TaxScripts® TaxPro User Manual

IMPORTANT: IRS' e-Services Website

In order to use TaxScripts® TaxPro, you must be registered with the IRS' e-Services Website. If you are not yet registered, you can sign up for your access at:

https://la2.www4.irs.gov/e-services/Registration/Reg_Online/Reg_RegisterUserForm

It may take up to 10 days to receive your access information. Any concerns on your access to e-Services must be addressed with the IRS' e-Services contact. For more assistance with e-services, call the IRS' e-Services Help Desk. If you are calling from within the U.S., contact the Help Desk at **1-866-255-0654**. International callers can call **01-512-416-7750**.

Revision 1
6 Dec 2008

TaxScripts, Inc.
7605 Yellow Bluff Road
Panama City, FL 32404

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Section 1. Introducing TaxScripts®

TaxScripts® software allows tax professionals (Enrolled Agents, CPAs, Attorneys, and Unenrolled Return Prepares) who have been assigned a Centralized Authorization File (CAF) number to request and retrieve IRS transcripts through the IRS e-services website in a matter of seconds. The tax practitioner must have access to the IRS e-services website and a valid Power of Attorney (POA) on file with the IRS for the tax client(s) the tax practitioner is requesting transcripts for, in order to have their transcript request processed.

Depending on the user's reply to the automated upload and download prompts, the user can ultimately end up simply clicking on one single icon on the main menu bar and the software will:

1. Automatically login to the IRS e-services website.
2. Automatically upload the user's IRS transcript requests.
3. Automatically check the user's e-services secure mailbox for IRS transcript(s) delivery.
4. Automatically download the IRS transcripts to the user's PC.
5. Automatically print the IRS transcripts.

Creating transcript requests has been streamlined for data entry through the use of a user's Profile which stores constant data (name, address, CAF number, etc.) and by allowing users to create multiple transcript requests in one single data entry screen, “Choose Product Details”. In addition, several required fields for transcript creation are populated automatically without having to prompt the user. The automated upload and download capability frees up the tax professional to work on other tasks which will be a significant time saving tool when compared to the on-line method.

There has never been an easier and faster way of obtaining IRS transcripts than through TaxScripts®. “IRS Transcripts in Seconds” is what TaxScripts® delivers to you.

1.1 Contact Information

TaxScripts, Inc. is dedicated to customer satisfaction. Your feedback is critically important to us. We will continue to strive to improve the quality and usability of our products and welcome any positive or negative feedback you may provide. If you are a new user and would like to learn how to use the software, we provide a set of visual tutorials. We invite you to visit the Tutorials page of our website: http://www.taxscripts.com/taxProTutorials.htm

If you have a general inquiry, chances are your question has already been asked by someone else. You may find an answer to a frequently asked question on the FAQ page of our website:

http://www.taxscripts.com/faq.htm

If you still cannot find the answer to your question, please reach us at:

Available from 8 a.m. to 8 p.m. Monday - Friday.

Customer Service, Toll Free: (800) 432-5910

To find a sales representative, please visit http://support.cch.com/findmyrep

You can also reach us by email at Cust_Serv@CCH.com.

1.2 Legal Notices

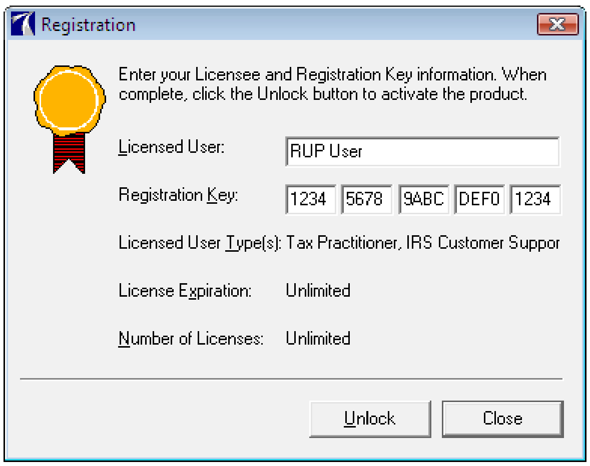
Section 2. Using TaxScripts®

2.1 Product Registration

In order to thwart attempts at piracy, TaxScripts® must be registered before it can be used. Registration requires a valid licensed username and registration key. This information is provided to you in your order receipt. You should receive this order receipt by email at time of purchase.

> If you cannot locate your receipt or failed to receive the email notification, please contact CCH customer support for an electronic copy.

The first time you launch TaxScripts®, the Registration dialog will be displayed prompting for a licensed username and registration key. By default, the trial registration is loaded into the form.



The Registration dialog can also be launched by selecting Registration from the Help menu item on the main menu.

To Register the Application

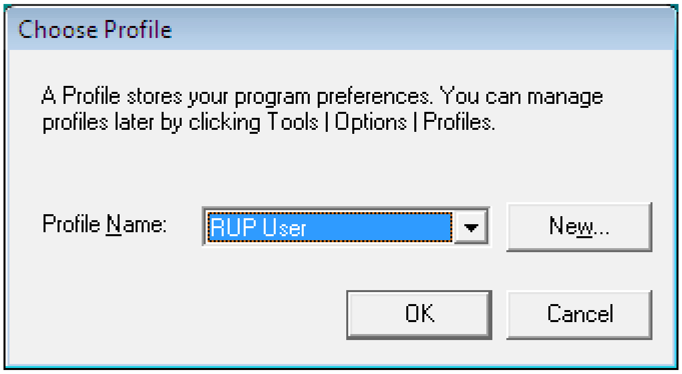
1. Type the licensed username into the Licensed User text box.
2. Type the registration key into the Registration Key text boxes.
3. Click the Unlock command button. The registration details you supplied will be validated and displayed in the Licensed User Type, License Expiration, and Number of Licenses fields.
4. Click the Close command button to dismiss the form.

