

BATCH PRINT

Use RS Batch Printing to batch print the preparer copy of a client's tax returns without opening the locators.

HOW TO USE BATCH PRINT

1. In the Browser, select **Returns Processing > Print > Batch Print > Select Returns**.

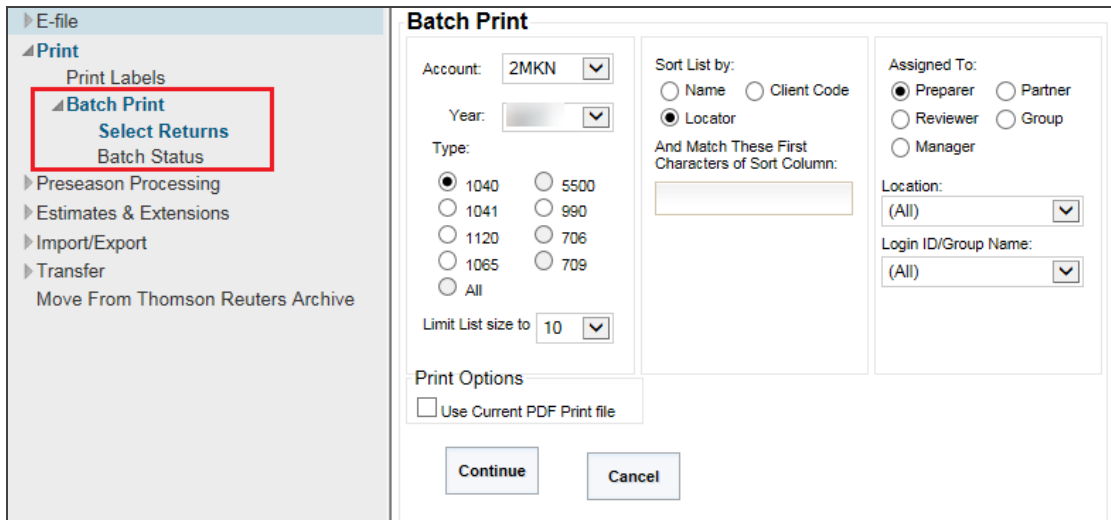


Figure 1

2. In the **Batch Print** screen, select the following criteria:

- account number
- tax year
- limit the list size
- 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)

The screenshot shows the 'Batch Print' interface with the following elements:

- Account:** 2MKN (dropdown)
- Year:** (dropdown)
- Type:** Radio buttons for 1040 (selected), 1041, 1120, 1065, All, 5500, 990, 706, 709.
- Limit List size to:** 10 (dropdown)
- Sort List by:** Radio buttons for Name, Client Code, Locator (selected).
- And Match These First Characters of Sort Column:** Text input field containing 'Ashmore'.
- Assigned To:** Radio buttons for Preparer (selected), Partner, Reviewer, Group, Manager.
- Location:** (All) (dropdown)
- Login ID/Group Name:** (All) (dropdown)
- Print Options:** Check box for 'Use Current PDF Print file' (checked).
- Buttons:** Continue (highlighted with a red box) and Cancel.

Figure 2

If you select the check box to use the current PDF print file, then we will use the existing one and will not create a new one.

3. Click **Continue** to display a list of returns from which to create print files.

- 4. Select the returns to batch print in one of the following ways:
 - a. Individually select the returns by marking the **Select** check box.

Returns Found in Account 2MKN:					
Select	Return Year	Account	Type	Taxpayer Name	Client Code
<input type="checkbox"/>	0774IW		2MKN	1040 Smith, HOWARD & Smith, TERESA	
<input checked="" type="checkbox"/>	1440IX		2MKN	1040 Taxpayer, Elizabeth	drw
<input type="checkbox"/>	1442IX		2MKN	1040 Taxpayer, Aiko	drw
<input type="checkbox"/>	1597IW		2MKN	1040 Calculations, Form 8582-CR	
<input type="checkbox"/>	7317IR		2MKN	1040 ReturnTwo, Test & ReturnTwo, Testina tvb	
<input type="checkbox"/>	9343IW		2MKN	1040 Sid, 2YearDouble	
<input checked="" type="checkbox"/>	9344IU		2MKN	1040 Sam, Mohan	
<input type="checkbox"/>	9347IV		2MKN	1040 1276074, Bug	
<input type="checkbox"/>	9351IU		2MKN	1040 TAYLOR, ROBERT & TAYLOR, KINAN	
<input type="checkbox"/>	9352IR		2MKN	1040 Gently, Dirk & Gently, Susie	MTI

10 record(s) returned.

Submit Select All Deselect All Cancel Next 10

Figure 3

b. *Select All*: Selects all returns in the list to create print files.

