Tax Reporting Online User's Guide

May 2011

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INTRODUCTION

The *Tax Reporting Online User's Guide* provides you with a general overview of the Tax Reporting Online application features and functions. Products, services, or application role authorizations for individual users are based on assignments by your company's Client Master or Client Administrator.

System Requirements

♦ Microsoft Windows[1] XP Professional, Windows Vista, or Windows 7 (MAC operating systems are not supported.)

♦ Microsoft Internet Explorer [1] Version 7, or 8 set to accept third party cookies or Firefox 3.5 or higher

♦ Adobe Acrobat Reader[2] 5.0 or higher

♦ Browser Security set to Medium with JavaScript, ActiveX controls, and plug-ins enabled

♦ (JRE 1.5.0* or higher for Java [3] Applet functionality)
  *If your workstation does not meet the minimum Java Runtime Environment (JRE) 1.5.0 requirement, please contact your internal workstation support department. Your support person can visit the following Website to download the necessary JRE:
  http://www.oracle.com/technetwork/java/javase/downloads/index.html

♦ 640 x 480, 256-color screen resolution or higher

♦ 56K modem or higher (DSL/Cable, T1 line, ISDN recommended)

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[1] Microsoft® Windows™ and Internet Explorer™ are trademarks of Microsoft Corporation

[2] Adobe® Acrobat® Reader® are trademarks of Adobe Systems Incorporated

[3] Oracle and Java are registered trademarks of Oracle and/or its affiliates

GETTING STARTED

Welcome to Tax Reporting Online! Through this application, you can access important tax-related information. The reports available are designed with specific filters containing your company's current or historical ADP tax filing details and can assist you with auditing and managing your tax filing information. These reports can be viewed, exported to your local computer drive, and/or printed as needed.
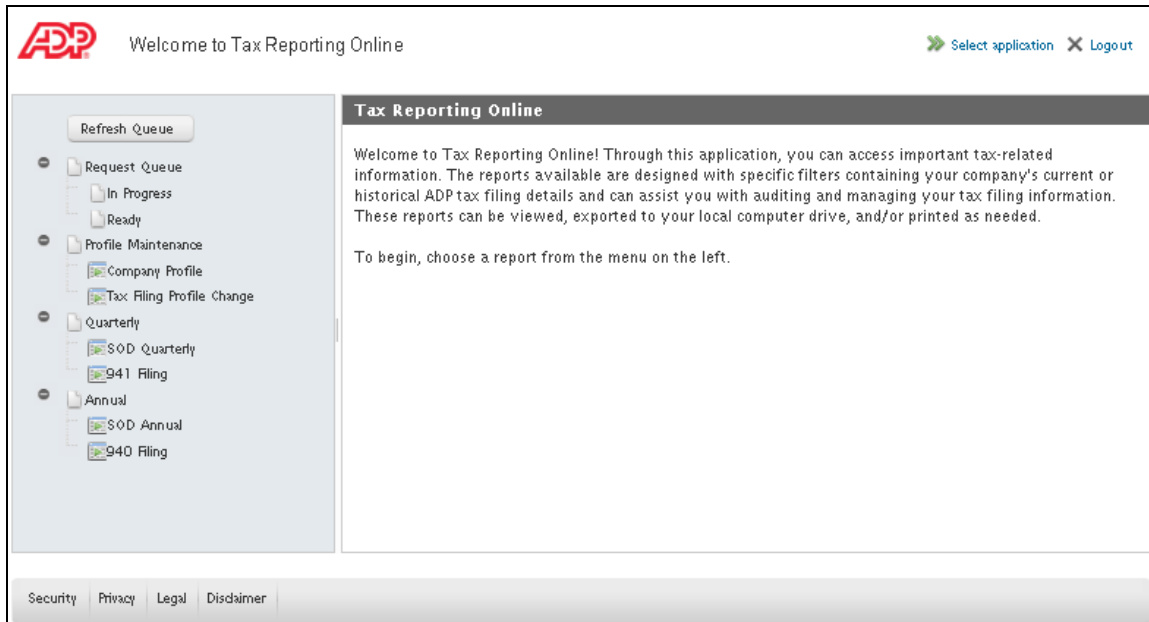
The Client Master and/or Client Administrator (client-appointed) are responsible for the administrative management of application users through Netsecure and the Security Services Administration application. Please contact your company's Client Master or Administrator to assist you if you have questions regarding access authorizations. For users who are Client Masters or Administrators, more detailed instructions are available in the *Security Services Administration Guide*.

ACCESS REPORTS

Main Menu Options

The Main Menu will be your Tax Reporting Online navigation tool. You can expand or hide report menu options. Click the Plus ⊕ icon to expand the view or the Minus ⊖ icon to hide the options.

Hidden View

Expanded View
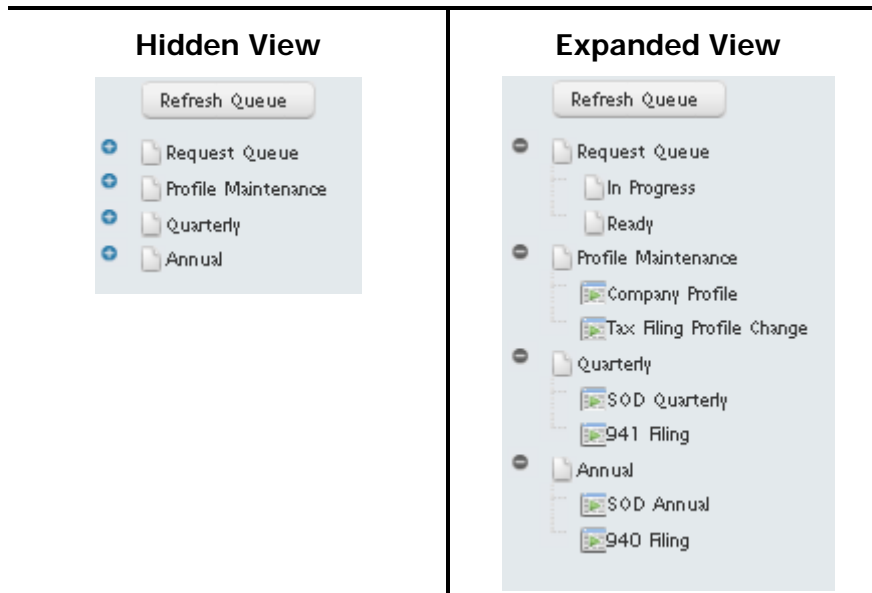
Request Queue

The following are Request Queue options.

Refresh Queue Button

Use this button to refresh the status of a report currently In Progress.

In Progress Status

One or more reports that are currently in process will display here until the status is Ready.

Ready Status

One or more reports that are ready to be reviewed will display here. A report remains here until it is viewed.

NOTE: Once viewed, reports are removed from the Request Queue. To save a viewed report, export the report to your local computer drive or destination of choice. See the View, Export, and Print Reports section in this guide for more details.

Available Reports

There are three high-level report categories on the menu options. When expanded, the available reports in each category will display. Reporting date availability begins with the Tax Reporting Online access date for your company.

For report descriptions, refer to each report section in this guide.

Profile Maintenance Reports

- Company Profile Report – Available daily, updated nightly.

- Tax Filing Profile Change Report – Available daily, updated nightly to reflect prior day changes.

Quarterly Reports

- SOD Quarterly Report – Available within two weeks following the last quarterly deposit date.

- 941 Filing Report – Available within one week following the quarterly filing.

Annual Reports

- SOD Annual Report – Available within two weeks following the last annual deposit date.

- 940 Filing Report – Available within one week following the Annual filing.

Icon Button Descriptions

The following are descriptions of icon buttons that display throughout the Tax Reporting Online selection process.

Help Panel

Sort Selected Up

Sort Selected Down

Move Selected Right

Move Selected Left

Move All Right

Move All Left

Profile Maintenance Reports

Company Profile Report

The Company Profile Report shows identification (ID) numbers, deposit frequencies, and deposit methods that ADP uses to make your tax deposits. Penalties and interest may be generated against a taxpayer's account if ADP is not provided with the correct deposit requirements. This report also shows the funding method and banking information for payroll tax liabilities as well as your company-assigned contact who is receiving ADP invoices and correspondence.

Reports are generated using a two-step process; choosing options and reviewing options before submitting your request. There are two choices available for running this report: generating a full report or generating a report using optional filters.

NOTE: Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Generate a Full Report

To generate a report with all details for your company, leave the optional filters unchecked.

1. Select the **Company Profile Report** from the Main Menu.
2. Click the **Filter by Year/Quarter** check box to display the options.
3. Use the drop-down menu to select an available **Year/Quarter** for this report.

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4. Click **Next** to continue to Review Options.

