User Guide – Taxpayer

Contents

Chapter 1
User Guide Overview

The ParishE-File.com User Guide is designed to help you electronically file Sales and Use Tax Returns and Hotel Tax Returns.

This guide provides information on using all available ParishE-File.com tools and options.

Using the User Guide

The User Guide is organized into sections that describe tasks you may need to complete to file returns online. To use the guide most effectively, refer to it with a specific task in mind. Then consult the table of contents to locate the section of this guide that contains information on completing the task.

Throughout this guide, the term **user** is used to describe you or another person using the functions of ParishE-File.com. The information is intended to guide the Primary Standard User. Other types of users are defined by their privileges in the User Privileges Table in Chapter 12.

The term **you** refers to the person performing the functions in each section.

Additional Information Resources

In addition to this user guide, other information resources are available:

Websites

The following websites can help answer questions you may have:

- **www.parishe-file.revenue.louisiana.gov/faq.aspx** offers answers to frequently asked questions.
- **www.parishe-file.revenue.louisiana.gov/lookup/lookup.aspx** offers contact information and rate information for parishes in Louisiana.
- **www.revenue.louisiana.gov** offers tax information issued by the state of Louisiana.

Technical Support

You can contact Technical Support directly by clicking **Support** on the menu bar.

Chapter 2
Getting Started Using ParishE-File.com

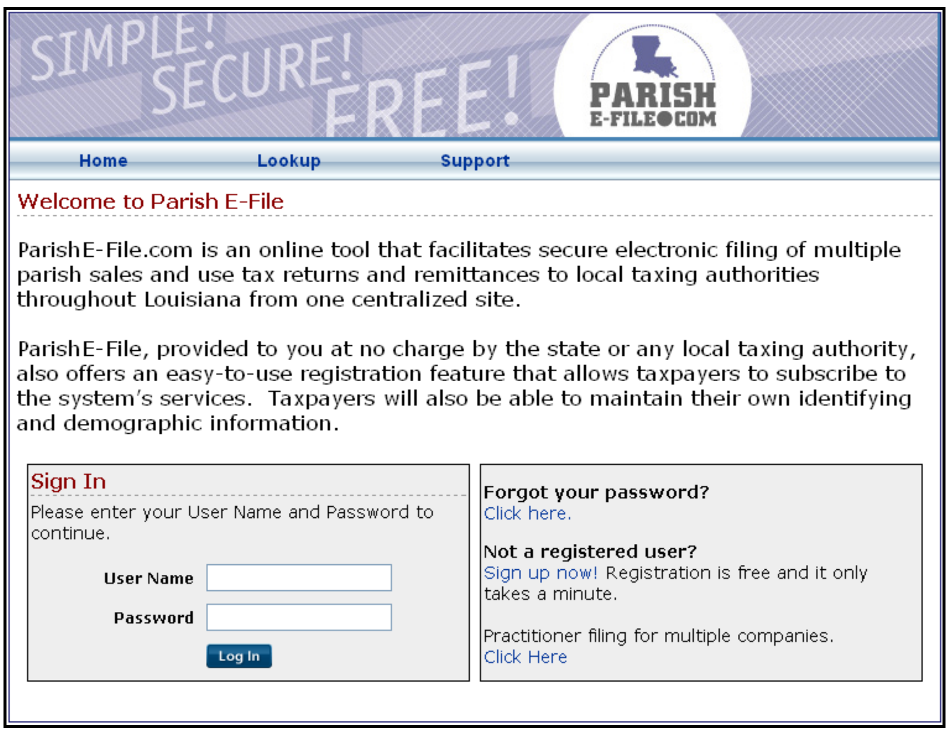
ParishE-File.com works best with the following applications on your system:

- A Portable Document Format (PDF) Reader. Install any version of the free program, Adobe Acrobat Reader. This program allows you to view and print PDF files. Details and system requirements for this software can be found at the Adobe website: **http://www.adobe.com/products/acrobat/readstep2.html**
- A web browser such as Internet Explorer Version 7.0 and newer or Mozilla Firefox version 6.0 and newer.
- A high-speed internet connection.

Note: The names of other companies, products and services may be the property of their respective owners.

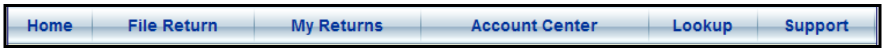
Starting ParishE-File.com

Start using ParishE-File.com by opening a web browser. Type www.ParishE-File.com or http://ParishE-File.revenue.louisiana.gov in the browser's address bar. The homepage appears.



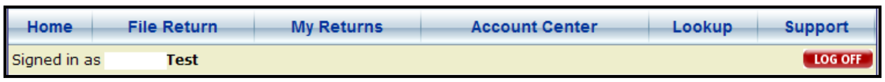
Using the ParishE-File.com Menu Bar

The menu bar appears at the top of every page on ParishE-File.com. Click directly on a label on the menu bar or place your mouse-pointer over the label to see the labels in the drop-down menus.



Exiting ParishE-File.com

To end a session on ParishE-File.com, click the red **Log Off** button, beneath the menu bar.



Chapter 3
Setting Up a New Account

This section helps you set up a new account from beginning to end.

By the end of this section, you will have created a ParishE-File.com account that allows you to easily:

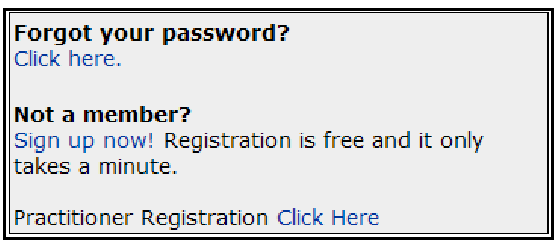
- File returns online
- Pay returns online
- Search for parishes
- Search for the most recent tax rates
- Manage multiple users
- Customize your account

Signing Up – New Account

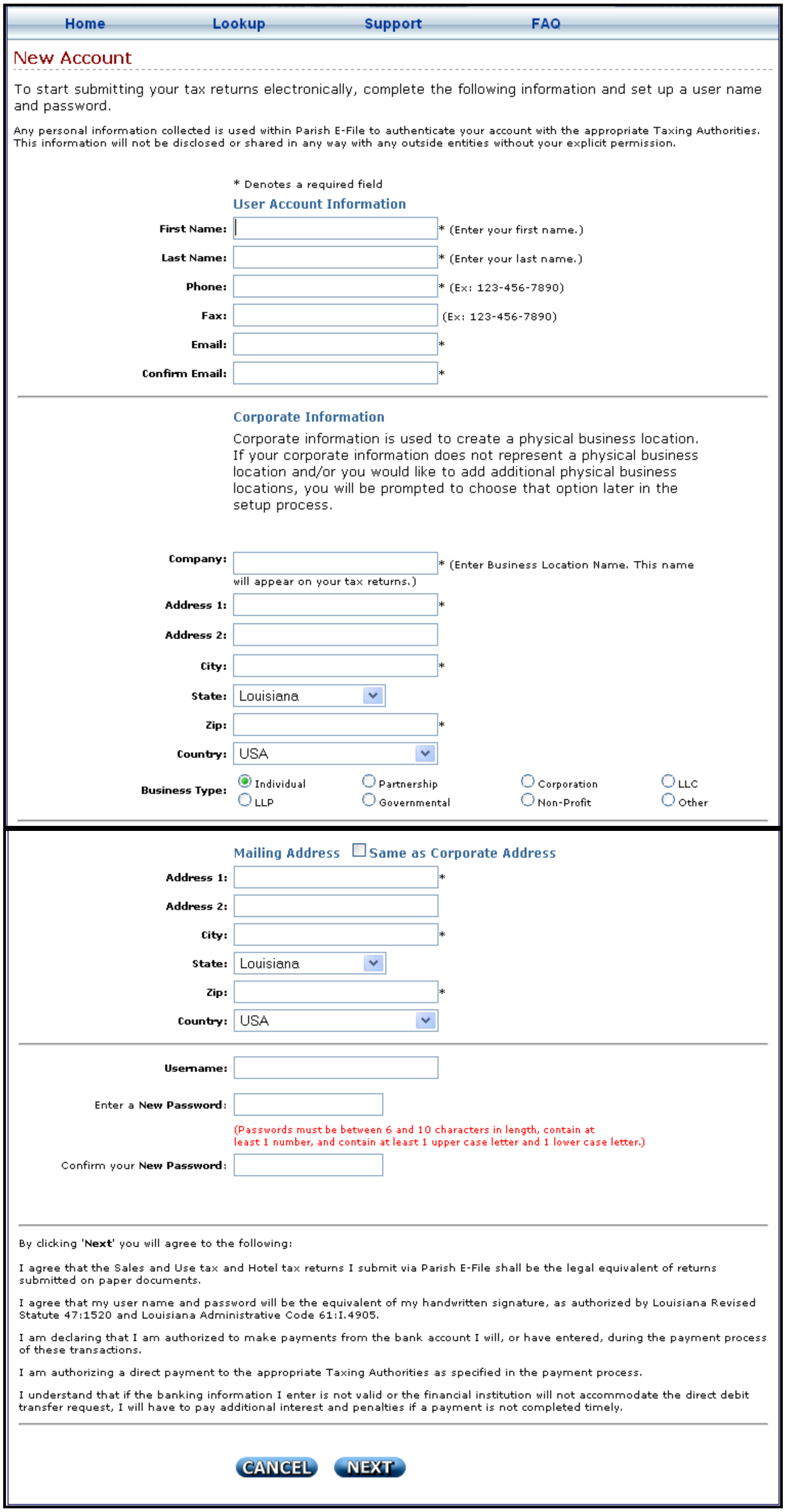
The first step is to register a new account.

▼To sign up:

1. Click **Sign Up Now**.



2. The **New Account** page appears.



Home Lookup Support FAQ

New Account

To start submitting your tax returns electronically, complete the following information and set up a user name and password.

Any personal information collected is used within Parish E-File to authenticate your account with the appropriate Taxing Authorities. This information will not be disclosed or shared in any way with any outside entities without your explicit permission.

* Denotes a required field

User Account Information

First Name: * (Enter your first name.)

Last Name: * (Enter your last name.)

Phone: * (Ex: 123-456-7890)

Fax: (Ex: 123-456-7890)

Email: *

Confirm Email: *

Corporate Information

Corporate information is used to create a physical business location. If your corporate information does not represent a physical business location and/or you would like to add additional physical business locations, you will be prompted to choose that option later in the setup process.

Company: * (Enter Business Location Name. This name will appear on your tax returns.)

Address 1: *

Address 2:

City: *

State: Louisiana

Zip: *

Country: USA

Business Type: Individual, Partnership, Corporation, LLC, LLP, Governmental, Non-Profit, Other

Mailing Address Same as Corporate Address

Address 1: *

Address 2:

City: *

State: Louisiana

Zip: *

Country: USA

Username:

Enter a New Password:

(Passwords must be between 6 and 10 characters in length, contain at least 1 number, and contain at least 1 upper case letter and 1 lower case letter.)

Confirm your New Password:

By clicking 'Next' you will agree to the following:

I agree that the Sales and Use tax and Hotel tax returns I submit via Parish E-File shall be the legal equivalent of returns submitted on paper documents.

I agree that my user name and password will be the equivalent of my handwritten signature, as authorized by Louisiana Revised Statute 47:1520 and Louisiana Administrative Code 61:I.4905.

I am declaring that I am authorized to make payments from the bank account I will, or have entered, during the payment process of these transactions.

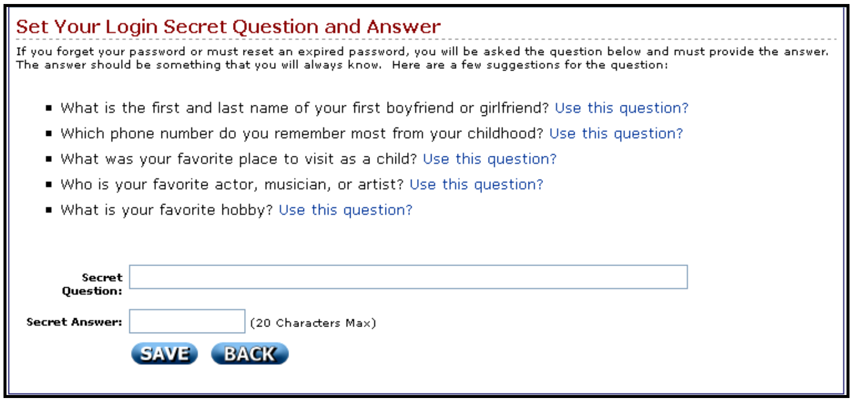
I am authorizing a direct payment to the appropriate Taxing Authorities as specified in the payment process.

I understand that if the banking information I enter is not valid or the financial institution will not accommodate the direct debit transfer request, I will have to pay additional interest and penalties if a payment is not completed timely.

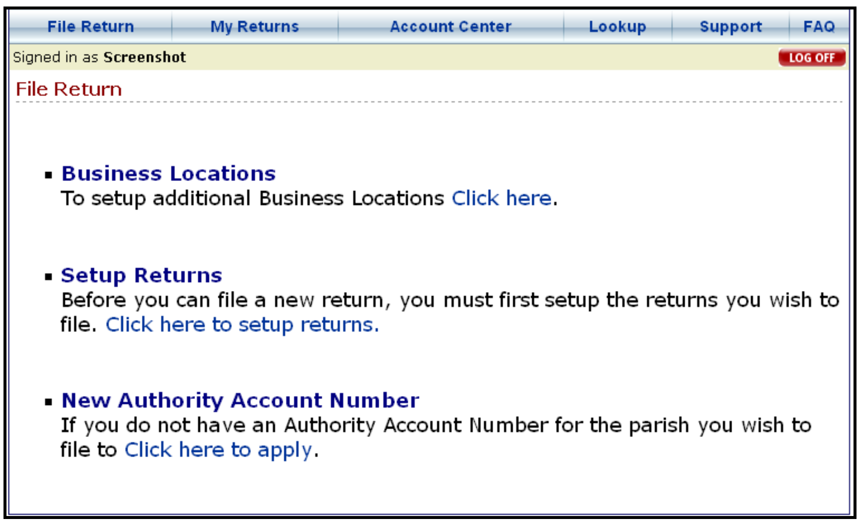
CANCEL NEXT

3. In the fields, enter your contact information, business type, business location address, and mailing address.
4. In the **User Name** field, type a User Name.
5. In the **New Password** field, type a new password. In the **Confirm New Password** field, type the new password again.

6. Read the User Agreement Disclaimer. Click **Next**. The **Secret Question and Answer** page appears.



7. Click on a blue link next to a question to use that question or create your own question. Type the answer to the secret question in the field labeled **Secret Answer**. Click the **Save** button. The **File Return** page appears.



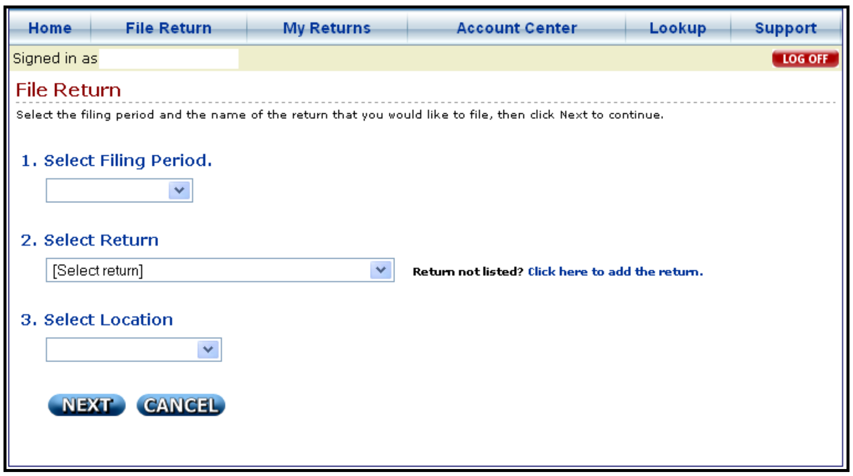
8. Click the first blue link to setup multiple physical business locations. See **Managing Business Locations**.
9. Click the second blue link to setup returns. See **Managing Return Setup**.
10. Click the third blue link to apply for an Authority Account Number. See **Managing Business Locations**.

Logging In

▼To log in:

1. In the **User Name** and **Password** fields, type your user name and password.

2. Click **Log In**. The **File Return** page appears.

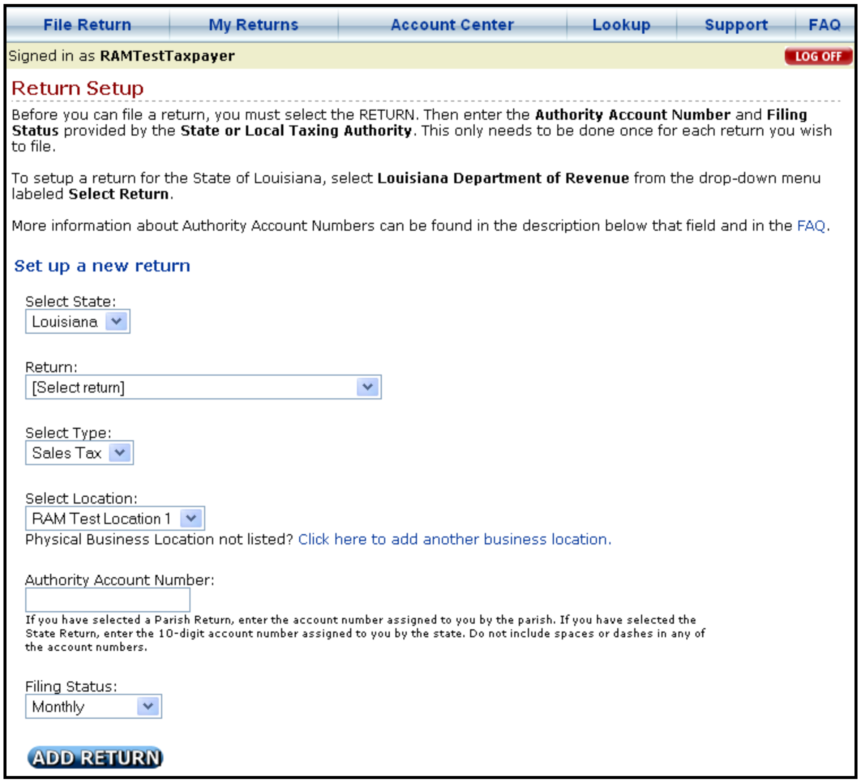


Chapter 4
Managing Return Setup

Setting Up Returns

▼To set up returns without an assigned Authority Account Number:

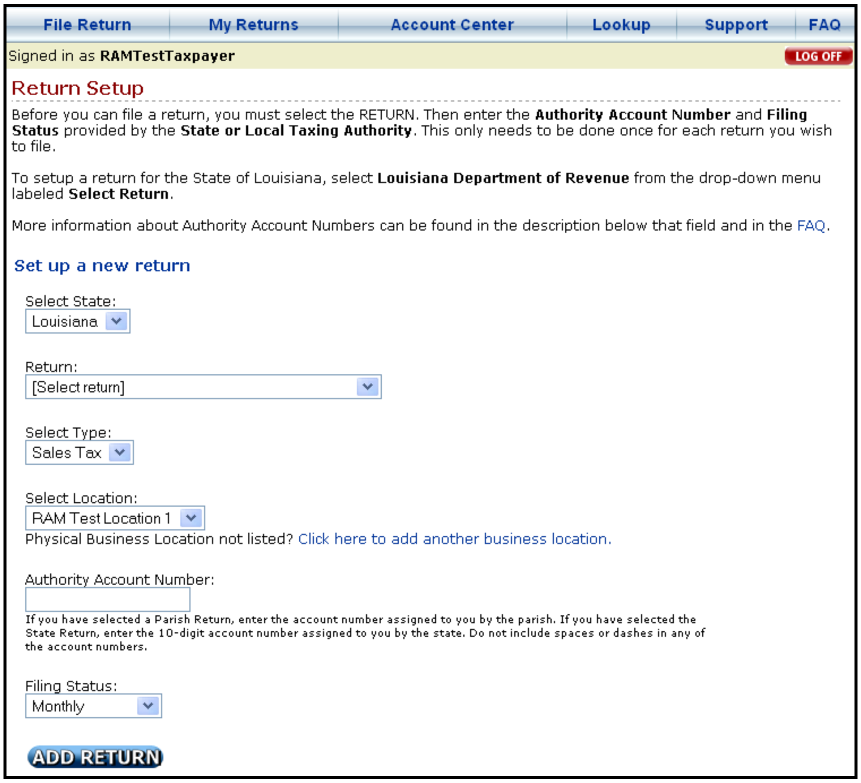
1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Setup** from the drop-down menu. The **Return Setup** page appears.



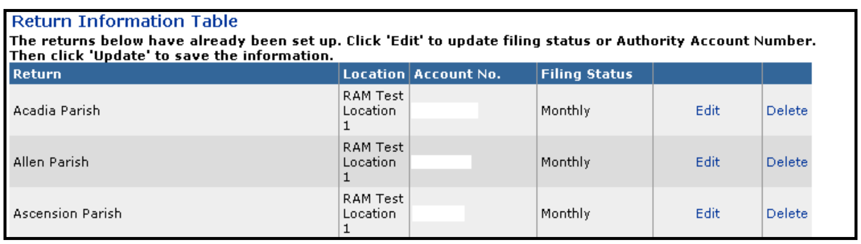
3. If you applied for an Authority Account Number, the return is already set up and is listed with the Account No. as **Applied For**. You can file one return with this default account number. To apply for an Authority Account Number, see **Managing Business Locations**.
4. When you have been assigned an account number for a business location, edit the account number. See **Editing Returns**.

▼To set up returns with an assigned Authority Account Number:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Setup** from the drop-down menu. The **Return Setup** page appears.



3. Select a **State**, **Return**, **Location**, and **Filing Status** from the drop-down menus.
4. In the **Account No.** field, type the account number for the Location that was assigned to you by that parish.
5. Click **Add Return**. The return appears in the table.



