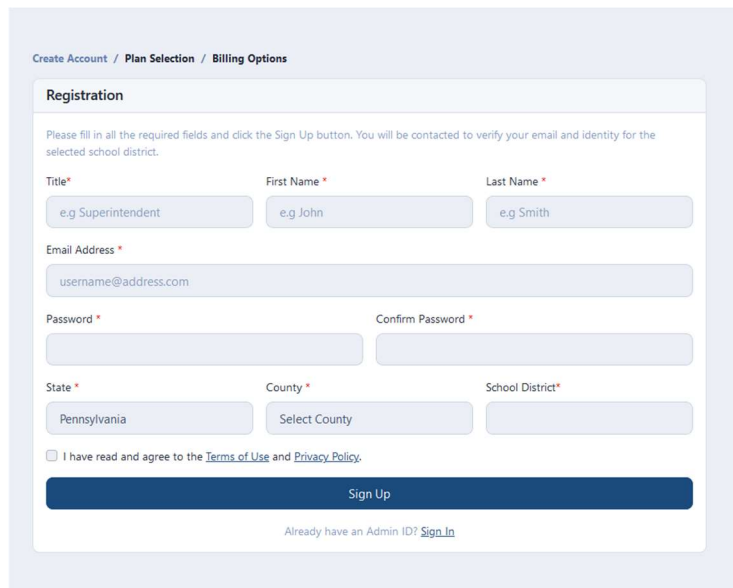


ACT80 AUTOMATED STEP BY STEP INSTRUCTIONS

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>

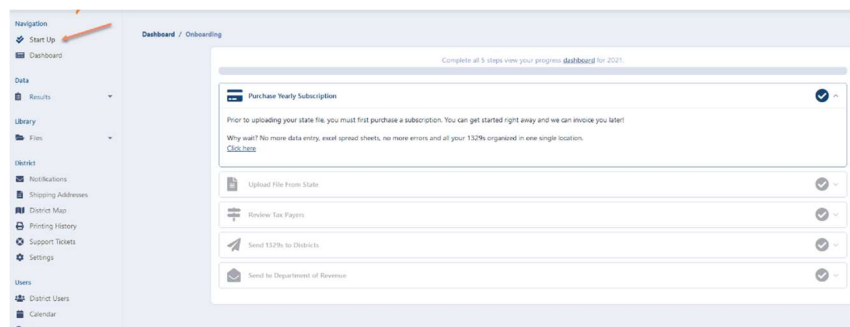


The screenshot shows the 'Registration' form on the Act80 website. The form includes fields for Title*, First Name*, Last Name*, Email Address*, Password*, Confirm Password*, State*, County*, and School District*. A 'Sign Up' button is at the bottom, and a link for 'Already have an Admin ID? Sign In' is below it. The form also includes a checkbox for 'I have read and agree to the Terms of Use and Privacy Policy'.

Enter all fields marked with the **red asterisk**. Select your **county** and then your **school district**. You will need a school district email address to register. Once you submit your registration, you will need to verify your email. Make sure your district is not blocking noreply@act80.com so that you can verify your email address and unlock your account.

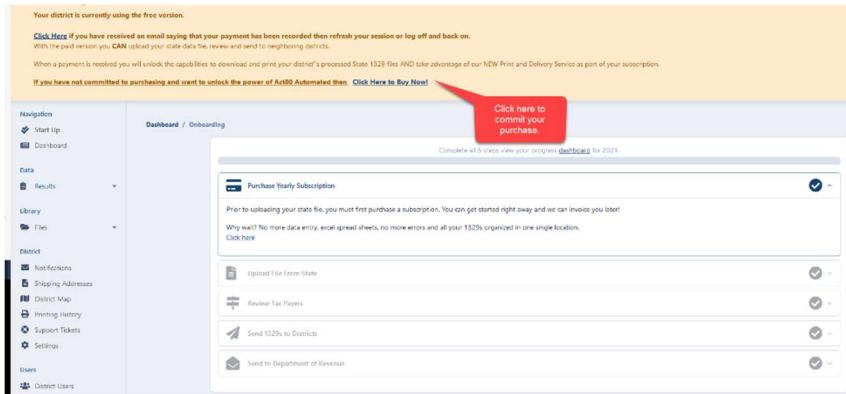
If your district **is not registered**, then check the "Terms of Use" and click **Sign Up**.