5. Review the information for accuracy. If all options are correct, click **Run Report**. The report will display in Crystal Reports Viewer. To modify options, click **Previous** to go back.
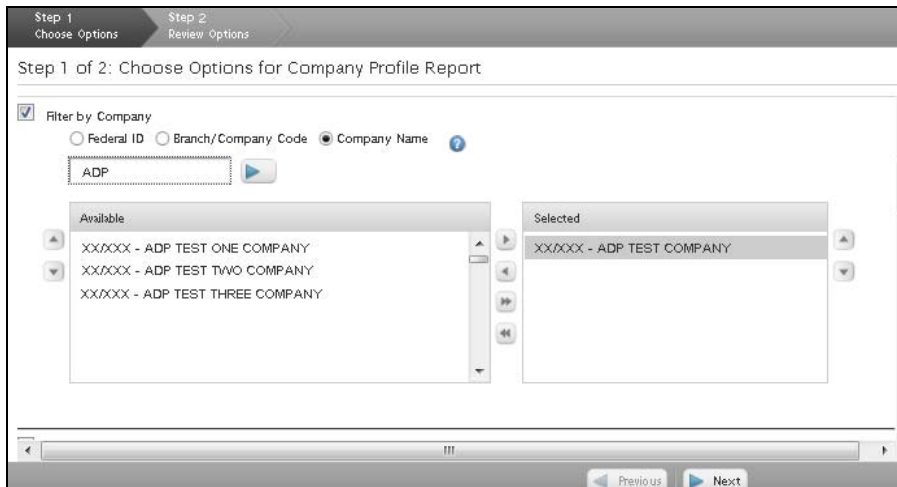
Generate With Optional Report Filters

To generate a report with only specifically selected report details for your company, select one or more of the optional filters. Click **Next** once you have selected all desired optional filters. Any option not selected will default to include all available details.

- Company – All companies set up on your account with ADP will display
- Jurisdiction – All jurisdictions set up on your account with ADP will display
- ABA/DDA Masking – ABA/DDA full or masked display options are available based on user setup

1. Select the **Company Profile Report** from the Main Menu.

2. Click the **Filter by Year/Quarter** check box to display the options.

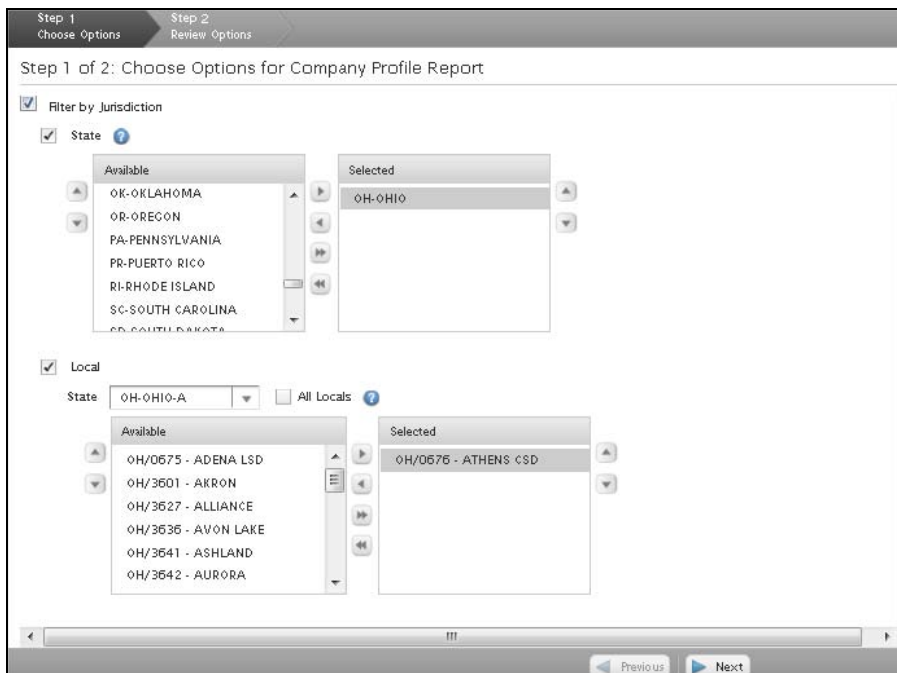3. Use the drop-down menu to select an available **Year/Quarter** for this report.

4. Click the **Filter by Company** check box to display the options. Click the **Federal ID**, **Branch/Company Code**, or **Company Name** radio button and enter the complete or partial information. The Available list box populates all matches to the information entered.

5. Click to select the company(ies) from the Available list box and click **Move Selected Right** ▶ to move to the Selected list box.

   NOTE: Only criteria in the Selected list box will be included in the report.

6. Select the **Filter by Jurisdiction** check box to display the options. Click the **State** check box to display all states set up for this company in the Available list box.

7. Click to select the state(s) from the Available list box and click **Move Selected Right** ▶ to move to the Selected list box.

8. a. Click the **Local** check box. Use the drop-down menu to select a state and display all locals set up for this company in the Available list box. For states with numerous locals, choose the state name with the first letter of the local name. For example, choose the Ohio-A selection for the Ohio-Athens local.

    Once populated in the Available list box, click to select one or more entries. Click **Move Selected Right** ▶ to move to the Selected list box.

    b. Click the **All Locals** check box to select all locals set up for this company.

    NOTE: Be certain that the Selected list box is clear before using the All Locals check box. Any previously selected items in the Selected list box will override the All Locals check box.

9. Select the **Filter by ABA/DDA Masking** check box to display the options.

10. Click to select the **Full ABA/DDA** or **Masked ABA/DDA** radio button.

11. Click **Next** to continue to Review Options.

12. Review the information for accuracy. If all options are correct, click **Run Report**. The report will display in Crystal Reports Viewer. To modify, click **Previous** to go back.

13. If Full ABA/DDA is selected, an alert message displays. Review this message and click **OK** to continue or **Cancel** to go back and modify the filter option.
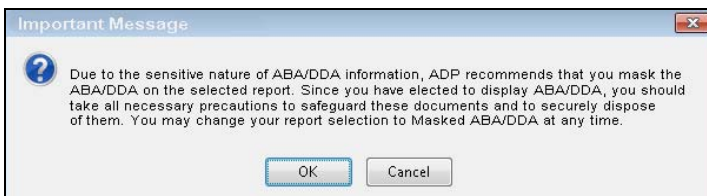
Tax Filing Profile Change Report

The Tax Filing Profile Change Report is used to analyze changes that have been made to your company's profile. This report provides the details of the changes as reported on the applicable Company ID Profile, Company Profile, or State Unemployment Verification reports. Some commonly made profile changes are tax identification numbers (federal/state/local), unemployment rates, legal names, and/or deposit methods/frequencies.

Reports are generated using a two-step process; choosing options and reviewing options before submitting your request. There are two choices available for running this report: generating a full report or generating a report using optional filters.

NOTE: Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Generate a Full Report

To generate a report with all details for your company, leave the optional filters unchecked.

1. Select the **Tax Filing Profile Change Report** from the Main Menu.

2. Click the **Filter by Year/Quarter** or **Change Date Range** check box to display the options.

3. Click to choose the **Year/Quarter** or the **Date** radio button. Use the drop-down menu to select an available **Year/Quarter** or enter the dates in the **From** and **To** fields. (The example includes both options for display purposes only.)

4. Click **Next** to continue to Review Options.

5. Review the information for accuracy. If all options are correct, click **Run Report**. The report will display in Crystal Reports Viewer. To modify, click **Previous** to go back.

Generate With Optional Report Filters

To generate a report with only specifically selected report details for your company, select one or more of the optional filters. Click **Next** once you have selected all desired optional filters. Any option not selected will default to include all available details.

- Company – Companies set up on your account with ADP will display

- Categories – Information types will display

- Jurisdiction – All jurisdictions set up on your account with ADP will display

- ABA/DDA Masking – ABA/DDA full or masked display options are available based on user setup

1. Select the **Tax Filing Profile Change Report** from the Main Menu.
2. Click the **Filter by Year/Quarter** or **Change Date Range** check box to display the options.

3. Click to choose the **Year/Quarter** or the **Date** radio button. Use the drop-down menu to select an available **Year/Quarter** or enter the dates in the **From** and **To** fields. (The example includes both options for display purposes only.)

4. Click the **Filter by Company** check box to display the options. Click the **Federal ID**, **Branch/Company Code**, or **Company Name** radio button and enter the complete or partial information. The Available list box populates all matches to the information entered.

5. Click to select the company(ies) from the Available list box and click **Move Selected Right** to move to the Selected list box.

    NOTE: Only criteria in the Selected list box will be included in the report.

