

How to Electronically Archive FEDTAXII History

You can print all agency data from the website or save it in an electronic format. To save data in an electronic format: you can copy and paste the data into a Microsoft (MS) Word document; or, copy and paste screen shots into a MS Word document. The tax return data for all quarters can be printed and/or saved as a .pdf file.

How to Save Data

Copy and Paste Data

1. Display the desired report/data within the FEDTAXII website.
2. Click the mouse at the top of the page and drag the mouse down the page so all information is highlighted.
3. Right-click the mouse and left-click on the “copy” option.
4. Open a MS Word document, right-click the mouse and left click the “paste” option.
5. Once all needed data has been copied you may either click “File” and “Print” or “File” and “Save As” to save an electronic copy of the document.

Copy and Paste Screen Shots

1. Display the desired report/data within the FEDTAXII website.
2. Simultaneously press the following keys on the keyboard: <CTRL> <ALT> <Print Screen>.
3. Open an MS Word document, right click on the mouse and choose the “paste” option.
4. Once all needed data has been copied you may either click “File” and “Print” or “File” and “Save As” to save an electronic copy of the document.

How to Save Tax Returns

1. On the FEDTAXII website click on the Tax Returns menu.
2. Click on View Tax Return Data Generate Tax Return Data File for Printing.
3. Select the type of tax for the return you are viewing (i.e. 941, 941x, 945, CT-1) and click “Next.”
4. If you are viewing a 941 or 941x tax return, choose the FEIN, the Quarter, the Year and click “Next”; If you are viewing a 945 or CT-1 tax return, choose the FEIN, the Year and click “Next.”

How to Save Tax Returns, continued...

5. You will see a listing of all tax returns generated for the specified period.
Note: A 941 return with a status of “Accepted” is the return that IRS accepted and carries on file. Click on the sequence number for the return you would like to view.
6. On the next screen, scroll down to the bottom and click “Generate/Download”.
7. On the next screen, right click on the link “Right Click Here to Save Link As FORM(form # here).PDF and left click “Open in New Window”.
8. A new window will open and the tax return will display in a PDF format.
9. To Print: click “File” and “Print”
10. To Save: click “File” and “Save As”, choose a destination and a file name and click “Save.”

How to View Data and Reports

1. To view payment history with EFT numbers and SF5515 numbers: Reports – Other Reports – Payment History Report – Select FEIN and click “Select ALC” – Select ALC and enter a “Settlement Date” range – click “Display Report”
2. To view individual tax liabilities: Tax & Wage Data – View Tax Data – Select type of tax and click “Next” – Select FEIN and click “Next” – Select ALC and click “Next” – To view individual liabilities, click the ID number on the left hand side
3. To view 941 adjustment data: Tax & Wage Data – View 941 Adjustment Data – Select FEIN and click “Next” – Select ALC and click “Next” – To view individual adjustment records click the ID numbers on the left-hand side.
4. To view 941 reports: Reports – 941 Reports.
5. To view 945 reports: Reports – 945 Reports.
6. To view CT-1 reports: Reports – CT-1 Reports.