Step TWO – Purchase ACT80 Automated



The screenshot shows the Act80 dashboard. The 'Start Up' button in the navigation menu is highlighted with a red arrow. The main content area shows a progress bar for 'Complete all 5 steps view your progress dashboard for 2021'. Below the progress bar, there are several tasks listed with checkboxes and minus signs: 'Purchase Yearly Subscription' (checked), 'Upload File From State', 'Review Tax Payers', 'Send 1329s to Districts', and 'Send to Department of Revenue'.

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

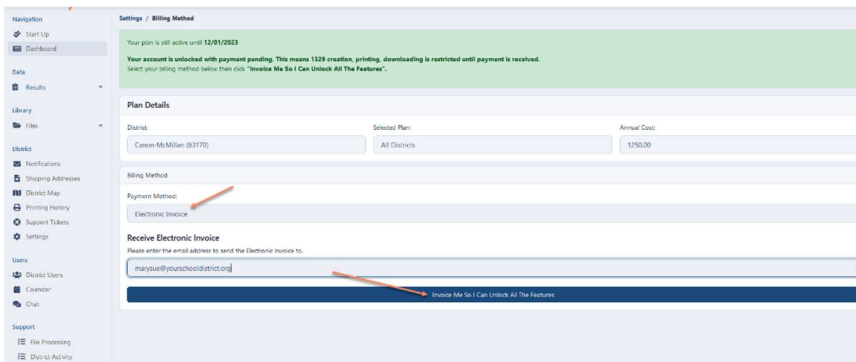


Step THREE – Invoice Me and Unlock Features

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.



Confirm Purchase

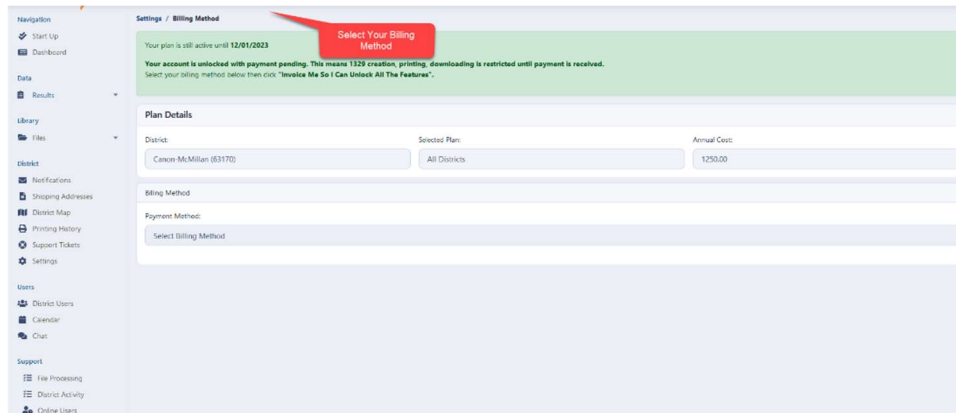
Please READ Carefully!

By clicking **Confirm** below you are agreeing to pay the invoice that will be sent to you for the Act80 Automated Service. This will unlock your account and allow you to upload your state data file for processing through our Geo Location engine and you can review the results but you will not be able to print or generate 1329's until payment is received.

