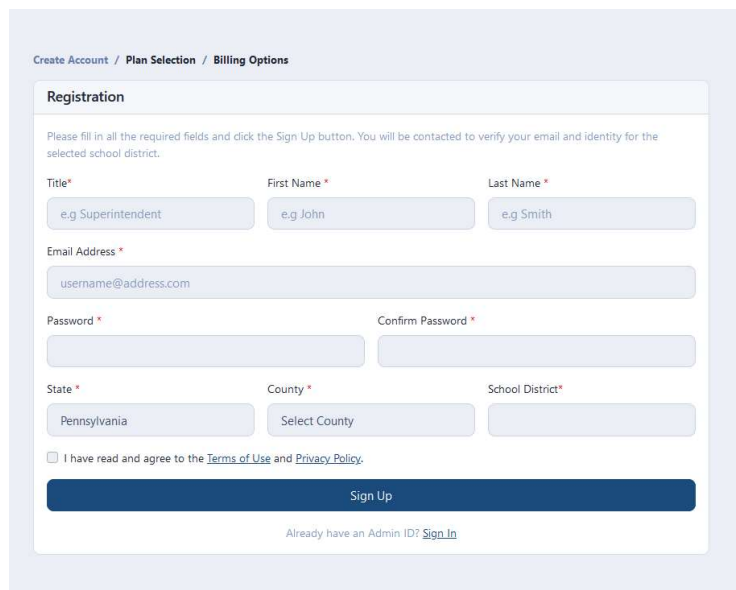


## ACT80 AUTOMATED STEP BY STEP INSTRUCTIONS

**Introduction: Using Act80 Automated and depending on the number of taxpayers you receive in your state file, this process should take you 1 - 3 hours to complete without the need to print and send your final files to the State. The Print and Delivery service is now available and included with your paid subscription!**

### Step ONE

Register your school district <https://www.act80.com/Account/Register>



The screenshot shows the 'Registration' form on the Act80 Automated website. The form is titled 'Registration' and includes the following fields and instructions:

- Title\***: e.g Superintendent
- First Name\***: e.g John
- Last Name\***: e.g Smith
- Email Address\***: username@address.com
- Password\*** and **Confirm Password\***: Two input fields for password creation.
- State\***: Pennsylvania
- County\***: Select County
- School District\***: [Empty field]

Below the fields, there is a checkbox:  I have read and agree to the [Terms of Use](#) and [Privacy Policy](#).

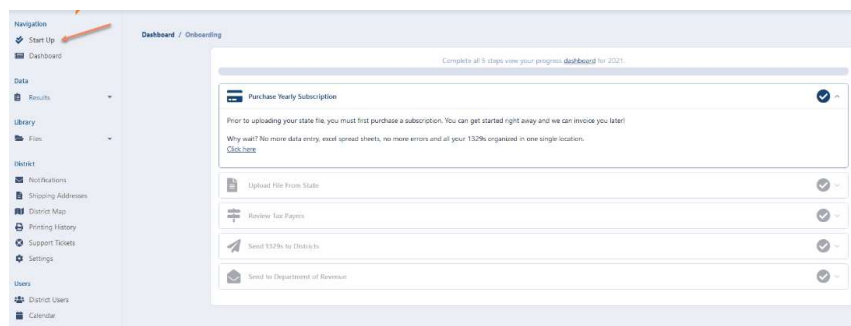
A large blue button labeled 'Sign Up' is at the bottom of the form. Below the button, it says 'Already have an Admin ID? [Sign In](#)'.

Enter all fields marked with the **red asterisk**. Select your **county** and then your **school district**. If someone from your district is already registered, then you will receive a notification that the district is already registered. Contact the administrator for your district and ask them to send you an invitation.

If your district is **not registered**, then check the "Terms of Use" and click **Sign Up**.