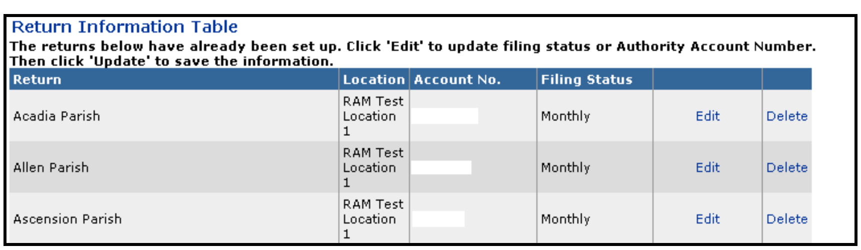
Return	Location	Account No.	Filing Status		
Acadia Parish	RAM Test Location 1		Monthly	Edit	Delete
Allen Parish	RAM Test Location 1		Monthly	Edit	Delete
Ascension Parish	RAM Test Location 1		Monthly	Edit	Delete

6. Repeat the same steps to add additional returns.

Editing Returns

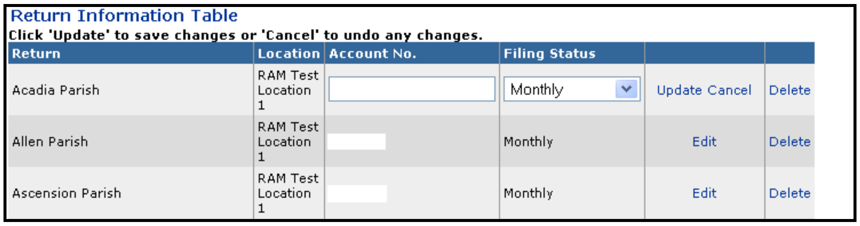
▼To edit a return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Setup** from the drop-down menu.
3. Click **Edit** in the row of the return.



Return	Location	Account No.	Filing Status		
Acadia Parish	RAM Test Location 1		Monthly	Edit	Delete
Allen Parish	RAM Test Location 1		Monthly	Edit	Delete
Ascension Parish	RAM Test Location 1		Monthly	Edit	Delete

4. In the **Account No.** field, edit the Authority Account Number.
5. In the **Filing Status** field, select a Filing Status from the drop-down menu.


Return Information Table
Click 'Update' to save changes or 'Cancel' to undo any changes.

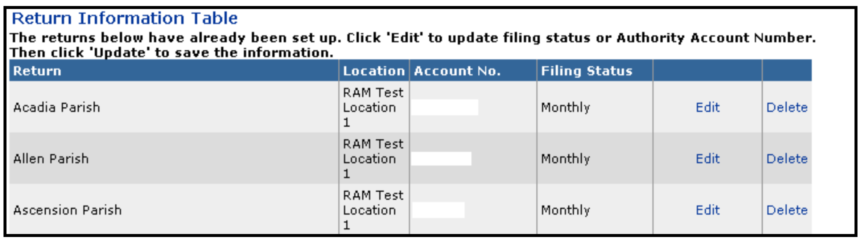
Return	Location	Account No.	Filing Status		
Acadia Parish	RAM Test Location 1		Monthly	Update Cancel	Delete
Allen Parish	RAM Test Location 1		Monthly	Edit	Delete
Ascension Parish	RAM Test Location 1		Monthly	Edit	Delete

6. Click **Update** to save the edited information.

Deleting Returns

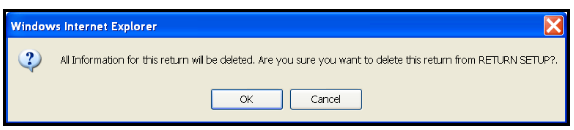
▼To delete a return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Setup** from the drop-down menu. The **Return Setup** page appears.


Return Information Table
The returns below have already been set up. Click 'Edit' to update filing status or Authority Account Number. Then click 'Update' to save the information.

Return	Location	Account No.	Filing Status		
Acadia Parish	RAM Test Location 1		Monthly	Edit	Delete
Allen Parish	RAM Test Location 1		Monthly	Edit	Delete
Ascension Parish	RAM Test Location 1		Monthly	Edit	Delete

3. Click **Delete** in the row of the return.
4. A confirmation message appears and asks if you wish to delete the return.



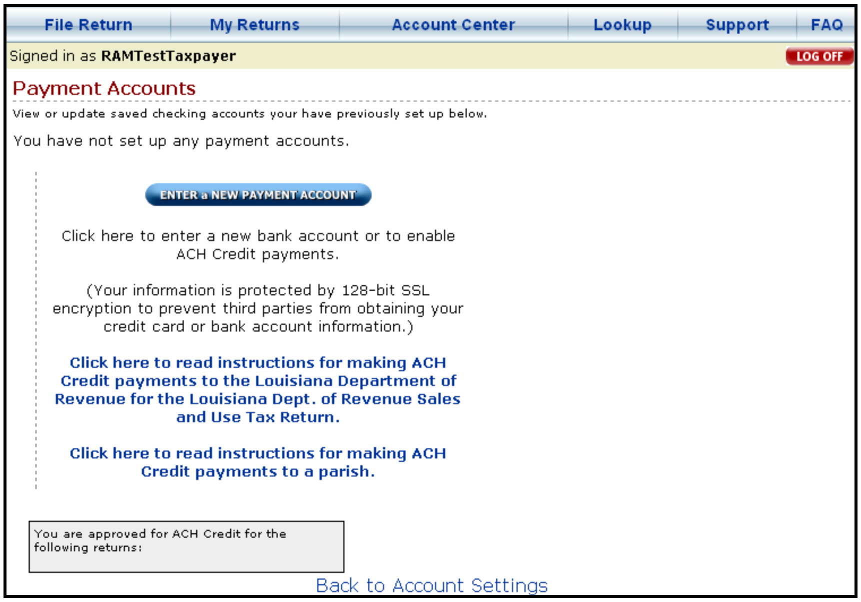
5. To delete the return, click **OK**.
6. To cancel deletion, click **Cancel**.

Chapter 5
Managing Payment Accounts

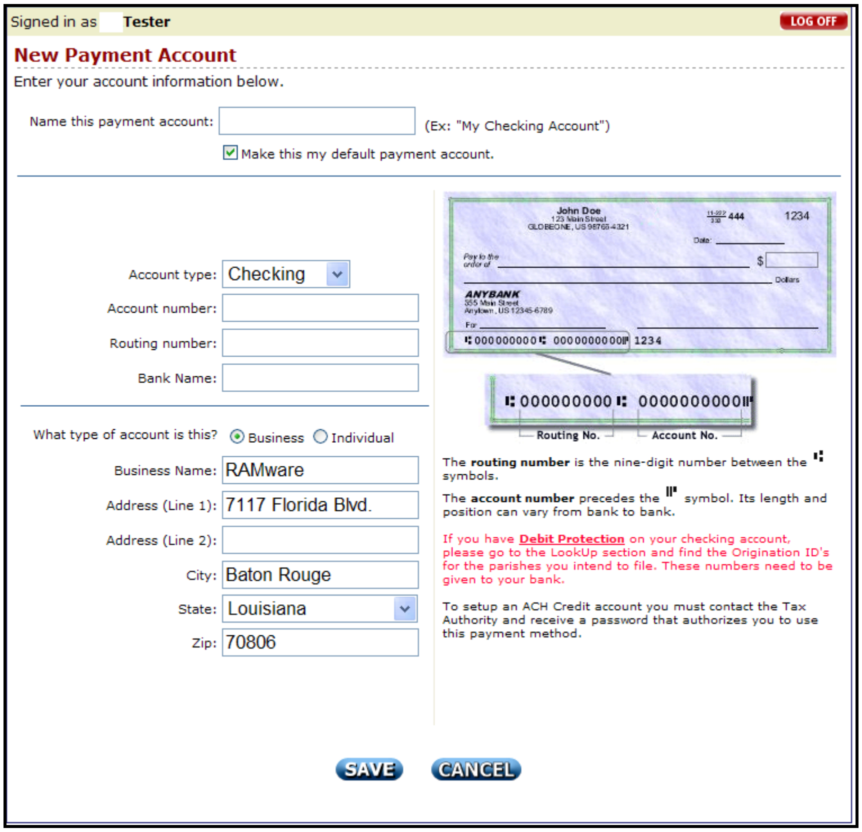
Setting up Payment Accounts from Checking

▼**To set up a payment account from checking:**

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Payment Accounts** from the drop-down menu. The **Payment Accounts** page appears.



3. Click the **Enter a New Payment Account** button. The **New Payment Account** page appears.

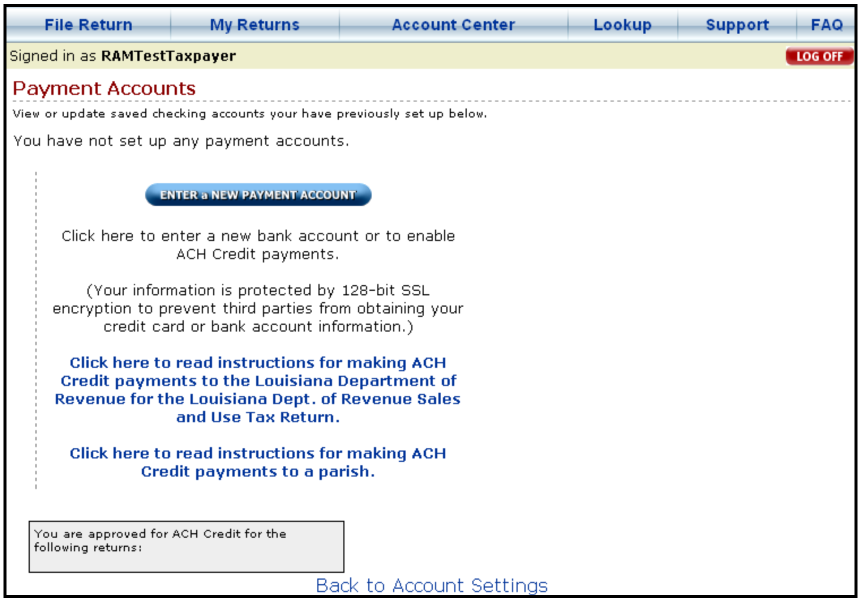


4. In the **Name Payment Account** field, type a name for the payment account. This name is visible only to users making payments.
5. Click the checkbox to make this account your default payment account.
6. Select **Checking** from the drop-down menu.
7. Type your bank account information in the fields.
8. Click the circle next to **Business** or **Individual** to define the type of Checking Account.
9. In the **Address** fields, type the billing address associated with the checking account.
10. Click **Save**.

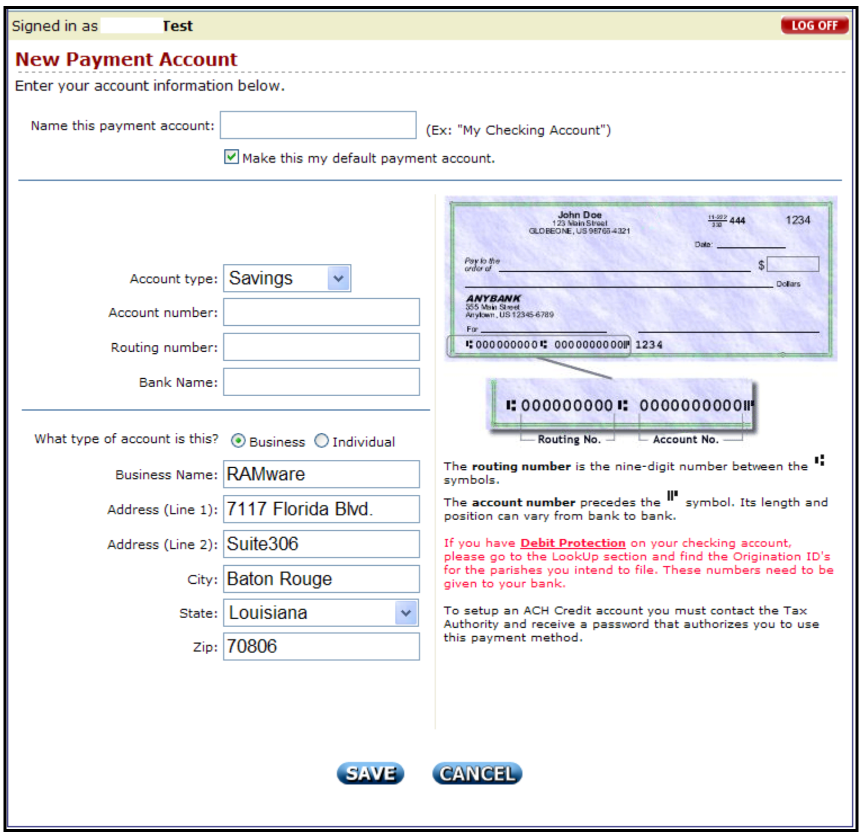
Setting up Payment Accounts from Savings

▼To set up a payment account from savings:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Payment Accounts** from the drop-down menu. The **Payment Accounts** page appears.



3. Click the **Enter a New Payment Account** button. The **New Payment Account** page appears.



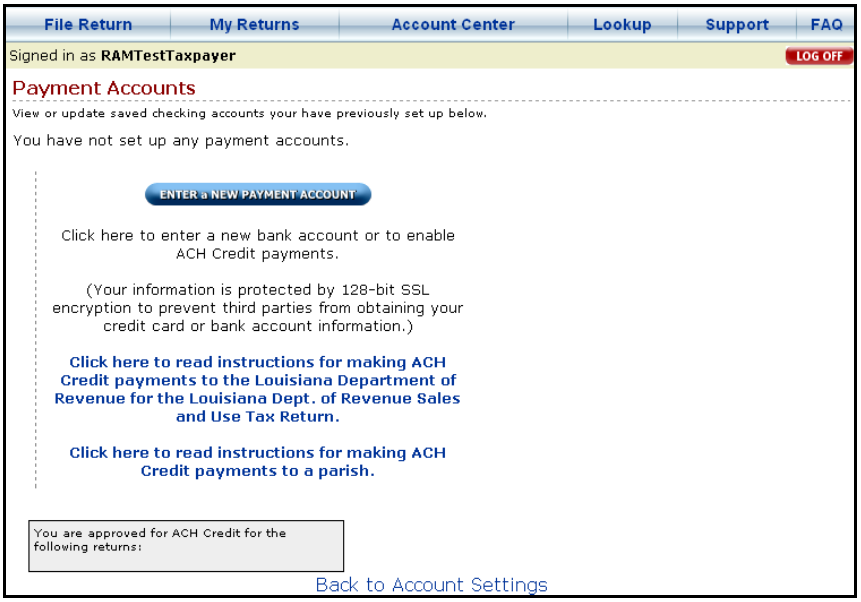
4. In the **Name Payment Account** field, type a name for the payment account. This name is visible only to users making payments.
5. Click the checkbox to make this account your default payment account.
6. Select **Savings** from the drop-down menu.
7. Type your bank account information in the fields.
8. Click the circle next to **Business** or **Individual** to define the type of Savings Account.
9. In the **Address** fields, type the billing address associated with the savings account.

10. Click **Save.**

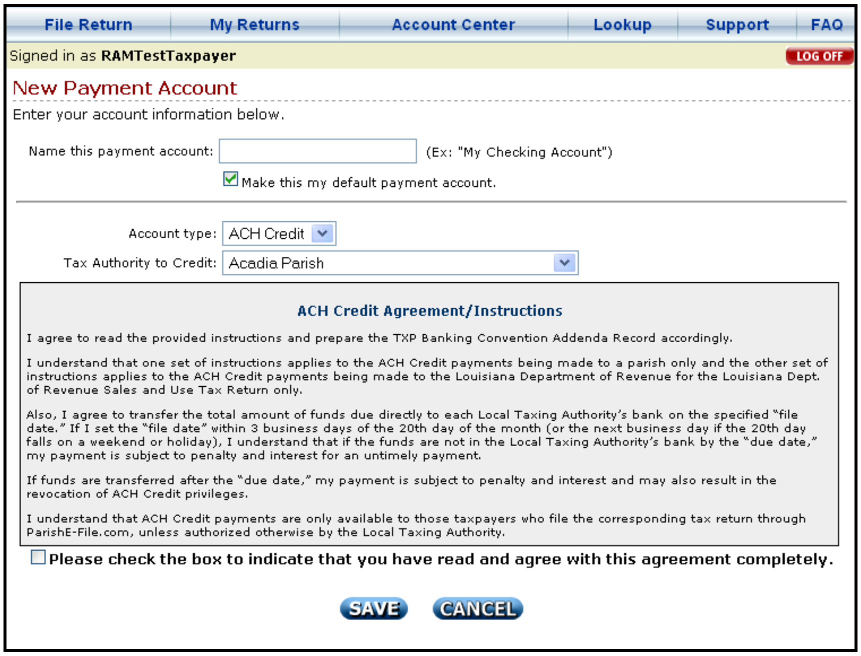
Setting up ACH Credit Payment Accounts

▼**To set up an ACH Credit payment account:**

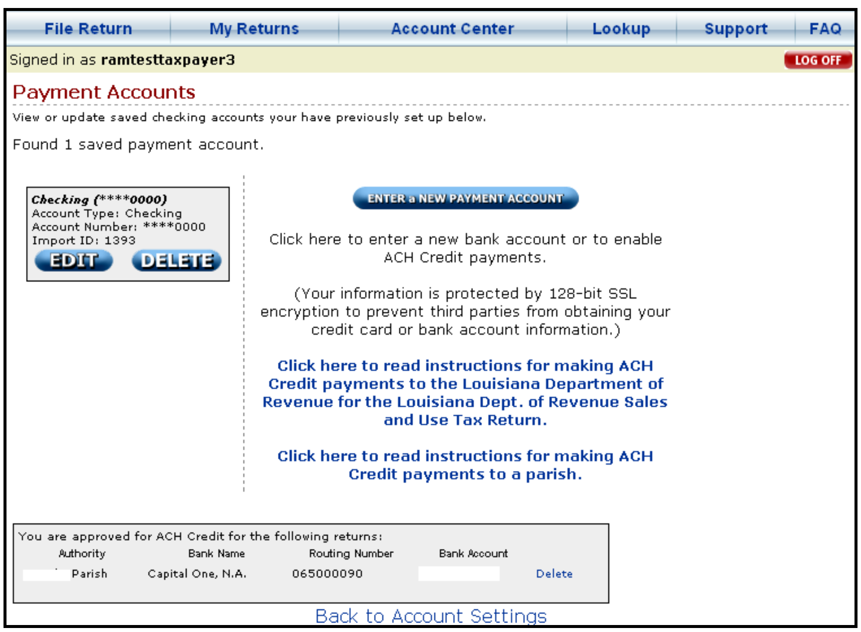
1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Payment Accounts** from the drop-down menu. The **Payment Accounts** page appears.



3. Click the **Enter a New Payment Account** button. The **New Payment Account** page appears.
4. In the **Name Payment Account** field, type a name for the payment account. This name is visible only to users making payments.
5. Click the checkbox to make this account your default payment account.
6. Select **ACH Credit** from the drop-down menu. A new form appears.



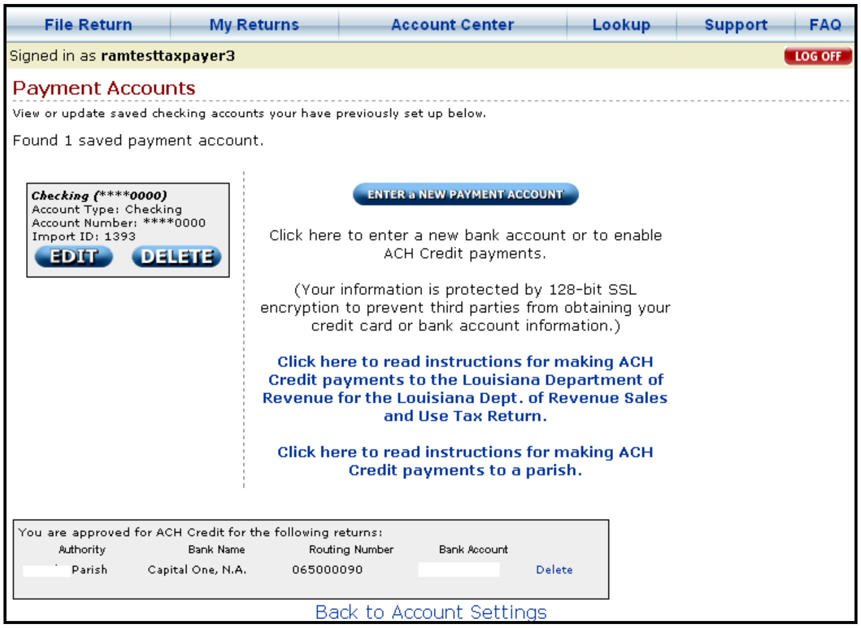
7. Select the **Tax Authority to Credit** from the drop-down menu.
8. **Read the ACH Credit Agreement/Instructions.** Click the checkbox acknowledging that you have read and agree with the statement.
9. Click **Save**. The ACH Credit Accounts appear in the bottom table.
10. Click the blue links to print instructions for making ACH Credit payments.



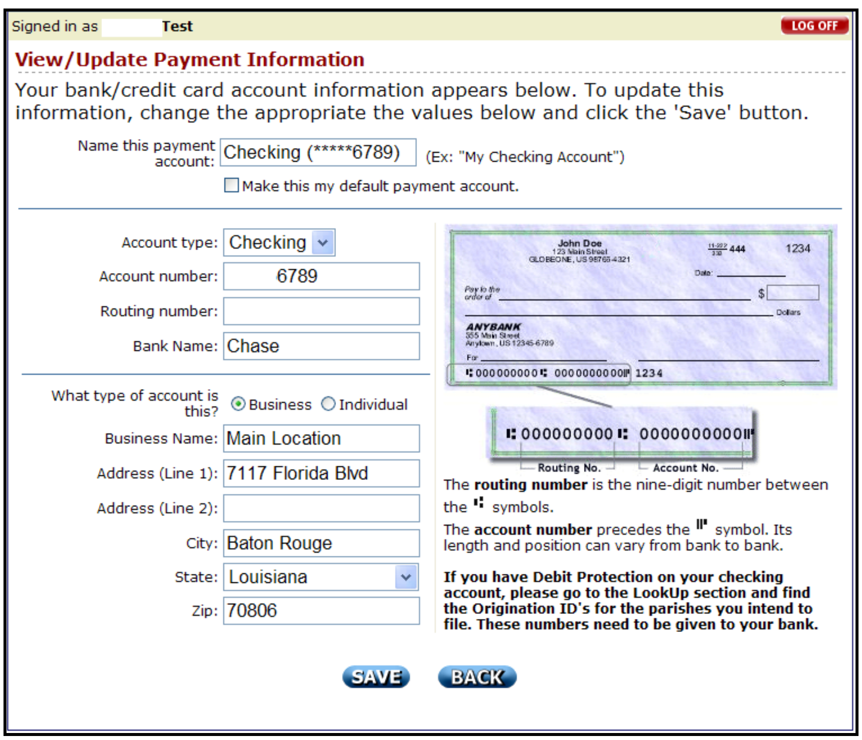
Editing Payment Accounts - Checking and Savings

▼To edit a checking or savings payment account:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Payment Accounts** from the drop-down menu. The **Payment Accounts** page appears.