Returns Found in Account 2MKN:

Select	Return	Year	Account	Type	Taxpayer Name	Client
<input checked="" type="checkbox"/>	0774IW		2MKN	1040	Smith, HOWARD & Smith, TERESA	
<input checked="" type="checkbox"/>	1440IX		2MKN	1040	Taxpayer, Elizabeth	drw
<input checked="" type="checkbox"/>	1442IX		2MKN	1040	Taxpayer, Aiko	drw
<input checked="" type="checkbox"/>	1597IW		2MKN	1040	Calculations, Form 8582-CR	
<input checked="" type="checkbox"/>	7317IR		2MKN	1040	ReturnTwo, Test & ReturnTwo, Testina	tvb
<input checked="" type="checkbox"/>	9343IW		2MKN	1040	Sid, 2YearDouble	
<input checked="" type="checkbox"/>	9344IU		2MKN	1040	Sam, Mohan	
<input checked="" type="checkbox"/>	9347IV		2MKN	1040	1276074, Bug	
<input checked="" type="checkbox"/>	9351IU		2MKN	1040	TAYLOR, ROBERT & TAYLOR, KINAN	
<input checked="" type="checkbox"/>	9352IR		2MKN	1040	Gently, Dirk & Gently, Susie	MTI

10 record(s) returned.

Figure 4



After checking all the returns on one page that you want to be included in the batch job, you can continue to the next page(s) until all the returns you want have been checked for batch creation. You no longer have to create a batch job for the locators listed one page at a time.

c. *Deselect All*: Selects none of the returns in the list to create print files.

Returns Found in Account 2MKN:

Select	Return Year	Account	Type	Taxpayer Name	Client
<input type="checkbox"/>	0774IW		2MKN 1040	Smith, HOWARD & Smith, TERESA	
<input type="checkbox"/>	1440IX		2MKN 1040	Taxpayer, Elizabeth	drw
<input type="checkbox"/>	1442IX		2MKN 1040	Taxpayer, Aiko	drw
<input type="checkbox"/>	1597IW		2MKN 1040	Calculations, Form 8582-CR	
<input type="checkbox"/>	7317IR		2MKN 1040	ReturnTwo, Test & ReturnTwo, Testina	tvb
<input type="checkbox"/>	9343IW		2MKN 1040	Sid, 2YearDouble	
<input type="checkbox"/>	9344IU		2MKN 1040	Sam, Mohan	
<input type="checkbox"/>	9347IV		2MKN 1040	1276074, Bug	
<input type="checkbox"/>	9351IU		2MKN 1040	TAYLOR, ROBERT & TAYLOR, KINAN	
<input type="checkbox"/>	9352IR		2MKN 1040	Gently, Dirk & Gently, Susie	MTI

10 record(s) returned.

Figure 5

5. After the returns are selected, click **Submit** to create the print files.

10 record(s) returned.

Figure 6

- 6. The **Batch Print** job automatically appears that is created once the locators are checkmarked and the print job is submitted. From this **Batch Print** page, you can click the **Refresh** option until all the locators are *Print File Ready*.

Batch Print

Print Status for Batch ID 84125:

NOTE: A Password input field indicates a password is required. These returns are not included in the Download All button status is displayed, please enter the password and click on the return's hyperlink.

Return	Password	Entity Name	PRINT PDF Status	WIP Status
0774IW		Smith, HOWARD & Smith, TERESA	Queued for Print File Generation	WIP0
1440IX		Taxpayer, Elizabeth	Queued for Print File Generation	WIP1
1442IX		Taxpayer, Aiko	Queued for Print File Generation	WIP2
1597IW		Calculations, Form 8582-CR	Queued for Print File Generation	WIP3
7317IR		ReturnTwo, Test & ReturnTwo, Testina	Queued for Print File Generation	WIP4
9343IW		Sid, 2YearDouble	Queued for Print File Generation	WIP5
9344IU		Sam, Mohan	Queued for Print File Generation	WIP6
9347IV		1276074, Bug	Queued for Print File Generation	WIP7
9351IU		TAYLOR, ROBERT & TAYLOR, KINAN	Queued for Print File Generation	WIP8
9352IR		Gently, Dirk & Gently, Susie	Queued for Print File Generation	WIP9

10 records returned.

Figure 7

Batch Print

Print Status for Batch ID 84125:

NOTE: A Password input field indicates a password is required. These returns are not included in the Download All button. To download a pas status is displayed, please enter the password and click on the return's hyperlink.

Return	Password	Entity Name	PRINT PDF Status	WIP Status	Download Status
0774IW		Smith, HOWARD & Smith, TERESA	Print File Ready	WIP0	
1440IX		Taxpayer, Elizabeth	Print File Ready	WIP1	
1442IX		Taxpayer, Aiko	Print File Ready	WIP2	
1597IW		Calculations, Form 8582-CR	Print File Ready	WIP3	
7317IR		ReturnTwo, Test & ReturnTwo, Testina	Print File Ready	WIP4	
9343IW		Sid, 2YearDouble	Print File Ready	WIP5	
9344IU		Sam, Mohan	Print File Ready	WIP6	
9347IV		1276074, Bug	Print File Ready	WIP7	
9351IU		TAYLOR, ROBERT & TAYLOR, KINAN	Print File Ready	WIP8	
9352IR		Gently, Dirk & Gently, Susie	Print File Ready	WIP9	

10 records returned.