6. Select the **Filter by Categories** check box to display the specific information options. Click to select one or more options from the Available list and click **Move Selected Right** ▶ to move to the Selected list box.
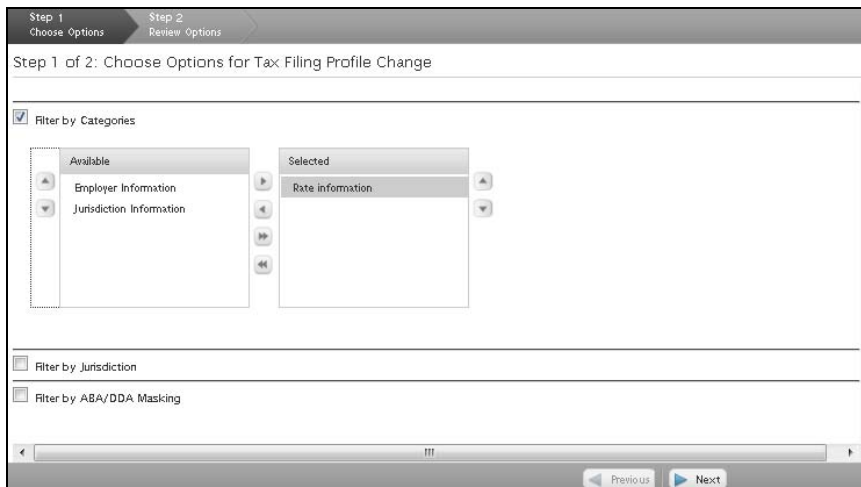
7. Select the **Filter by Jurisdiction** check box to display the options. Click the **State** check box to display all states set up for this company in the Available list box.

8. Click to select the state(s) from the Available list box and click **Move Selected Right** ▶ to move to the Selected list box.

    NOTE: Only criteria in the Selected list box will be included in the report.

9. a. Click the **Local** check box. Use the drop-down menu to select a state and display all locals set up for this company in the Available list box. For states with numerous locals, choose the state name with the first letter of the local name. For example, choose the Ohio-D selection for the Ohio-Dover local.

   Once populated in the Available list box, click to select one or more entries. Click **Move Selected Right** ▶ to move to the Selected list box.

   b. Click the **All Locals** check box to select all locals set up for this company.

   NOTE: Be certain that the Selected list box is clear before using the All Locals check box. Any previously selected items in the Selected list box will override the All Locals check box.

10. Select the **Filter by ABA/DDA Masking** check box to display the options.

11. Click to select the **Full ABA/DDA** or **Masked ABA/DDA** radio button.
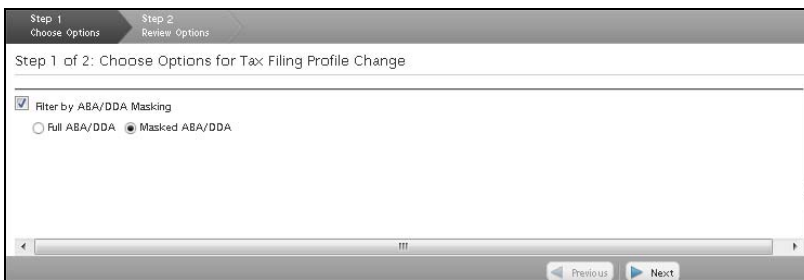
12. Click **Next** to continue to Review Options.
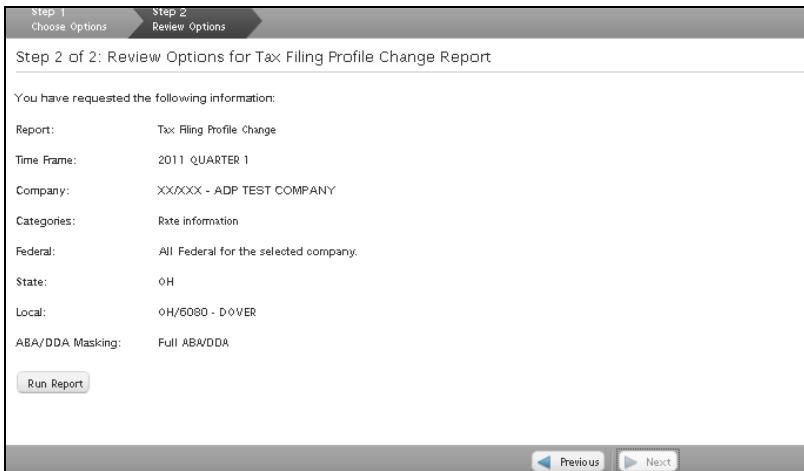
13. Review the information for accuracy. If all options are correct, click **Run Report**. The report will display in Crystal Reports Viewer. To modify, click **Previous** to go back.

14. If Full ABA/DDA is selected, an alert message displays. Review this message and click **OK** to continue or **Cancel** to go back and modify the filter option.
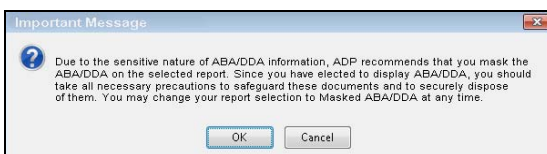
Quarterly Reports

SOD Quarterly Report

The quarterly Statement of Deposits and Filings (SOD) is a summary of the company information, liabilities, and deposit activity for the period reported to the taxing agencies on your company's behalf. A statement is produced for every active jurisdiction that ADP was responsible for depositing and/or filing during the quarter. If your company has multiple branch company codes that share the same tax ID number, a summary statement is produced at the low branch company code on a tax ID level. A detailed statement will then generate for each company code within the shared jurisdictions.

Reports are generated using a two-step process; choosing options and reviewing options before submitting your request. There are two choices available for running this report: generating a full report or generating a report using optional filters.

NOTE: Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Generate a Full Report

To generate a report with all details for your company, leave the optional filters unchecked.

1. Select the **SOD Quarterly Report** from the Main Menu.
2. Click **Next** to continue to Review Options.

3. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

4. The requested report information displays at the bottom of the page. Click the **Schedule** link to process a report.

5. The report status will display in the Request Queue in the Main Menu. The report begins in the In Progress status. Click the **Refresh Queue** button to update the status. When the report status changes to Ready, click the Report link to display the report in Crystal Reports Viewer.

    NOTE: Once viewed, reports are removed from the Request Queue. To save a viewed report, export the report to your local computer drive or destination of choice. See the View, Export, and Print Reports section in this guide for more details.
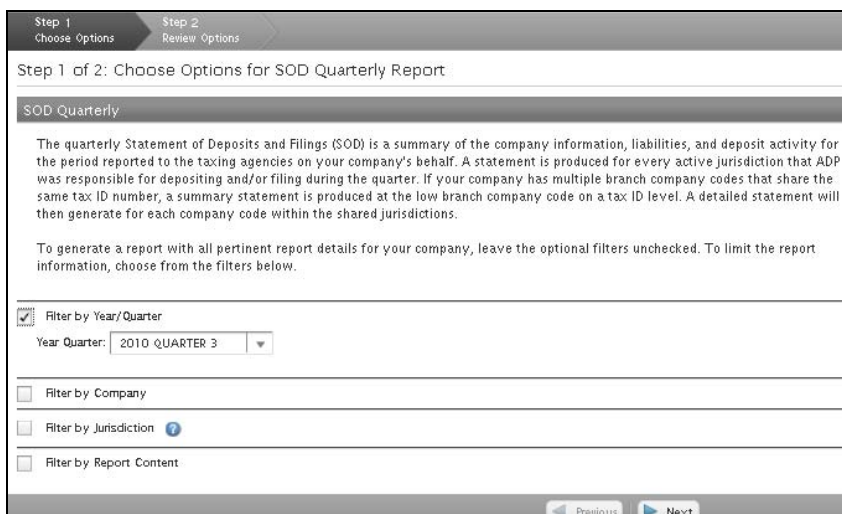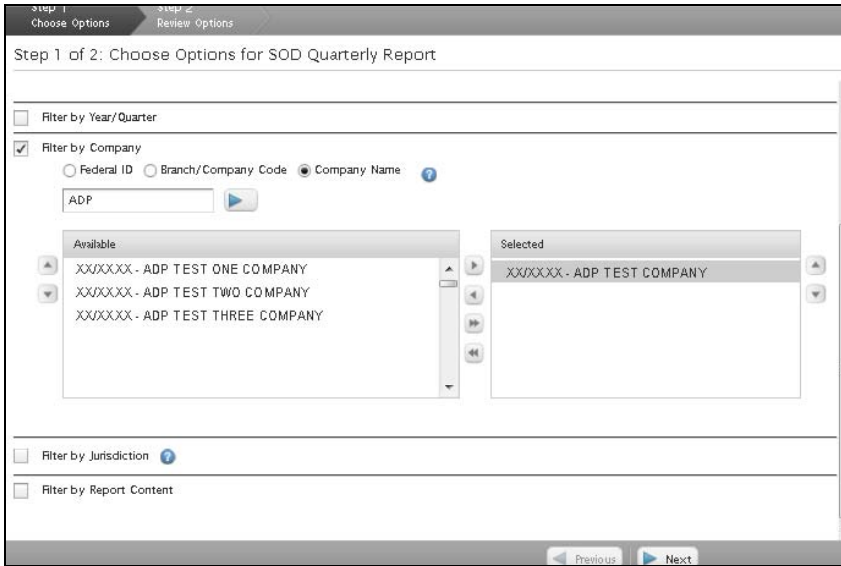

Generate With Optional Report Filters

To generate a report with only specifically selected report details for your company, select one or more of the optional filters. Click **Next** once you have selected all desired optional filters. Any option not selected will default to include all available details.