3. Saved checking and savings payment accounts are in individual boxes in a column on the left side of the page.
4. Click the **Edit** button in the box of the payment account. The **View/Update Payment Information** page appears.

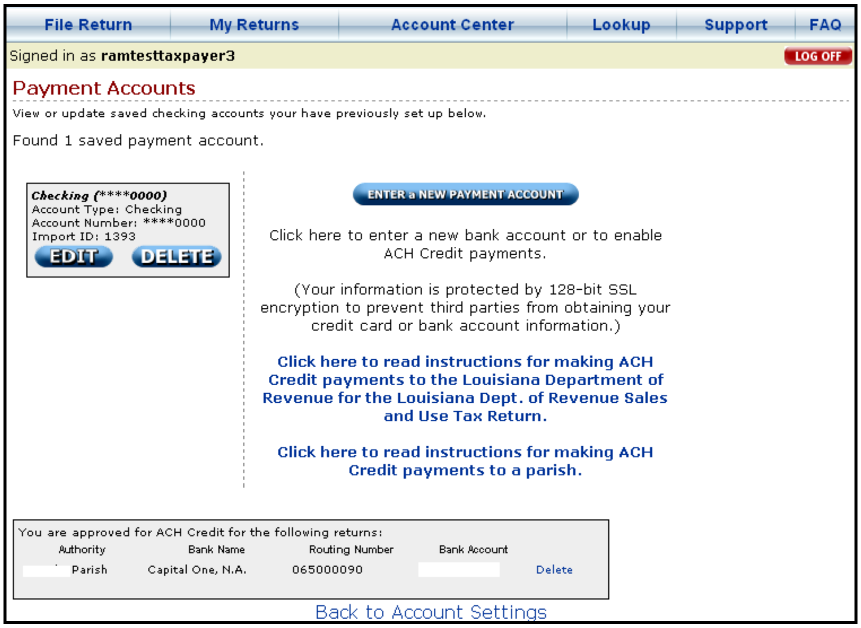


5. Type in the fields you wish to edit.
6. Click **Save**.

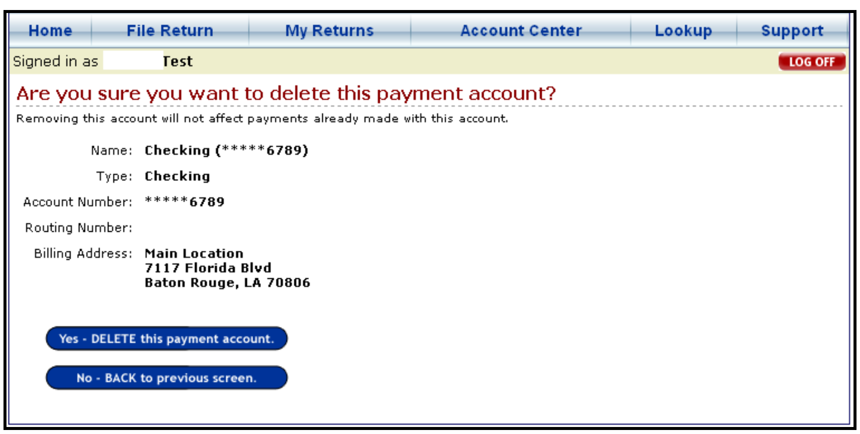
Deleting Payment Accounts - Checking and Savings

▼**To delete a checking or savings payment account:**

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Payment Accounts** from the drop-down menu. The **Payment Accounts** page appears.



3. Saved checking and savings payment accounts are in individual boxes in a column on the left side of the page.
4. Click the **Delete** button in the box of the payment account.
5. A confirmation message appears and asks you if you wish to delete the payment account.

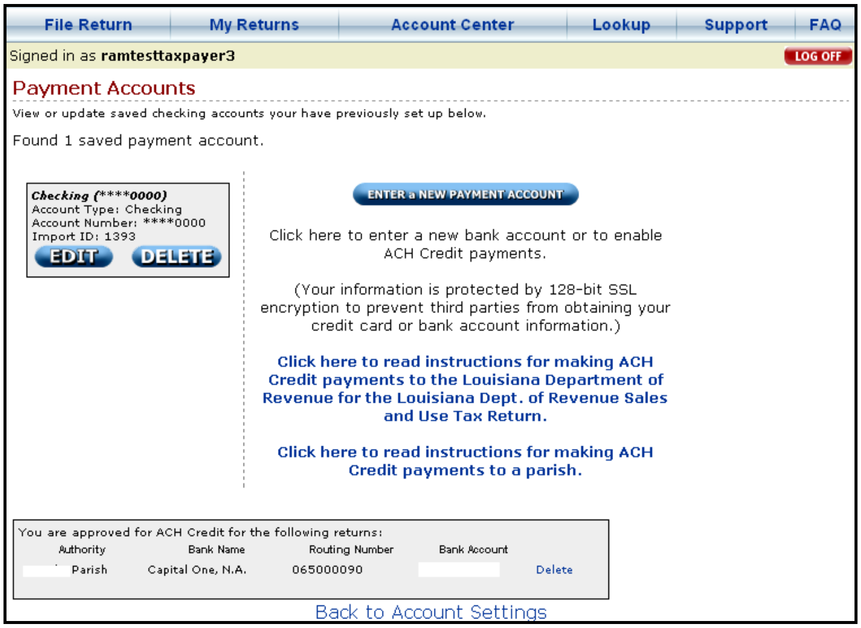


6. To delete the payment account, click **Yes – Delete**.
7. To cancel deletion, click **No – Back**.

Deleting ACH Credit Payment Accounts

▼ To delete an ACH Credit payment account

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Payment Accounts** from the drop-down menu. The **Payment Accounts** page appears.



3. Returns with approved ACH Credit Payment Accounts are listed in a box on the bottom, left side of the page.
4. Click **Delete** next to the return. The return no longer appears in the list.

Chapter 6
Making Payments

Making Payments with Saved Payment Accounts

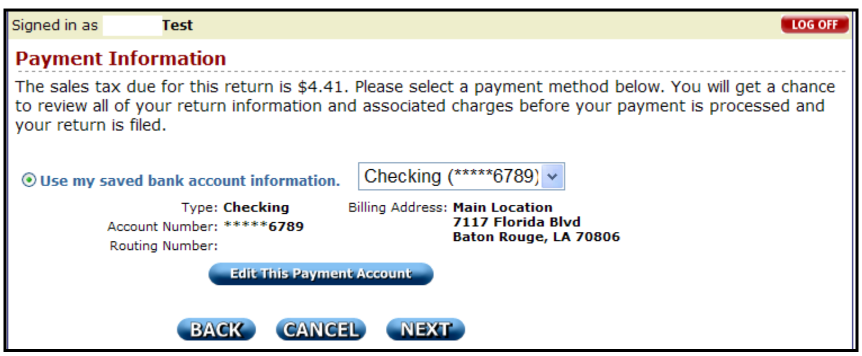
Making a payment is the final part of the filing process.

The following instructions assume that you have completed a return. Click the **Next** button on the Return page to continue to the Payment Information Page.

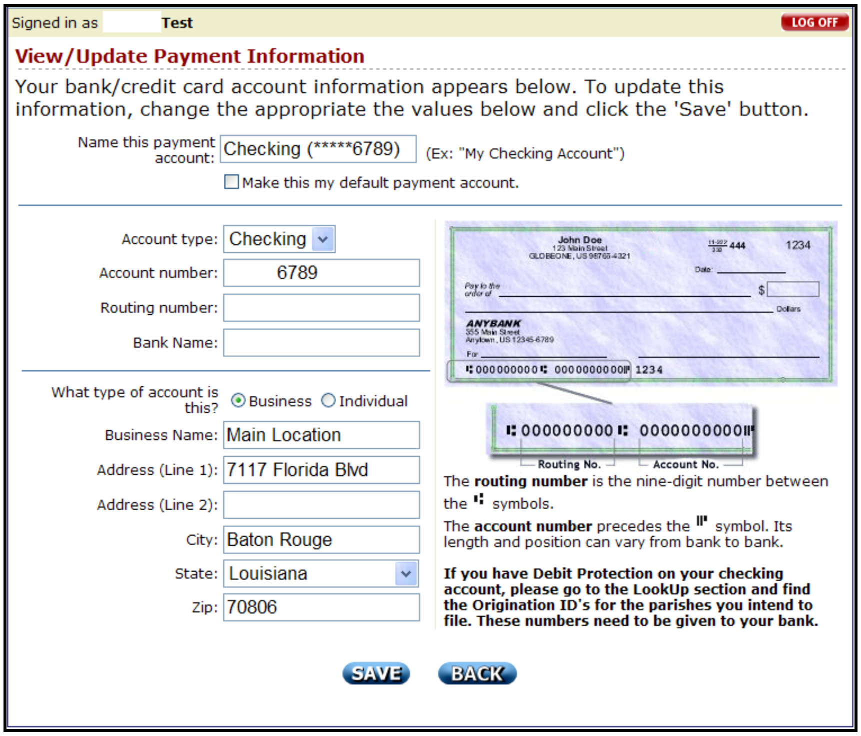
They also assume that you have filed a return that requires payment. If you have filed a zero or negative return, you will not make a payment. Follow normal filing procedures to receive a confirmation number.

▼To make a payment with a saved payment account:

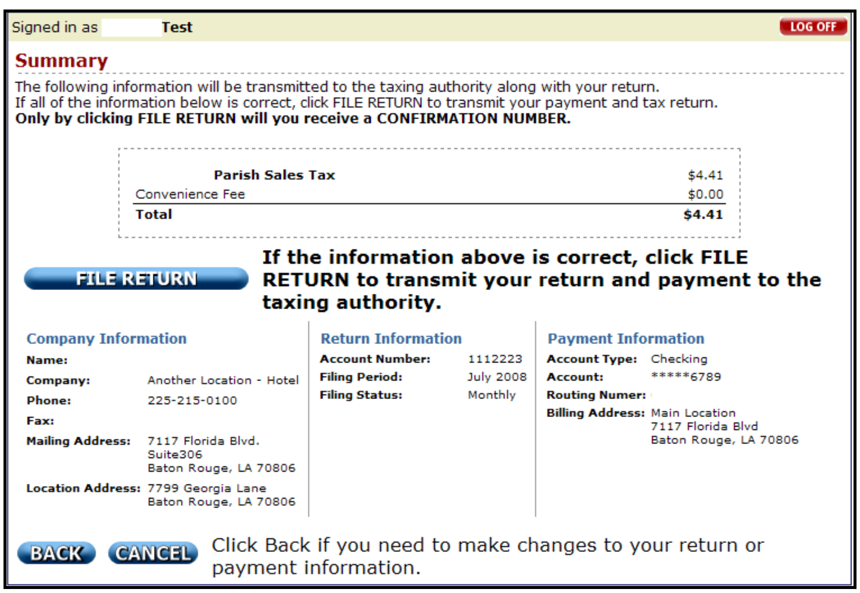
1. The **Payment Information** page appears.



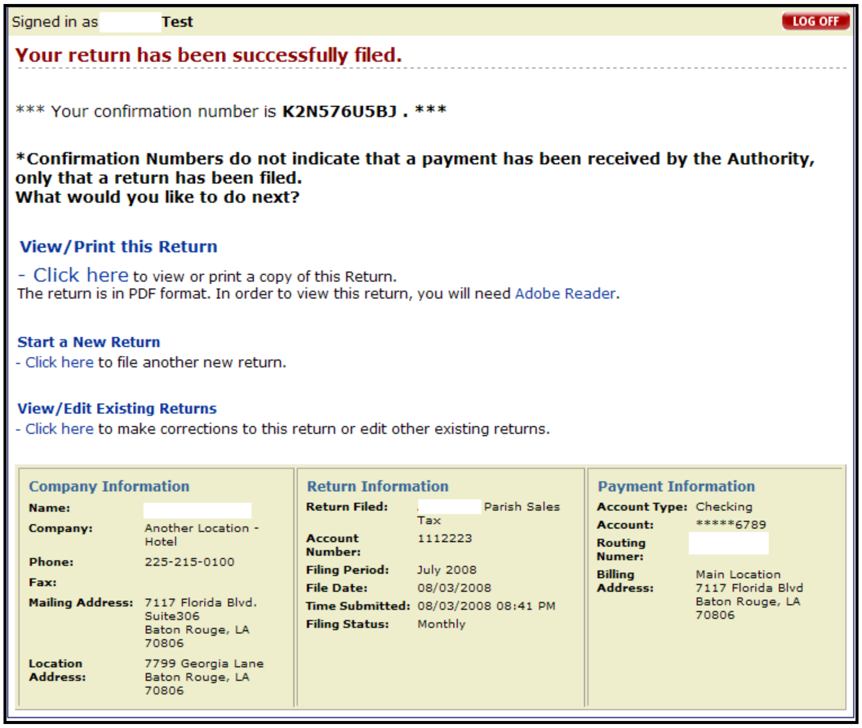
2. Click the circle marked **Use my Saved Bank Account Information**.
3. Select a saved account from the drop-down menu. The account information and billing address appear.
4. If the information is correct, click **Next** to make a payment. The **Summary** page appears. See **Step 7**.
5. If the information is incorrect, click the **Edit this Payment Account** button. The **View/Update Payment Information** page appears.



6. Type in the fields you wish to edit. Click **Save**. The **Payment Information** page appears again.
7. Click **Next** to make a payment. The **Summary** page appears.



8. To make changes to your return or payment information, click the **Back** button.
9. To file your return and make a payment, click the **File Return** button.
10. The **Confirmation Number** page appears with your confirmation number. Confirmation numbers do not indicate that a payment has been received by the taxing authority, but do indicate that your return has been filed and payment has been submitted.


Signed in as Test LOG OFF

Your return has been successfully filed.

*** Your confirmation number is **K2N576U5BJ** . ***

***Confirmation Numbers do not indicate that a payment has been received by the Authority, only that a return has been filed.**
What would you like to do next?

View/Print this Return
- Click here to view or print a copy of this Return.
The return is in PDF format. In order to view this return, you will need Adobe Reader.

Start a New Return
- Click here to file another new return.

View/Edit Existing Returns
- Click here to make corrections to this return or edit other existing returns.

Company Information
Name:
Company: Another Location - Hotel
Phone: 225-215-0100
Fax:
Mailing Address: 7117 Florida Blvd. Suite306 Baton Rouge, LA 70806
Location Address: 7799 Georgia Lane Baton Rouge, LA 70806

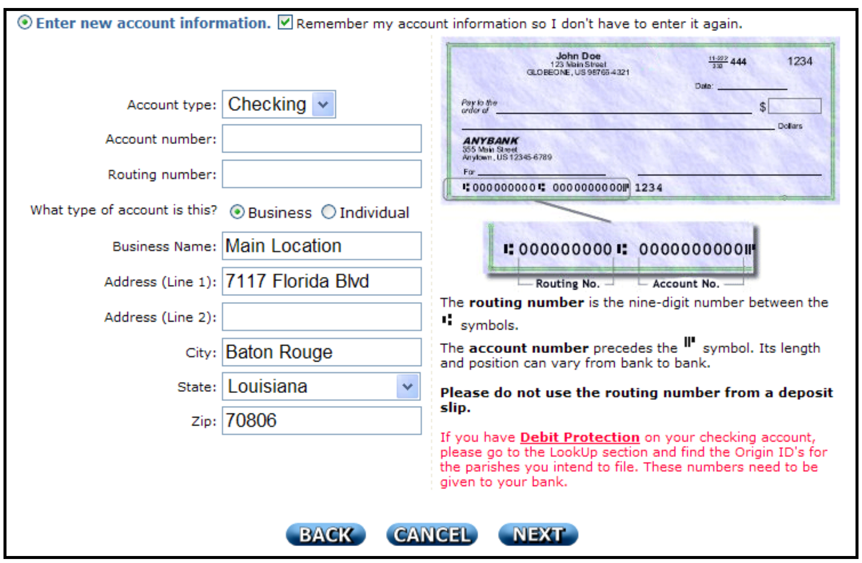
Return Information
Return Filed: Parish Sales Tax
Account Number: 1112223
Filing Period: July 2008
File Date: 08/03/2008
Time Submitted: 08/03/2008 08:41 PM
Filing Status: Monthly

Payment Information
Account Type: Checking
Account: *****6789
Routing Numer:
Billing Address: Main Location 7117 Florida Blvd Baton Rouge, LA 70806

Making Payments without Saved Payment Accounts

▼To make a payment without a saved payment account:

1. The **Payment Information** page appears.


Enter new account information. Remember my account information so I don't have to enter it again.

Account type: Checking
Account number:
Routing number:
What type of account is this? Business Individual
Business Name: Main Location
Address (Line 1): 7117 Florida Blvd
Address (Line 2):
City: Baton Rouge
State: Louisiana
Zip: 70806

The **routing number** is the nine-digit number between the ⑆ symbols.
The **account number** precedes the ⑈ symbol. Its length and position can vary from bank to bank.

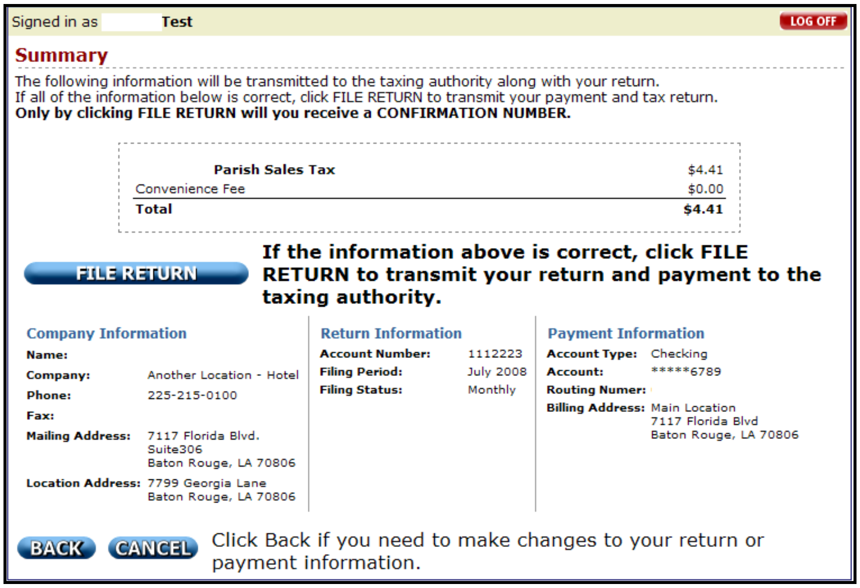
Please do not use the routing number from a deposit slip.

If you have **Debit Protection** on your checking account, please go to the LookUp section and find the Origin ID's for the parishes you intend to file. These numbers need to be given to your bank.

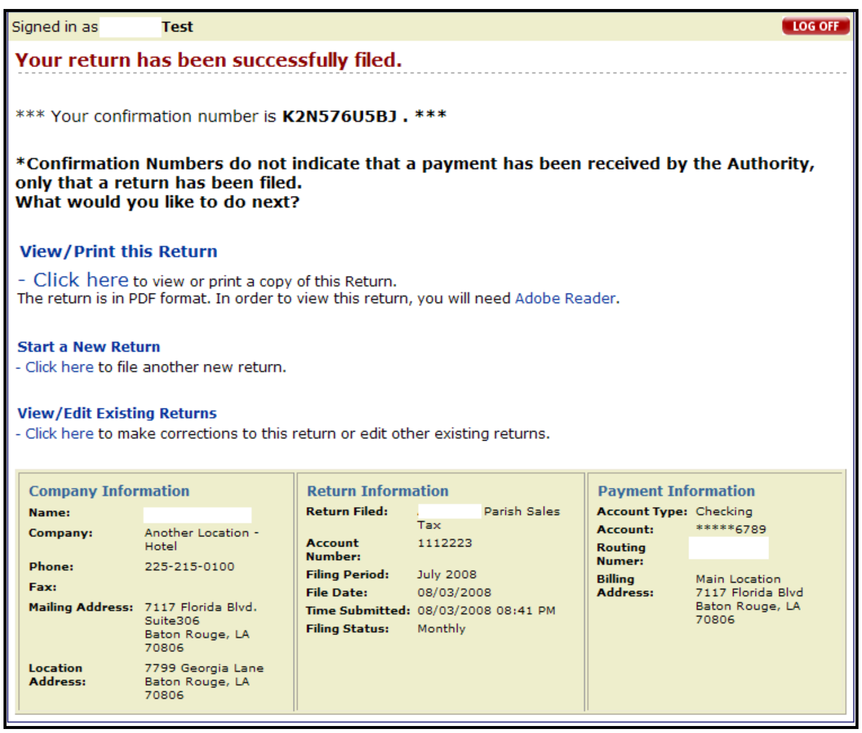
BACK CANCEL NEXT

2. Click the circle marked **Enter New Account Information**.
3. Click the checkbox to **Remember my Account Information** if you wish to save this account information.
4. Select **Checking** or **Savings** from the drop-down menu.
5. Type your bank account information in the fields.
6. Click the circle next to **Business** or **Individual** to define the type of account.
7. In the **Billing Address** fields, keep the information that is automatically filled in or type in the fields.

8. Click **Next** to make a payment. The **Summary** page appears.



9. To make changes to your return or payment information, click the **Back** button.
10. To file your return and make a payment, click the **File Return** button.
11. The **Confirmation Number** page appears with your confirmation number. Confirmation numbers do not indicate that a payment has been received by the taxing authority, but do indicate that your return has been filed and payment has been submitted.