Figure 8

7. Make a note of the batch number at the top of the screen.

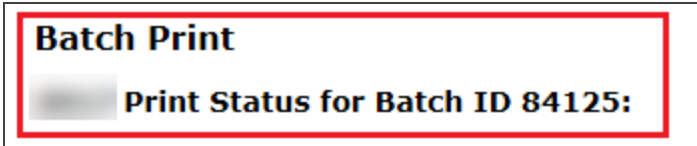


Figure 9

8. [Checking the Status of the Batch Print \(page 8\)](#)

CHECKING THE STATUS OF THE BATCH PRINT

1. To check the status of the batch, click **Batch Status**.
2. Select the originator of the batch from the list of user names in the drop-down list.
3. Enter the batch submission date (or range of dates, beginning and ending) in the appropriate format.

The screenshot shows a web application interface. At the top, there is a navigation bar with links: Home, Returns, Returns Processing (highlighted with a red box), Admin, Reports, Support, and e-Form RS. On the left side, there is a sidebar menu with the following items: E-file, Print (expanded), Print Labels, Batch Print (expanded), Select Returns, Batch Status (highlighted with a red box), Preseason Processing, Estimates & Extensions, Import/Export, Transfer, and Move From Thomson Reuters Archive. The main content area is titled 'Batch Status'. It contains a 'User:' dropdown menu currently set to '(ALL)'. Below this is a section titled 'Date Batch Submitted' which includes two input fields: 'From (MM/DD/YYYY):' and 'To (MM/DD/YYYY):', both of which are highlighted with a red box. At the bottom of the form are two buttons: 'Continue' and 'Cancel'.

Figure 10

4. Click **Continue**.

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

Print PDF Batches Found:

Date/Time	Tax Year	Tax Type	Items	Batch ID
		1040	10	84125

1 batch found.

Cancel

Figure 11

- To download PDF files with the status of *Print File Ready*, except those that require a password, click **Download All**.

Batch Print

Print Status for Batch ID 84125:

NOTE: A Password input field indicates a password is required. These returns are not included status is displayed, please enter the password and click on the return's hyperlink.

Return	Password	Entity Name	PRINT PDF Status
0774IW		Smith, HOWARD & Smith, TERESA	Print File Ready
1440IX		Taxpayer, Elizabeth	Print File Ready
1442IX		Taxpayer, Aiko	Print File Ready
1597IW		Calculations, Form 8582-CR	Print File Ready
7317IR		ReturnTwo, Test & ReturnTwo, Testina	Print File Ready
9343IW		Sid, 2YearDouble	Print File Ready
9344IU		Sam, Mohan	Print File Ready
9347IV		1276074, Bug	Print File Ready
9351IU		TAYLOR, ROBERT & TAYLOR, KINAN	Print File Ready
9352IR		Gently, Dirk & Gently, Susie	Print File Ready

10 records returned.

Refresh Cancel **Download All**

Figure 12

- To download PDF files that require a password, enter the password and click the return hyperlink.
- A pop-up dialog appears asking if you want to **Open**, **Save**, or **Cancel** the download.
- You can **Save** the file to the default download directory or choose **Save As** to change the name of the file. Select the drive and path where you want to save the file.



Figure 13

- The message *Downloading* will appear in the **Download Status** column for each selected return as it downloads.

- When all the selected return PDFs have finished downloading, you will see the following message:



Figure 14

- The word *Finished* will appear in the **Download Status** column for each selected return.



For return PDF files, the naming convention is *X111111Y.PDF* where *X* is the entity signifier (A- 1040), *111111* is the locator number, and *Y* is the last digit of the tax year (for 2021, *Y* is the digit 1).

VIEWING AND PRINTING THE PDF FILES

- To view the PDF files, choose the option to **View download** and open the saved zip file. Double-click the PDF return.
- To print return PDFs, with the return PDF open, select the option **File > Print**.

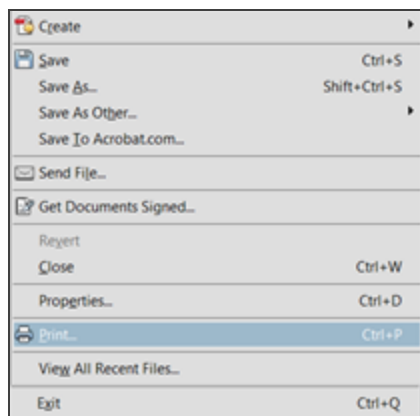


Figure 15

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