- Year/Quarter – Year/Quarters available will display
- Company – Companies set up on your account with ADP will display
- Jurisdiction – All jurisdictions set up on your account with ADP will display
- Report Content – Summary only and Detail only or Both will display

1. Select the **SOD Quarterly Report** from the Main Menu.
2. Click the **Filter by Year/Quarter** check box to display the options.
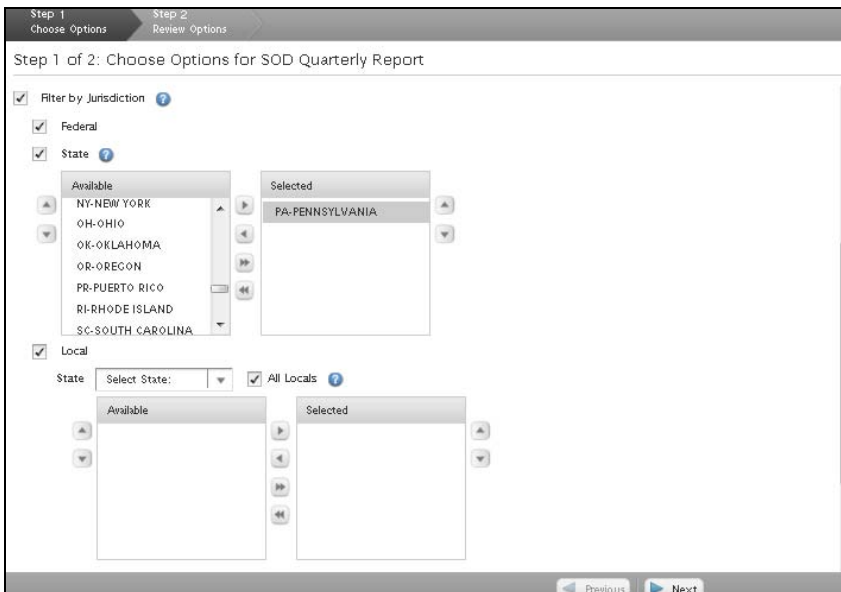3. Use the drop-down menu to select an available **Year/Quarter** for this report.

4. Click the **Filter by Company** check box to display the options. Click the **Federal ID**, **Branch/Company Code**, or **Company Name** radio button and enter the complete or partial information. The Available list box populates all matches to the information entered.

5. Click to select the company(ies) from the Available list box and click **Move Selected Right** to move to the Selected list box.

    NOTE: Only criteria in the Selected list box will be included in the report.

6. Select the **Filter by Jurisdiction** check box to display the options. Click the **State** check box to display all states set up for this company in the Available list box.

7. Click to select the state(s) from the Available list box and click **Move Selected Right** to move to the Selected list box.

8. a. Click the **Local** check box. Use the drop-down menu to select a state and display all locals set up for this company in the Available list box. For states with numerous locals, choose the state name with the first letter of the local name. For example, choose the Ohio-D selection for the Ohio-Dover local.

    Once populated in the Available list box, click to select one or more entries. Click **Move Selected Right** ▶ to move to the Selected list box.

    b. Click the **All Locals** check box to select all locals set up for this company.

    NOTE: Be certain that the Selected list box is clear before using the All Locals check box. Any previously selected items in the Selected list box will override the All Locals check box.

9. Click the **Filter by Report Content** check box to display the options. Click to select the **Summary**, **Detail**, or **Both** radio button.

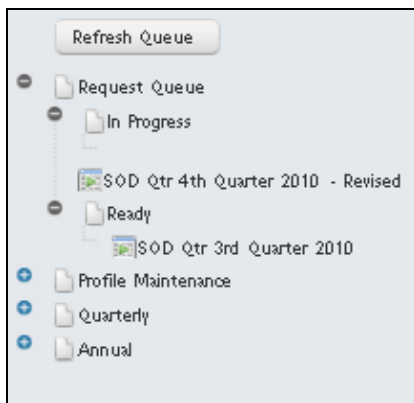10. Click **Next** to continue to Review Options.

11. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

12. The requested report information displays at the bottom of the page. Click the **Schedule** link to process a report.

13. The report status will display in the Request Queue in the Main Menu. The report begins in the In Progress status. Click the **Refresh Queue** button to update the status. When the report status changes to Ready, click the report link to display the report in Crystal Reports Viewer.

    NOTE: Once viewed, reports are removed from the Request Queue. To save a viewed report, export the report to your local computer drive or destination of choice. See the View, Export, and Print Reports section in this guide for more details.

941 Filing Report

The employer's quarterly federal tax return is a computation of federal income tax, social security, and Medicare tax withheld from the employee as well as employer social security and Medicare tax based on your quarter file.

The 941 Filing report displays Federal Income Tax (FIT), Social Security (SS), and Medicare wages along with adjustments to Tips, Third Party Sick Pay (3PSP), and Group Term Life (GTL). The 941 is also filed with Schedule B, which details liabilities (not deposits) per check date.

Reports are generated using a two-step process; choosing options and reviewing options before submitting your request. There are two choices available for running this report: generating a full report or generating a report using optional filters.

NOTE: Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Generate a Full Report

To generate a report with all details for your company, leave the optional filters unchecked.

1. Select the **941 Filing Report** from the Main Menu.
2. Click **Next** to continue to Review Options.

3. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.


4. The requested report information displays at the bottom of the page. Click the **View Report** link to view a report. The report will display in Crystal Reports Viewer.

Generate With Optional Report Filters

To generate a report with only specifically selected report details for your company, select one or more of the optional filters. Click **Next** once you have selected all desired optional filters. Any option not selected will default to include all available details.

- Year/Quarter – Year/Quarters available will display
- Company – Companies set up on your account with ADP will display

1. Select the report from the Main Menu. Click the **Filter by Year/Quarter** check box to display the options.

2. Use the drop-down menu to select an available **Year/Quarter** for this report.
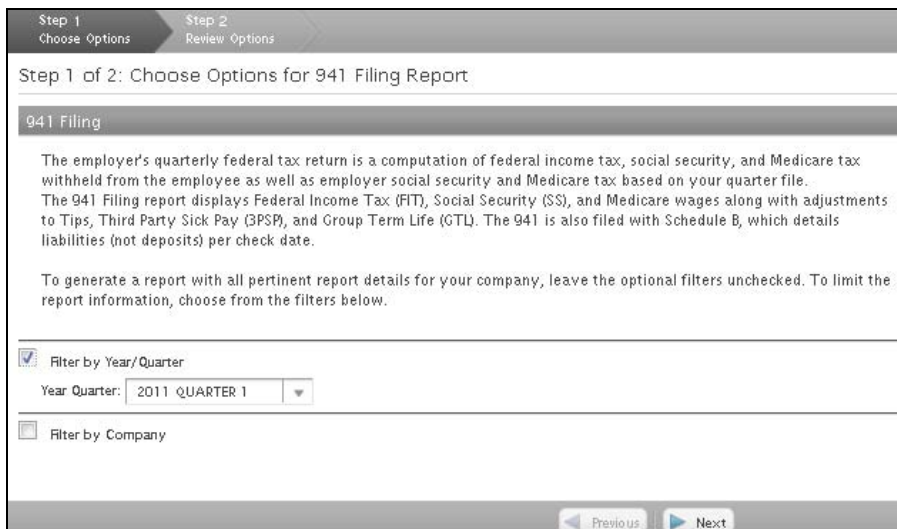
3. Click the **Filter by Company** check box to display the options. Click the **Federal ID**, **Branch/Company Code**, or **Company Name** radio button and enter the complete or partial information. The Available list box populates all matches to the information entered.

4. Click to select the company(ies) from the Available list box and click **Move Selected Right** to move to the Selected list box.

   NOTE: Only criteria in the Selected list box will be included in the report.

5. Click **Next** to continue to Step 2 of 2: Review Options for 941 Filing Report.

6. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

7. The requested report information displays at the bottom of the page. Click the **View Report** link to view a report. The report will display in Crystal Reports Viewer.