### Step TWO – Purchase ACT80 Automated

Navigate to "Start Up" screen

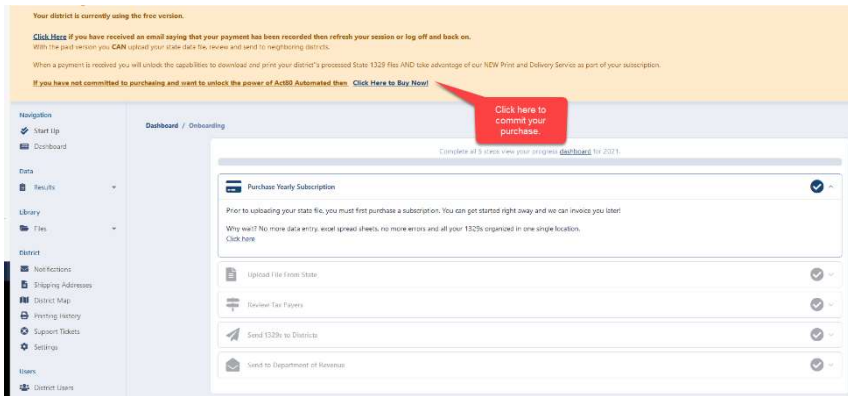


The screenshot shows the 'Start Up' screen in the Act80 Automated dashboard. The page title is 'Dashboard / Onboarding'. The main content area displays a progress bar and a list of steps to complete:

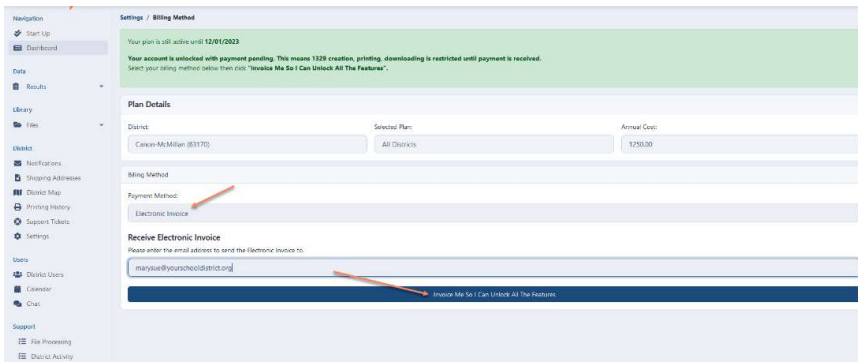
- Purchase Yearly Subscription** (Completed with a checkmark)
- Upload File From State** (Not completed)
- Review Tax Payees** (Not completed)
- Send 1329s to Districts** (Not completed)
- Send to Department of Revenue** (Not completed)

A sidebar on the left contains navigation links: Start Up, Dashboard, Data, Results, Library, Files, Helpdesk, Notifications, Shipping Addresses, District Map, Printing History, Support Tickets, Settings, Users, District Users, Calendar, and Chat.

The **Start Up** screen provides the steps needed to complete the Act80 report. Step one – purchase ACT80 Automated to unlock all the features.



## Step THREE – Invoice Me and Unlock Features



Unlock the application by clicking on the “**Buy Now**” button. Next. Ensure the payment method of “Electronic Invoice” is selected. Then enter your email address where the invoice should be directed.

Then click on the “Invoice Me So I Can Unlock All the Features”. This will then present you with a purchase

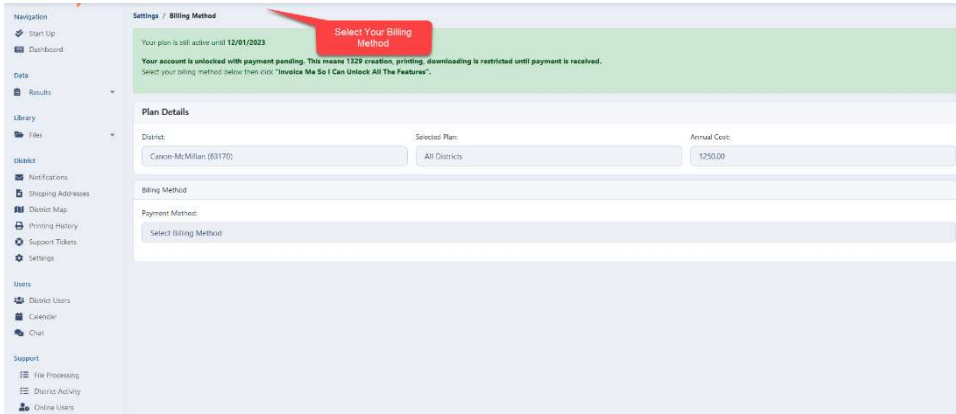
confirmation dialog. Please carefully read the message prior to confirming your purchase.