2.2 Profiles

TaxScripts® uses profiles to store unique, constant data (name, address, etc) about the requestor for insertion in each transcript request. This eliminates repetitive data entry and significantly speeds up the process of creating multiple transcript requests. At least one profile must be created and selected for use before gaining full access to TaxScripts®.

Selecting a Profile

The Choose Profile dialog allows a user to select a profile. Users are required to select the profile they wish to use at the start of program execution.



> First time users must create a profile before using TaxScripts®. If a profile is not listed in the combo box, you can create a new profile by clicking the New command button.

To Select a Profile

1. Click the drop-down arrow in the Profile Name combo box. The combo box will expand to show all profiles that currently exist.
2. Click the name of the profile that you would like to select.
3. Click the OK button. The application will launch with the specified profile.

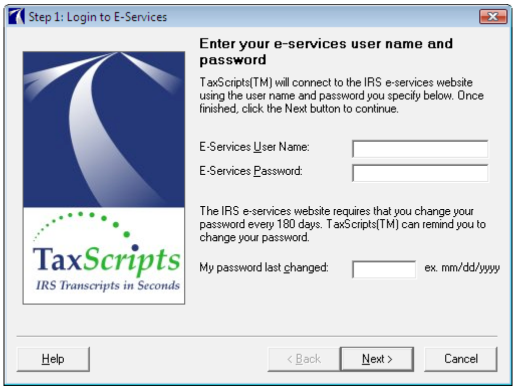
Creating a New Profile

TaxScripts® provides a wizard to streamline the process of creating a new user profile. The Create Profile wizard is divided up into six steps. To create a new profile, simply follow the instructions listed on each of the wizard's steps.

> TaxScripts® restricts the number of profiles you can create based upon the number of licenses that you purchased. You can create a single profile for each purchased license. If you only purchased one license, you can only create a single profile.

To begin the process of creating a new profile, click the New button in the Choose Profile dialog or click the Add command button on the Profiles tab of the Options dialog (you can reach the Options dialog by clicking Tools | Options on the main menu).

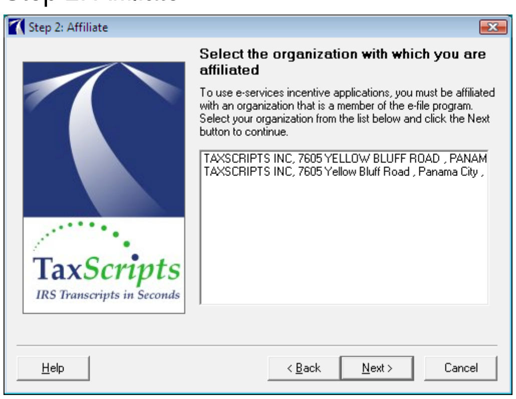
Step 1: Login to E-Services



TaxScripts® retrieves transcripts and requests POAs on tax clients by communicating directly with the IRS e-services website. You must supply a valid set of credentials in order to proceed.

1. Type your e-services user name into the User Name text box.
2. Type your e-services password into the Password text box.
3. If you would like TaxScripts® to remind you to change your password, type the date your e-services password last changed into the "My password last changed" text box.
4. Click the Next button to proceed to the next step. TaxScripts® will log into the IRS e-services website to verify your account.

Step 2: Affiliate



The IRS e-services website requires you to affiliate with an organization that is a member of the e-file program in order to use incentive applications such as DA and TDS. The Affiliate step allows you to specify this organization.

> If you do not see an organization in the list, your e-services account registration is incomplete. Contact the IRS e-services help desk for further assistance.

1. Click on an organization in the list box to select it.
2. Click the Next button to proceed to the next step.

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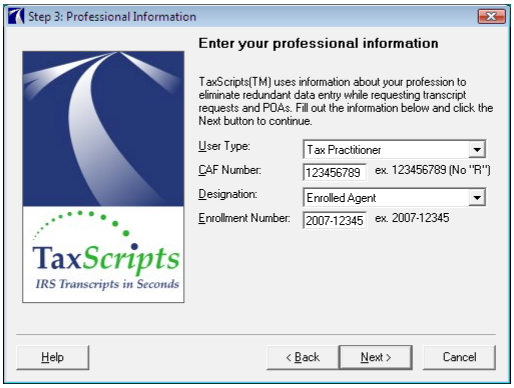
Step 3: Professional Information



Information about your profession is used in the process of requesting transcripts and POAs.

1. Type your CAF number without the trailing R into the CAF Number text box.
2. Select your designation by clicking the drop-down arrow in the Designation combo box. The combo box will expand to show all designations. Click the title of your designation.
3. If you are an Attorney, Certified Public Accountant, or Unenrolled Return Preparer
    a. Select your state of jurisdiction by clicking the drop-down arrow in the Jurisdiction State combo box. The combo box will expand to show all US states. Click your state.
4. If you are an Enrolled Actuary or Enrolled Agent
    a. Type your enrollment number into the Enrollment Number text box.
5. Click the Next button to proceed to the next step.