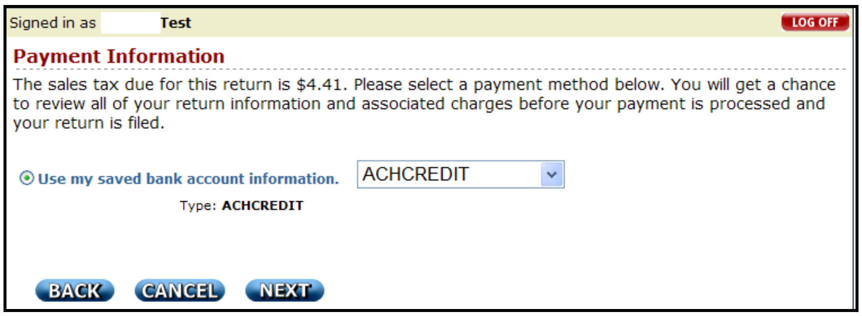
Making Payments with ACH Credit Payment Accounts

This type of account allows taxpayers to draft payment from their accounts at will. By making payments with ACH Credit, the taxpayer accepts full responsibility for making payments on time.

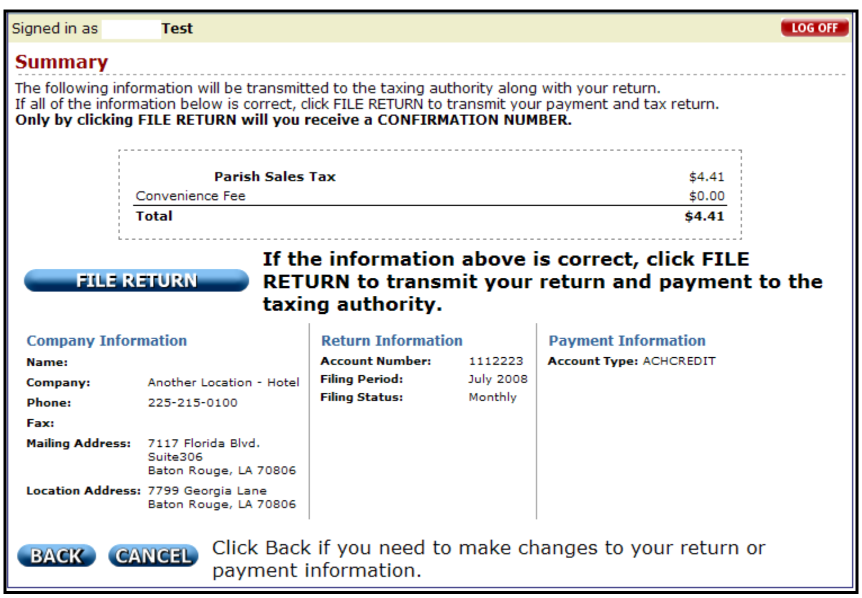
To make an ACH Credit payment you must apply for approval in advance of making a payment. See **Setting up Payment Accounts**.

▼To make a payment with an ACH Credit payment account:

1. The **Payment Information** page appears.
2. Click the circle marked **Use my Saved Bank Account Information**.



3. Select your **ACH Credit** account from the drop-down menu.
4. Click **Next** to make a payment. The **Summary** page appears.



5. To make changes to your return or payment information, click **Back**.
6. To file your return, click the **File Return** button.
7. The **Confirmation Number** page appears with your confirmation number. Confirmation numbers do not indicate that a payment has been received by the taxing authority, but do indicate that your return has been filed.

8. **You must make a payment by the file date printed on your return or you will be subject to penalties and interest.**

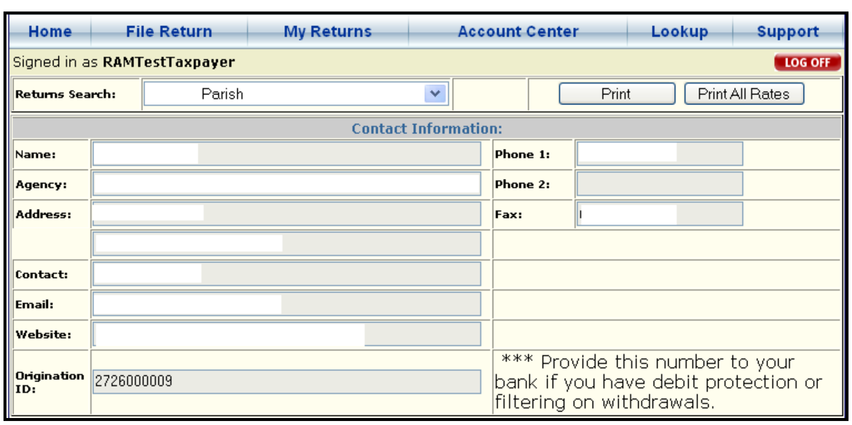
Troubleshoot Payments: Debit Protections, Withdrawal Filtering

▼If you have Debit Protection or Withdrawal Filtering on your bank account:

To allow a parish to draft payments from your checking or savings accounts, you must provide the parish's bank Origination ID to your bank.

▼To retrieve a parish's bank Origination ID:

1. Click **Lookup** on the menu bar.



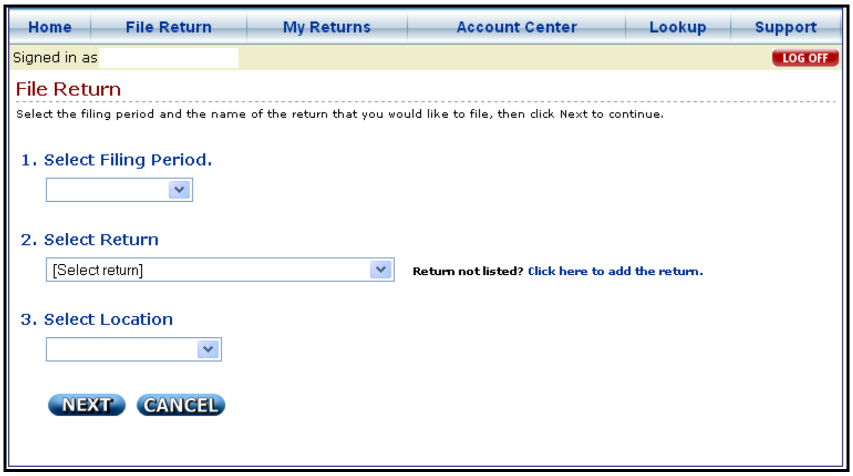
2. Select a **Return** or **City** from the drop-down menus.
3. Or, type a **Zip Code** in the field. Click **Go**.
4. The **Origination ID** appears in the **Contact Information** table.
   Note: The Origination ID must have ten characters.

Chapter 7
Filing Returns

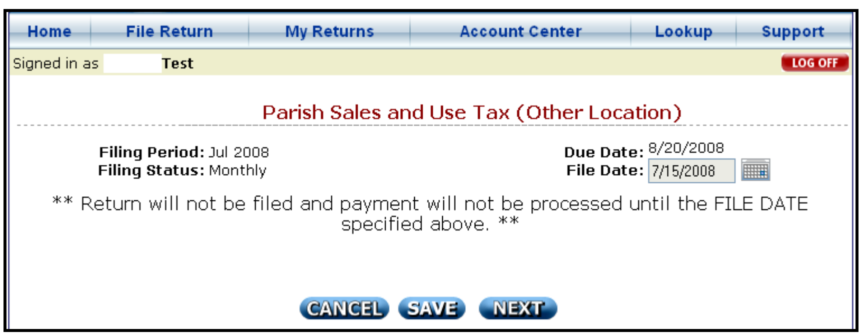
Filing Parish Returns

▼To file a parish return:

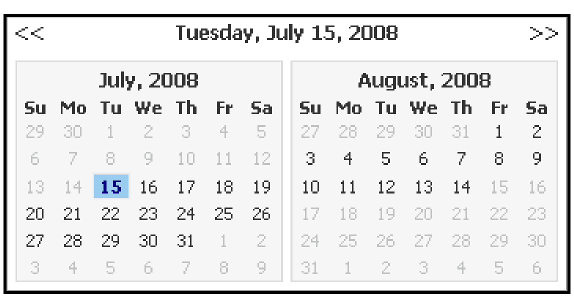
1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **File Return** from the drop-down menu.



3. Select the **Filing Period**, **Return**, and **Location** from the drop-down menus.
4. Click **Next**. The return appears.



5. Select the **File Date** by clicking the calendar icon next to the **File Date** field. A calendar will appear. Click a date on one of the months that display or use the arrows to navigate through months. Then click the date.

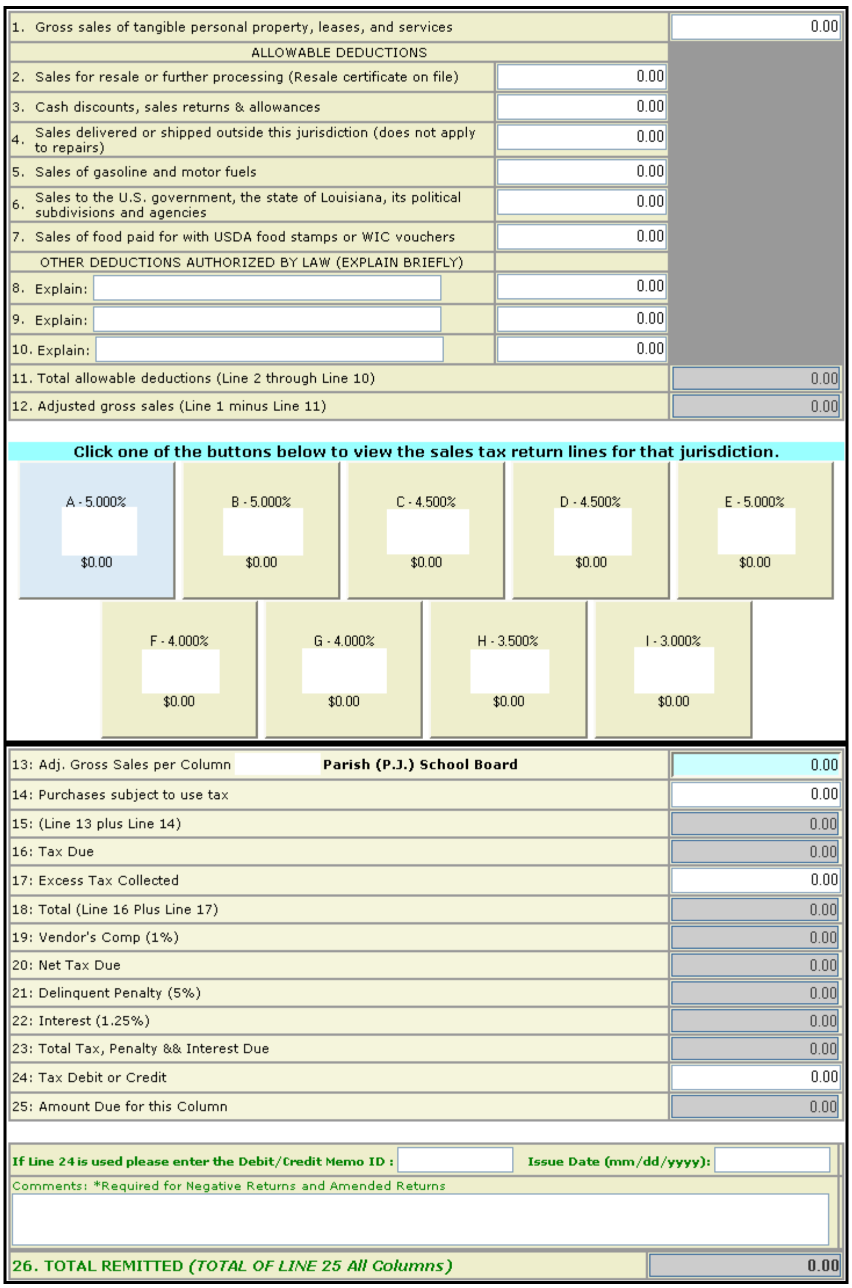


6. Follow normal filing procedures.

Note about Line 24:

Debit Memos are memos issued by the parish if underpayment was made on a previous return. Including a debit memo on a current return will add the amount of the debit memo to the total amount owed on the current return. For example, to report a debit of $500, type **500** in Line 24. You must also enter the debit memo ID and Issue Date provided to you by the parish in the green lines below Line 25.

Credit Memos are memos issued by the parish if overpayment was made on a previous return. Including a credit memo on a current return will deduct the amount of the credit memo from the total amount owed on the current return. For example, to report a credit of $500, type **-500** in Line 24. You must also enter the credit memo ID and Issue Date provided to you by the parish in the green lines below Line 25.



1. Gross sales of tangible personal property, leases, and services		0.00
ALLOWABLE DEDUCTIONS		
2. Sales for resale or further processing (Resale certificate on file)	0.00	
3. Cash discounts, sales returns & allowances	0.00	
4. Sales delivered or shipped outside this jurisdiction (does not apply to repairs)	0.00	
5. Sales of gasoline and motor fuels	0.00	
6. Sales to the U.S. government, the state of Louisiana, its political subdivisions and agencies	0.00	
7. Sales of food paid for with USDA food stamps or WIC vouchers	0.00	
OTHER DEDUCTIONS AUTHORIZED BY LAW (EXPLAIN BRIEFLY)		
8. Explain:	0.00	
9. Explain:	0.00	
10. Explain:	0.00	
11. Total allowable deductions (Line 2 through Line 10)		0.00
12. Adjusted gross sales (Line 1 minus Line 11)		0.00

Click one of the buttons below to view the sales tax return lines for that jurisdiction.

A - 5.000%	B - 5.000%	C - 4.500%	D - 4.500%	E - 5.000%
$0.00	$0.00	$0.00	$0.00	$0.00

F - 4.000%	G - 4.000%	H - 3.500%	I - 3.000%
$0.00	$0.00	$0.00	$0.00

13: Adj. Gross Sales per Column **Parish (P.J.) School Board**	0.00
14: Purchases subject to use tax	0.00
15: (Line 13 plus Line 14)	0.00
16: Tax Due	0.00
17: Excess Tax Collected	0.00
18: Total (Line 16 Plus Line 17)	0.00
19: Vendor's Comp (1%)	0.00
20: Net Tax Due	0.00
21: Delinquent Penalty (5%)	0.00
22: Interest (1.25%)	0.00
23: Total Tax, Penalty && Interest Due	0.00
24: Tax Debit or Credit	0.00
25: Amount Due for this Column	0.00

If Line 24 is used please enter the Debit/Credit Memo ID : **Issue Date (mm/dd/yyyy):**

Comments: *Required for Negative Returns and Amended Returns

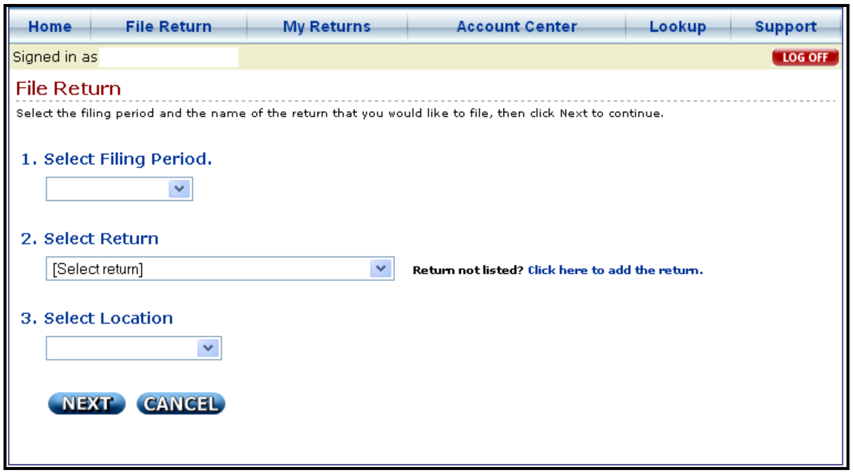
26. TOTAL REMITTED *(TOTAL OF LINE 25 All Columns)* **0.00**

7. Click **Next**.
8. Continue following the on-screen instructions to file and pay your return. See **Making Payments**.

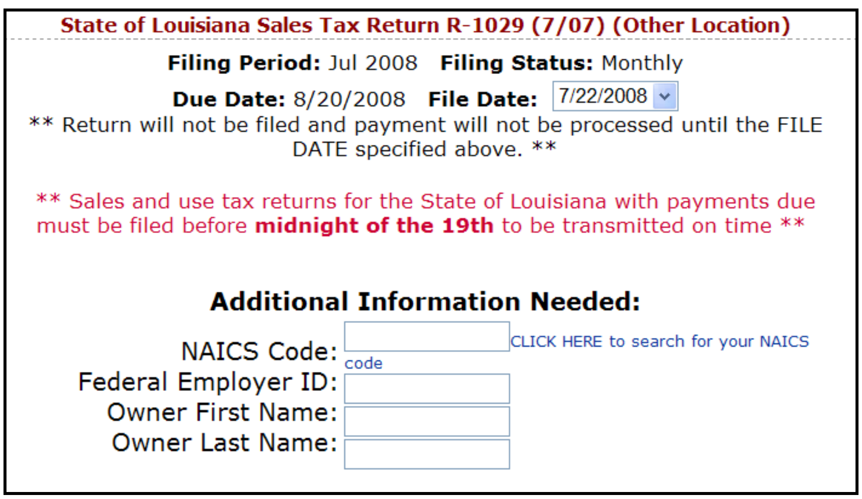
Filing State Returns

▼To file a state return:

1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **File Return** from the drop-down menu.



3. Select the **Filing Period**, **Return**, and **Location** from the drop-down menus.
4. Click **Next**. The return appears.



5. Select the **File Date** from the drop-down menu.
6. Type your **NAICS Code**, **Federal Employer ID**, and the **Owner's First and Last Name** in the fields.
7. Follow normal filing procedures.
8. Click **Next**.
9. Continue following the on-screen instructions to file and pay your return. See **Making Payments**.

Filing Amended Returns

A taxpayer must meet four requirements before filing an amended **parish** return:

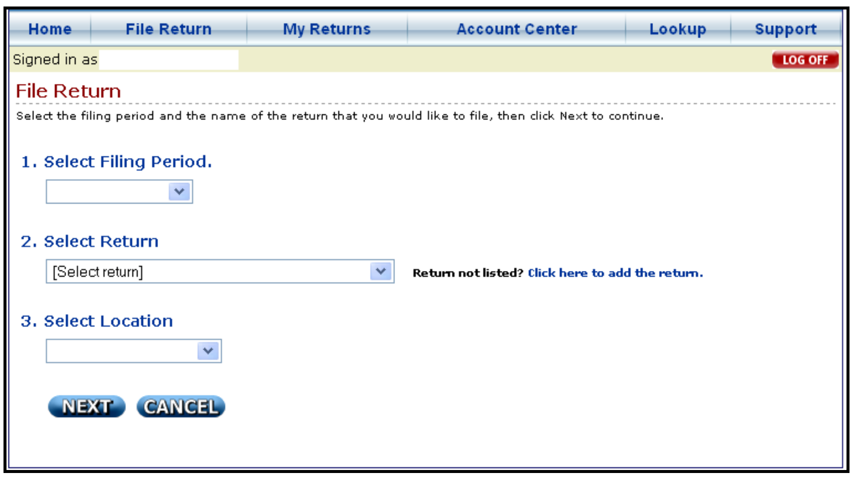
- The original return must have been filed on ParishE-File.com,
- The original return must have been filed on time,
- Line 24 (Credit Memo) must be blank on the original return,
- Line 24 (Credit Memo) must be blank on the amended return.

A taxpayer must meet two requirements before filing an amended **state** return:

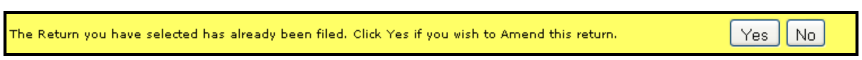
- The original return must have been filed on ParishE-File.com,
- The original return must have been filed on time.

▼To file an amended return:

1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **File Return** from the drop-down menu.



3. Select the **Filing Period**, **Return**, and **Location** from the drop-down menus.
4. Click **Next**. The return appears with a confirmation message.

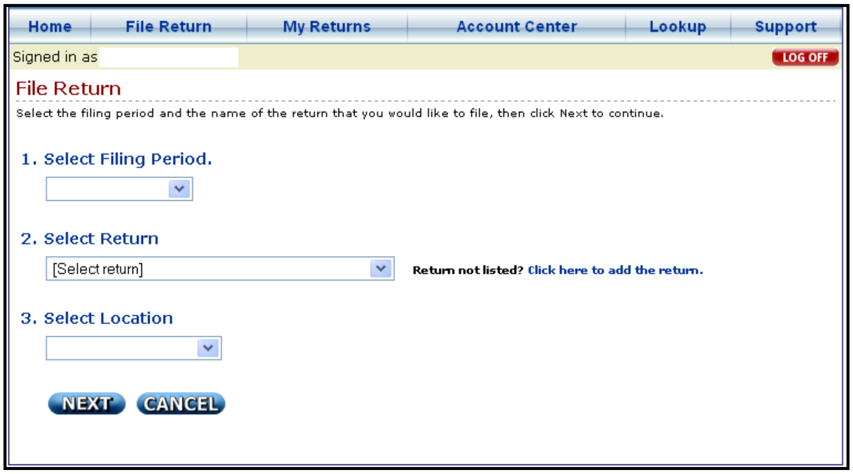


5. To continue filing the amended return, click **Yes**.
6. Make amendments to the return and follow normal filing procedures. Enter comments about the amended return in the box provided on the return form page.
7. To cancel filing the amended return, click **No**.

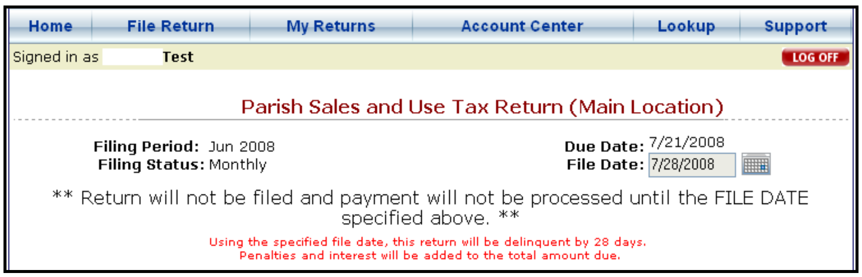
Filing Delinquent Returns

▼To file a delinquent return:

1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **File Return** from the drop-down menu.



3. Select the **Filing Period**, **Return**, and **Location** from the drop-down menus.
4. Click **Next**. The return appears with a warning message.

