TaxAct Professional Reports User Guide

V 1.0

Thank you for choosing TaxAct Professional Editions. Accessible from your TaxAct Account (Practice Manager) or from within your Professional Edition software, TaxAct Professional Reports provides you with summary and detailed information about e-files by status, EFIN, PTIN and settlement type.

Use this guide to learn how to access Professional Reports and navigate through the system.

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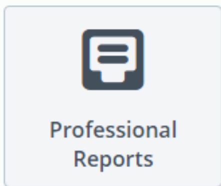
1. Accessing Professional Reports

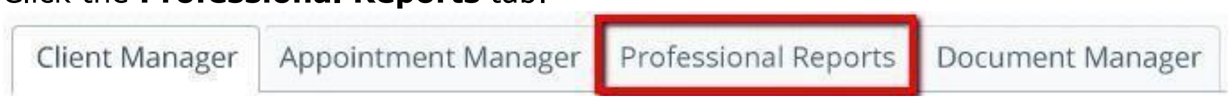
You can access Professional Reports in two ways:

1. **From Practice Manager:**
    a. Go to https://www.taxact.com/professional and click the **Sign In** button in the top right corner.

    b. Enter your Username and Password and any other required information to sign in.
    c. Click the **Professional Reports** tile in Practice Manager.

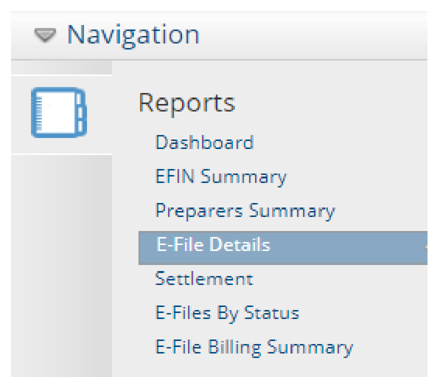


2. **From within TaxAct Professional Editions:**
    a. Open your Professional Edition software (and sign in if you're using online networking).
    b. Click the **Professional Reports** tab.



    c. Click the refresh button (two green arrows) at the top left of your screen.

2. Menu and Navigation



1. Once you access Professional Reports, your home page is the E-File Details Report.
2. Click any of the reports in the Navigation menu on the upper left of your screen to view.
3. You can minimize the navigation menu by clicking the arrow.

4. You can also switch between tax filing years by using the drop down above the reports navigation

3. Reports

Dashboard Report

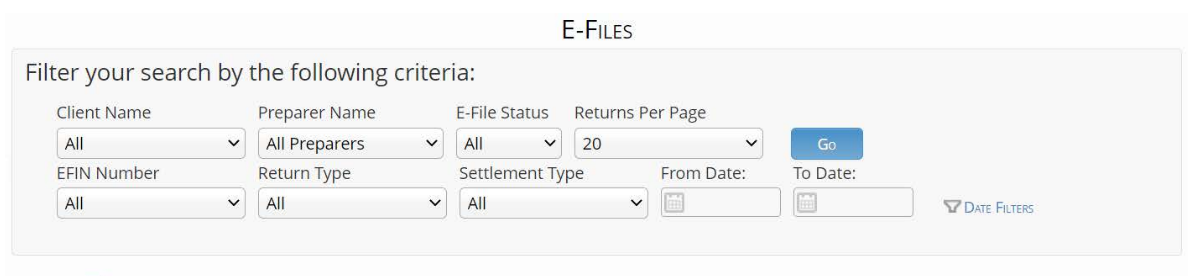
To view this report at any time, click **Dashboard** in the navigation menu. This report is broken into 3 parts:

1. E-Files Over Time

Click **Daily**, **Weekly** or **Monthly** to view the E-Files Over Time graph by different time periods.

E-Files Over Time

You may also click any point in the graph to view e-file details for that point in time.