Step 4: Name and Phone

1. Type your first name into the First Name text box.

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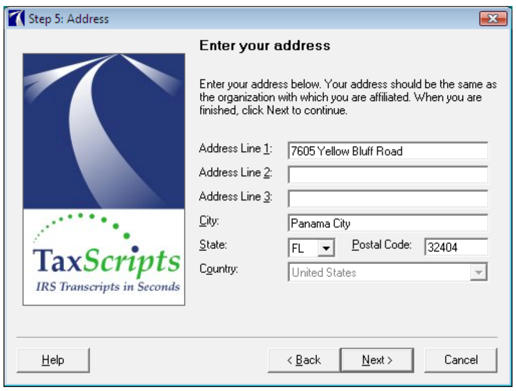
2. Type your last name into the Last Name text box.
3. Type your telephone number into the Telephone text box. If your telephone number has an extension, you must omit the extension.
4. Optionally, type your fax number into the Facsimile text box.
5. Click the Next button to proceed to the next step.

Step 5: Address



Your organization's address must be used to request transcripts and POAs. TaxScripts® attempts to extract this address from your organization's name. Simply verify that the address is correct.

> Your organization must currently reside in the United States. If you are affiliated with an organization with a foreign address, you cannot use the current version of TaxScripts®. This capability will be provided in the near future.

1. Type your organization's first address line into the Address Line 1 text box.
2. Type your organization's second address line into the Address Line 2 text box.
3. Type your organization's third address line into the Address Line 3 text box.
4. Type your organization's city into the City text box.
5. Select your organization's state by clicking the drop-down arrow in the State combo box. The combo box will expand to show all states. Click the state.
6. Type your organization's postal code into the Postal Code text box.
7. Click the Next button to proceed to the next step.

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Step 6: Profile Identification

Each profile must be associated with a unique name. This name will help you identify your profile. By default, TaxScripts® names a profile by joining your first name and last name together. If you are not satisfied with the default name, you are free to enter a customized name.

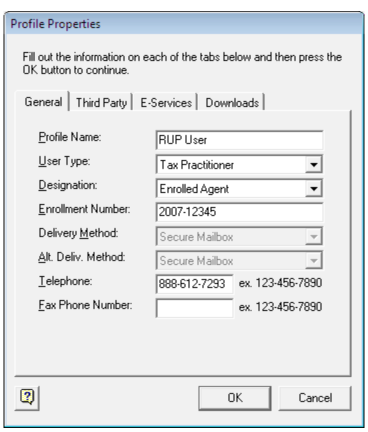
1. Type a profile name into the Profile Name text box.
2. Click the Finish button to complete the wizard. The profile will be created and added to the Choose Profile dialog and the Profiles list box in the Options dialog.

Modifying an Existing Profile

Once a profile has been created, it can be modified from the Profiles tab of the Options dialog. You can open the Options dialog by clicking Tools | Options on the main menu.

The Profile Properties dialog allows you to modify an existing profile. It is composed of four tabs: General, Third Party, E-Services, and Downloads.

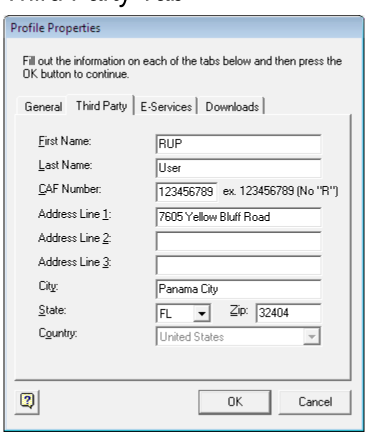
General Tab



The General tab contains the following fields:

- **Profile Name**: The name that identifies this profile. This is usually the individual's name; however, you can use any name you wish to identify to whom the profile applies.
- **User Type**: For tax professionals this is going to be “Tax Practitioner” which identifies which IRS record layout to use for the creation of the transcript request.
- **Designation**: Denotes the profession of the tax professional (e.g., Attorney, Certified Public Accountant, Enrolled Actuary, or Enrolled Agent).
- **Jurisdiction State**: Denotes the state of jurisdiction for Attorneys and Certified Public Accountants.
- **Enrollment Number**: Denotes the enrollment number of Enrolled Actuaries and Enrolled Agents.
- **Delivery Method**: This is the primary delivery method for transcripts. The only valid delivery method for tax professionals is through the Secure Mailbox, and thus this value cannot be changed.
- **Alt. Delivery Method**: This option is used by e-services in case the IRS system is unable to deliver the transcript to the user's first delivery method. The only valid alternate delivery method for tax professionals is through the Secure Mailbox, and thus this value cannot be changed.
- **Telephone Number**: A valid telephone number is required to submit a POA Form 2848.
- **Fax Phone Number**: Fax number is an optional field provided merely for backwards compatibility with older versions of TaxScripts®. This field may be safely ignored.