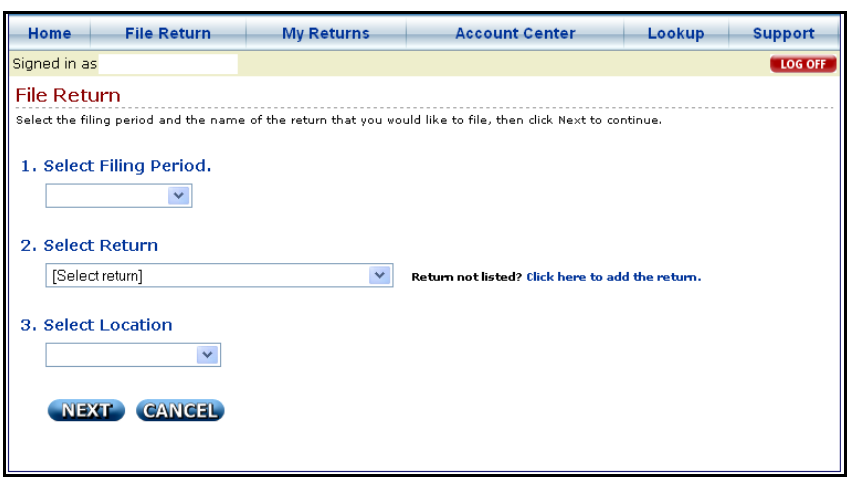


5. Follow normal filing procedures. Penalties and interest will be added to the total amount due during payment.

Filing Negative Returns

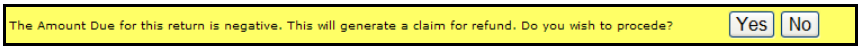
▼**To file a negative return:**

1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **File Return** from the drop-down menu.



3. Select the **Filing Period**, **Return**, and **Location** from the drop-down menus.
4. Click **Next**. The return appears.

5. Follow normal filing procedures. If the system calculates a negative amount a warning message will appear.



6. To generate a Claim for Refund, click **Yes**. The system generates a Claim for Refund using your contact and return information. The system sends this generated Claim for Refund to the taxing authority in the parish. Enter comments about the negative return in the box provided on the return form page.
7. To cancel generating a Claim for Refund, click **No**. You cannot continue filing a negative return until you agree to generate a Claim for Refund.

Saving Returns While Filing

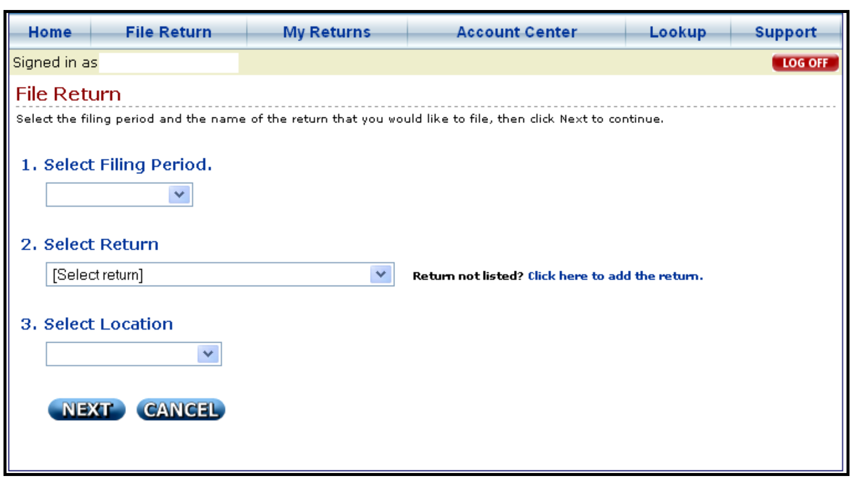
▼To save a return while filing:

Click the **Save** button located at the top or bottom of the return.

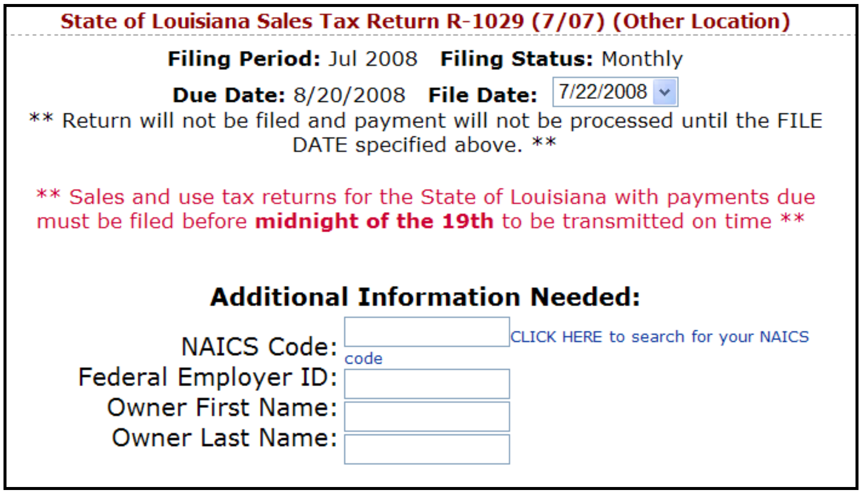
Filing a Final Return (State)

▼To file a final return:

1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **File Return** from the drop-down menu.



3. Select the **Filing Period**, **Return**, and **Location** from the drop-down menus.
4. Click **Next**. The return appears.



State of Louisiana Sales Tax Return R-1029 (7/07) (Other Location)

Filing Period: Jul 2008 **Filing Status:** Monthly

Due Date: 8/20/2008 **File Date:** 7/22/2008

** Return will not be filed and payment will not be processed until the FILE DATE specified above. **

** Sales and use tax returns for the State of Louisiana with payments due must be filed before **midnight of the 19th** to be transmitted on time **

Additional Information Needed:

NAICS Code: CLICK HERE to search for your NAICS code

Federal Employer ID:

Owner First Name:

Owner Last Name:

5. Select the **File Date** from the drop-down menu.
6. Type your **NAICS Code**, **Federal Employer ID**, and the **Owner's First and Last Name** in the fields.
7. Follow normal filing procedures.
8. At the bottom of the return, click the checkbox marked **Final Return**.

Final Return? Enter date business sold/terminated:

If business is sold, a new owner should complete a new application for a new account number. Furnish new owner's name.

New Owner:

Check applicable boxes **for address changes only: (Please verify that the new address has been entered on the business location page.**

New **mailing** address

New **location** address

9. Type in the fields and click the checkboxes applicable to the final return.
10. Click **Next** to continue filing.

Chapter 8
Managing Return Center

The Return Center allows you to view the status of each return you have started. To begin viewing returns, place your mouse-pointer over **My Returns** on the menu bar. Select **Return Center** from the drop-down menu.

Each return listed in the table will have a status.

Status Descriptions:

IN PROGRESS - Return has been created but not filed and is not available to be received by the tax authority

FILED - Return has been filed and waiting to be downloaded by the tax authority

RECEIVED - Return has been downloaded and processed by the tax authority

Action Descriptions:

CONTINUE - To complete a return that has been created but not filed

UNFILE - To make changes to a return that has been filed but not downloaded by the tax authority

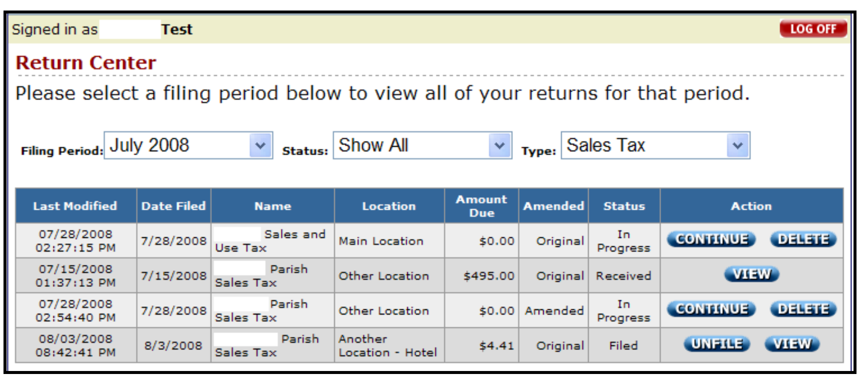
VIEW - To review and/or print a return that has been filed and processed by the tax authority

DELETE - To delete a return that has not been filed

Searching for Returns

▼To search for a return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Center** from the drop-down menu. The **Return Center** page appears.



Signed in as Test
LOG OFF
Return Center
Please select a filing period below to view all of your returns for that period.
Filing Period: July 2008 Status: Show All Type: Sales Tax

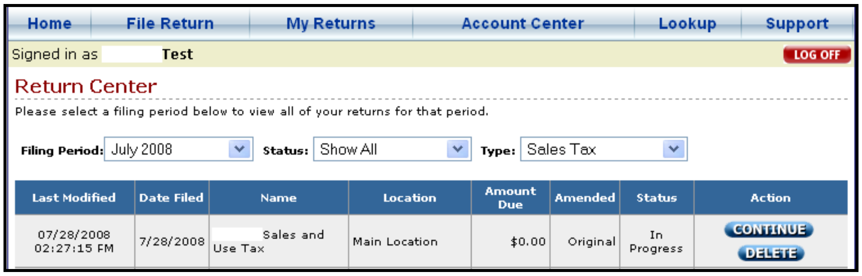
Last Modified	Date Filed	Name	Location	Amount Due	Amended	Status	Action
07/28/2008 02:27:15 PM	7/28/2008	Sales and Use Tax	Main Location	$0.00	Original	In Progress	CONTINUE DELETE
07/15/2008 01:37:13 PM	7/15/2008	Parish Sales Tax	Other Location	$495.00	Original	Received	VIEW
07/28/2008 02:54:40 PM	7/28/2008	Parish Sales Tax	Other Location	$0.00	Amended	In Progress	CONTINUE DELETE
08/03/2008 08:42:41 PM	8/3/2008	Parish Sales Tax	Another Location - Hotel	$4.41	Original	Filed	UNFILE VIEW

3. To search for a return by **Filing Period**, select a filing period from the drop-down menu. The returns of that filing period appear in a table.
4. To search for a return by **Status**, select a status from the drop-down menu. The returns of that status appear in a table.
5. To search for a return by **Type**, select a type from the drop-down menu. The returns of that type appear in a table.

Continuing a Saved Return

▼To continue a saved return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Center** from the drop-down menu. The **Return Center** page appears.
3. Search for the return you wish to continue filing. Only returns with a status of **In Progress** can be continued.

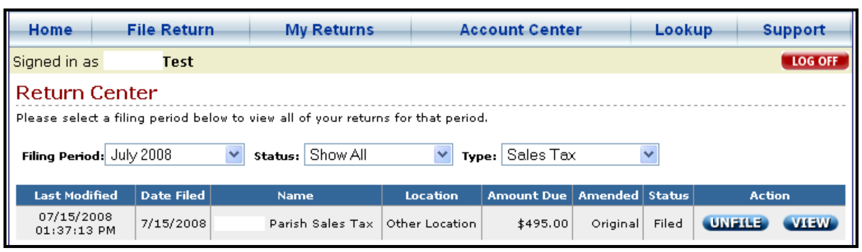


4. Click **Continue** in the row of the return. The return appears on a new page.

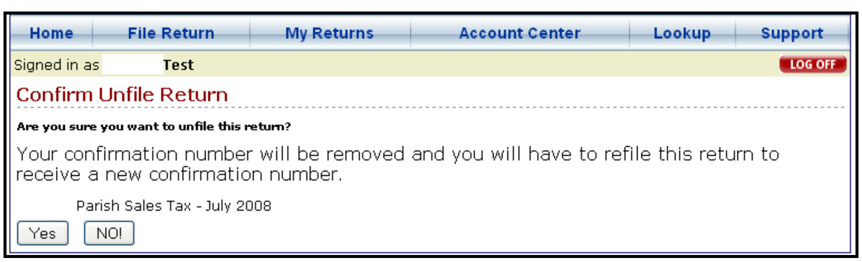
Un-filing a Return

▼To un-file a return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Center** from the drop-down menu. The **Return Center** page appears.
3. Search for the return you wish to un-file. Only returns with a status of **Filed** can be un-filed.



4. Click **Un-File** in the row of the return. A confirmation message appears.

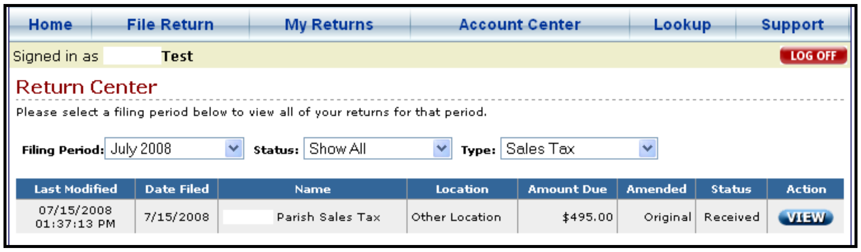


5. To confirm that you wish to un-file the return and remove the confirmation number, click **Yes**. The return appears in the table with a status of **In Progress**.
6. To cancel the un-filing, click **No**.

Viewing a Filed Return

▼To view a filed return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Center** from the drop-down menu. The **Return Center** page appears.
3. Search for the return you wish to view. Only returns with a status of **Filed** or **Received** can be viewed as a PDF copy.

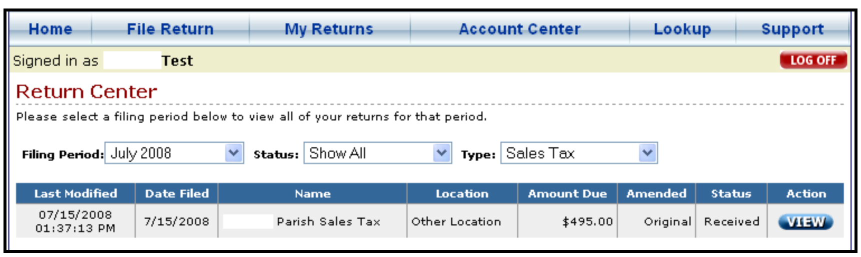


4. Click **View** in the row of the return. A new window appears with a PDF copy of the return.

Printing Returns

▼To print a return:

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Center** from the drop-down menu. The **Return Center** page appears.
3. Search for the return you wish to print. Only returns with a status of **Filed** or **Received** can be printed from a PDF file.

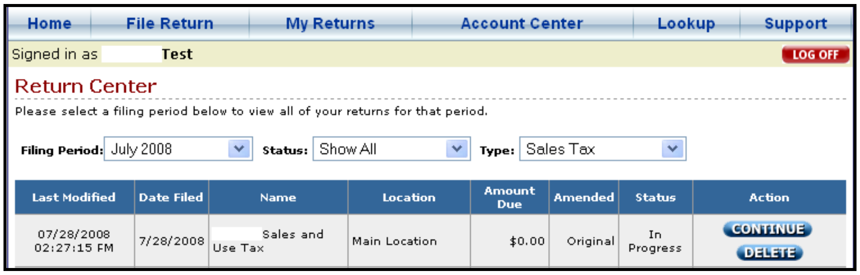


4. Click **View** in the row of the return. A new window appears with a PDF copy of the return.
5. Click the printer icon in the upper-left corner of the PDF viewer or print normally from your web browser.

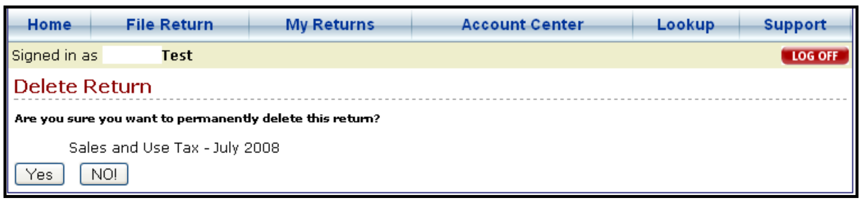
Deleting Returns

▼**To delete a return:**

1. Place your mouse-pointer over **My Returns** on the menu bar.
2. Select **Return Center** from the drop-down menu. The **Return Center** page appears.
3. Search for the return you wish to delete. Only returns with a status of **In Progress** can be deleted.



4. Click **Delete** in the row of the return. A confirmation message appears.



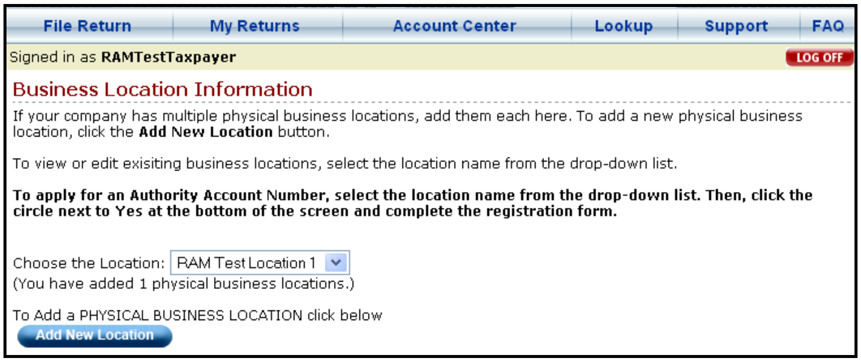
5. To permanently delete the return, click **Yes**. The return no longer appears in the table.
6. To cancel deletion, click **No**.

Chapter 9
Managing Business Locations

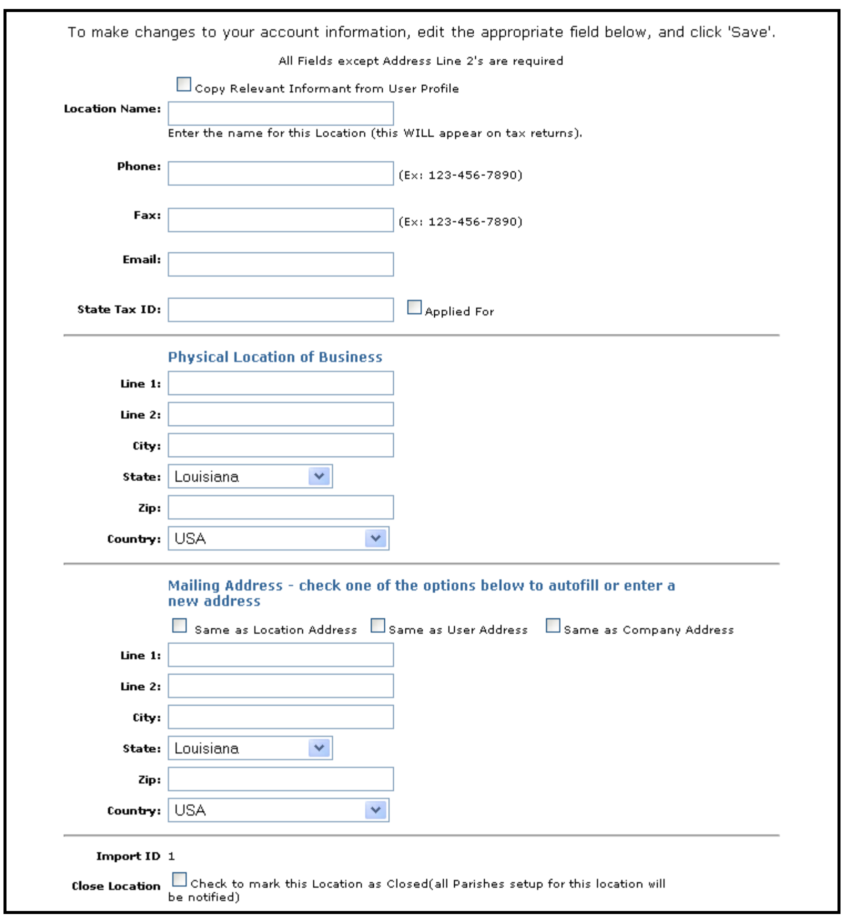
Adding Business Locations

▼To add a business location:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.



3. Click the **Add** button. Enter information for one business location at a time.



4. In the **Location Name** field, type a name for the location. This name will appear on tax returns, but can be any name you choose.
5. In the **State Tax ID** field, type your state Tax ID. If you have already applied for a state Tax ID, click the checkbox marked **Applied For** and continue.
6. In the **Business Location Information** fields, click the checkboxes to copy relevant information from previous pages, or type your business location information.
7. If you do not need to apply for an Authority Account Number for this business location, click the circle marked **No**. Click **Save**. The **Business Location Information** page appears, and an Import ID has been assigned to the location.
8. If you need to apply for an Authority Account Number for this business location, click the circle marked **Yes**. See **Applying for an Authority Account Number**.

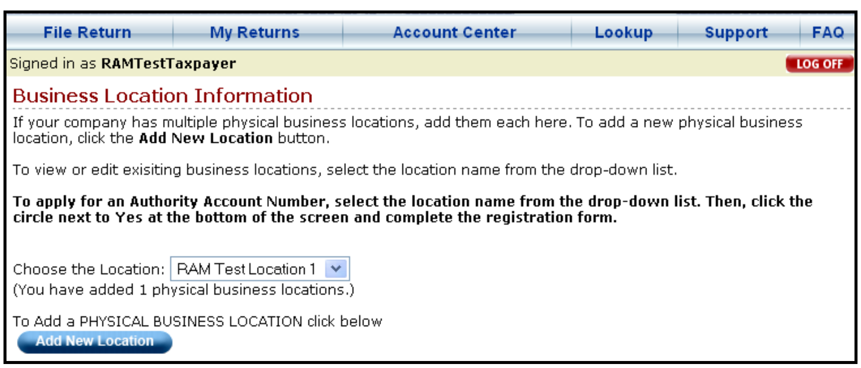
Applying for an Authority Account Number at an Existing Location

▼ **Before applying for an Authority Account Number at an existing location:**

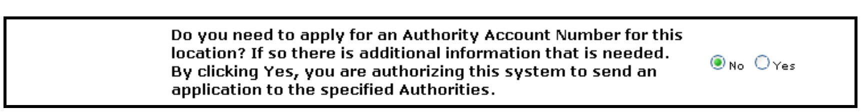
1. Confirm that your **Corporate Information** is accurate and complete:
2. Place your mouse-pointer over **Account Center** on the menu-bar.
3. Place your mouse-pointer over **Account Settings** in the drop-down menu.
4. Click **Corporate Information** in the right drop-down menu.
5. At the bottom of the form, click in the **Type of Organization** circle.
6. Type information for up to four company owners (Except for Individual Organizations). The Agent for Service is usually the attorney who incorporated the company.
7. Click **Save**. A success message appears.