Confirm your purchase and your district will be invoiced electronically.



- **After clicking on Buy Now you will be able to:**
  - Upload state file
  - Review 1329's
- **A PAID subscription is REQUIRED to**
  - Review 1329's
  - Download 1329's
  - Forward 1329's to other districts
  - Print 1329's

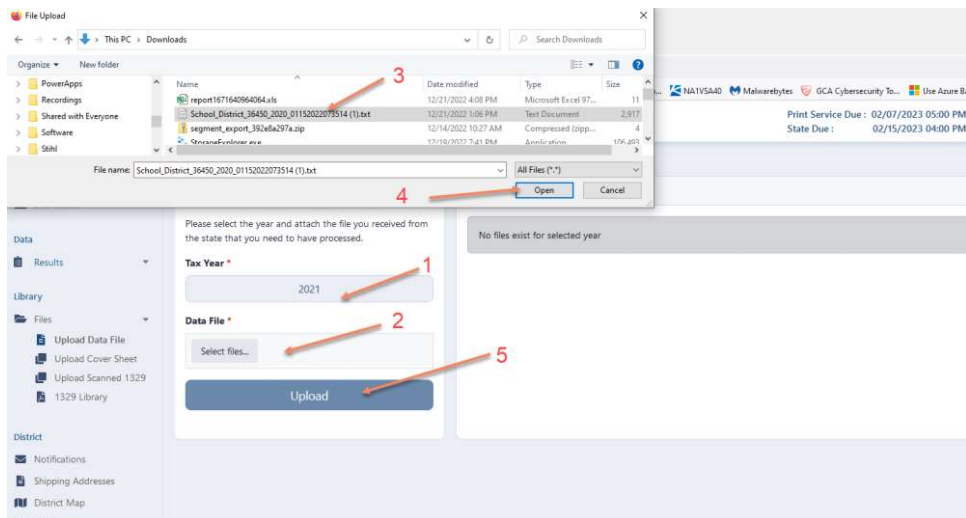
○ Utilize the new print & delivery service.



## STEP FOUR – File Upload

- Download State text file from myPath for your district.
- Upload State file to Act80 Automated (Must be registered and confirm purchase service)
- From left side menu navigate by clicking - **Library/Files/Upload Data File**

### File Upload

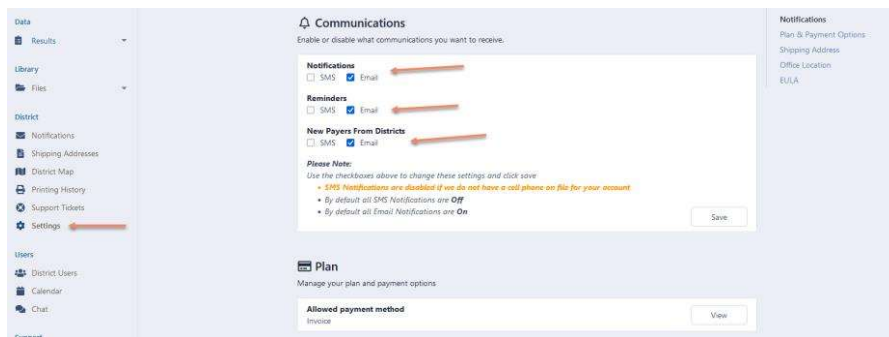


1. Select tax year.
2. Click on Select files.
3. Select the state file from your computer.
4. Select Open
5. Click Upload

The file will upload and immediately start the address verification process.

Navigate to the Startup screen to see the progress of your file being processed. While your file is being processed, you can log off or wait. If you uploaded last year, typical processing time is 1/10<sup>th</sup> of last year. If you are new with a large number (over 30,000) addresses, it could take up to 30 minutes to process. You will receive an email or SMS notification when completed, depending on your Settings.