Third Party Tab



The Third Party tab contains individual data (name, address) required for each transcript request. The required data is:

- First Name
- Last Name
- CAF Number (9 numeric only, no ending alpha (“R”) character required)

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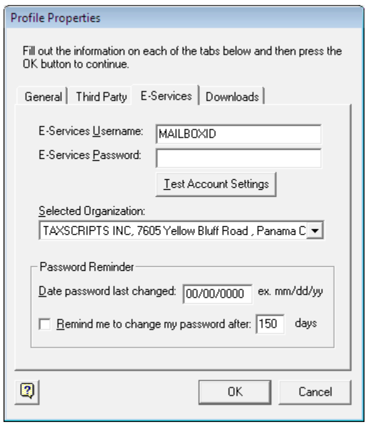
- Address (3 lines are provided)
- City
- State (pop down menu allows typing in just the first character of the state for selection)
- Zip code

E-Services Tab



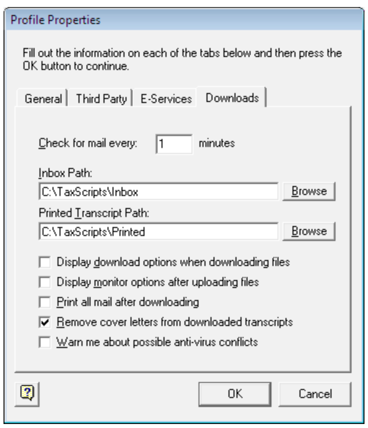
The E-Services tab contains the user's information for accessing the IRS e-services website, which TaxScripts® uses to perform the upload and download functions. It also includes information about the date that a user's e-services password was established. The individual fields are:

- **E-Services Username**: This is the user's login name when accessing e-services. The Username is also the name used by e-services to identify the user's e-services secure mailbox called Secure Object Repository (SOR).
- **E-Services Password**: This is the user's password when logging in to e-services. TaxScripts® does not store the user's password. The entry here is used for the "Test Account Settings" and is discarded after the Profile Properties window is closed.
- **Test Account Settings**: In order to ensure that the proper organization users are affiliated with is selected during the upload and download process, users must first perform a "Test Account Settings" which allows TaxScripts® to test the login information provided. TaxScripts® will provide a message window indicating a successful test and will prompt users to select the organization they normally use when logging into e-services.
- **Selected Organization**: After a successful "Test Account Settings" has been performed, TaxScripts® will provide a list of organizations that the user normally sees while logging into e-services. Users need to select the organization they normally log through for gaining access to e-services. TaxScripts® will use that organization during the upload and download process.
- **Password Reminder**: Users are required to change their e-services password every 180 days (6 months) otherwise the password will expire. TaxScripts® will keep track of that requirement for the user and alert them 30 days before expiration that the time is approaching for when the password will need to be changed. Once the user has changed

their password and updated this field, the prompts alerting the user will cease. Users should refer to the IRS e-services Help section for more details on how to change passwords in eservices.

- **Date password last changed**: Users should enter in the date their e-services password was last changed. If the date is unknown it is best to go ahead and change the password in e-services and then return to this tab and enter in the date.
- **Remind me to change my password after [] days**: The default setting of 150 days will allow TaxScripts® to provide the 30 day notice prior to the 180 day expiration day of the password. Users are encouraged to leave the default setting unchanged.

Downloads Tab



The Downloads tab contains the user's desired intervals to check the e-services secure mailbox for transcript delivery, paths for transcripts to be downloaded and moved after printing, and options for prompting the user during the upload and download process. The individual fields are:

- **Check for mail every**: This allows a user to set the intervals, in minutes, they wish TaxScripts® to check their secure mailbox for delivery of the IRS transcripts. The default is set to 1 and cannot be set lower.
- **Inbox Path**: The default is set to C:\TaxScripts\Inbox and should not be changed. The Inbox is where transcripts are downloaded until the software prints them. Once a transcript has been printed, it is then moved to the Printed subdirectory. If a user turns the automated print feature off, they can select the “Print Inbox” command under “File” from the main menu to print the transcripts that are contained in their inbox. User will also be prompted to turn the automated print feature back on if it has been turned off.
- **Printed Transcript Path**: The default is set to C:\TaxScripts\Printed and should not be changed. Transcripts that have been printed are stored in this subdirectory for reprinting, if necessary.
- **Display download options when downloading files**: If checked, it will allow displaying a prompt that allows the user flexibility in future displaying of the prompt and changing paths for downloading. If left unchecked, users will have transcripts downloaded as set in their Profile, in the E-Services tab. Users will be prompted in the display

if they wish to have the automated print feature turned on. The automated print feature can always be changed by selected “Print Inbox” under the “File” command on the main menu.

- **Display monitor options after uploading files**: This allows users to change the Profile preferences regarding mailbox monitoring options. Users can turn off future displaying of the prompt.
- **Print all mail after downloading**: This option if checked will turn on the automated print feature. If left off, users can print the contents of their inbox by selecting “Print Inbox Contents” under “File” in the main menu.

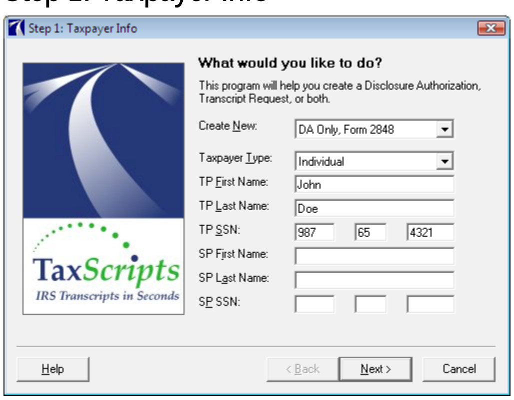
2.3 Request a Power of Attorney

You can request a POA on one of your tax clients using the Insert Request wizard provided by TaxScripts®. To launch the Insert Request wizard, perform one of the following steps:

- From the main window, press the “Insert” key on the keyboard (recommended).
- Select Insert from the Request menu item on the main menu.
- Click the Insert Request icon on the toolbar.

