

# 1065 COLUMNAR K-1 EXPORT

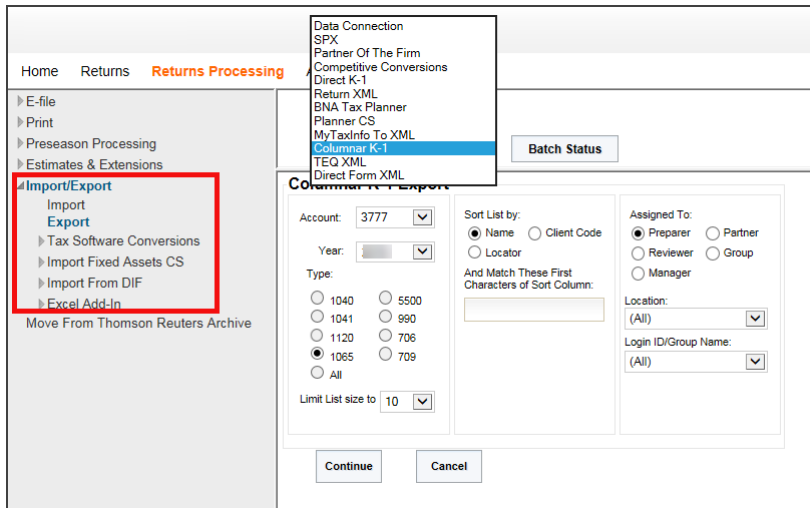
The Columnar K-1 Export tool allows you to export data from the 1065 Columnar Partner Review. The 1065 tax application has the capability to export California e-file data from **States > California > CA Columnar Review**. This data represents the information from the federal Schedule K-1s and, for 1065, also the state K-1s. The information **cannot** be imported back into the 1065 returns.

In addition to Partner Columnar Review for 1065 and State Columnar Review for 1065, you have the capability to export all activity information (for example, Pass-Through, Rental Real Estate, etc.) for 1065.

## USING COLUMNAR K-1 EXPORT

 To create an export, make sure that your login ID for RS Browser does not contain **any** spaces.

1. In RS Browser, select the **Returns Processing** tab.
2. Select **Import/Export > Export** from the left menu.
3. Select *Columnar K-1* from the drop-down box.



The screenshot shows the RS Browser interface. The top navigation bar includes 'Home', 'Returns', and 'Returns Processing' (selected). The left sidebar menu has 'Import/Export' > 'Export' highlighted with a red box. A dropdown menu is open, showing 'Columnar K-1' selected. The main content area displays the 'Columnar K-1 Export' form. The form includes fields for 'Account' (3777), 'Year' (2010), 'Type' (1065), 'Sort List by' (Name), 'And Match These First Characters of Sort Column' (empty), 'Assigned To' (Preparer), 'Location' ((All)), and 'Login ID/Group Name' ((All)). There are 'Continue' and 'Cancel' buttons at the bottom.

Figure 1

4. A window opens below the Columnar K-1 choice. Choose additional criteria as needed (**Account**, tax **Year**, tax **Type**, and **Sort** criteria). Then click **Continue**.

**Columnar K-1 Export**

Columnar K-1

**Columnar K-1 Export**

Account: 3777   
 Year:   
 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:  
 2102ki

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

**Figure 2**



Please note that, if you select 1120 as the tax type, rather than 1065 as shown below, you will see corporate returns instead of partnership returns in the following screens.

5. A warning screen is displayed indicating a change will occur. Click the **Continue** button.

Charge Warning Dialog -- Webpage Dialog

**Columnar K-1 Export**

The Columnar K-1 Export process will incur a charge.  
 Press Continue to perform Columnar K-1 Export.  
 Press Cancel to exit and select a different export type.

☐ Do not show this dialog in the future.  
 Note: To enable this dialog again, click the Enable Charge Warning Dialog button on the User Preferences page.

**Figure 3**

6. A list of returns meeting your selected criteria appears.

Columnar K-1 Export

Returns Found in Account 3777:

Select Return

Year

Account

Type

Taxpayer Name

Client Code

Completed

Assigned Group

☒

2102KI

3777

1120

1120 Column Partner Review

LLINADDIN

None

1 record returned.

Continue

Select All

Deselect All

Cancel

Next 10

Figure 4

7. Select returns from the list by clicking the check box, or click the **Select All** button. Click **Continue**.
8. You will see a status screen as shown below. To check the status, click the **Close** button.

Columnar K-1 Export

Firm	Account	Year	Tax Type
FT	3777		1120

Locator	Status
2102KI	Export Queued

Export Batch job: 64872  
1 returns queued  
0 returns rejected

Close

Figure 5

9. You will return to the criteria selection screen but in this instance click the **Batch Status** button.

**Columnar K-1 Export**

Columnar K-1

**Columnar K-1 Export**

Account: 3777   
 Year:    
 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:

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

**Figure 6**

10. Enter the **To (MM/DD/YYYY)** date in the **Date the Batch Submitted** section. Click **Continue**.

**Batch Status**

Date Batch Submitted

From (MM/DD/YYYY): 8/30/   
 To (MM/DD/YYYY): 8/30/

**Figure 7**

11. Click the link in the **Batch ID** column for the export file you want to see.

**Columnar K-1 Export Batches Found:**

Date/Time	Tax Year	Tax Type	Items	Batch ID
		1120	1	<a href="#">64872</a>

1 batch found.

[Cancel](#)




Figure 8

12. Click the **Refresh** button to see the updated **Export Status**. Be aware that large export files may take longer.

**Columnar K-1 Export**

**Export Status for Batch ID 64872:**

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

Return	Password	Entity Name	Export Status	WIP Status	Download Status
<a href="#">2102K1</a>		1120 Column Partner Review	File Export Complete	<a href="#">WIP0</a>	

1 record returned.

[Refresh](#) [Cancel](#) [Download All](#)

Figure 9

13. When the **Export Status** column indicates *File Export Complete*, then click the **Download All** button.

**Columnar K-1 Export**

**Export Status for Batch ID 64872:**

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

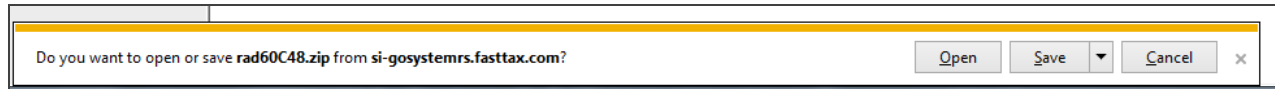
Return	Password	Entity Name	Export Status	WIP Status	Download Status
<a href="#">2102K1</a>		1120 Column Partner Review	File Export Complete	<a href="#">WIP0</a>	

1 record returned.

[Refresh](#) [Cancel](#) [Download All](#)

Figure 10

14. A message is displayed at the bottom of the screen to open or save the ZIP export file. Click the down pointing arrow next to **Save** to **Save**, **Save as**, or **Save and Open**.



**Figure 11**

15. If you select **Save as**, browse to a location for the download, and then click **Save**.
16. A message confirms that the download process is complete. Click **Open**, **Open folder**, or **View Downloads**.



**Figure 12**

17. Click **Open** to view the ZIP file and the export file. The export file will be named as follows:
- **1065**: \*.PX1
  - **1120**: \*.CX1

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