Or you can cancel

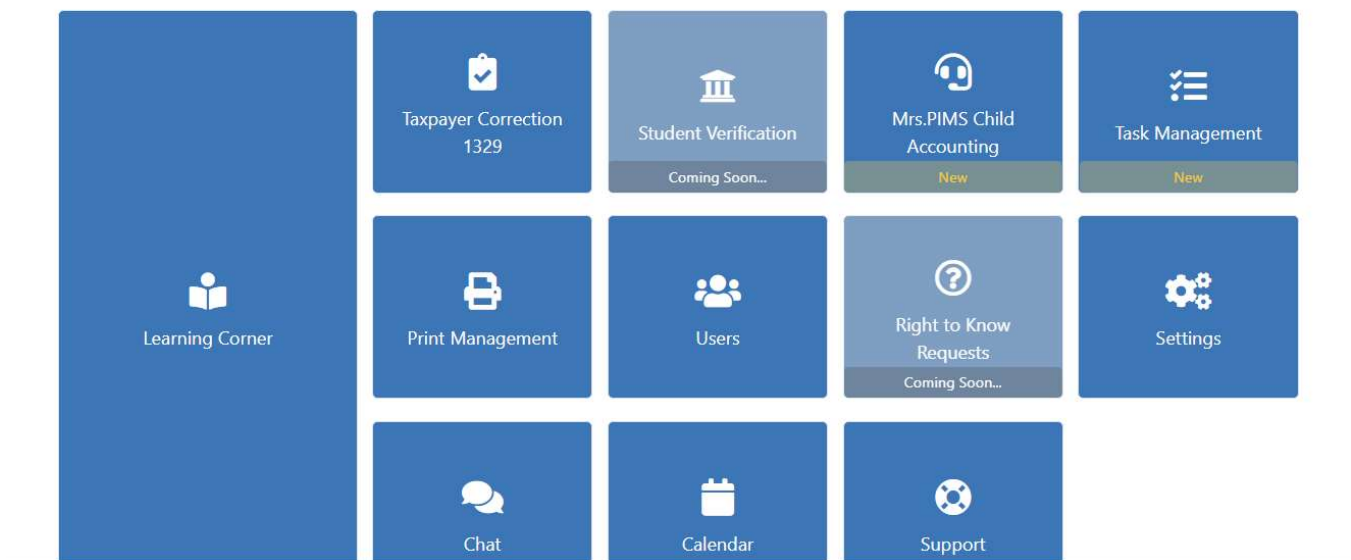


- **After clicking on Buy Now you will be able to:**
 - Upload state file
 - Review 1329's
- **A PAID subscription is REQUIRED to**
 - Review 1329's
 - Download 1329's
 - Forward 1329's to other districts
 - Print 1329's
 - Access the print & delivery service.



Once you have registered successfully you have access to the main menu where you will click on “Taxpayer Correction 1329” to move on to step four.

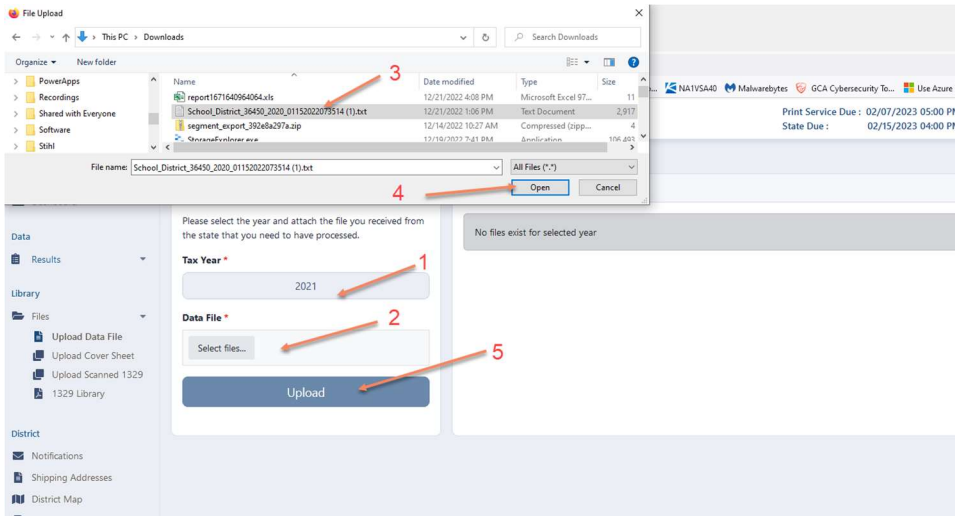
What would you like to do? We can take you there.



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 - **Files/1. State Data Files**

File Upload



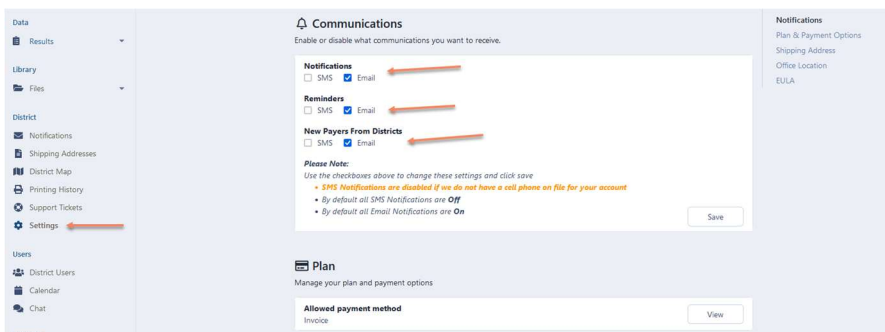
1. Select tax year.
2. Click on Select files.
3. Select the state file from your computer.
4. Select Open
5. Click Upload

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

NOTE: Do not edit or alter the file from the state prior to uploading.

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 1/10th 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 (if you added your cell number in the Settings and requested 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.