▼ **To apply for an Authority Account Number at an existing location:**

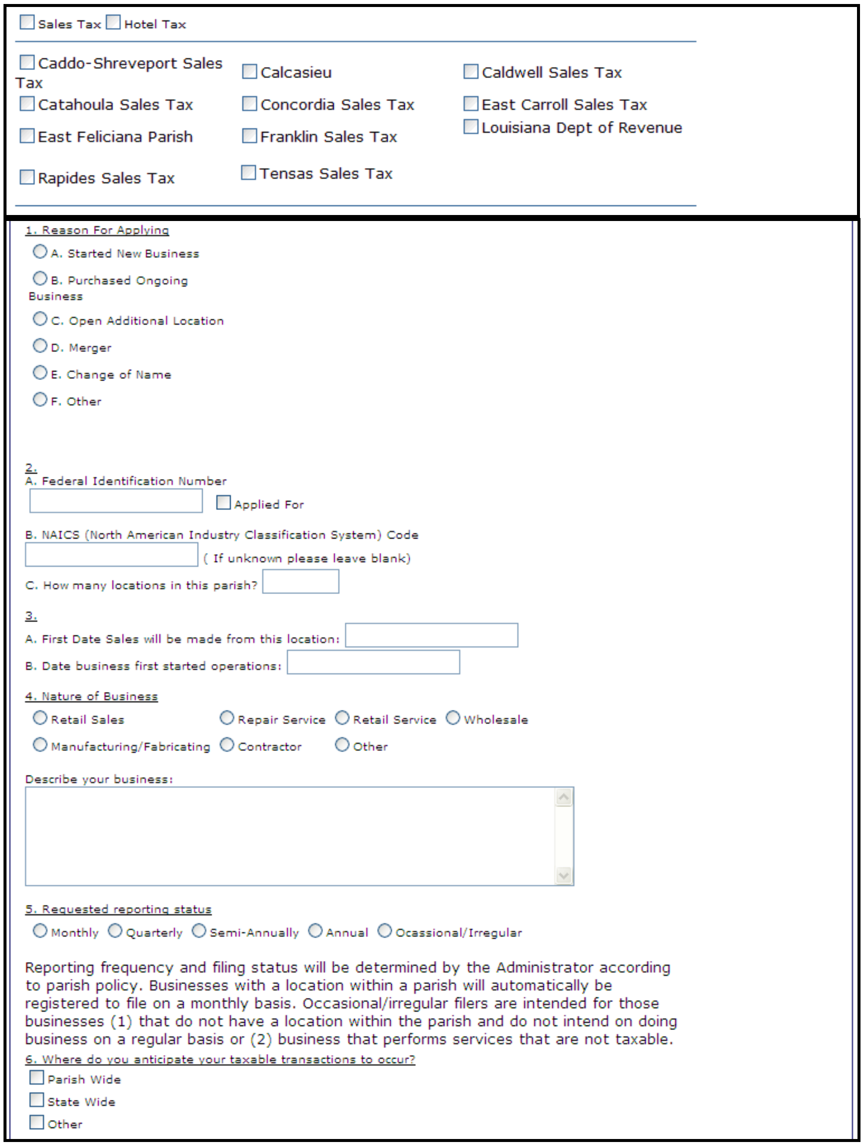
1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.



3. Select a **Location** from the drop-down menu. The **Business Location Information** page appears.
4. At the bottom of the form, click the circle marked **Yes**.



5. Check the boxes next to the types of returns you will be filing. You will receive a temporary Authority Account Number for each return you select.
6. Type information in the fields as instructed on the form.


☐ Sales Tax ☐ Hotel Tax

☐ Caddo-Shreveport Sales Tax ☐ Calcasieu ☐ Caldwell Sales Tax
☐ Catahoula Sales Tax ☐ Concordia Sales Tax ☐ East Carroll Sales Tax
☐ East Feliciana Parish ☐ Franklin Sales Tax ☐ Louisiana Dept of Revenue
☐ Rapides Sales Tax ☐ Tensas Sales Tax

1. Reason For Applying
○ A. Started New Business
○ B. Purchased Ongoing Business
○ C. Open Additional Location
○ D. Merger
○ E. Change of Name
○ F. Other

2.
A. Federal Identification Number ☐ Applied For
B. NAICS (North American Industry Classification System) Code (If unknown please leave blank)
C. How many locations in this parish?

3.
A. First Date Sales will be made from this location:
B. Date business first started operations:

4. Nature of Business
○ Retail Sales ○ Repair Service ○ Retail Service ○ Wholesale
○ Manufacturing/Fabricating ○ Contractor ○ Other

Describe your business:

5. Requested reporting status
○ Monthly ○ Quarterly ○ Semi-Annually ○ Annual ○ Ocassional/Irregular

Reporting frequency and filing status will be determined by the Administrator according to parish policy. Businesses with a location within a parish will automatically be registered to file on a monthly basis. Occasional/irregular filers are intended for those businesses (1) that do not have a location within the parish and do not intend on doing business on a regular basis or (2) business that performs services that are not taxable.

6. Where do you anticipate your taxable transactions to occur?
☐ Parish Wide
☐ State Wide
☐ Other

7. Click **Save**.

Applying for an Authority Account Number at a New Location

▼**Before applying for an Authority Account Number at a new location:**

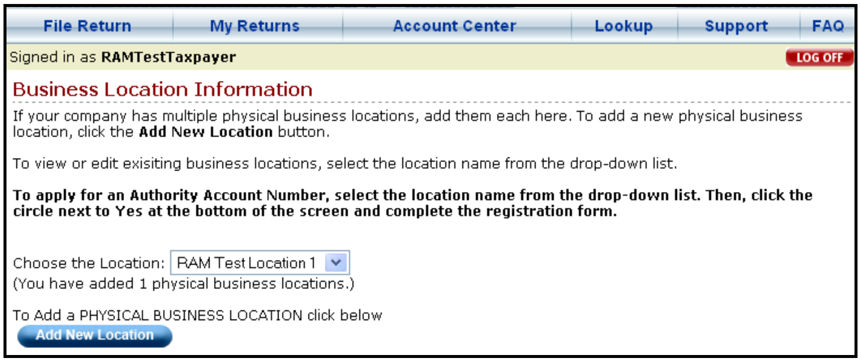
1. Confirm that your **Corporate Information** is accurate and complete:
2. Place your mouse-pointer over **Account Center** on the menu-bar.
3. Place your mouse-pointer over **Account Settings** in the drop-down menu.
4. Click **Corporate Information** in the right drop-down menu.
5. At the bottom of the form, click in the **Type of Organization** circle.
6. Type information for up to four company owners (Except for Individual Organizations). The Agent for Service is usually the attorney who incorporated the

company.

7. Click **Save**. A success message appears.

▼To apply for an Authority Account Number at a new location:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.


File Return | My Returns | Account Center | Lookup | Support | FAQ

Signed in as **RAMTestTaxpayer** LOG OFF

Business Location Information

If your company has multiple physical business locations, add them each here. To add a new physical business location, click the **Add New Location** button.

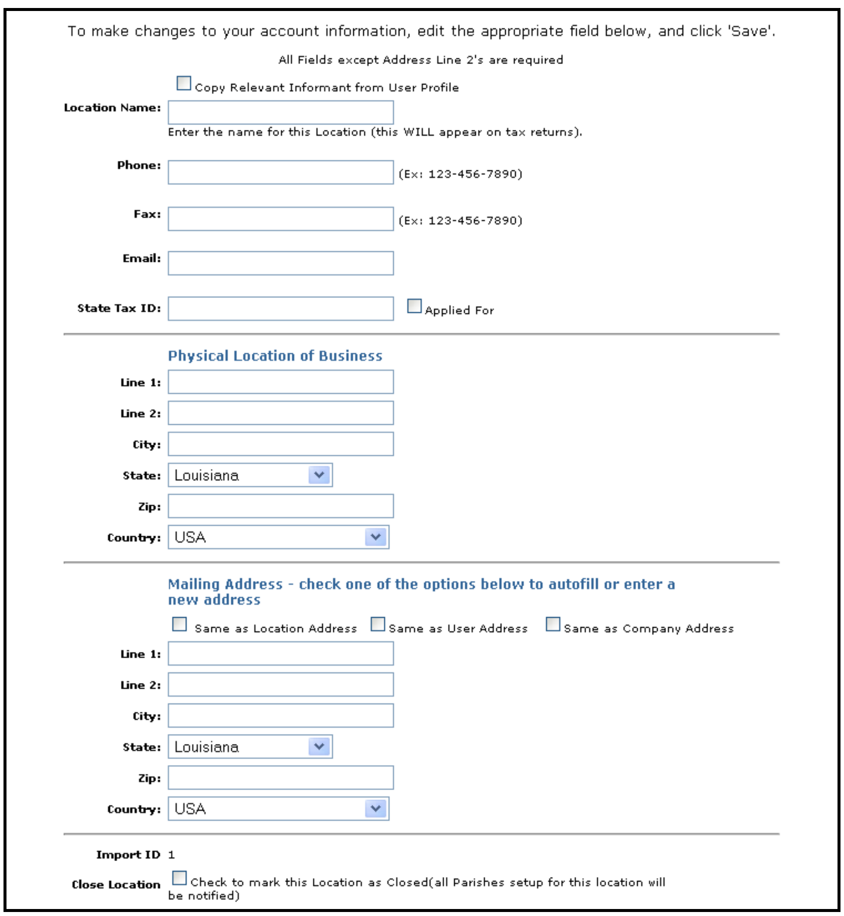
To view or edit exisiting business locations, select the location name from the drop-down list.

To apply for an Authority Account Number, select the location name from the drop-down list. Then, click the circle next to Yes at the bottom of the screen and complete the registration form.

Choose the Location: RAM Test Location 1
(You have added 1 physical business locations.)

To Add a PHYSICAL BUSINESS LOCATION click below
Add New Location

3. Click the **Add** button. Enter information for one business location at a time.


To make changes to your account information, edit the appropriate field below, and click 'Save'.

All Fields except Address Line 2's are required

Copy Relevant Informant from User Profile

Location Name:
Enter the name for this Location (this WILL appear on tax returns).

Phone: (Ex: 123-456-7890)

Fax: (Ex: 123-456-7890)

Email:

State Tax ID: Applied For

Physical Location of Business

Line 1:
Line 2:
City:
State: Louisiana
Zip:
Country: USA

Mailing Address - check one of the options below to autofill or enter a new address

Same as Location Address | Same as User Address | Same as Company Address

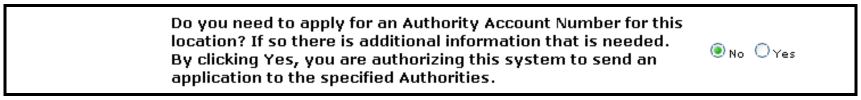
Line 1:
Line 2:
City:
State: Louisiana
Zip:
Country: USA

Import ID 1

Close Location Check to mark this Location as Closed(all Parishes setup for this location will be notified)

4. In the **Location Name** field, type a name for the location. This name will appear on tax returns, but can be any name you choose.
5. In the **State Tax ID** field, type your state Tax ID. If you have already applied for a state Tax ID, click the checkbox marked **Applied For** and continue.

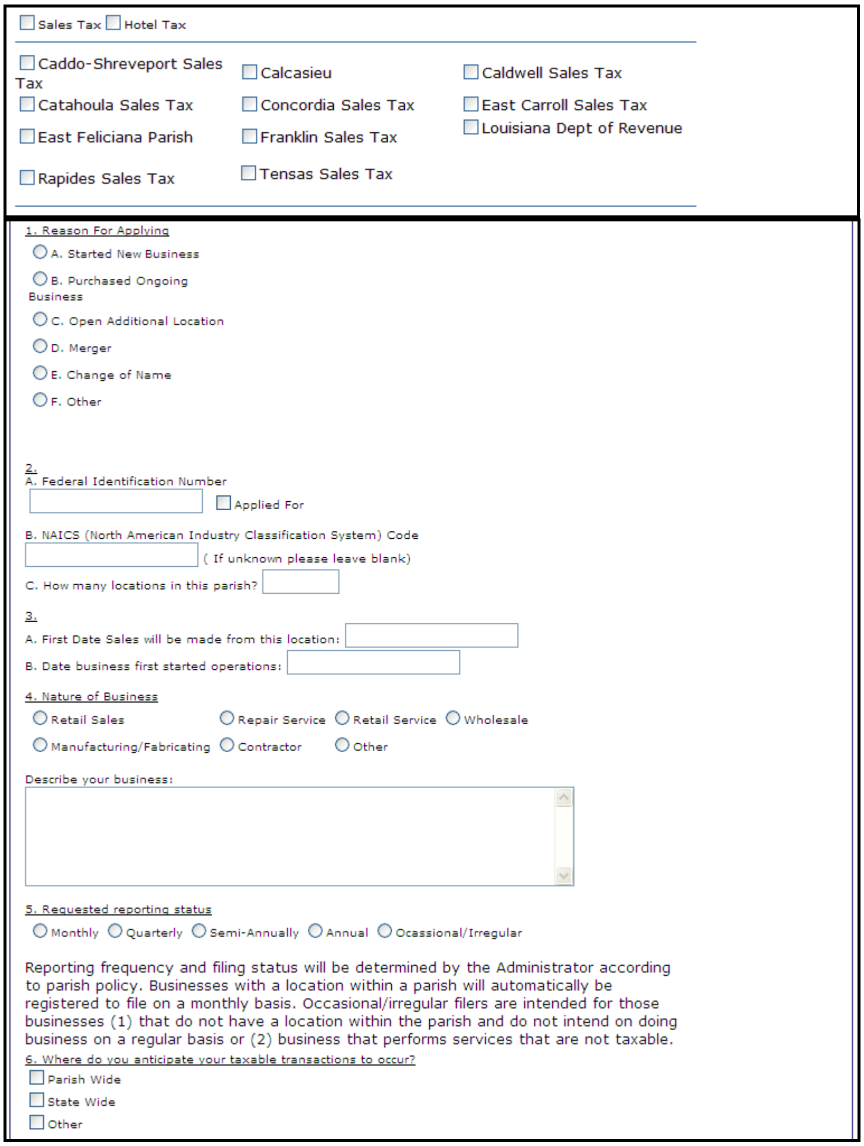
6. In the **Business Location Information** fields, click the checkboxes to copy relevant information from previous pages, or type your business location information.
7. Click the circle marked **Yes**.



Do you need to apply for an Authority Account Number for this location? If so there is additional information that is needed. By clicking Yes, you are authorizing this system to send an application to the specified Authorities.

No Yes

8. Check the boxes next to the types of returns you will be filing. You will receive a temporary Authority Account Number for each return you select.
9. Type information in the fields as instructed on the form.



Sales Tax Hotel Tax

Caddo-Shreveport Sales Tax
Calcasieu
Caldwell Sales Tax
Catahoula Sales Tax
Concordia Sales Tax
East Carroll Sales Tax
East Feliciana Parish
Franklin Sales Tax
Louisiana Dept of Revenue
Rapides Sales Tax
Tensas Sales Tax

1. Reason For Applying
A. Started New Business
B. Purchased Ongoing Business
C. Open Additional Location
D. Merger
E. Change of Name
F. Other

2.
A. Federal Identification Number
Applied For
B. NAICS (North American Industry Classification System) Code
(If unknown please leave blank)
C. How many locations in this parish?

3.
A. First Date Sales will be made from this location:
B. Date business first started operations:

4. Nature of Business
Retail Sales
Repair Service
Retail Service
Wholesale
Manufacturing/Fabricating
Contractor
Other

Describe your business:

5. Requested reporting status
Monthly Quarterly Semi-Annually Annual Ocassional/Irregular

Reporting frequency and filing status will be determined by the Administrator according to parish policy. Businesses with a location within a parish will automatically be registered to file on a monthly basis. Occasional/irregular filers are intended for those businesses (1) that do not have a location within the parish and do not intend on doing business on a regular basis or (2) business that performs services that are not taxable.

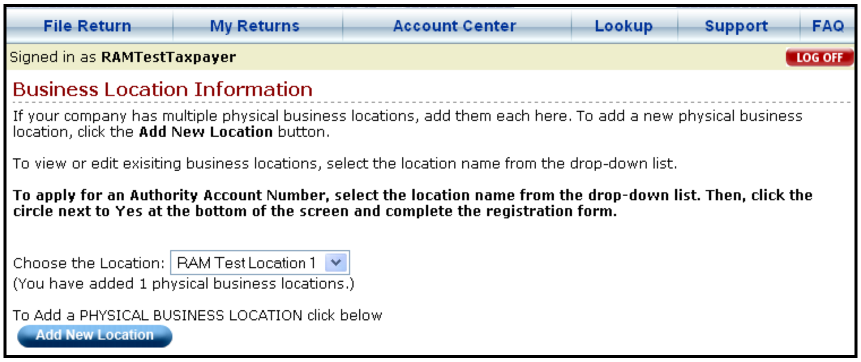
6. Where do you anticipate your taxable transactions to occur?
Parish Wide
State Wide
Other

10. Click **Save**. The **Business Location Information** page appears, and an Import ID has been assigned to the location.

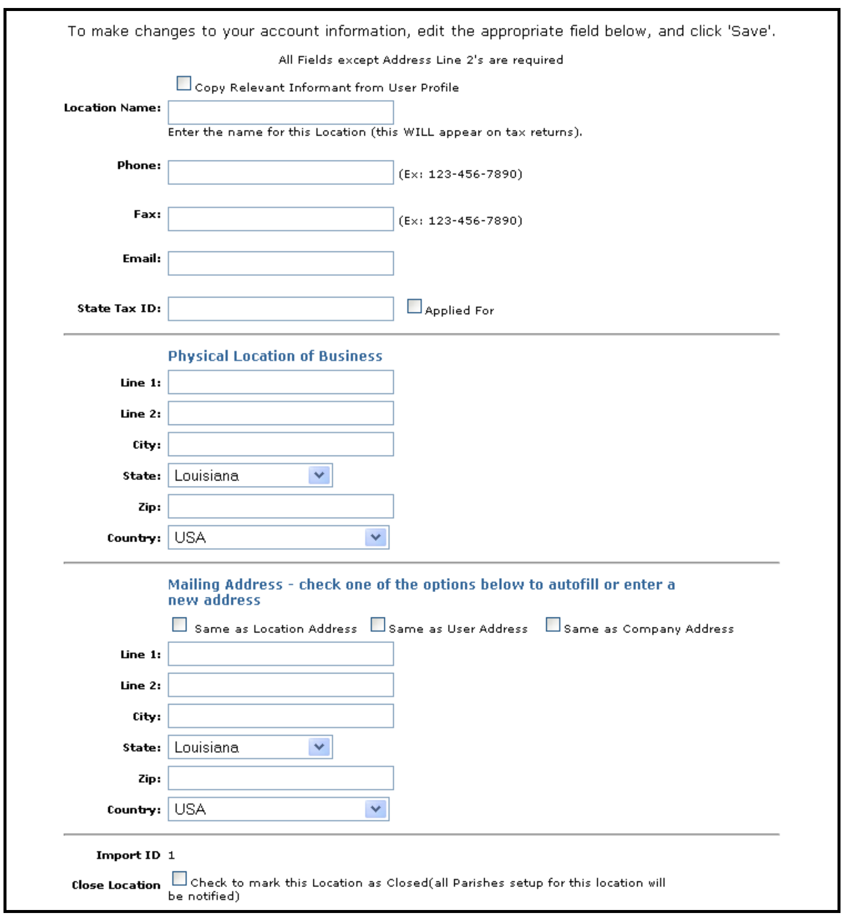
Editing Business Locations

▼**To edit a business location:**

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.



3. Select a location from the drop-down menu. The **Business Location Information** page appears.

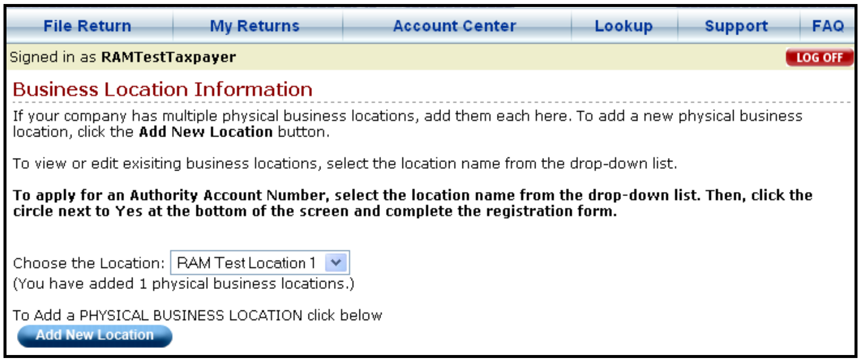


4. Type in the fields you wish to edit.
5. Click **Save**. A success message appears.

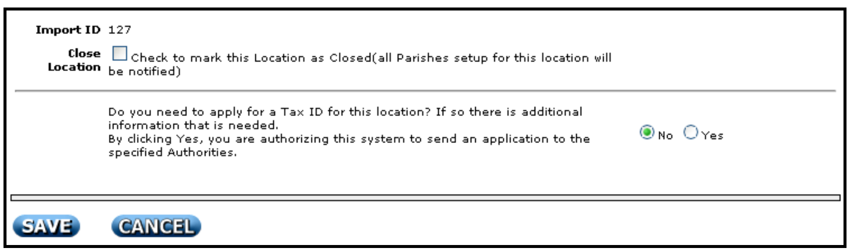
Marking a Business Location as Closed

▼To mark a business location as closed:

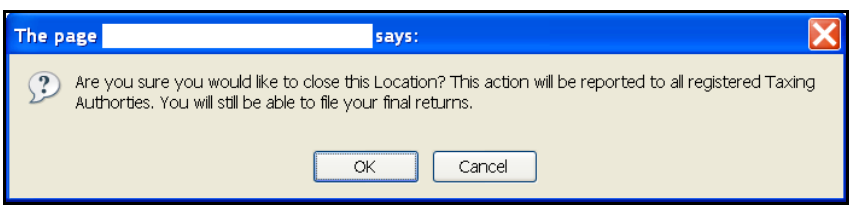
1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.