## Communication Settings



**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

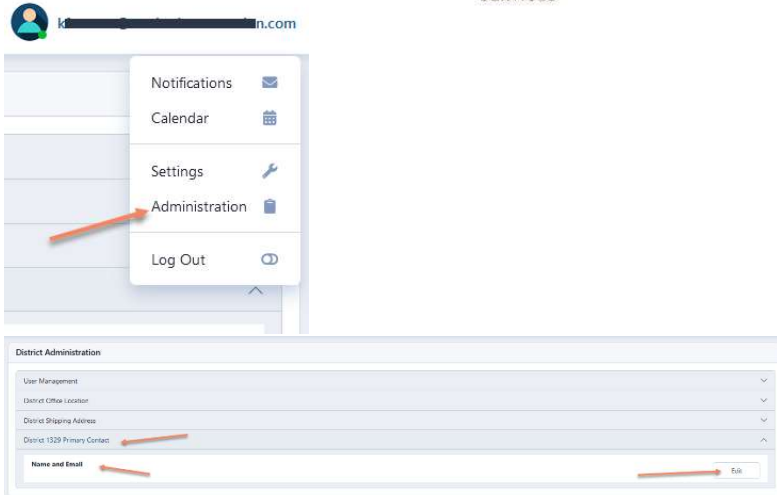
corner

- Select **EDIT** to update
- If this has not been set in the settings section, you will be prompted to enter this information prior to starting to review. The information entered here will be displayed at the bottom of the generated 1329 reports.



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 FIVE – Review Incoming

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

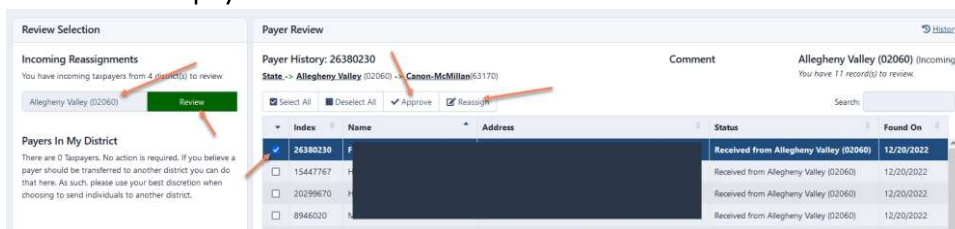
From Dashboard - **RESULTS/TAXPAYER REVIEW** -or- (PURPLE PANEL) **NEEDS REVIEWED/REVIEW & APPROVE**

### 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

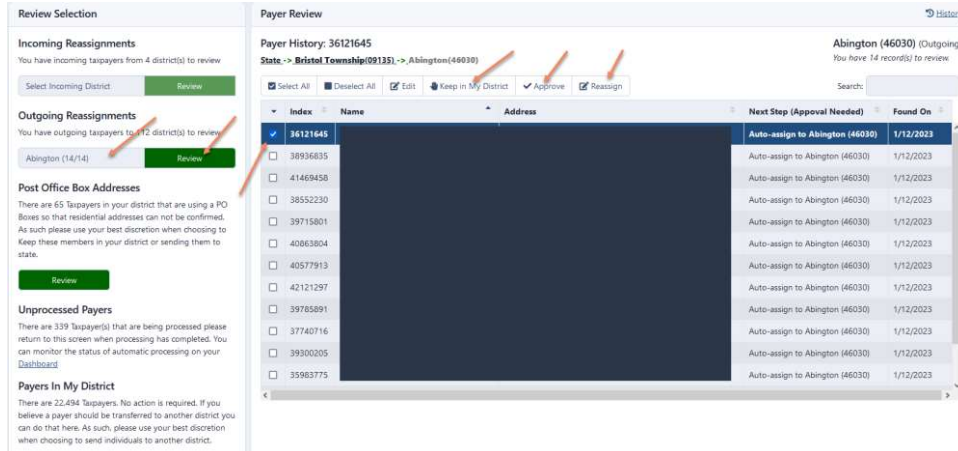


- Select **APPROVE** for your district or **REASSIGN** to another district
- Repeat process if more than one district