1329 Report Print Settings

Name *Not Set*
 Title *Not Set*
 Phone *Not Set*

INDIVIDUAL COMPLETE ORIGINAL LIST See the instructions for information regarding affidavits of notice to second or third school districts SEE INSTRUCTIONS
NAME TITLE TELEPHONE NUMBER EXT DATE REASSIGN
Not Set RETURN TO TOP REASSIGNMENTS MADE MORE THAN 30 DAYS AFTER YOU RECEIVE THE ACT 80 LIST WILL NOT BE ACCEPTED NEXT PAGE PRINT FORM

[Edit](#)

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

Notifications
 Calendar
 Settings
Administration
 Log Out

District Administration
 User Management
 District Office Location
 District Shipping Address
 District 1329 Primary Contact
 Name and Email [Edit](#)

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

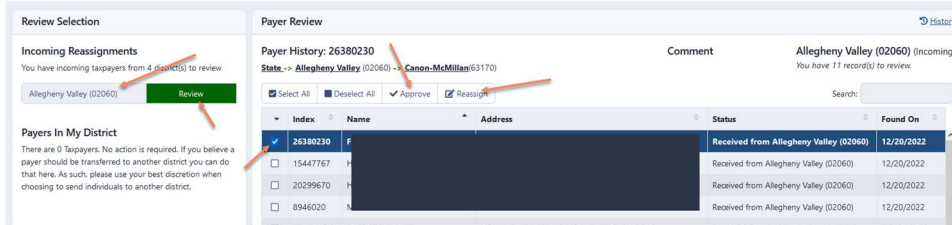
Select Incoming District [Review](#)

Select Incoming District

- Allegheny Valley (02060)
- New Kensington-Arnold (65630)
- Redbank Valley (16800)

- Click in **SELECT INCOMING DISTRICT** field, select **REVIEW** tab
- Select district from drop down list

- Click on the taxpayer



The screenshot shows the 'Payer Review' interface. On the left, under 'Review Selection', there is a 'Review' button for 'Allegheny Valley (02060)'. The main area shows 'Payer History: 26380230' and 'State -> Allegheny Valley (02060) -> Canon-McMillan (63170)'. Below this is a table of taxpayers with columns for Index, Name, Address, Status, and Found On. The first row is selected, showing Index 26380230 and Status 'Received from Allegheny Valley (02060)'. Red arrows point to the 'Review' button, the 'State' dropdown, and the 'Approve' button in the table's toolbar.

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

There is now a “Reviewed” tab that allows you to “Undo” a review if you did something by mistake. This is only available if you have NOT completed all your reviews. All your outgoing files and final state file is automatically generated once you complete your outgoing reviews.

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)

Incoming reviews will immediately produce a 1329 file upon completion of the individual review. Outgoing 1329s will not be generated until all Outgoing PO Boxes and Unprocessed reviews have been completed. Then, a Generate 1329 button will appear. Once clicked, all of your outgoing and state 1329s will be generated and email notifications sent.

Review Selection

To Review | Reviewed

Incoming Reassignments
You have incoming taxpayers from 7 district(s) to review.
Incoming reviews will immediately produce a 1329 file upon completion of the individual review and can be found in your Files\1329 Library under State. You do **NOT** have to click the Generate 1329 Files button again.

Select Incoming District: Review

Outgoing Reassignments
You have outgoing taxpayers to 92 district(s) to review

Donegal (1/1) Review

Post Office Box Addresses
There are 147 taxpayer(s) in your district that use a PO Box. A residential address cannot be confirmed for these taxpayers. Use discretion when choosing to keep these members in your district or send them to state.

Review

Unprocessed Payers
There are 164 taxpayer(s) that cannot be automatically processed. Taxpayers identified as "Out of State" or not found in our address database should be manually reviewed.

Review

Payers In My District
There are 12,047 taxpayer(s) in your district. No action is