3. Select a location from the drop-down menu. The **Business Location Information** page appears.



4. Click the checkbox marked **Mark this Location as Closed**. A confirmation box appears.



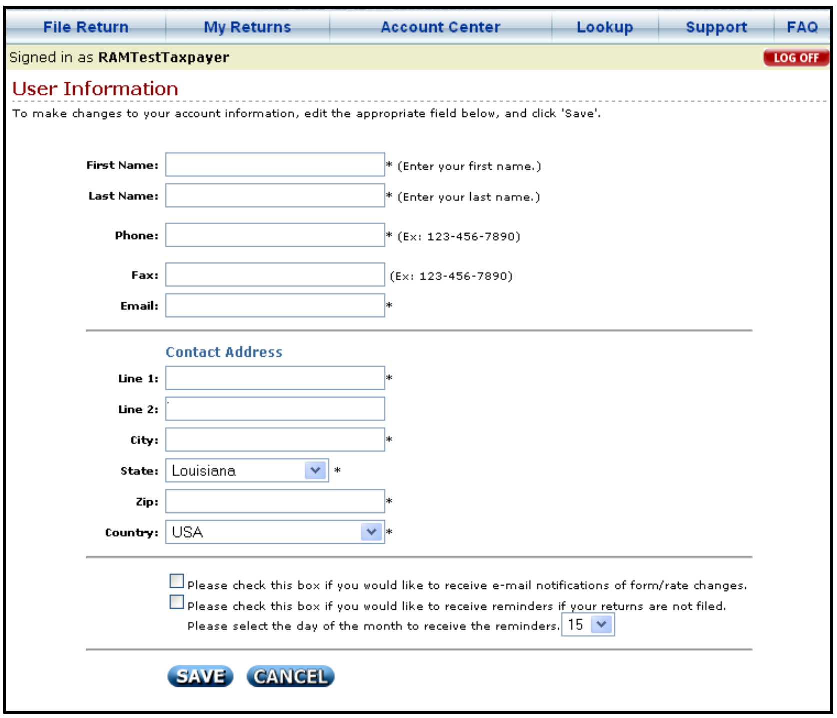
5. To confirm that you wish to mark the location as closed, click **OK**.
6. To cancel closing the location click **Cancel**.
7. Click **Save**. A success message appears.

Chapter 10
Managing User Accounts

Editing User Account Information

▼To edit user account information:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Click **User Information** on the right drop-down menu. The **User Information** page appears.

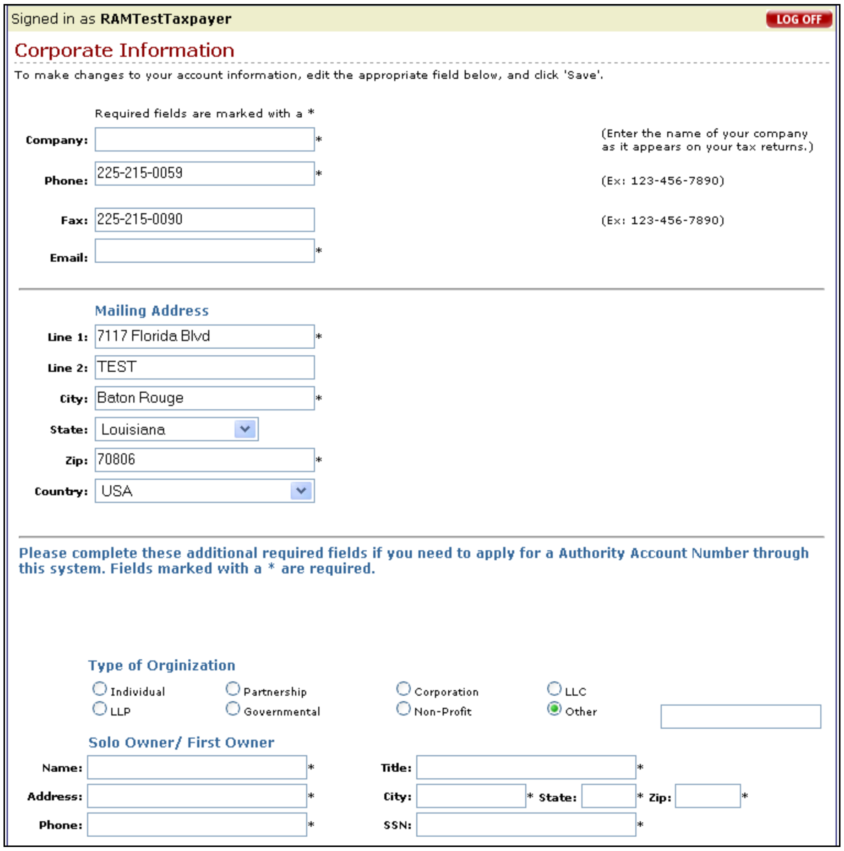


4. Type in the fields you wish to edit.
5. Click **Save**. A success message appears.

Editing Corporate Information

▼To edit company information:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Click **Corporate Information** on the right drop-down menu. The **Corporate Information** page appears.


Signed in as **RAMTestTaxpayer** LOG OFF

Corporate Information

To make changes to your account information, edit the appropriate field below, and click 'Save'.

Required fields are marked with a *

Company: * (Enter the name of your company as it appears on your tax returns.)

Phone: 225-215-0059 * (Ex: 123-456-7890)

Fax: 225-215-0090 (Ex: 123-456-7890)

Email: *

Mailing Address

Line 1: 7117 Florida Blvd *

Line 2: TEST

City: Baton Rouge *

State: Louisiana

Zip: 70806 *

Country: USA

Please complete these additional required fields if you need to apply for a Authority Account Number through this system. Fields marked with a * are required.

Type of Orginization

Individual, Partnership, Corporation, LLC, LLP, Governmental, Non-Profit, Other

Solo Owner/ First Owner

Name: * **Title:** *

Address: * **City:** * **State:** * **Zip:** *

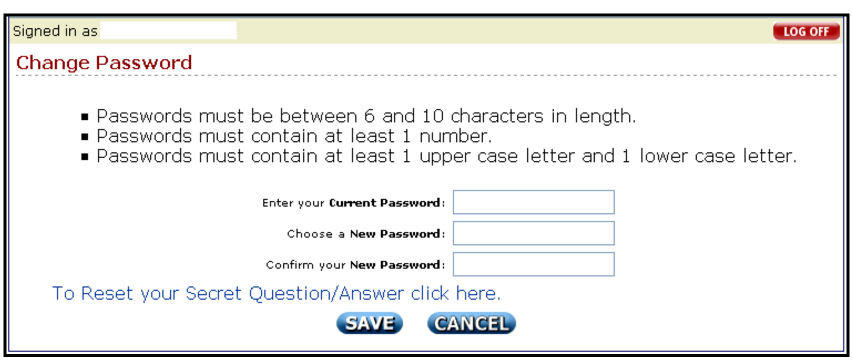
Phone: * **SSN:** *

4. Type in the fields you wish to edit.
5. Click **Save**. A success message appears.

Changing Your Password

▼To change your password:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Click **Change Password** on the right drop-down menu. The **Change Password** page appears.


Signed in as LOG OFF

Change Password

- Passwords must be between 6 and 10 characters in length.
- Passwords must contain at least 1 number.
- Passwords must contain at least 1 upper case letter and 1 lower case letter.

Enter your **Current Password**:

Choose a **New Password**:

Confirm your **New Password**:

To Reset your Secret Question/Answer click here.

SAVE CANCEL

4. In the **Current Password** field, type your current password.
5. In the **New Password** field, type a new password. In the **Confirm New Password** field, type the new password again.

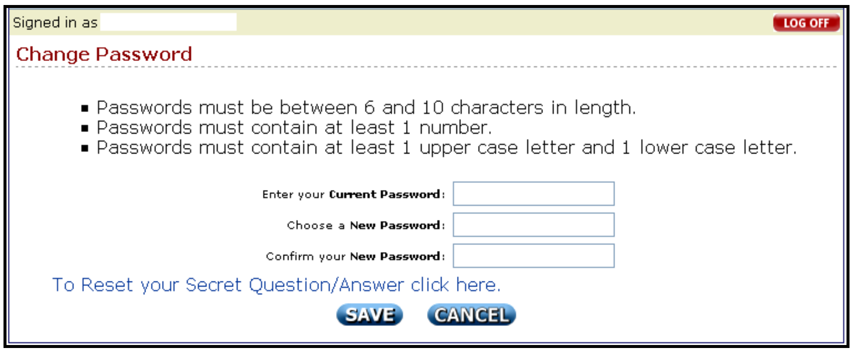
Note: Passwords must be at least six characters long, contain at least one number, and contain at least one capitalized letter.

6. Click **Save**. A success message appears.

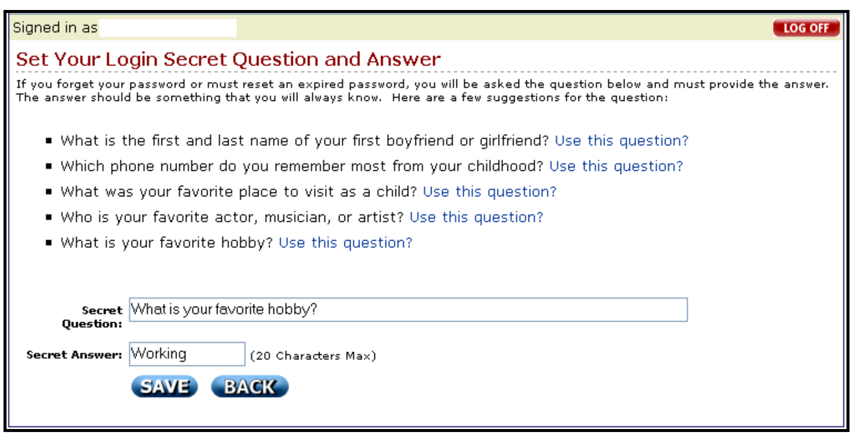
Changing Your Secret Question and Answer

▼To change your secret question and answer:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Click **Change Password** on the right drop-down menu. The **Change Password** page appears.



4. Click the link **To Reset your Secret Question/Answer**. The **Set Login Question/Answer** page appears.

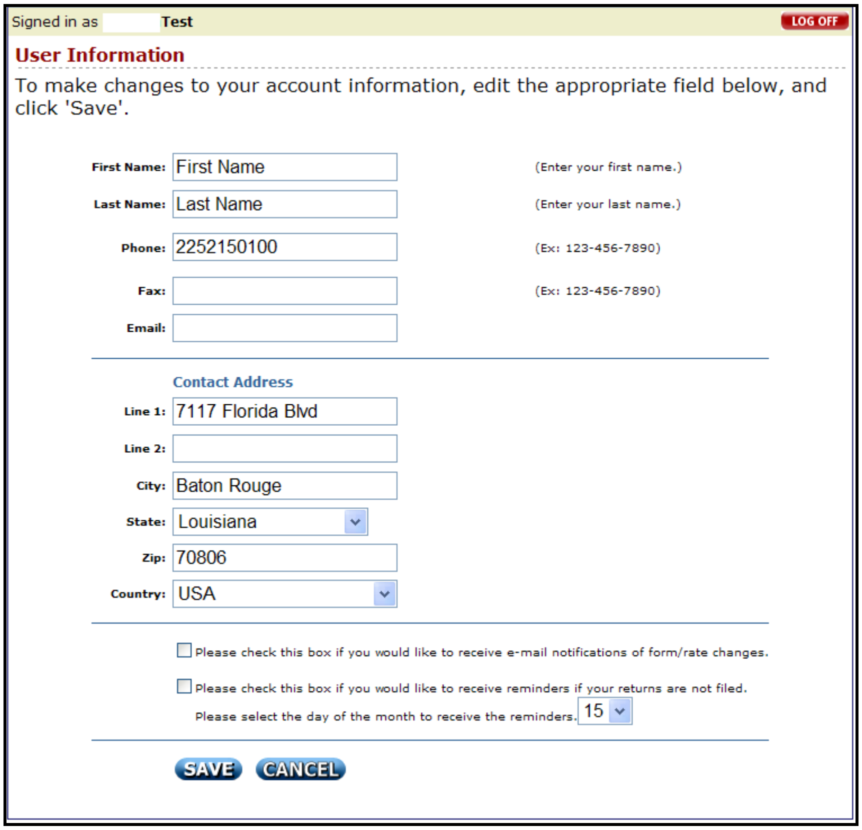


5. Type in the fields you wish to edit.
6. Click **Save**. The **File Return** page appears. Your Secret Question and Answer have been successfully saved.

Setting Email Notifications

▼To set email notifications:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Click **User Information** on the right drop-down menu. The **User Information** page appears.



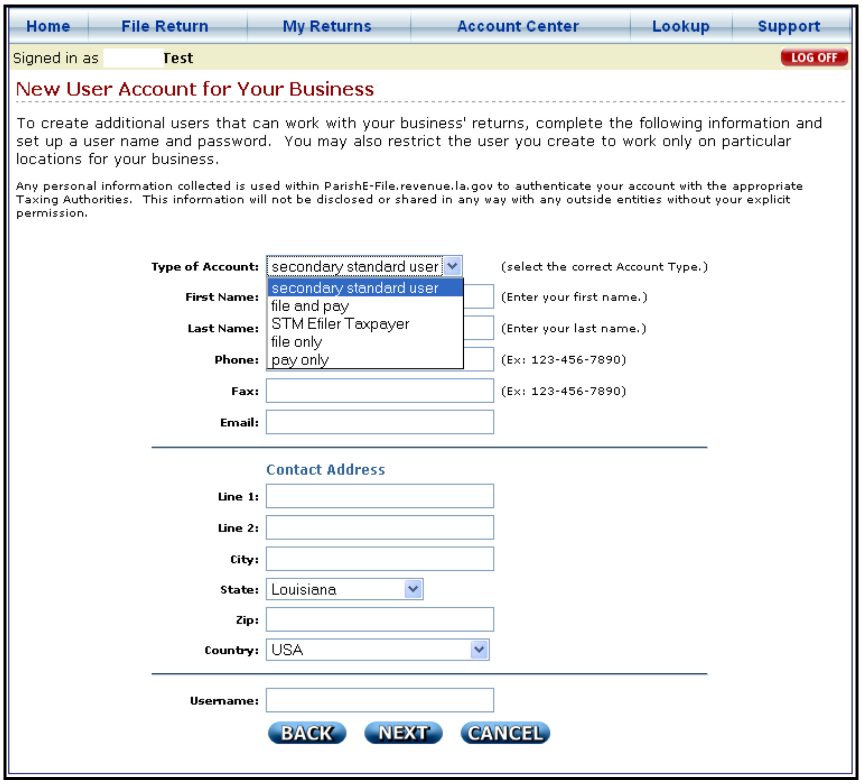
4. Click the first checkbox to receive email notifications of **form or rate change**s for returns you are registered to file.
5. Click the second checkbox to receive email reminders to **file returns**. Select the day of the month to receive emails from the drop-down menu.
6. Click **Save**.
7. To undo any of these settings, click the checkbox so that the checkbox is blank. Click **Save**.

Chapter 11
Managing Clerical Users

Creating Clerical Users

▼To create a clerical user:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Select **New Clerical User** from the right drop-down menu. The **New User Account** page appears.



4. Select the type of user account from the drop-down menu. Refer to the Clerical Users table to determine which type to choose based on the privileges it allows.
5. Type the contact information for the new user.

   Note: The system emails the default password for this account to the email address provided in this field.

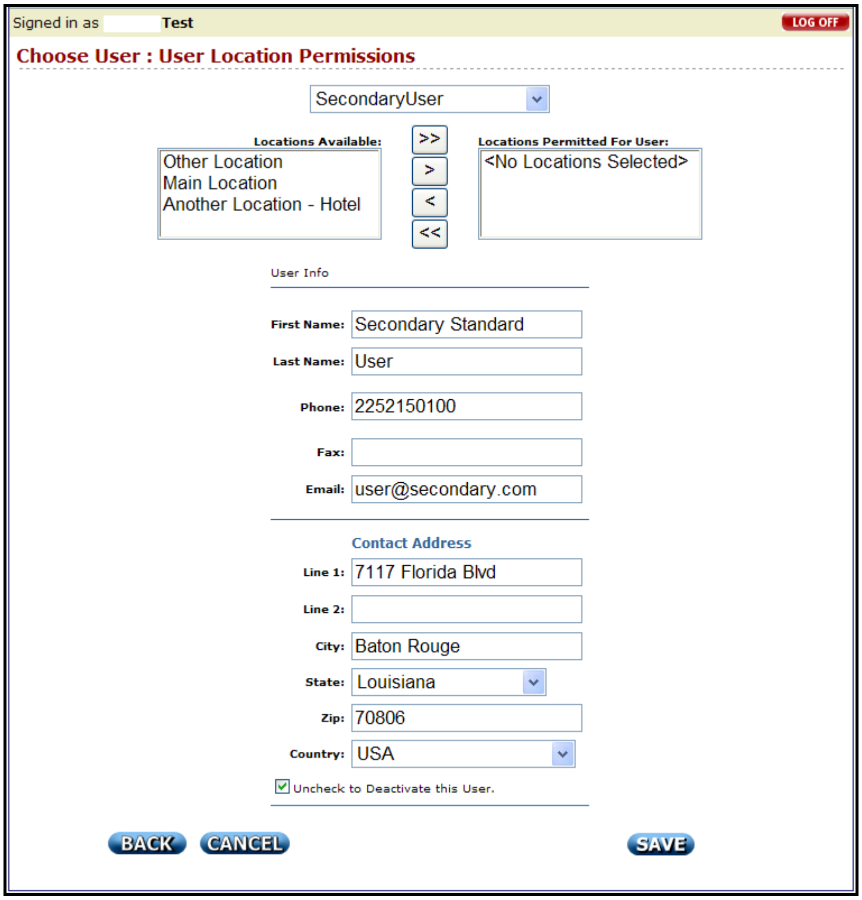
6. In the **User Name** field, type a user name for the clerical user.
7. Click **Next**. See **Assigning Clerical User Locations, Step 4**.

Assigning Clerical User Locations

▼To assign a clerical user location:

1. Place your mouse-pointer over **Account Center** on the menu bar.

2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Select **Manage Clerical Users** from the right drop-down menu. The **User Location Permissions** page appears.

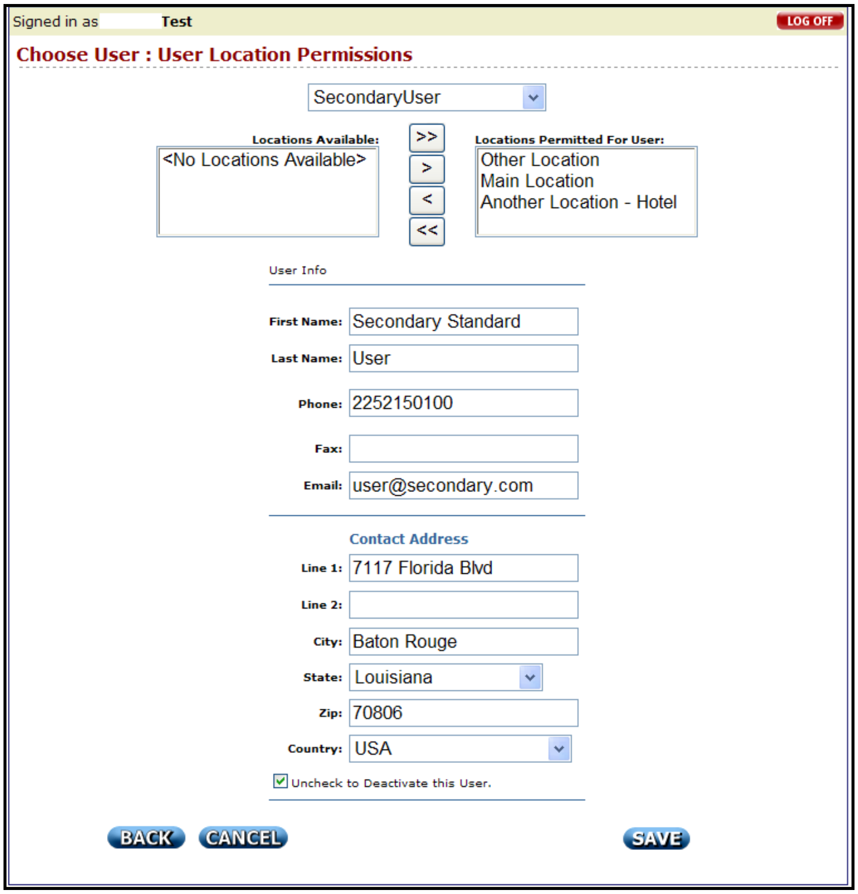


4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below. Available locations for the user appear in the box marked **Locations Available**.
5. To assign a location to a user, click on an available location. Click the **>** arrow to move it to the box marked **Locations Permitted**.
6. To assign all locations to a user, click the **>>** arrows. All locations appear in the box marked **Locations Permitted**.

Un-Assigning Clerical User Locations

▼To un-assign a clerical user location:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Select **Manage Clerical Users** from the right drop-down menu. The **User Location Permissions** page appears.

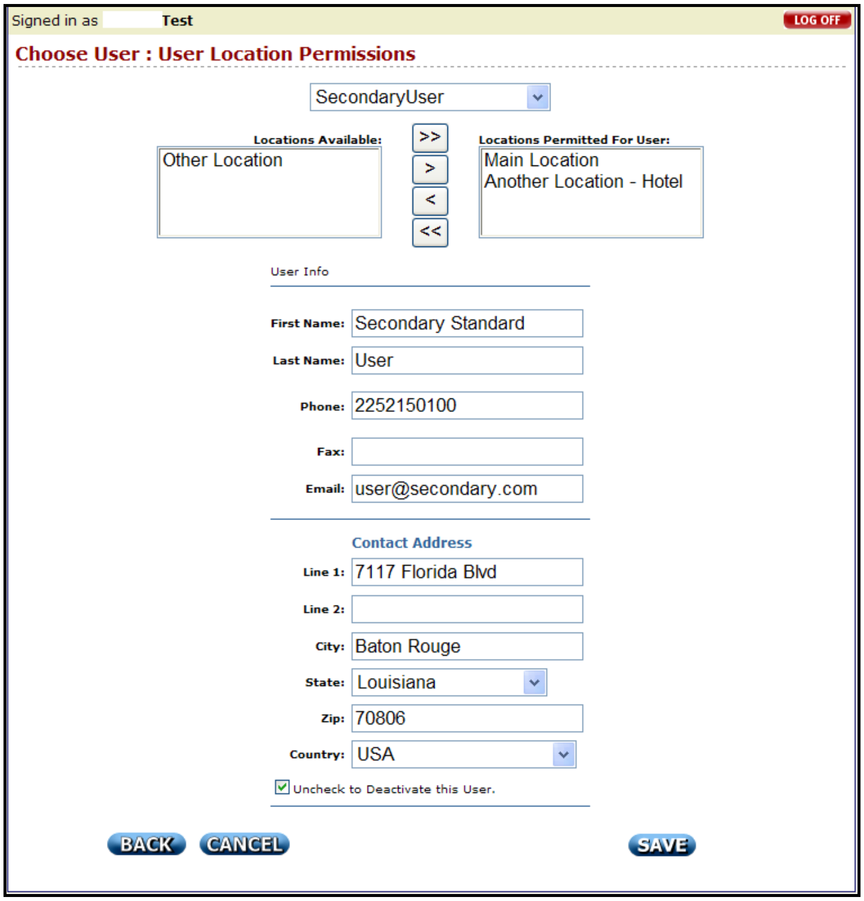


4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below. Permitted locations for the user appear in the box marked **Locations Permitted**.
5. To un-assign a location from a user, click on a permitted location. Click the **<** arrow to move it to the box marked **Available Locations**.
6. To un-assign all locations from a user, click the **<<** arrows. All locations appear in the box marked **Locations Available**.