Export: Excel

Client Name	Preparer Name	Refund/Owed	Submit Date	EFIN Number	E-File Status	Return Type	Settlement Type
[redacted]	Last Name, First Name	$0.00	4/14/2016	[redacted]	Pending	1041 OH	None
[redacted]	Last Name, First Name	$0.00	4/14/2016	[redacted]	Pending	1041 FED	None
[redacted]	Last Name, First Name	$0.00	4/14/2016	[redacted]	Pending	1041 MN	Balance Due
[redacted]	Preparer Name, Here	$0.00	4/12/2016	[redacted]	Pending	1040 PA Ext	Balance Due
[redacted]	Preparer Name, Here	$0.00	4/12/2016	[redacted]	Pending	1040 NC Ext	Balance Due
[redacted]	Preparer Name, Here	$0.00	4/12/2016	[redacted]	Pending	1040 NJ Ext	Balance Due
[redacted]	Preparer Name, Here	$25.00	4/12/2016	[redacted]	Pending	1040 NY Ext	None
[redacted]	Preparer, Name	$105.00	3/31/2016	[redacted]	Pending	1040 LA Ext	Balance Due

E-Files Over Time

Click any of the lines in the graph to view e-file details for an EFIN at that point in time

The table below the graph presents summary statistics for each EFIN, including total PEHURI PTINs, E-files, Accepted, Federal, State and Settlement. Click a column heading to sort.

EFIN Name	EFIN #	# of PTINS	Total E-Files	Accepted	Federal	State	Settlement
[illegible]	[illegible]	16	1456	1413	703	753	1456
[illegible]	[illegible]	4	309	297	19	290	309
[illegible]	[illegible]	4	346	331	43	303	346
[illegible]	[illegible]	1	5	5	0	5	5
[illegible]	[illegible]	3	38	37	17	21	38
[illegible]	[illegible]	1	40	39	24	16	40
[illegible]	[illegible]	10	54	51	38	16	54

PTIN Summary Report

Click 37,16PPDU in the navigation menu to access this report, which lists all PTINs in your practice, each preparer's name, and a summary for each preparer, including Total E-files, Accepted, Federal, State, and Settlement.

PTIN Summary

2248 Total E-Files 7 EFINS 24 PTINs 2173 Accepted 2248 Settlement

PTIN Name	PTIN	Total E-Files	Accepted	Federal	State	Settlement
[illegible]	[illegible]	140	134	62	78	140

E-F ile Details Report

This report provides a table of all e-files your practice has submitted with details for:

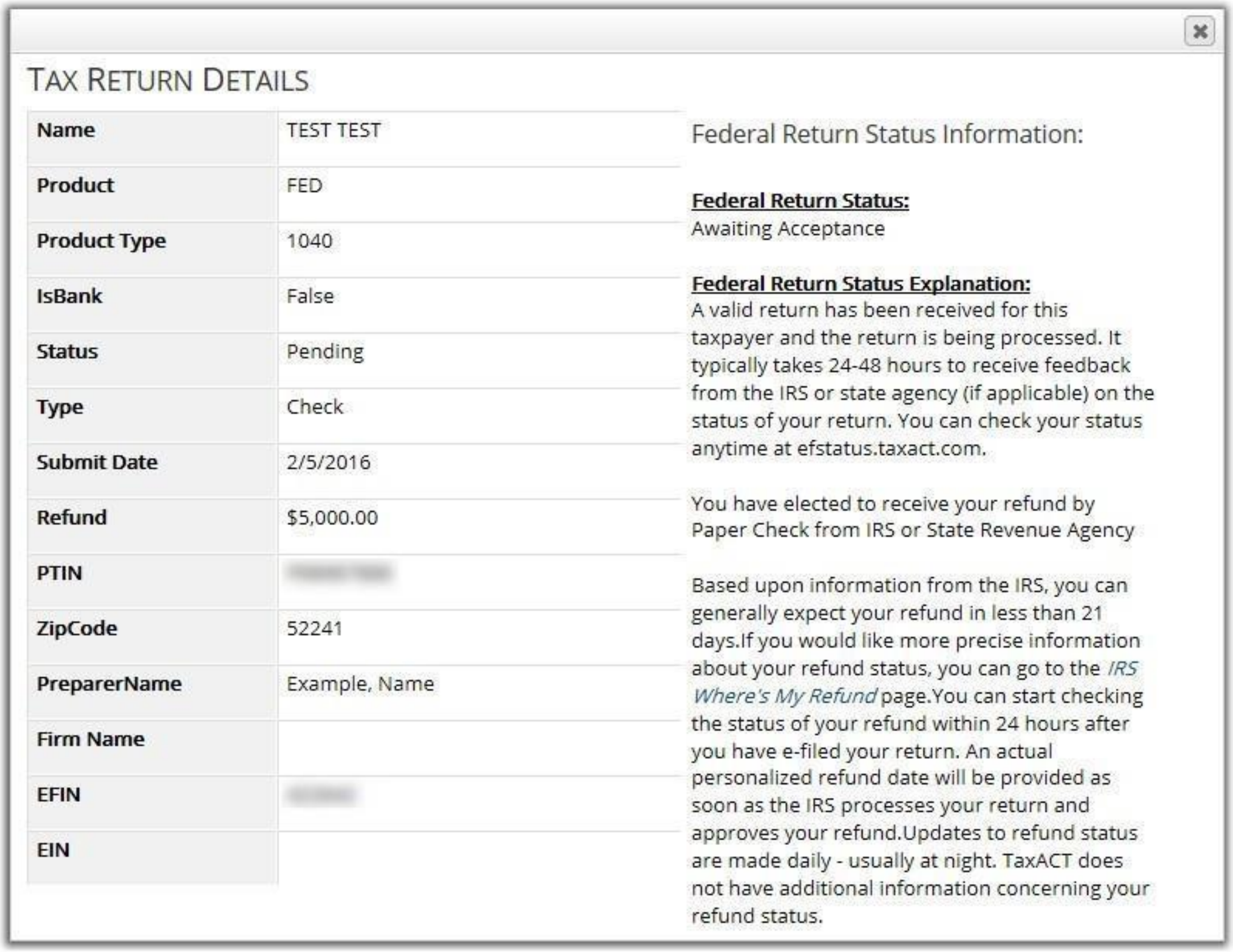
- Client Name
- Preparer Name
- Refund/Owed
- Submit Date
- EFIN Number
- E-file Status
- Return Type
- Settlement Type