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

## STEP SIX – Review Outgoing

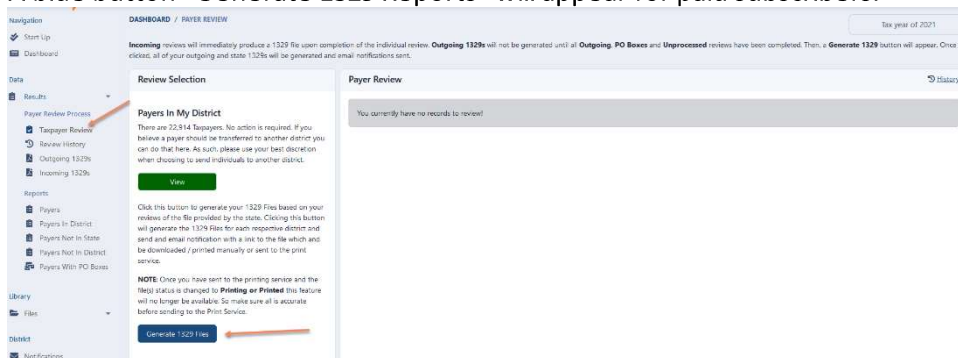
**REVIEW OUTGOING REASSIGNMENTS** (Taxpayers who were on the initial file sent by the state but belong in other districts as determined by the Method Automation school district location program)



The screenshot shows the 'Payer Review' interface. On the left, there are four sections: 'Incoming Reassignments' (4 districts), 'Outgoing Reassignments' (12 districts), 'Post Office Box Addresses' (65 taxpayers), and 'Unprocessed Payers' (339 taxpayers). The 'Outgoing Reassignments' section is highlighted with a red arrow pointing to the 'Review' button. The main area shows a table of taxpayers with columns for Index, Name, Address, Next Step (Approval Needed), and Found On. The first row is selected, and the 'Next Step' is 'Auto-assign to Abington (46030)'. Above the table, there are action buttons: 'Select All', 'Deselect All', 'Edit', 'Keep in My District', 'Approve', and 'Reassign'. Red arrows point to these buttons and the 'State' dropdown menu.

- Click in **SELECT OUTGOING DISTRICT** field, select **REVIEW** tab
- Select district from drop down list
- Click on the taxpayer
- Select one of the following options to **EDIT**, **KEEP IN MY DISTRICT**, **APPROVE** or **REASSIGN** to another district
  - **Edit** - You can edit the existing address and re-validate the address should a correction need to be made.
  - **Keep In My District** - you are confident the taxpayer should not be forwarded to another district but rather be reassigned to your district.
  - **Approve** - you believe that the Act80 engine correctly identified the taxpayer(s) to be forwarded to another district.
  - **Reassign** - you are confident that Act80 engine did not get the correct district and you know that it should be in an entirely different district.
- Repeat process if more than one district

**NOTE:** 1329s will not generate until all Outgoing, PO Box Addresses and Unprocessed Payers are completed. A blue button “Generate 1329 Reports” will appear for paid subscribers.



The screenshot shows the 'DASHBOARD / PAYER REVIEW' interface. The 'Payer Review' section is active, showing a message: 'You currently have no records to review'. Below this, there is a 'Generate 1329 Files' button highlighted with a red arrow. The interface also includes a navigation sidebar on the left and a 'Tax year of 2021' dropdown menu.