> To submit an electronic Power of Attorney, Form 2848, you must know the taxpayer’s (a) AGI for either the current or one of the previous three tax years and (b) date of birth. For businesses, you must also know an authorized agents SSN and official contact title.
>
> If you do not have access to this information or if the taxpayer has not filed a tax return, you cannot use TaxScripts® to request an electronic POA. You must request the POA by facsimile from the IRS.

Step 1: Taxpayer Info

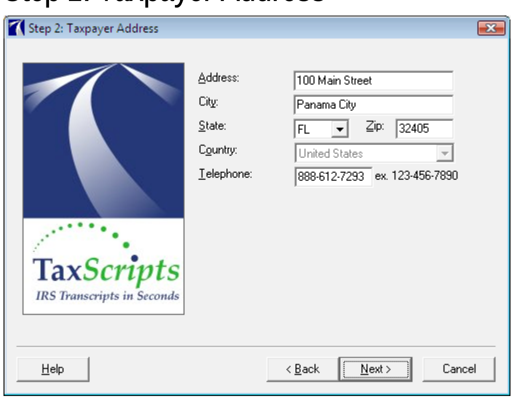


The Insert Request wizard is used to create a transcript request or request a POA on an individual or a business. To request a POA:

1. Click the drop-down arrow in the Create New combo box. In the list that appears, click the “DA Only, Form 2848” item.
2. Click the drop-down arrow in the Taxpayer Type combo box. In the list that appears, click “Individual” to create a POA for an individual tax client or click “Business” to create a POA for a business tax client.
3. If your tax client is an individual:
    a. Type the first name of the taxpayer in the TP First Name text box.
    b. Type the last name of the taxpayer in the TP Last Name text box.
    c. Type the SSN of the taxpayer in the TP SSN text boxes.
    d. If the taxpayer is married, type the spouse’s information into the SP text boxes.
4. If your tax client is a business:
    a. Type the name of the business in the Business Name text box.
    b. Type the FEIN of the business in the FEIN text box.
5. Click the Next button to move to the next step.

> You can also use TaxScripts® to request a POA and transcripts for a single tax client at one time. To do this, select “DA and Transcript Request” in the Create New combo box. Once the DA has been filed, the Insert Request wizard will continue by prompting for transcript products (see Step 2a: Transcript Products under the section entitled Request an IRS Transcript).

Step 2: Taxpayer Address



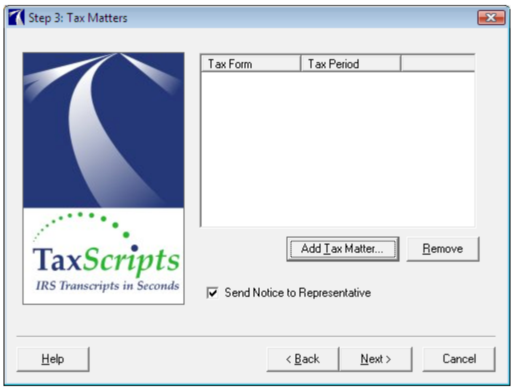
The Taxpayer Address step prompts for the tax client’s address. To complete this step:

1. Type the address into the Address text box.
2. Type the city into the City text box.
3. Click the drop-down arrow in the State combo box. In the list that expands, click the appropriate state.

4. Type the postal code into the Zip text box.
5. Type the telephone number into the Telephone text box.

> The tax client's address must reside in the United States. If the address is foreign, you cannot use the current version of TaxScripts®. This capability will be provided in the near future.

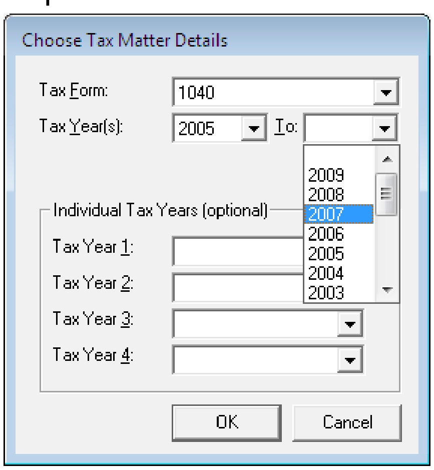
Step 3a: Tax Matters



The Tax Matters step allows the user to manage the tax matters that will be included in the POA request. From this step, the user can add a new tax matter to the request or remove an existing tax matter from the request. To add a tax matter:

- Click the Add Tax Matter command button. The Choose Tax Matter Details dialog will appear.

Step 3b: Choose Tax Matter Details



The Choose Tax Matter Details dialog allows the user to select a tax form and a range of tax years to which a tax matter will apply. To modify the details:

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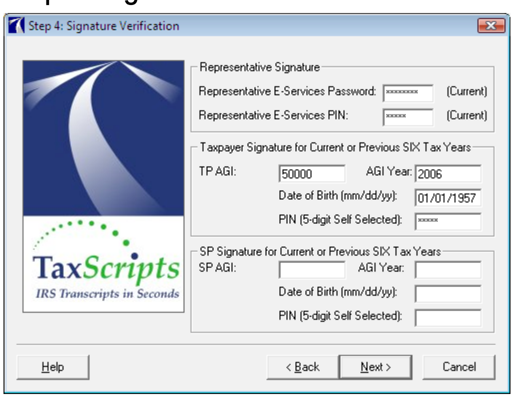
1. Click the drop-down arrow in the Tax Form combo box. In the list that expanded, click the tax form related to the transcripts you would like to request. If you are requesting a POA on an individual, the default Form 1040 is sufficient most of the time.
2. If you would like to request a range of tax years:
   a. Select a start year in the left Tax Years combo box.
   b. Select a stop year in the right Tax Years combo box.
3. If you would like to request an individual set of tax years:
   a. Select a year for one or more of the Tax Year combo boxes.
4. Click the OK command button to commit the changes.