Client Name	Preparer Name	Refund/Owed	Submit Date	EFIN Number	E-File Status	Return Type	Settlement Type
[illegible]	Last Name, First Name	$0.00	4/14/2016	[illegible]	Pending	1041 OH	None
[illegible]	Last Name, First Name	$0.00	4/14/2016	[illegible]	Pending	1041 FED	None
[illegible]	Last Name, First Name	$0.00	4/14/2016	[illegible]	Pending	1041 MN	Balance Due
[illegible]	Preparer Name, Here	$0.00	4/12/2016	[illegible]	Pending	1040 PA Ext	Balance Due
[illegible]	Preparer Name, Here	$0.00	4/12/2016	[illegible]	Pending	1040 NC Ext	Balance Due
[illegible]	Preparer Name, Here	$0.00	4/12/2016	[illegible]	Pending	1040 NJ Ext	Balance Due
[illegible]	Preparer Name, Here	$25.00	4/12/2016	[illegible]	Pending	1040 NY Ext	None
[illegible]	Preparer, Name	$105.00	3/31/2016	[illegible]	Pending	1040 LA Ext	Balance Due
[illegible]	Example, Name	$998.00	3/30/2016	[illegible]	Pending	1040 FED Ext	None
[illegible]	Example, Name	$0.00	3/9/2016	[illegible]	Pending	1120 FED	None
[illegible]	Example, Name	$0.00	3/9/2016	[illegible]	Pending	1120 NY	None
[illegible]	Preparer Name, Here	$5,367.00	3/2/2016	[illegible]	Pending	1040 FED	Direct Deposit
[illegible]	Example, Name	$5,000.00	2/29/2016	[illegible]	Pending	1040 FED	Check
[illegible]	Example, Name	$5,367.00	2/29/2016	[illegible]	Pending	1040 FED	Check
[illegible]	Example, Name	$3,367.00	2/18/2016	[illegible]	Pending	1040 FED	Direct Deposit
[illegible]	Example, Name	$4,367.00	2/18/2016	[illegible]	Pending	1040 FED	Direct Deposit
[illegible]	Example, Name	$31,775.00	2/15/2016	[illegible]	Pending	1040 FED	Direct Deposit
[illegible]	Example, Name	$1,000.00	2/15/2016	[illegible]	Pending	1040 UT	Check
[illegible]	Example, Name	$5,367.00	2/11/2016	[illegible]	Pending	1040 FED	Check
[illegible]	Example, Name	$55.00	2/11/2016	[illegible]	Pending	1040 IA	Check

1 2 3

The table is divided into pages, with each page showing 20 e-files (federal and state for the same TIN will be on separate lines). Simply click the page number buttons on the bottom right of the table to view a different page.