Payer Review History

Select All Deselect All Edit Keep in My District Approve Reassign

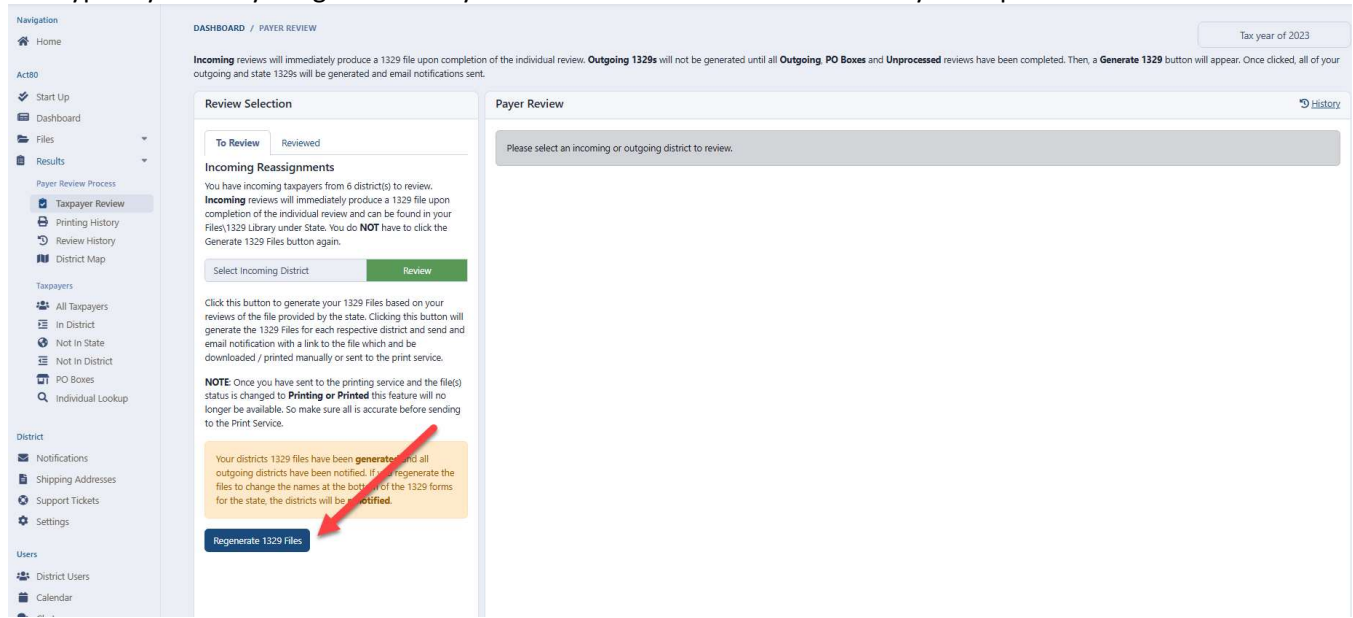
Donegal (36220) (Outgoing)
You have 1 record(s) to review.
Search:

Index	Name	Address	Next Step (Approval Needed)	AI Decision
<input type="checkbox"/> 94730712		<input type="text"/>	Auto-assign to Donegal (36220)	

- 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. This will save the district information properly prior to sending to a new district or back to the state.
 - **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.
 - **AI Decision** – If you see a button here it will provide you the ability to view possible addresses that may match the address that could not be found. These are typically bad zip codes or street names misspelled. AI will give you a hint of what it would have picked. You can pick the new address from the list or investigate it by clicking on the view links to see the location in Google Street Maps.
- Repeat process if more than one district

NOTE: 1329s will not generate until all Outgoing, PO Box Addresses and Unprocessed Payers are completed. Once you have completed those reviews the files automatically generate and you will see the animation on your screen of the files being built.

A blue button “Regenerate 1329 Reports” will appear for paid subscribers after all the reports are generated. You typically will only “Regenerate” if you have found an error or issue with your reports.



STEP SEVEN – Review PO Boxes

REVIEW PO BOX ADDRESSES (Taxpayers with PO Box Addresses)

Per the state PO boxes should be marked as not in your district. There are some exceptions which is why the options are still available in the buttons. Typically, you would not forward PO boxes to another district.

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**



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

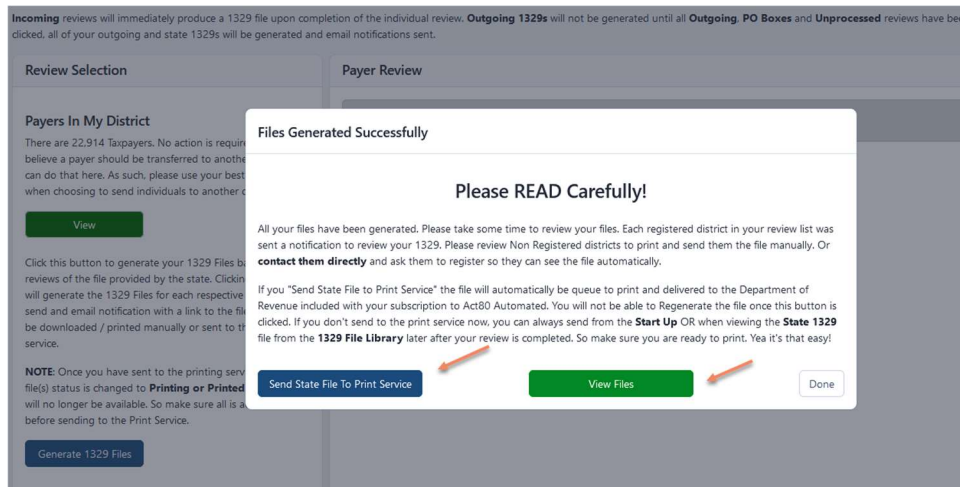
Generate 1329 Files: Once you have not completed reviewing your PO boxes, Outgoing and Out of State payers 1329 files will be generated for the individual districts and the state.