Step 3c: Tax Matters (cont'd)

Clicking the OK command button in the Choose Tax Matter Details combo box will add the tax matters to the list box on the Tax Matters step. To continue:

1. Optionally, click the Send Notice to Representative check box to uncheck it. By default, this check box is checked. If it is checked, you will receive a written notification by mail if and when the respective POA has been revoked.
2. Click the Next button to continue to the next step.

Step 4: Signature Verification



The Signature Verification step allows you to enter the POA request's electronic signatures. The IRS e-services website requires these signatures to verify your identity and that the tax client has granted you authority to file this POA. To sign the request:

1. Type your current e-services password into the Representative E-Services Password text box.
2. Type your current 5-digit e-services Personal Identification Number (PIN) into the Representative E-Services Password text box. This PIN number is the same number that you used in the e-services registration process.

3. If your tax client is an individual:

   a. Type the primary taxpayer's AGI for either the current or one of the previous three tax years into the TP AGI text box.

   b. Type the respective year into the AGI Year text box.

   c. Type the clients self selected 5-digit PIN number into the PIN text box. TaxScripts, Inc. recommends the use of either the postal code or the last four digits of the taxpayer's SSN.

   d. If the tax client is married, specify the spouse's information in the SP fields.

4. If your tax client is a business:

   a. Type the AGI for either the current or one of the previous three tax years into the TP AGI text box of the person who authorized and signed the original 2848.

   b. Type the respective year into the AGI Year text box.

   c. Type the date of birth of the person who signed the 2848 into the Date of Birth text box.

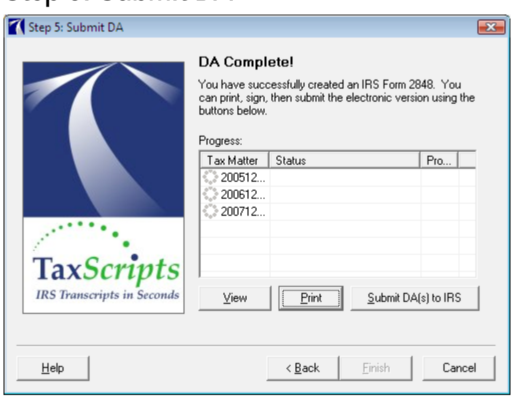
   d. Type the clients self selected 5-digit PIN number into the PIN text box. TaxScripts, Inc. recommends the use of either the postal code or the last four digits of the business's FEIN.

   e. Type the SSN into the Individual TIN text boxes of the person who signed the 2848.

   f. Type the official title into the Contact Title text box of the person who signed the 2848.

5. Click the Next button to continue to the next step.

Step 5: Submit DA



The Submit DA step allows you to view, print, and submit the electronic Form 2848 to the IRS e-services website. Even though an electronic form is filed through e-services, the IRS still requires tax professionals to retain a signed hardcopy of the form.

To View the Form 2848

- Click the View command button. The Form 2848 will be opened and viewable in your web browser.

To Print the Form 2848

- Click the Print command button. The Form 2848 will be printed to your default printer.

To Submit the Form 2848 to E-Services

1. Click the Submit DA(s) to IRS command button. TaxScripts® will login to the IRS e-services website.
2. If prompted, enter your e-services username and password.
3. TaxScripts® will begin submitting each of the tax matters to the e-services website. Currently, the IRS e-services website allows TaxScripts® to submit three tax matters si-multaneously.
4. As the submission process continues, the list view's contents will be updated with a brief description of the current activity. When the process completes, the Status will be one of the following:
   a. **Acknowledged**: The POA for the respective tax matter was electronically filed successfully.
   b. **Failed**: The POA could not be successfully filed because of an error in the POA or an internal IRS e-services failure.
   c. **Error**: The POA could not be submitted because of the connection to e-services failed.
5. For details about an acknowledgement, a failure, or an error, double-click the respective tax matter. This will open a window with a full detailed message.
6. Click the Finish command button to complete the wizard.

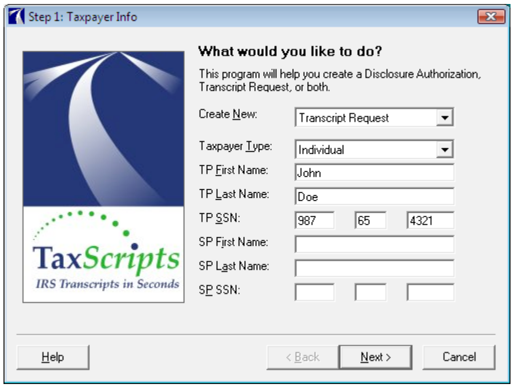
2.4 Request an IRS Transcript

TaxScripts® requests transcripts from the IRS website using the IRS e-services bulk transcript request file format. This file can be constructed using the Insert Request wizard. To launch the Insert Request wizard, perform one of the following steps:

- From the main window, press the "Insert" key on the keyboard (recommended).
- Select Insert from the Request menu item on the main menu.
- Click the Insert Request icon on the toolbar.

