



ACT80 AUTOMATED STEP BY STEP INSTRUCTIONS

STEP ONE

- Download State file from myPath
- Upload State file to [Act80 Automated](#) (Must be registered and purchase service)

From Dashboard - **Library/Files/Upload Data File**

- Click in **Select Tax Year** field, select the year
- Click on **Select files** under **Data File**
- Browse to the state file, double click on the file
- Select **Upload**

Upload New Data File for Validation

Please select the year and attach the file you received from the state that you need to have processed.

Tax Year *

Select Tax Year

Data File *

Select files...

Upload

NOTE: Before you begin reviewing, **CHECK** the following:

Title and phone number (Information will appear on approved 1329s)

- Select **SETTINGS** under your email located in the upper right corner
- Select **EDIT** to update

Primary Contact (Contact will receive 1329 email notifications)

- Select **ADMINISTRATION** under your email in the upper right corner
- Select **DISTRICT 1329 PRIMARY CONTACT**
- Select **EDIT** to update



STEP TWO

REVIEW INCOMING REASSIGNMENTS (Taxpayers sent to your district from other school districts)

From Dashboard - **RESULTS/TAXPAYER REVIEW** -or- (PURPLE PANEL) **NEEDS REVIEWED/REVIEW & APPROVE**

Incoming Reassignments

You have incoming taxpayers from 4 district(s) to review

- Click in **SELECT INCOMING DISTRICT** field, select **REVIEW** tab
- Select district from drop down list
- Click on the taxpayer
- Select **APPROVE** for your district or **REASSIGN** to another district
- Repeat process if more than one district

NOTE: If taxpayers are grayed out, it's awaiting approval by the other district

STEP THREE

REVIEW OUTGOING REASSIGNMENTS (Taxpayers who were on the initial file sent by the state but belong in other districts as determined by the Method Automation school district location program)

Outgoing Reassignments

You have outgoing taxpayers to 46 district(s) to review

- Click in **SELECT OUTGOING DISTRICT** field, select **REVIEW** tab
- Select district from drop down list
- Click on the taxpayer
- Select **EDIT, KEEP IN MY DISTRICT, APPROVE** or **REASSIGN** to another district
- Repeat process if more than one district

NOTE: 1329s will not generate until all Outgoing, PO Box Addresses and Unprocessed Payers are completed

STEP FOUR

REVIEW PO BOX ADDRESSES (Taxpayers with PO Box Addresses)

Post Office Box Addresses

There are 432 Taxpayers in your district that are using a PO Boxes so that residential addresses can not be confirmed. As such please use your best discretion when choosing to Keep these members in your district or sending them to state.

Review

Taxpayer Reason Code Assignment

Assign all 1 selected taxpayers the following reason code and comment?

Reason*

Select Reason (Defaults to: Address is not in my district)

Select Reason (Defaults to: Address is not in my district)

The address is unknown

The address is not in the school district

The address cannot be verified

The school district is unable to verify the taxpayer resided in the school dist

Other - Please provide an explanation of the reason for making or denying In School District

Assign Reason Cancel

- Select **REVIEW** tab
- Select **EDIT, KEEP IN MY DISTRICT, APPROVE** or **REASSIGN** to another district
- Edit taxpayers if you know their address, otherwise **SELECT ALL/ASSIGN CODE**
- Select **REASON** from drop down list, **ASSIGN REASON**

STEP FIVE

REVIEW UNPROCESSED PAYERS (Taxpayers with Out of State addresses)

Unprocessed Payers

There are 5 Taxpayer(s) that can not be automatically processed, and need to be manually reviewed because they have been identified as "Out of State" or not found in our address database.

Review

- Select **REVIEW** tab
- Select **EDIT, KEEP IN MY DISTRICT, APPROVE** or **REASSIGN** to another district
- Edit taxpayers if you know their address, otherwise **SELECT ALL/ASSIGN CODE**
- Select **REASON** from drop down list, **ASSIGN REASON**



STEP SIX (FINAL PROCESS)

PRINT **OUTGOING** 1329s (Mail to School Districts)

PRINT **STATE** 1329s (Mail to State)

NOTE: Change printer settings to **DUPLEX** or **PRINT BOTH SIDES**

Outgoing 1329s:

Dashboard - **LIBRARY/FILES/1329 LIBRARY**, Select **OUTGOING DISTRICTS**

- Access to print ALL Outgoing 1329s

State 1329s:

Dashboard - **LIBRARY/FILES/1329 LIBRARY**, Select **STATE**

- Access to print State 1329s (PAID VERSION)

NOTE: ALL FILES under the State tab should be mailed to the state. The State PDF includes all the original payers that you approved and sent to other districts. The other PDFs are incoming to your district that you accepted in your district, reassigned to a third district, or reassigned to the state.

DASHBOARD / LIBRARY

Completed 1329 Viewer

1329 Category

- Outgoing Districts
- Incoming Districts
- State

Files

- 2020 - State
- 2020 - Bermudian Springs(01110)
- 2020 - Bristol Township(09135)
- 2020 - Chambersburg Area(28130)
- 2020 - Delaware Valley(52200)