## STEP SEVEN – Review PO Boxes

### 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

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

#### 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

## STEP EIGHT – Review Unprocessed

### 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.

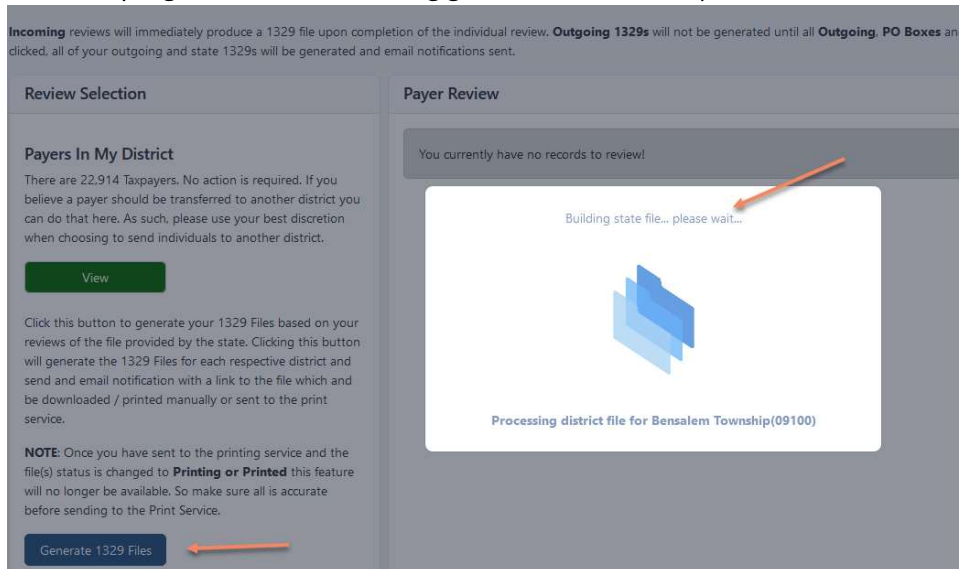
Review

- 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**

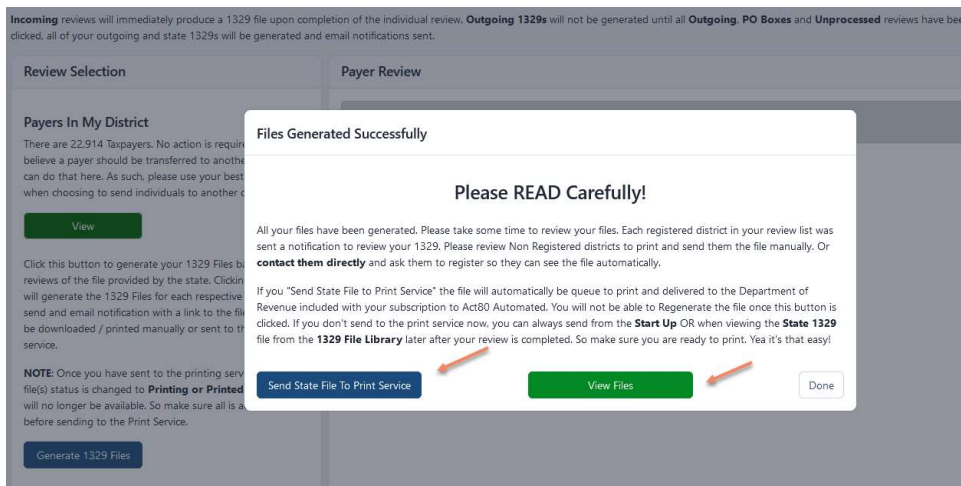
## STEP NINE – Generate 1329 Files

Generate 1329 Files: Click on the district drop-down area. view the progress of each file being generated for each specific district.

the button that now appears near 1329 files will be generated. To



Once completed, Act80 Automated will prompt you to either view the completed files or send your state file to the print service. **The print service is an outside service that prints, shrink-wraps, and delivers** your state file to the department of revenue given that you have added a notarized cover sheet, all as part of your paid subscription.