Incoming reviews will immediately produce a 1329 file upon completion of the individual review. **Outgoing 1329s** will not be generated until all **Outgoing, PO Boxes** and **Outgoing, PO Boxes** are checked, all of your outgoing and state 1329s will be generated and email notifications sent.

Review Selection	Payer Review
<p>Payers In My District</p> <p>There are 22,914 Taxpayers. No action is required. If you believe a payer should be transferred to another district you can do that here. As such, please use your best discretion when choosing to send individuals to another district.</p> <p>View</p> <p>Click this button to generate your 1329 Files based on your reviews of the file provided by the state. Clicking this button will generate the 1329 Files for each respective district and send an email notification with a link to the file which can be downloaded / printed manually or sent to the print service.</p> <p>NOTE: Once you have sent to the printing service and the file(s) status is changed to Printing or Printed this feature will no longer be available. So make sure all is accurate before sending to the Print Service.</p> <p>Generate 1329 Files</p>	<p>You currently have no records to review.</p> <div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <p>Building state file... please wait...</p>  <p>Processing district file for Bensalem Township(09100)</p> </div>

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. There is no limit to the files you can send to the state.



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.

NOTE: In some cases, districts that are registered, still require a printed copy because they love to do extra work! In this case you will see a red-letter icon beside their district name which signifies they require a printed copy even though they could print out the 1329 themselves from within the application. Unregistered districts will have the same red-letter icon signifying that they need printed and mailed.

STEP TEN – View/Print generated 1329 Files

You can view and review your outgoing and state file that was generated by navigating to - **FILES/3. 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 no comments, then you can print simplex.

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!

If you are printing those unregistered districts or those districts requiring hard copies, then click on Shipping Addresses in the menu. There you will see two filters at the top to quickly filter the list of addresses to only those that you need to mail to who require hard copies. You can then export that list of addresses to a CSV (comma separated values) file which you can then use in Microsoft word to create a mail merge for your labels.

District Shipping Addresses

A list of all school districts and their shipping addresses. **Bold addresses signify at least one user is registered** with Act80 Automated and can receive email notifications when 1329s are generated for their district. If there is an **🟢** next to a bolded (registered) district, they require a hard copy.

Showing 1 to 10 of 19 entries

School District	Code	Address 1	Address 2	City	State	Zip
Alliquippa Borough 🟢	04050	800 21st Street		Alliquippa	PA	15001
Baldwin-Whitehall 🟢	02110	4900 Curry Rd		Pittsburgh	PA	15236
General McLane 🟢	25390	11771 Edinboro Rd		Edinboro	PA	16412
Gettysburg Area 🟢	01375	900 Biglerville Rd		Gettysburg	PA	17325
Greenwood 🟢	50300	405 E Sunbury St		Millerstown	PA	17062
Haverford Township 🟢	23450	50 East Eagle Road		Havertown	PA	19083
Hopewell Area 🟢	04410	2354 Brodhead Rd		Alliquippa	PA	15001
Jeannette City 🟢	65410	800 Florida Ave		Jeannette	PA	15644
Jersey Shore Area 🟢	41400	175 A & P Drive		Jersey Shore	PA	17740
Mechanicsburg Area 🟢	21650	600 S Norway St	2nd Floor	Mechanicsburg	PA	17055

Outgoing 1329s:

Dashboard - **FILES/3. 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.

District Printing History

Document Pending Print & Delivery Ready to Print: 0 Printing: 0 Printed: 0 Pending Delivery: 0 Delivered: 0 Tax Year: 2021 Printing Status: All

Tax Year	District	File	Coversheet	Pages	Status

The print button is only found on scanned files and state files in you file library. There is no limit on how many files you can send to the print services.