Annual Reports

SOD Annual Report

The annual Statement of Deposits and Filings (SOD) is a summary of the company information, liabilities, and deposit activity for the period reported to the taxing agencies on your company's behalf. A statement is produced for every active jurisdiction that ADP was responsible for depositing and/or filing during a calendar year. If your company has multiple branch company codes that share the same tax ID number, a summary statement is produced at the low branch company code on a tax ID level. A detailed statement will then generate for each company code within the shared jurisdictions.

Reports are generated using a two-step process; choosing options and reviewing options before submitting your request. There are two choices available for running this report: generating a full report or generating a report using optional filters.

NOTE: Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Generate a Full Report

To generate a report with all details for your company, leave the optional filters unchecked.

1. Select the **SOD Annual Report** from the Main Menu.
2. Click **Next** to continue to Review Options.

3. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

4. The requested report information displays at the bottom of the page. Click the **Schedule** link to process a report.

5. The report status will display in the Request Queue in the Main Menu. The report begins in the In Progress status. Click the **Refresh Queue** button to update the status. When the report status changes to Ready, click the report link to display the report in Crystal Reports Viewer.

    NOTE: Once viewed, reports are removed from the Request Queue. To save a viewed report, export the report to your local computer drive or destination of choice. See the View, Export, and Print Reports section in this guide for more details.
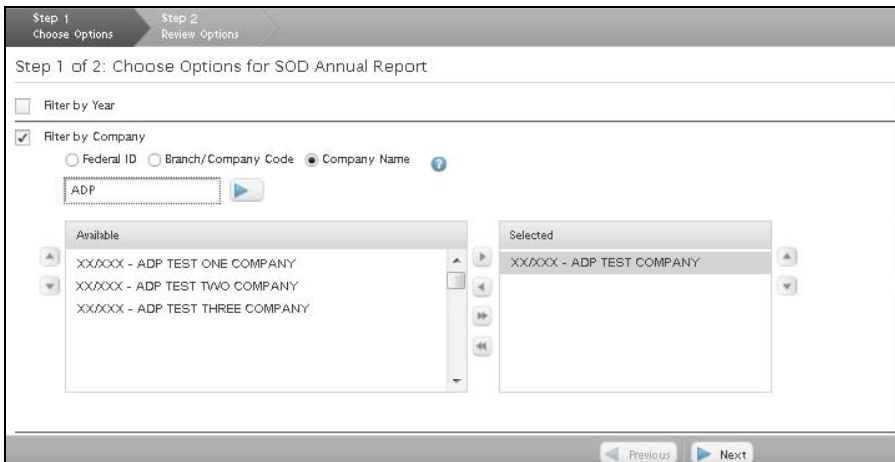

Generate With Optional Report Filters

To generate a report with only specifically selected report details for your company, select one or more of the optional filters. Click **Next** once you have selected all desired optional filters. Any option not selected will default to include all available details.

- Year/Quarter – Year/Quarters available will display
- Company – Companies set up on your account with ADP will display
- Jurisdiction – All jurisdictions set up on your account with ADP will display
- Report Content – Summary only and Detail only or Both will display

1. Select the **SOD Annual Report** from the Main Menu.

2. Click the **Filter by Year/Quarter** check box to display the options.

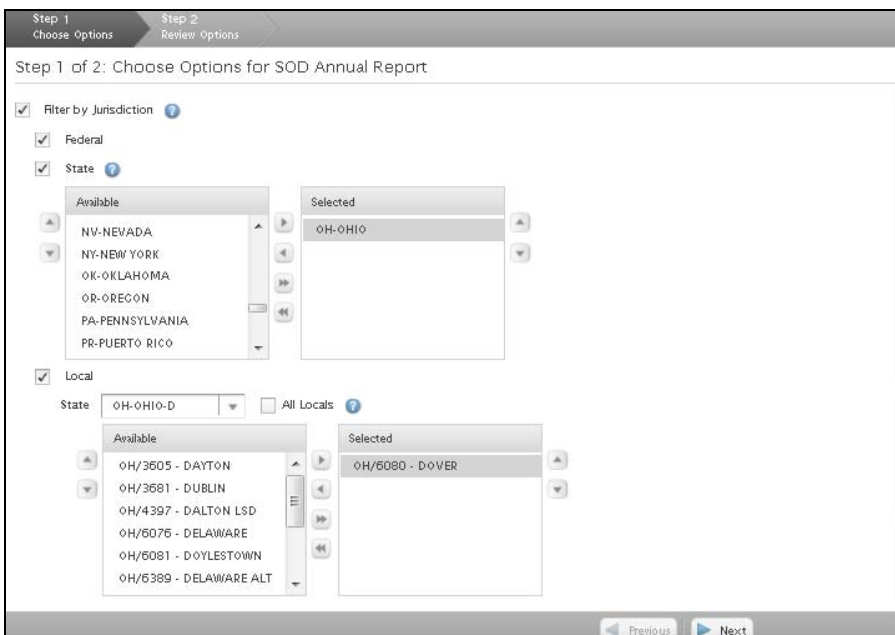3. Use the drop-down menu to select an available **Year/Quarter** for this report.

4. Click the **Filter by Company** check box to display the options. Click the **Federal ID**, **Branch/Company Code**, or **Company Name** radio button and enter the complete or partial information. The Available list box populates all matches to the information entered.

5. Click to select the company(ies) from the Available list box and click **Move Selected Right** to move to the Selected list box.

    NOTE: Only criteria in the Selected list box will be included in the report.

6. Select the **Filter by Jurisdiction** check box to display the options. Click the **State** check box to display all states set up for this company in the Available list box.

7. Click to select the state(s) from the Available list box and click **Move Selected Right** to move to the Selected list box.

8. a. Click the **Local** check box. Use the drop-down menu to select a state and display all locals set up for this company in the Available list box. For states with numerous locals, choose the state name with the first letter of the local name. For example, choose the Ohio-D selection for the Ohio-Dover local.

    Once populated in the Available list box, click to select one or more entries. Click **Move Selected Right** ▶ to move to the Selected list box.

    b. Click the **All Locals** check box to select all locals set up for this company.

    NOTE: Be certain that the Selected list box is clear before using the All Locals check box. Any previously selected items in the Selected list box will override the All Locals check box.

9. Click the **Filter by Report Content** check box to display the options. Click to select the **Summary**, **Detail**, or **Both** radio button.

10. Click **Next** to continue to Review Options.

11. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

12. The requested report information displays at the bottom of the page. Click the **Schedule** link to process a report.

13. The report status will display in the Request Queue in the Main Menu. The report begins in the In Progress status. Click the **Refresh Queue** button to update the status. When the report status changes to Ready, click the report link to display the report in Crystal Reports Viewer.

   NOTE: Once viewed, reports are removed from the Request Queue. To save a viewed report, export the report to your local computer drive or destination of choice. See the View, Export, and Print Reports section in this guide for more details.

940 Filing Report

The employer's annual Federal Unemployment Tax Act (FUTA) tax return is filed at the beginning of each year. This report reflects the total federal unemployment tax due for the completed calendar year and reconciles the tax due against the quarterly deposits made for the year.

Reports are generated using a two-step process; choosing options and reviewing options before submitting your request. There are two choices available for running this report: generating a full report or generating a report using optional filters.

NOTE: Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Generate a Full Report

To generate a report with all details for your company, leave the optional filters unchecked.

1. Select the **940 Filing Report** from the Main Menu.

2. Click **Next** to continue to Review Options.

3. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

4. The requested report information displays at the bottom of the page. Click the **View Report** link to view a report. The report will display in Crystal Reports Viewer.
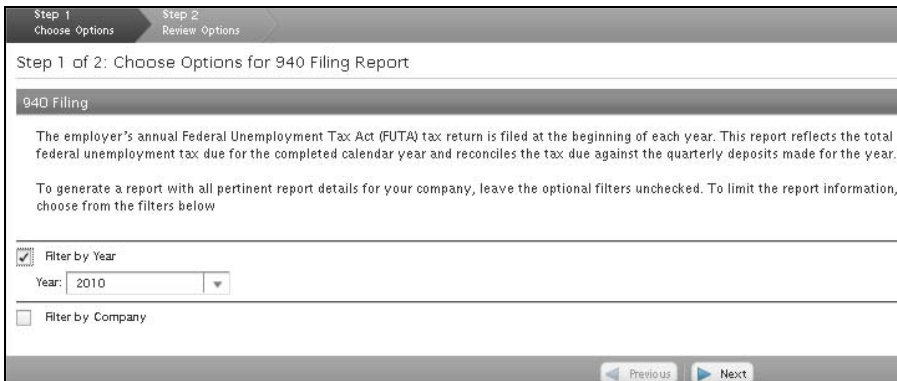