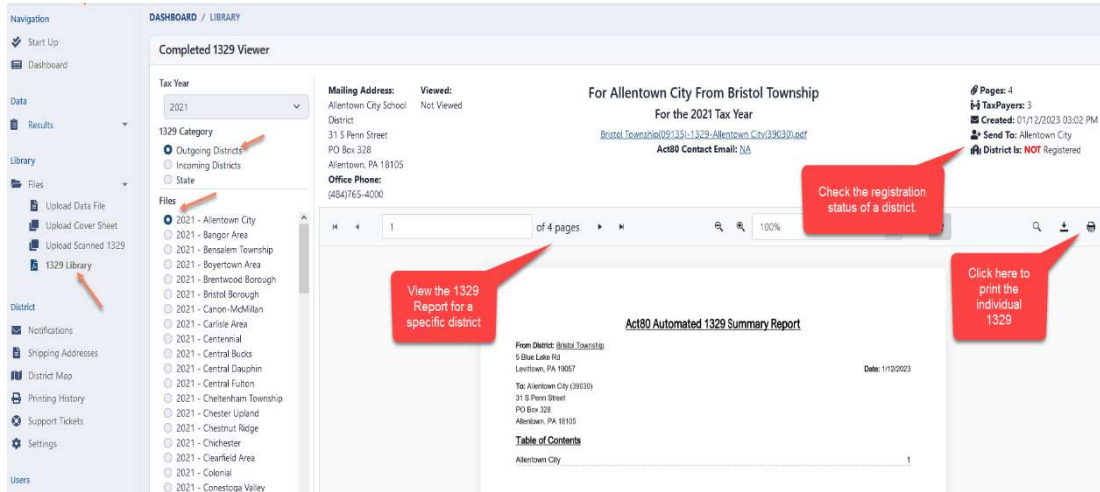
When the files are generated, emails and SMS messages are sent to the neighboring districts with a link to the file that was generated. You will be able in 1329 Library to see who and when each file was viewed. If a district has not viewed your files, ask them to register. If a district declines to register, then print and mail a copy to the district.



## STEP TEN – 1329 Files

View/Print generated

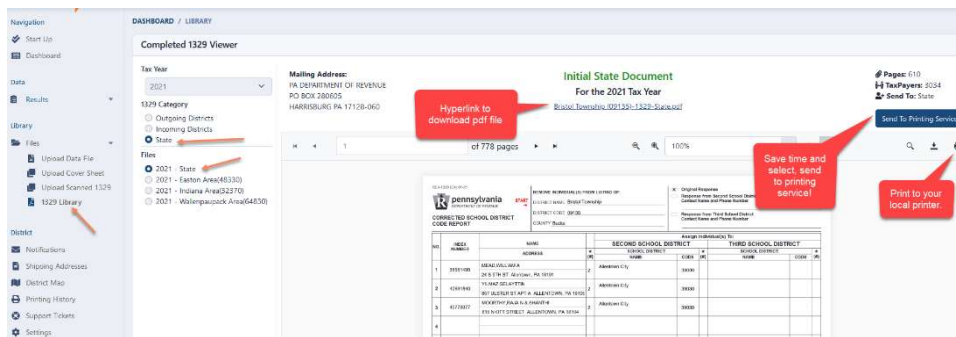
You can view and review your outgoing and state file that was generated by navigating to - **LIBRARY/FILES/1329 LIBRARY**, Select **Tax year** from drop down list then select **Outgoing Districts** to view all the files that were generated. The document's view provides you with much information, such as the point of contact for that district, their mailing address, a link to download and print, and information as to who and when the report was viewed by the specific district.



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

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

If you are not taking advantage of the Act80 Automated printing service (part of your paid subscription) or missed the printing service due date, then set your printer to duplex to ensure comments are printed on the back of the page. If there are comments the page will be blank.



**NOTE:** Depending on the size of your State File you may need to use the hyperlink in the header section to download your file to your browser and print. Some of the state files can contain a large number of pages which can take some time to load. If you are using the Print Service, then do not worry, we will handle it!

**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

**NOTE:** ALL FILES under the State tab should be mailed to the state by your district unless you are taking advantage of the Act80 Automated Printing Service. The State PDF includes all the original payers that you approved and sent to other districts. The other PDFs are the incoming taxpayers to your district that you accepted in your district, reassigned to a third district, or reassigned to the state. These also need to be sent to the state or the Act80 Printing service. After the print service due date is passed the send to Print Service options found in the Startup and 1329 Library will be disabled which means you will have to print and send yourself.

## STEP ELEVEN – Monitoring Print Jobs

Monitor your print jobs. Navigate to **DISTRICT/PRINTING HISTORY** to view your print jobs sent to the printing service. You can monitor their progress and verify that you have added your cover sheet.