Create a New Transcript Request

Step 1: Taxpayer Info



This is the first of three screens required to create a transcript request. The data entry is designed for speed and therefore users need to know how to maximize the data entry features.

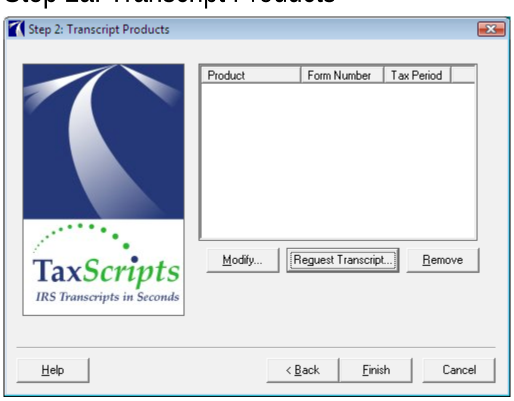
TaxScripts® defaults to a taxpayer type of Individual. If the taxpayer type is Business, then simply press the "B" key on the keyboard will change the data entry screen. While typing in the taxpayer's SSN, no tabbing forward to the next field is needed because TaxScripts® does that for you.

If a Spouse is applicable to the transcript request, the last name is automatically inserted by using the taxpayer's last name. In most cases, this would be true.

While typing in the spouse's SSN, no tabbing forward to the next field is needed because TaxScripts® does that for you.

Once you have entered in all applicable data, you do not need to press the Next key, simply press the "Enter" key on your keyboard to go to the next screen, Step 2: Transcript Products.

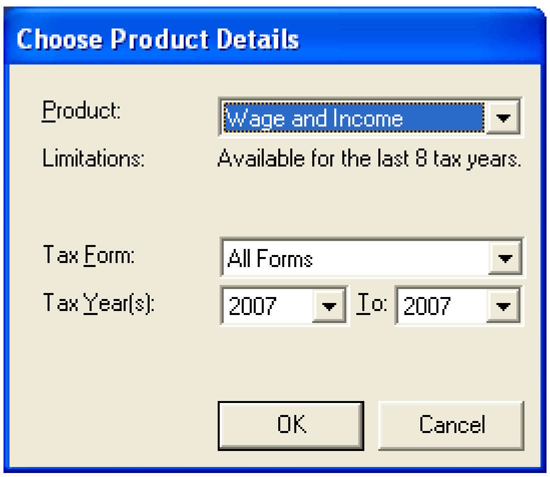
Step 2a: Transcript Products



This screen allows to you modify requests, create new product details, and remove transcripts during the creation process.

- **Modify**: Select the transcript you wish to modify by clicking on it with your mouse, and then click on Modify. Users will then be taken to the Step 3: Product Details screen where they can make changes.
- **Request Transcript**: The system has already assigned control to the button labeled “Request Transcript” which allows users to simply press the “Enter” key on your keyboard to go to the next screen, Product Details.
- **Remove**: This button allows you to remove transcript requests during the creation process.

Step 2b: Choose Product Details



This is where the uniqueness of TaxScripts® is found. The Choose Product Details screen allows users to build the maximum amount of transcripts allowed in one very simple, yet powerful screen.

By default, this screen is first set to Wage and Income Transcripts. There are five types of IRS transcripts available through the IRS e-services, Transcript Delivery System capability.

It is very important that users be aware of the limitations of transcript availability. TaxScripts® provides you on the Choose Product Details screen, what the limitations are and builds in those limits so you do not request transcript products beyond what is available. For instance, Wage and Income Documents are only available for the last six years. The maximum oldest year available is built in the selection and users cannot request beyond that 6-year limit. All transcripts are handled in the same fashion. The available transcripts and limitations are:

- **Account Transcript**: Like a bank statement, this transcript provides crucial posting actions to an account. Available any year the account has an open issue.
- **Record of Account**: This is a merger of the Account Transcript and Return Transcript. Available for the current and last three previous tax years.
- **Return Transcript**: This is a printout of the tax return filed and the IRS computer figures for the return. Available for returns processed in the current and last 3 tax years.

- **Verification of Non-Filing**: This transcript is actually a letter stating that the taxpayer did not have a filing requirement. Available for the current and last three previous tax years.
- **Wage and Income Document**: This transcript type will provide all income information documents (W-2, 1099-MISC, etc.) reported to the IRS for the taxpayer in a particular year. Available for the last 8 tax years. Wage and Income Documents begin to post in May of each year for the previous tax year.

By typing in the first letter of the transcript, the user can select the type of transcript or can simply click on the pull-down menu and make the selection. Data entry speed is achieved using the first letter of the transcript:

- [A] Account Transcript
- [R] Record of Account Transcript
- [R] Return Transcript (press “R” twice)
- [V] Verification of Non-filing Transcript
- [W] Wage and Income Transcript

Once the user has made a transcript product selection, the system will display the limitations.

The tax form is set to the default for each type of transcript and, in the case of Wage and Income Documents, will probably never be changed by users. Using the default selection of All Forms is certainly the best selection for Wage and Income Documents instead of selecting each form one at a time.

The range of tax years can be specified by selecting a year in the From combo box and the To combo box. This allows a user to create the maximum number of transcripts available with minimal data entry.