Generate With Optional Report Filters

To generate a report with only specifically selected report details for your company, select one or more of the optional filters. Click **Next** once you have selected all desired optional filters. Any option not selected will default to include all available details.
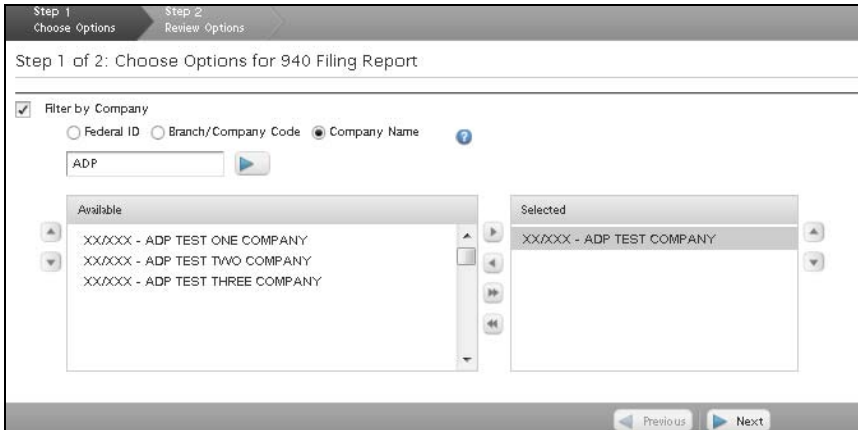
- Year/Quarter – Year/Quarters available will display
- Company – Companies set up on your account with ADP will display

1. Select the **940 Filing Report** from the Main Menu.

2. Click the **Filter by Year/Quarter** check box to display the options.

3. Use the drop-down menu to select an available **Year/Quarter** for this report.

4. Click the **Filter by Company** check box to display the options. Click the **Federal ID**, **Branch/Company Code**, or **Company Name** radio button and enter the complete or partial information. The Available list box populates all matches to the information entered.

5. Click to select the company(ies) from the Available list box and click **Move Selected Right** to move to the Selected list box.

   NOTE: Only criteria in the Selected list box will be included in the report.

6. Click **Next** to continue to Review Options.

7. Review the information for accuracy. If all options are correct, click **Run Report**. To modify, click **Previous** to go back.

8. The requested report information displays at the bottom of the page. Click the **View Report** link to view a report. The report will display in Crystal Reports Viewer.

VIEW, EXPORT, AND PRINT REPORTS

View Reports

The reports will display in the Crystal Reports Viewer software with the parameters that you have selected. If you get a message stating that you need to install Crystal Reports Viewer, click **Yes** and follow the installation instructions. The report will display when the installation is complete. You will only need to install the software once.

NOTE: Once viewed, reports are removed from the Request Queue. To save a viewed report, export the report to your local computer drive or destination of choice. See the View, Export, and Print Reports section in this guide for more details.

Crystal Reports Viewer Navigation

The Crystal Reports Viewer main toolbar displays at the top of the report screen. A description of each icon button displays when you hover the pointer over the icon. You may slide the vertical scroll bar to widen or narrow the Preview tab, or click the Group Tree icon to open or close the Preview tab column. Use these icons to navigate through your reports.
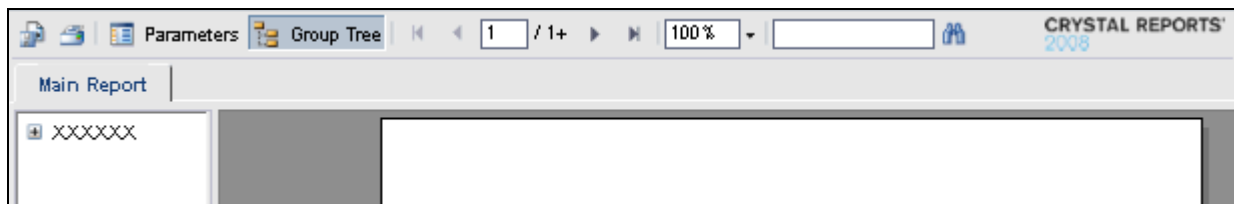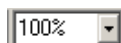

|	
The Export icon will export the file into a different software format.
The Printer icon will open up the Print dialog box.
Parameters will open or close the Main Report view box.
The + or – icons allow expansion or contraction of view options.
Group Tree displays or hides the Preview Tab display.
The Magnification Factor allows you to select larger or smaller view options.
The current page number and number of pages available in the report will display.
Go to First Page takes you to the first page of the document.
Go to Previous Page takes you to the previous page of the document.
Go to Next Page takes you to the next page of the document.
Go to Last Page takes you to the last page of the document.
The Search icon allows you to search for specific information.

Export Reports

When the report is open in Crystal Reports Viewer, use the following instructions to download and save the file. From the download window, the report must be opened before a copy can be saved to a local folder. Examples displayed in this section are for PDF and Word documents, which are more commonly used; however, file format compatibility varies by report.

1. To save a report in a local folder, click the **Export** icon located in the upper-left corner of your Crystal Reports Viewer window.

2. An Export Report dialog box displays. Use the drop-down list to select a **File Format** and enter the **Page Range**. Click **Export.** A confirmation dialog box displays.
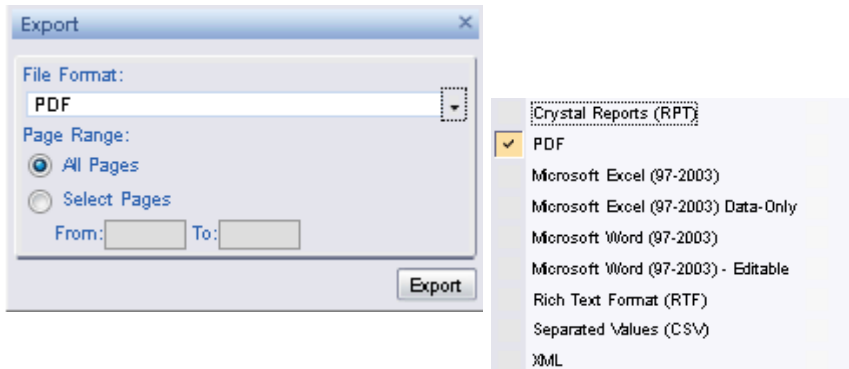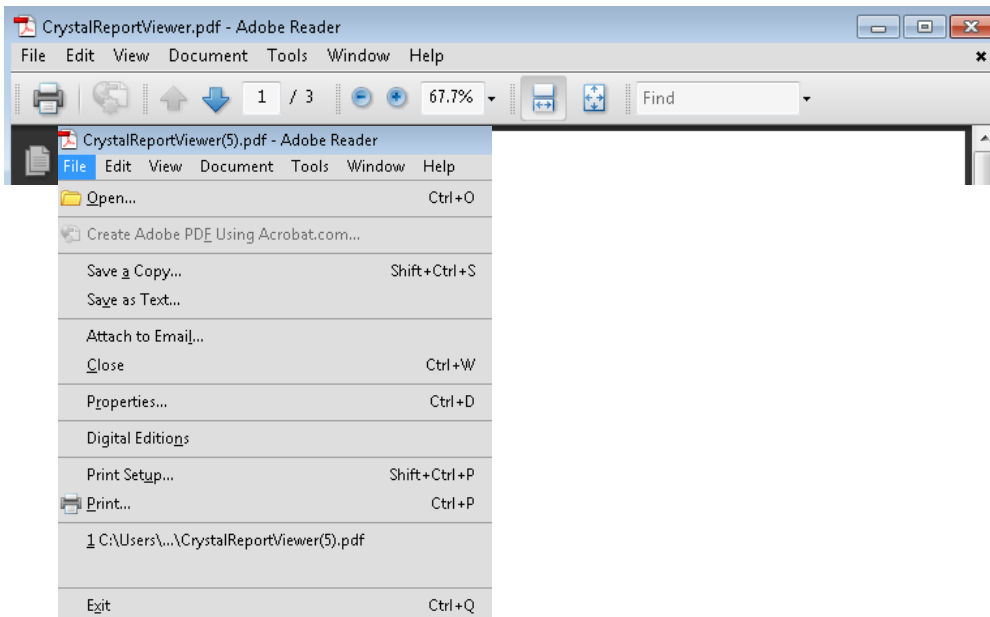