1 2 3 4 ... LAST (113)



TAX RETURN DETAILS

Name	TEST TEST
Product	FED
Product Type	1040
IsBank	False
Status	Pending
Type	Check
Submit Date	2/5/2016
Refund	$5,000.00
PTIN	[illegible]
ZipCode	52241
PreparerName	Example, Name
Firm Name	
EFIN	[illegible]
EIN	

Federal Return Status Information:

Federal Return Status:
Awaiting Acceptance

Federal Return Status Explanation:
A valid return has been received for this taxpayer and the return is being processed. It typically takes 24-48 hours to receive feedback from the IRS or state agency (if applicable) on the status of your return. You can check your status anytime at efstatus.taxact.com.

You have elected to receive your refund by Paper Check from IRS or State Revenue Agency

Based upon information from the IRS, you can generally expect your refund in less than 21 days.If you would like more precise information about your refund status, you can go to the *IRS Where's My Refund* page.You can start checking the status of your refund within 24 hours after you have e-filed your return. An actual personalized refund date will be provided as soon as the IRS processes your return and approves your refund.Updates to refund status are made daily - usually at night. TaxACT does not have additional information concerning your refund status.

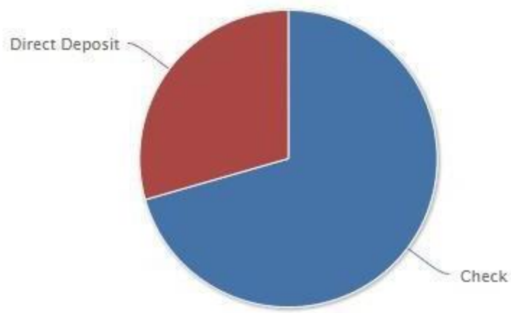
Click any of the rows in the table (each row represents a submitted e-file) to view a pop-up table containing more detail for that return, including:

- Client name
- Product
- Product Type
- Bank Product Flag (yes/no)
- Status
- Type (disbursement)
- Submit Date
- Refund Owed
- PTIN
- Zip Code
- Preparer Name
- Firm Name
- EFIN
- EIN

To export the table to a .CSV file, click the **Excel** icon at the upper left of the table.

Settlement Report

To view, click Settlement in the navigation menu. This report displays a pie chart and a table showing the total e-files submitted for each settlement type.



2248 Total E-Files

0	Balance Due
1586	Check
662	Direct Deposit
0	None
0	Prepaid Card

Click a pie chart section to view e-file details for a particular settlement type.

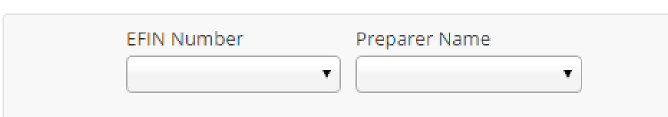
E-files by Status Report

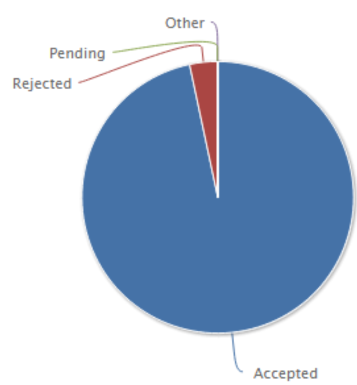
Click E-files by Status in the navigation menu. You will see a pie chart and table with total e-files submitted by status (accepted, rejected, pending and other).

Hover your cursor over the pie chart sections to see the corresponding number for a status.

Click a pie chart section to view e-file details by status.

Use the drop-downs at the top to filter the report by EFIN or Preparer.





2248 Total E-Files

2173	Accepted
74	Rejected
0	Pending
1	Other

I need help / I have questions. Where can I find answers?

TaxAct's dedicated Professional Support Team is here for you every step of the way.

TaxAct Professional Support Options

Online Support Center

For the fastest answers, search our online Help Topics.

Technical Support

For account and software questions:

professional@taxactservice.com

(319) 731-2682

TaxPayer Support

For tax questions:

protaxhelp@taxact.com

(319) 731-2680

Sales

For order, payment and sales questions:

https://www.taxact.com/professional

prosales@taxact.com

(319) 536-3571

Support Hours:

Monday – Friday	8am - 5pm
Saturday & Sunday	Closed

All times are in Central time zone

* Check our support page for in-season hours

Sales hours:

Monday – Friday	8am - 5pm