Users can either use their down arrow key once they have tabbed to the FROM year, (far left side) to select downward until they reach the oldest year desired. Users can also click on the pull-down menu and select directly the oldest year. For data entry speed, the down arrow key is the fastest way to select the oldest or FROM tax year.

The TO range (far right side) is also accessed in the same manner as the FROM tax year period. Users can either use their down arrow key once they have tabbed to the TO year, the one furthest on the right, to select downward until they reach the latest year desired. Users can also click on the pull-down menu and select directly the latest year. For data entry speed, the down arrow key is the fastest way to select the latest or TO tax year. Simply press the down arrow key until the desired year is display.

If the user is selecting a Business Form 941, the user will also be prompted for a tax quarter.

Once a user is finished with the Choose Product Details and either presses the “OK” button or presses the Enter key, they are taken back to Step 2: Transcript Products where they can choose to end the creation process or request additional transcript products.

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Step 2c: Transcript Products

At this point, the user's transcripts have been created and they can finish the transcript creation process or press the Enter key to go to the Choose Product Details screen for additional requests.

For users that wish to complete their transcript creation, they can click on the “Finish” button or tab to the “Finish” button and then press the “Enter” key.

For data entry speed, tabbing to the “Finish” field and then pressing the “Enter” key is the fastest way to complete the transcript creation process.

Once a user has completed their transcript creation, they are brought back to the main menu with all transcripts displayed.

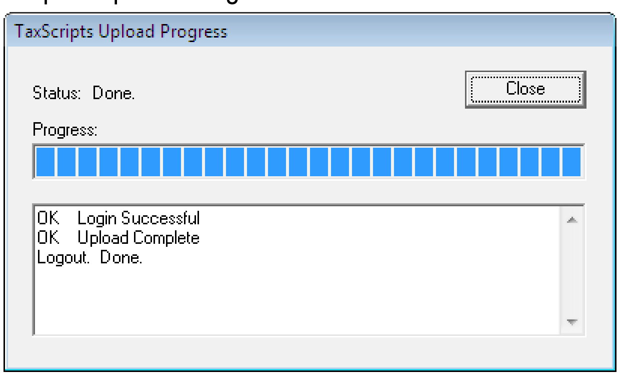
The user is now ready to upload their transcript requests to the IRS e-services website for processing.

Upload a Transcript Request

Uploading transcript requests is a very easy and quick process. Transcripts can be uploaded by performing one of the following steps:

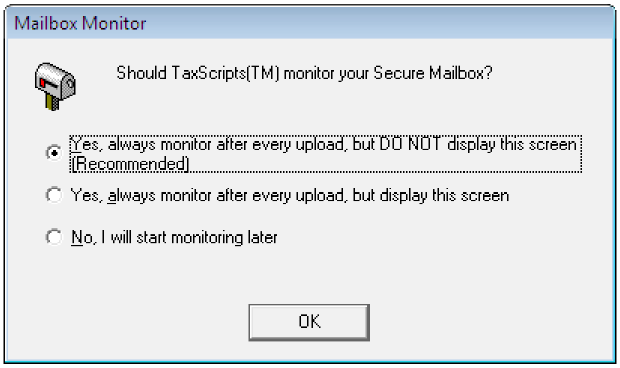
- Click the Upload icon on the toolbar (recommended).
- Select Upload to e-services from the Tools menu item on the main menu.

Step 1: Upload Progress



The user will be given a display showing the login and upload progress. When completed, users need to click on the “Close” button.

Step 2: Configure the Secure Mailbox Monitor

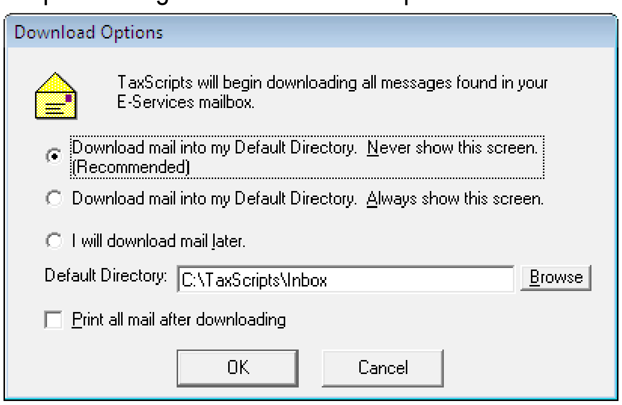


This prompt provides the user several different options available on how they want TaxScripts® to handle the monitoring of their secure mailbox in e-services.

The top choice, “Yes, always monitor after every upload, but DO NOT display this screen” is the default. We recommend this option.

If you decide later that you wish to have the prompt reappear, you can change the setting by accessing the E-Services tab within your Profile settings.

Step 3: Configure the Download Options



This provides the user a tremendous opportunity to have all transcripts downloaded without any future prompting and have all transcripts printed as soon as the download is complete.

We recommend the default for download, “Download mail into my default directory. Never show this screen” in addition to leaving the Default Directory set with C:\TaxScripts\Inbox.

Users are also encouraged to turn on the last option, “Print all mail after downloading” which will then enable the user to benefit from the full potential of TaxScripts®, the automated checking for transcripts with automated download and printing.

For users that select “Yes, always monitor after every upload, but DO NOT display this screen” for the Mailbox Monitor prompt and “Download mail into my default directory. Never show this screen." along with the "Print all mail after downloading." option, there will only be one screen displayed, the Upload Progress dialog. All other window prompts will be suppressed.