3. Select the **Save File** radio button and click **OK** to download. The file will export to the Downloads window that automatically opens on your desktop.
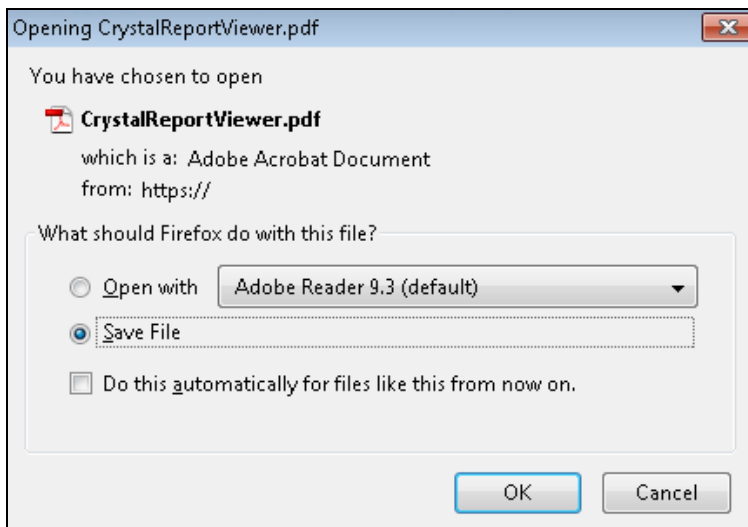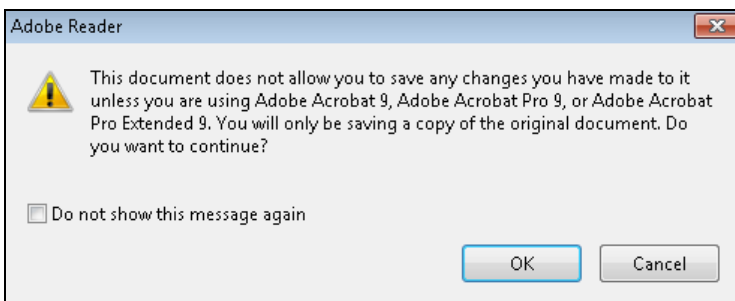
4. The Downloads window from your desktop displays the files that have been exported. Double-click the file name to open.
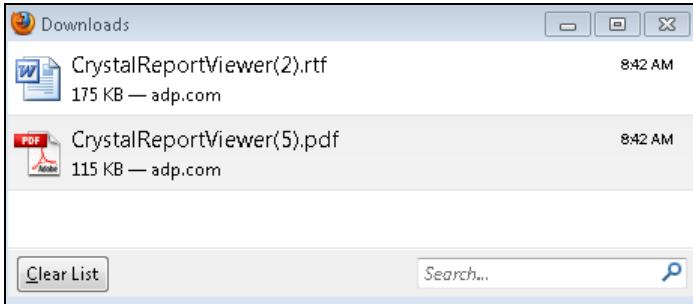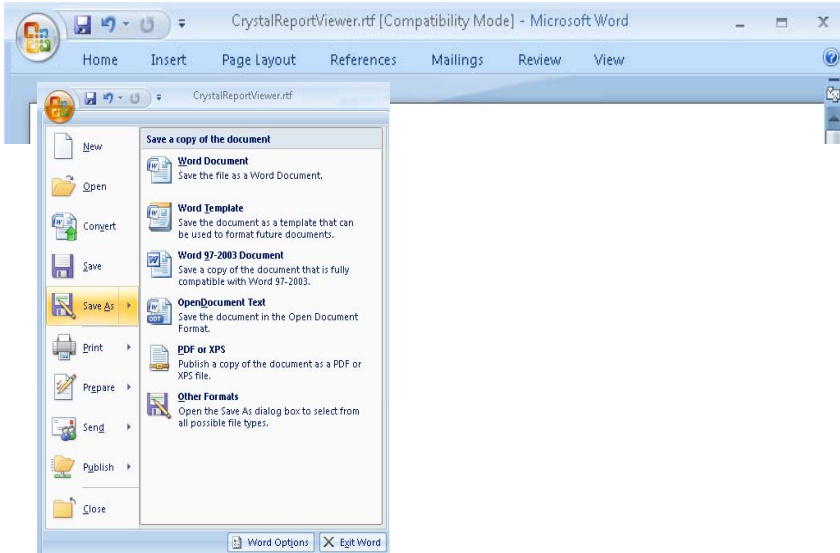

5. The report will display in a new window. For an Adobe Acrobat PDF file, click **File** > **Save a Copy**.

6. An alert message as shown below may display. Review the message, and click **OK** to continue.

7. For a Word document, depending on the version, you can click the Microsoft **Office Button** > **Save As**, or **File** > **Save As**, and select a document format.

8. A Save window displays. Navigate to the Drive location and Folder where you will save the file. Enter a desired name in the File name field. Click **Save**.
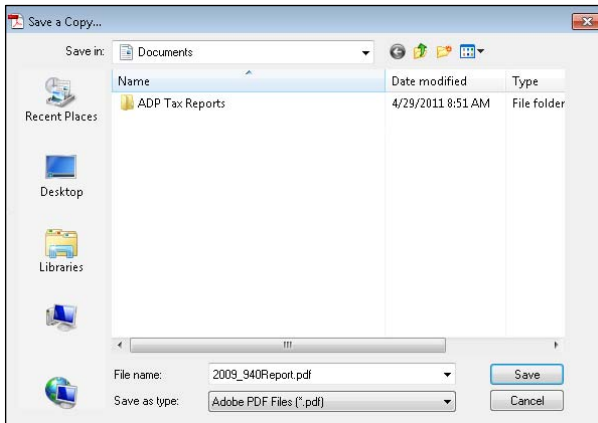
Adobe Acrobat
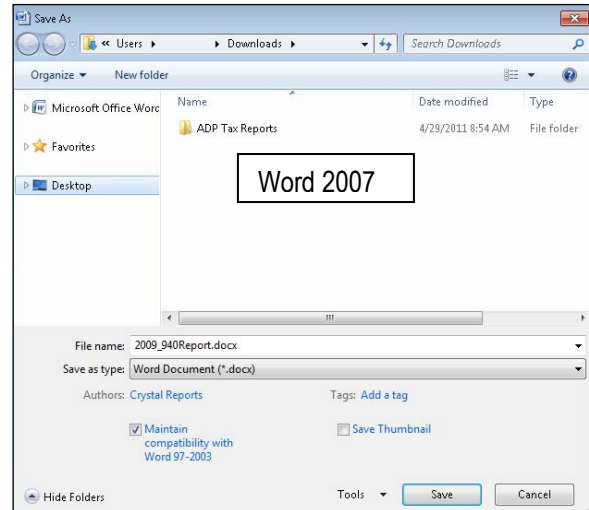
Word 2007

Print Reports

If you are viewing a report from Crystal Reports Viewer and you want to print the file, the file must first be exported to a PDF file. Once the PDF file is open, the print option from Adobe Acrobat is used.

NOTE: If you have downloaded the file and are viewing the report in compatible software, use the applicable software Print options.

1. Click the **Print** 🖨 icon located in the upper-left corner of your Crystal Reports Viewer window.

2. A Print to PDF dialog box displays. Enter the **Page Range** and click **Export.**

3. Select the **Save File** radio button and click **OK** to download. The file will export to the Downloads window that automatically opens on your desktop.
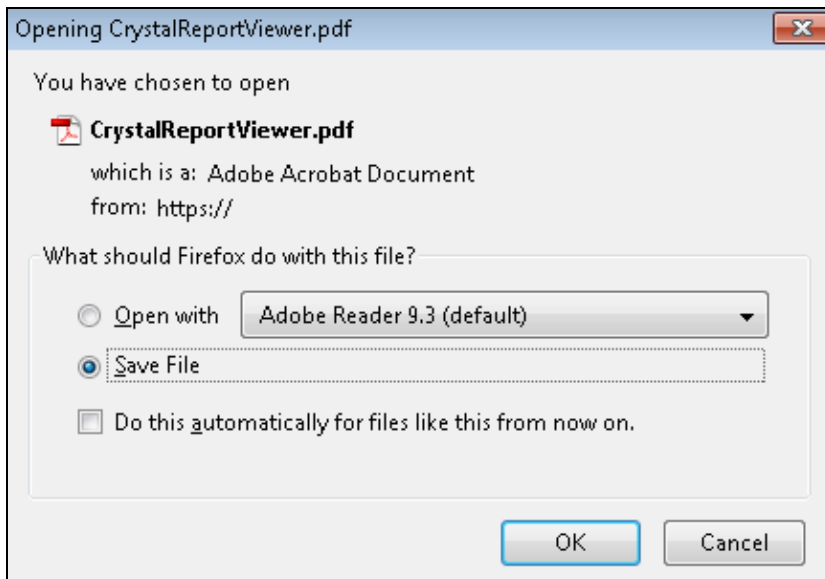
4. The Downloads window from your desktop displays the files that have been exported. Double-click the file to open.

