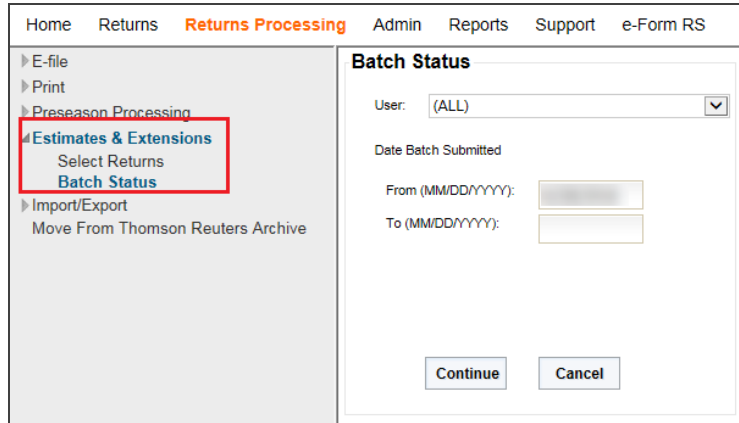


Figure 11

13. Select the originator of the batch from the list of user names in the drop-down list.
14. Enter the date information for when the batch was submitted in the appropriate format, and then click **Continue**.

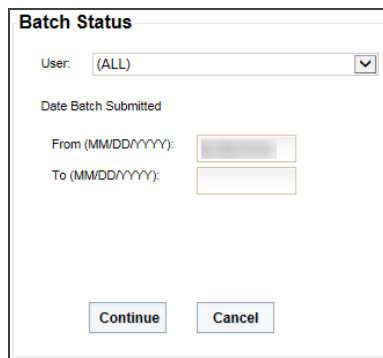


Figure 12

15. A list of batches submitted appears. Click the desired **Batch ID** hyperlink to display the status of the list of returns.

16. To download zip files with the **Status** of *Print File Ready*, click **Download Zip**.

Status for Estimates & Extensions Batch ID 283800, sorted by Return:

Return	Password	Taxpayer	Estimates & Extensions Status	WIP Status
02888X		Unittest, SC AR MS R-S	Print File Ready	WIP1
0389CP		AZ TESTING FOR, FILING INSTRUCN	Print File Ready	WIP2
		PRW Convert WIP record		WIP3

2 records returned.

To Download Zip files with the Status of "Print File Ready", click **Download Zip**. All returns with the status of "Print File Ready" will download as one zip file.

To print extensions and/or estimates for multiple returns - click Download Zip, choose to Open the Zip file, choose Actions/Select All, right click to Extract to local directory, navigate to the local directory, select files, right click and Print.

Note: File naming convention is 111111Y?.PDF where 111111 is locator number; Y is last digit of the tax year; ? is 'X' for extensions or 'E' for estimates.

Download Zip Refresh Cancel

Figure 13

Click **Refresh** on this screen if the **Download Zip** button is grayed out.

17. All returns with the status of *Print File Ready* will download as one zip file.

The zip file can either be saved to the hard drive or opened.

The zip file will contain a PDF for each locator’s extension and estimates.

The naming convention for estimate PDF files is *111111YE.PDF* where *111111* is the locator number and *Y* is the last digit of the tax year. The naming convention for extension PDF files is *111111YX.PDF* where *111111* is the locator number and *Y* is the last digit of the tax year. (For example, for Tax Year 2021, Y is the digit 1.)

You must enter the password for password protected returns and click its locator hyperlink separately in order to download the protected locator’s zip file.

9783FZ [Redacted] Single One Print File Ready

Figure 14

18. To save the PDF files unzipped:

- a. Open the zip file within WinZip (or other zip extraction program).
- b. Highlight the files to save.



The screen shown may differ, depending on which version of the zip extractor you are using.

- c. Either use the **Extract** function or drag and drop to a designated folder.

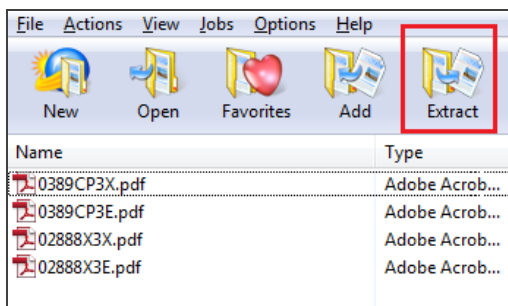


Figure 15

19. To print estimate and/or extension PDFs:

- a. Extract the PDFs to a folder.
- b. Highlight those PDFs that you wish to print.
- c. Right-click and choose to **Print**.

ADDITIONAL INFORMATION

We do not allow forms with scanlines and barcodes to print *Alpha Only* because the amount due within the scanline or barcode would be incorrect. We cannot generate these as per state requirements.

BATCH EXTENSIONS

* Available before the 2009 tax year.

** Letters print only if state(s) marked *On Extension*.

		PRINTOUT WILL BE			ADDITIONAL INFORMATION
		ALPHA ONLY	W/DATA	LETTERS	
1120	Extension amount entered in locator	N/A	X	X	States with scanlines or barcodes will print.
	Extension amount not entered in locator	X*	N/A	X**	States with scanlines or barcodes will NOT print.
1065	Extension amount entered in locator	N/A	X	N/A	States with scanlines or barcodes will print.
	Extension amount not entered in locator	X*	N/A	N/A	States with scanlines or barcodes will NOT print.
1040		X*	N/A	N/A	States with scanlines or barcodes will NOT print.*

		PRINTOUT WILL BE			ADDITIONAL INFORMATION
		ALPHA ONLY	W/DATA	LETTERS	
1041		X*	N/A	N/A	States with scanlines or 1040 barcodes will NOT print.*
990		X*	N/A	N/A	States with scanlines or barcodes will NOT print.*

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