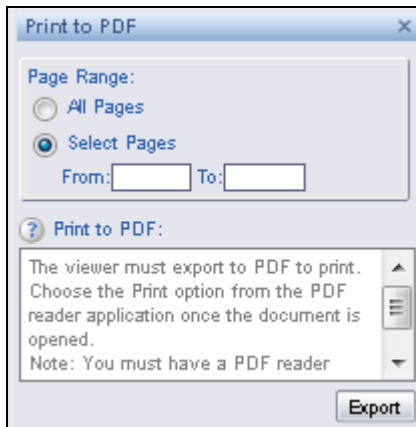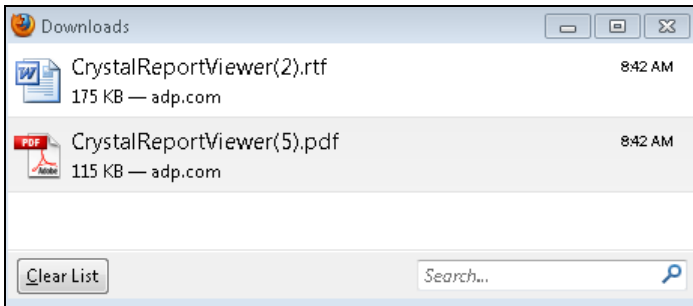5. The report will display in a new window. For an Adobe Acrobat PDF file, click the **Print** icon located in the upper left corner of your window.
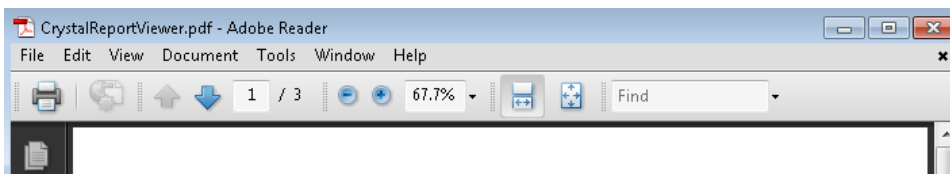
6. For a Word document, depending on the version, you can click the Microsoft **Office Button** > **Print**, or **File** > **Print** and select a document format.
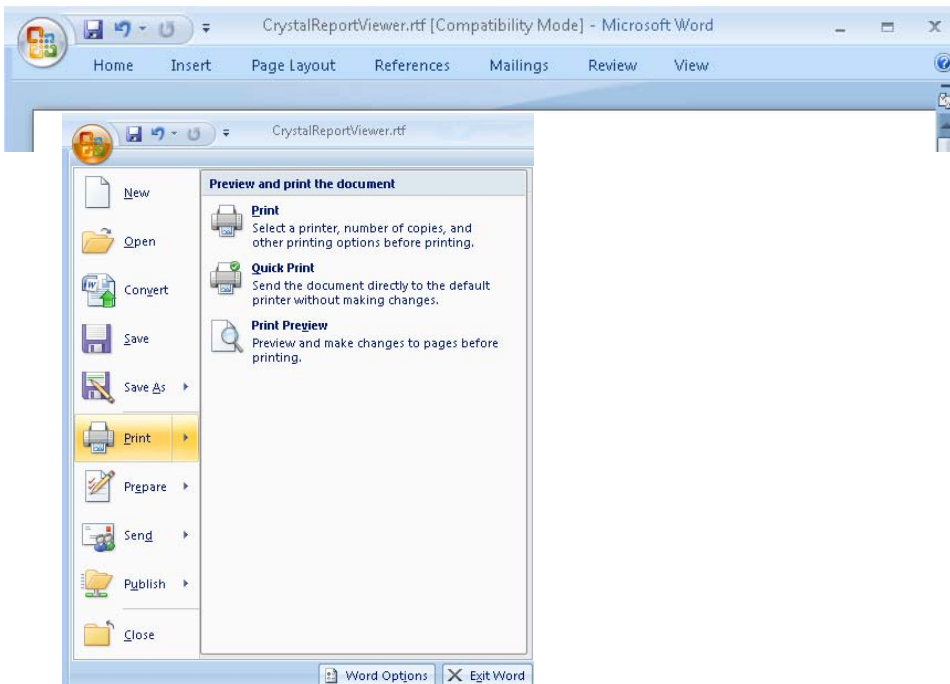
7. A Print window displays. Select your print options. Click **OK**.

Adobe Acrobat

Word 2007

FREQUENTLY ASKED QUESTIONS

This section provides answers to some frequently asked questions regarding ADP Tax Reporting Online.

Q1   *How do I reset a forgotten password?*

A1   Only a Client Master or Client Administrator is authorized to reset your password. If you have forgotten your ADP Internet Services password, contact your Netsecure Administrator to have it reset. Once your password has been reset, you will receive an e-mail message.
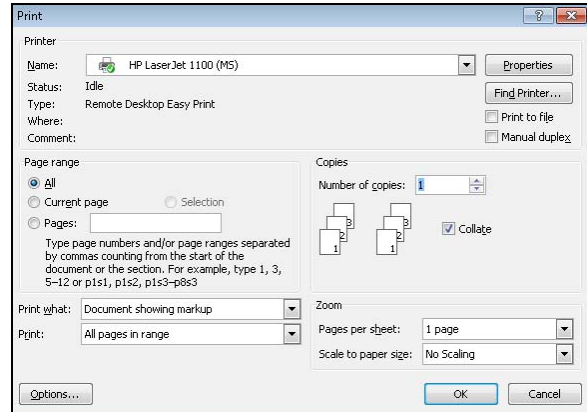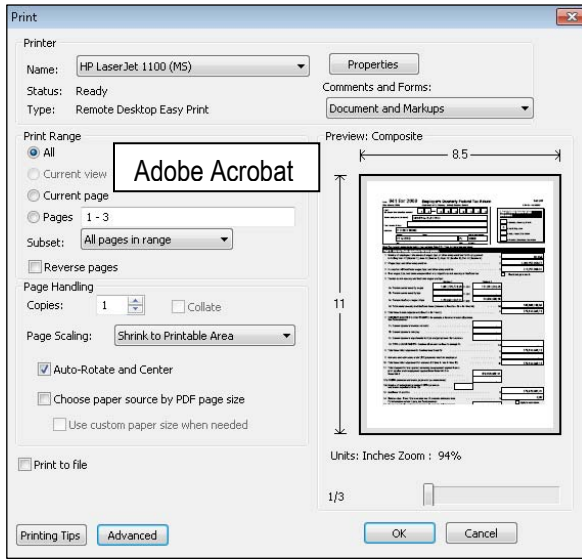
Q2   *How long is the report information available online?*

A2   Tax information is available for seven years from the reporting year.

Q3   *When is the quarterly or annual SOD Report information available on Tax Reporting Online?*

A3   Tax Reporting Online – SOD Reports are available online within one week of the last quarter deposit date, which can be up to four weeks prior to receiving the paper report through USPS mail.

Q4   *Why am I unable to view historical information for my company?*

A4   Report availability is limited to time frames beginning with the Tax Reporting Online access date for your company.

Q5   *How does a Client Administrator assign a user with access to view historical information from the time of the initial Tax Reporting Online setup?*

A5   To assign a user to view historical reports from the time of the initial setup of Tax Reporting Online, the Client Administrator must select the Publish Historical Reports check boxes to assign report access. For more details, the Client Administrator can refer to the Assign Reports section in the *Security Services Administration Guide*.

Q6   *Can specific report assignments be made without assigning a user access to all reports?*

A6   Yes. The Client Administrator can designate the reports to which a user has access. For more details, the Client Administrator can refer to the Assign Reports section in the *Security Services Administration Guide*.

Q7   *Why am I unable to see information for all my company codes?*

A7   Please confirm that you have the correct company code entitlements. This can be verified by accessing the My Info under Company Codes Assignment. If the desired company codes are not listed in this field, contact your Client Administrator to assign the codes. For more details, the Client Administrator can refer to the Company Code Maintenance section in the *Security Services Administration Guide*.

Q8 *If a 940 Filing Report is available, does this mean ADP filed a 940 on my behalf?*

A8   The 940 Filing Report is a reflection of information accumulated for the purposes of filing and does not mean ADP filed. For confirmation that ADP filed, refer to your Statement of Deposit, which reflects if ADP or your company was responsible for the actual filing.

Q9 *If a 941 Filing Report is available, does this mean ADP filed a 941 on my behalf?*

A9   The 941 Filing Report is a reflection of information accumulated for the purposes of filing and does not mean ADP filed. For confirmation that ADP filed, refer to your Statement of Deposit, which reflects if ADP or your company was responsible for the actual filing.

Q10 *How do I know when my report is ready?*

A10   Check the Main Menu – Request Queue for a status. The In Progress menu option lists reports currently in process. The Ready menu option lists reports ready for viewing. Once a report is ready for viewing, a plus (+) icon will appear. Click the (+) icon and select the desired report. The report remains here until it is viewed. Once viewed, reports are removed from the Request Queue.