Editing Clerical User Information

▼To edit clerical user information:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Select **Manage Clerical Users** from the right drop-down menu. The **User Location Permissions** page appears.

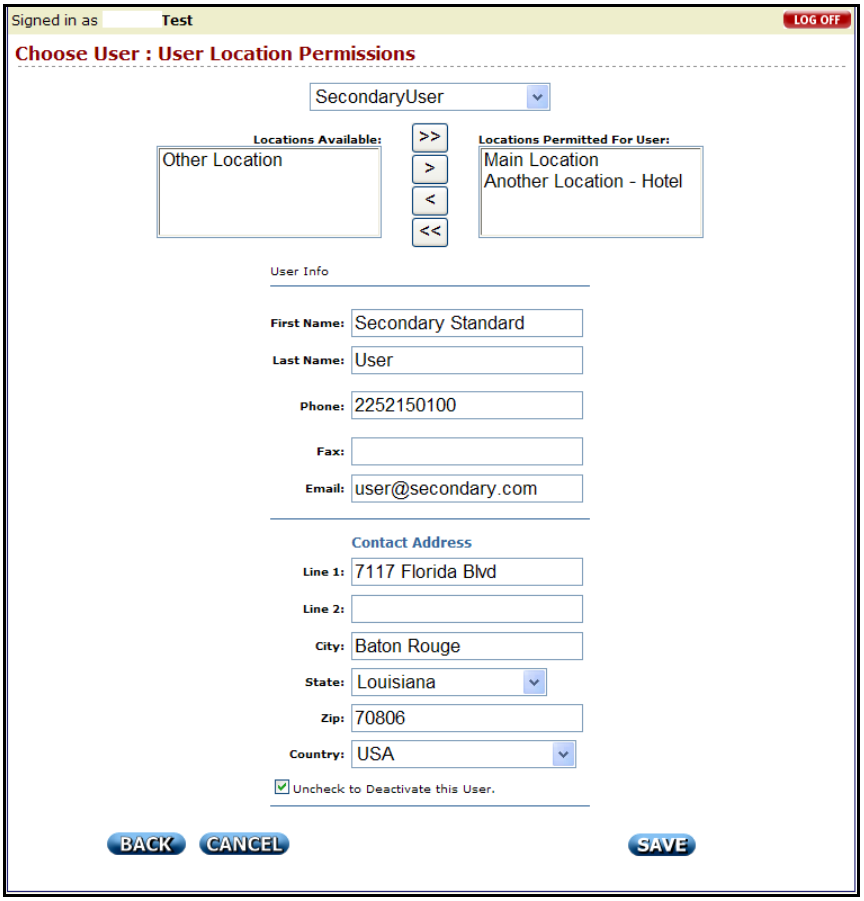


4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below.
5. Type in the fields you wish to edit.
6. Click **Save**.

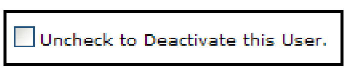
Deactivating Clerical Users

▼To deactivate a clerical user:

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Select **Manage Clerical Users** from the right drop-down menu. The **User Location Permissions** page appears.



4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below.
5. Click the checkbox marked **Deactivate this User** so that the checkbox does not have a check in it.

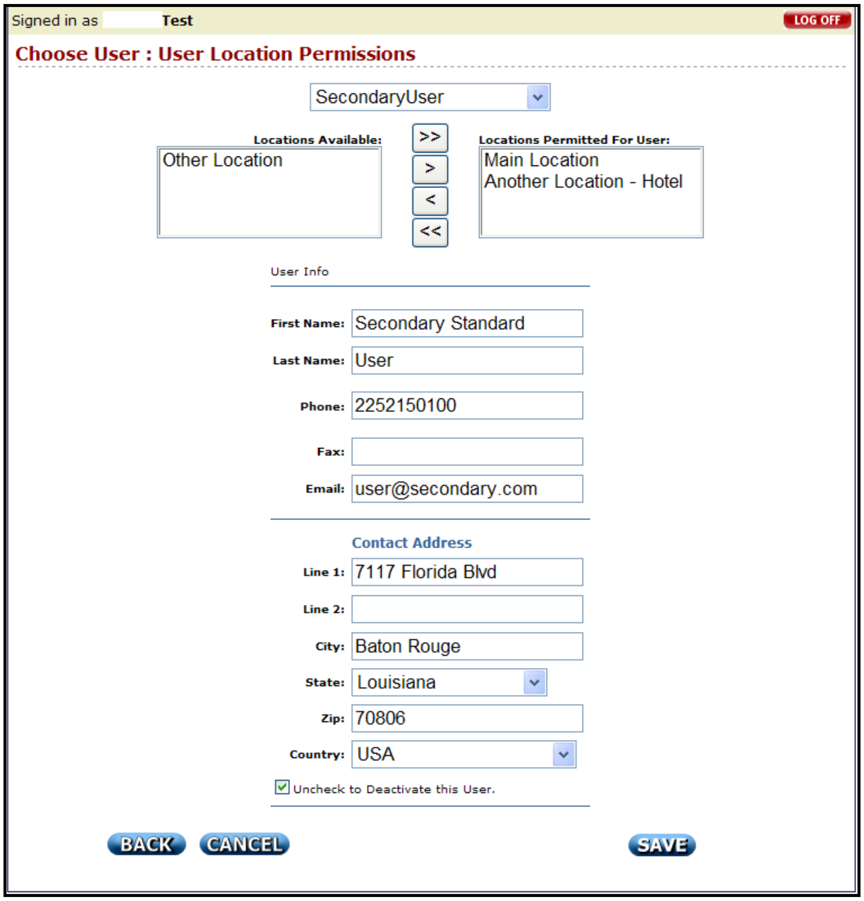


6. Click **Save**.

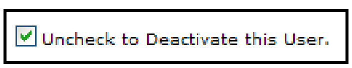
Reactivating Clerical Users

▼**To reactivate a clerical user:**

1. Place your mouse-pointer over **Account Center** on the menu bar.
2. Place your mouse-pointer over **Account Settings** on the drop-down menu.
3. Select **Manage Clerical Users** from the right drop-down menu. The **User Location Permissions** page appears.



4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below.
5. Click the checkbox marked **Deactivate this User** so that the checkbox has a check in it.



6. Click **Save**.

User Privileges Table

	Secondary Standard User	File-and-Pay User	File-Only User	Pay-Only User
Privileges:				
Lookup Parish Information and Tax Rates	X	X	X	X
Manage Company Information	X			
Manage Business Locations	X	X		
Set up New Returns	X	X	X	
Import Return Files	X	X	X	
File Returns	X	X	X	
Un-file Returns	X	X	X	X
View and Print Returns	X	X	X	X
Delete Existing Returns	X	X	X	X
Manage Payment Accounts (Including ACH Set up)	X	X		X
Make Payments/ Pay Pending Returns	X	X		X
Manage Personal User Information	X	X	X	X
Manage Personal Password	X	X	X	X
Activate email notifications and reminders	X	X	X	X
Create Clerical Users	X			
Manage Clerical Users	X			
Deactivate Clerical Users				

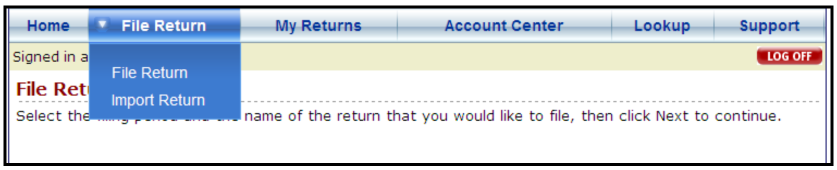
Appendix A
Importing Return Files – Taxpayer

The Import is accomplished with a comma delimited text file. The file can contain multiple returns with different locations.

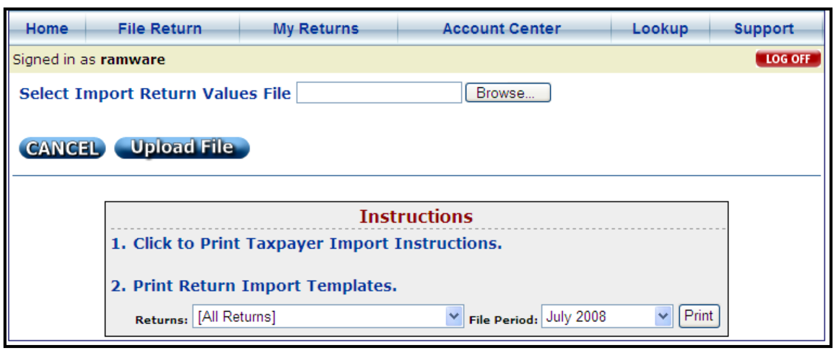
Create the import file using the program of your choice. Be sure to save your import file in a secure and accessible location. Refer to the **File Structure** guide to ensure your file is formatted correctly and meets the specifications for the return and period.

▼To import returns:

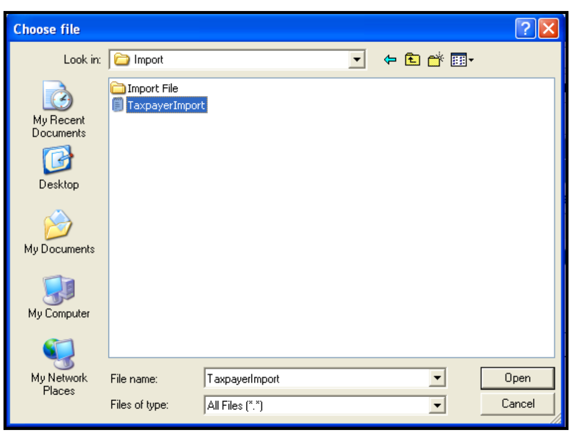
1. Place your mouse-pointer over **File Return** on the menu bar.
2. Select **Import Return** from the drop-down menu. The **Import Page** appears.



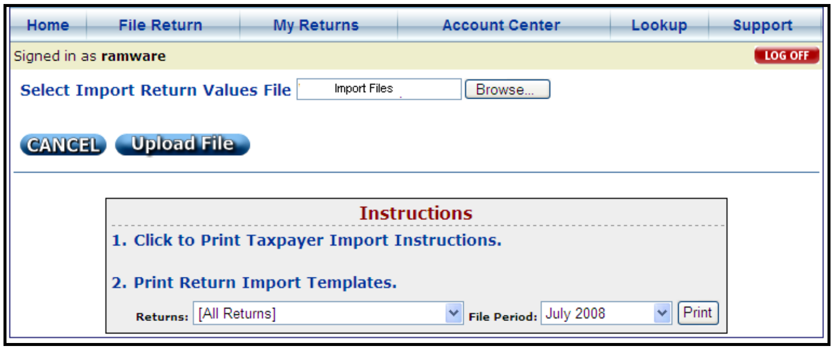
3. To find the import file, click the **Browse** button.



4. Select the file. Then click **Open**.



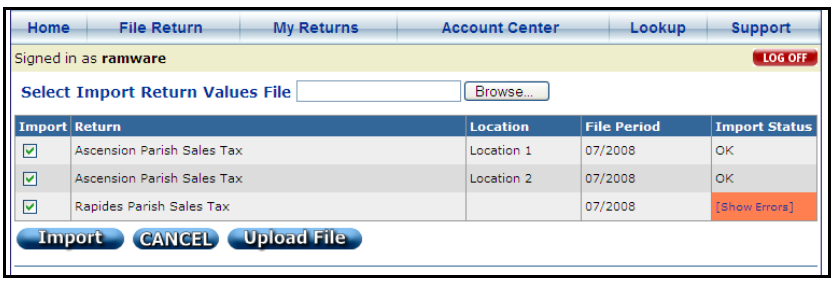
5. The file name appears in the field. Click **Upload File.**



6. A summary of import file information appears. The column labeled **Import Status** shows any errors detected in the file. If there are no errors detected, move to the section below labeled **No Errors**.

Errors:

If there are any errors in the file, the import status displays **[Show Errors].** Click **[Show Errors]** to see the line location and description of the errors.



The error in following screen shows that the Location Identifier is not valid. The location for Location Identifier 19 has not been setup in the return information. Click **Cancel**.

7. Revisit the original file to reconcile the error:

    ASCENS,7/2008,2
    Line1,1000
    Line2,50
    Line8,100
    Line8_Exemption,New Computer
    //////////
    ASCENS,7/2008,3
    Line1,1000
    Line2,50
    Line8,100
    Line8_Explanation,New Computers
    //////////
    RAPIDE,7/2008,19
    Line1,600
    Line3,600
    //////////

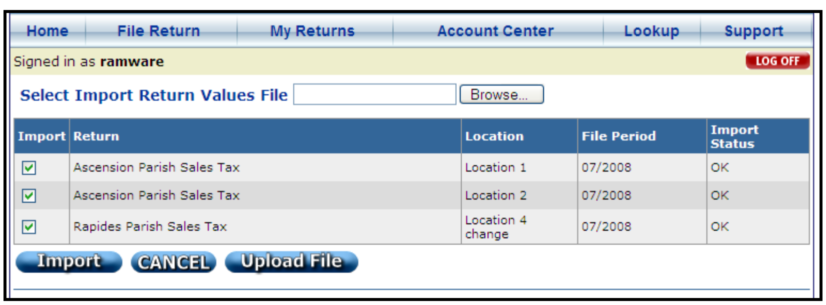
    The correct Location Identifier for this return is 18, not 19.
    Edit the information and save the file. Upload the new file following the same procedure.

    ### No Errors:

    If there are no errors in the file, the import status displays **OK**.

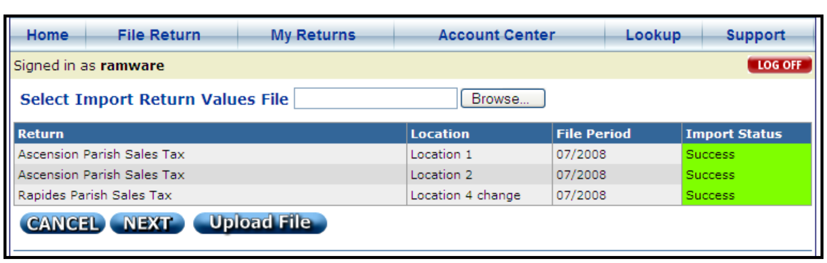
    The checkboxes in the Import column are automatically checked. Uncheck the checkboxes next to returns that should not be imported.

8. To import the checked returns, click **Import**.



9. The files are imported into the system when the status of the import is displayed in the **Import Status** column as **Success**. Click **Next** to continue the filing process.

    Note: A successful import does **not** mean that the return has been filed.



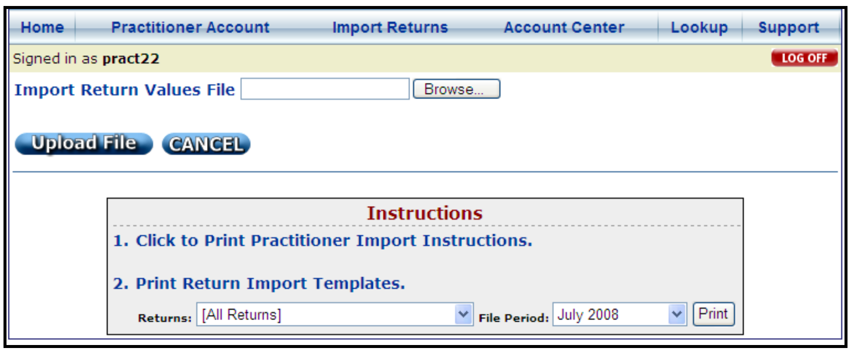
Appendix B
Importing Return Files – Practitioner

The import is accomplished with a comma delimited text file. The file can contain multiple returns with different locations for multiple clients. Clients must already be setup in ParishE-File.com and have authorized you as their Practitioner.

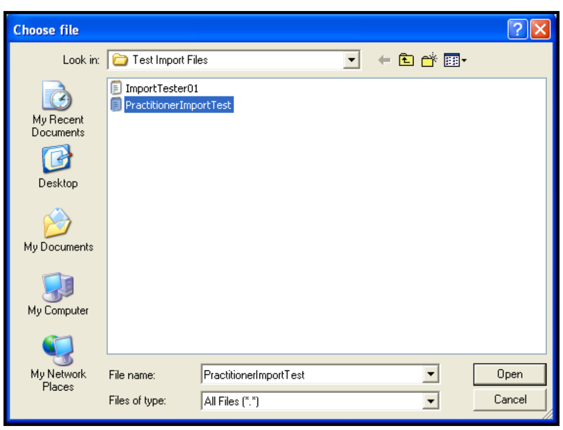
Create the import file using the program of your choice. Be sure to save your import file in a secure and accessible location. Refer to the **File Structure** guide below to ensure your file is formatted correctly and meets the specifications for the return and period.

▼To import returns:

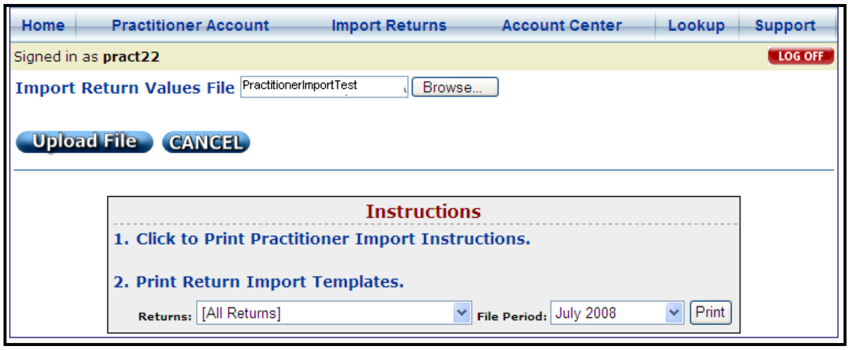
1. Click **Import Returns** on the menu bar. The **Import Page** appears.
2. To find the import file, click the **Browse** button.



3. Select the file. Then click **Open**.



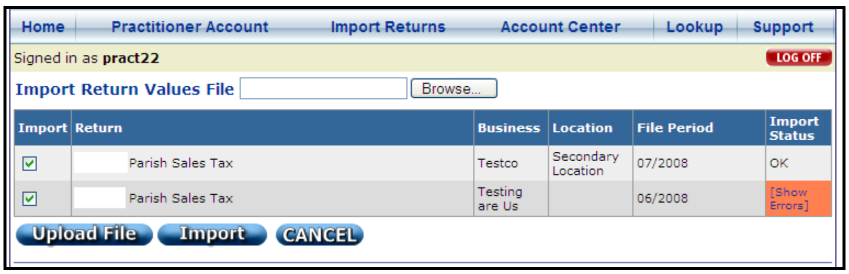
4. The file name appears in the field. Click **Upload File**.



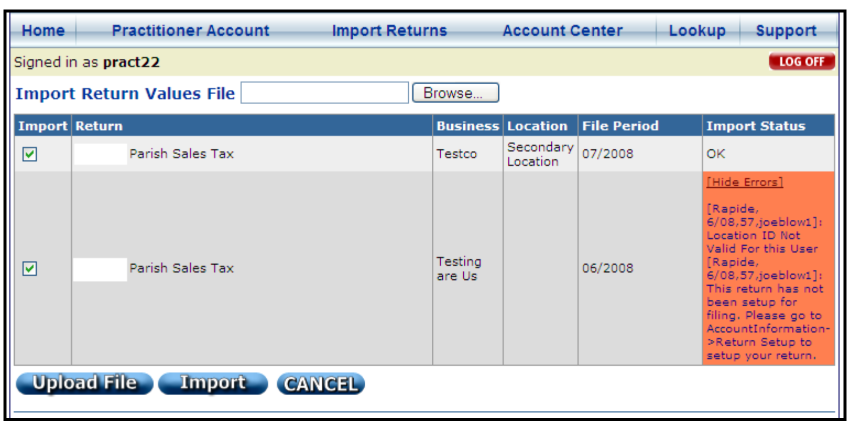
5. A summary of import file information appears. The column labeled **Import Status** shows any errors detected in the file. If there are no errors detected, move to the section below labeled **No Errors**.

Errors:

If there are any errors in the file, the import status displays **[Show Errors].** Click **[Show Errors]** to see the line location and description of the errors.



The error in following screen shows that the Location Identifier and User Name do not correspond. Click **Cancel**.



6. Revisit the original file to reconcile the error:

Rapide,6/08,57,joeblow1
Line1,10540
Line2,20
Line3,30
Line4,40
Line5,50
Line6,60
Line7,70
Line9,90
Line10,100

Line8,80
Line8_Explanation,special deduction test
LineA_13,10000.00
LineB_13,10000.00

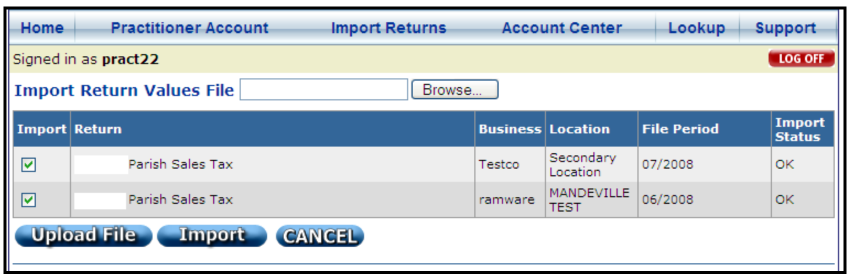
The correct User Name for Location Identifier 57 is joeblow, not joeblow1. Edit the information and save the file. Upload the new file following the same procedure.

No Errors:

If there are no errors in the file, the import status displays **OK**.

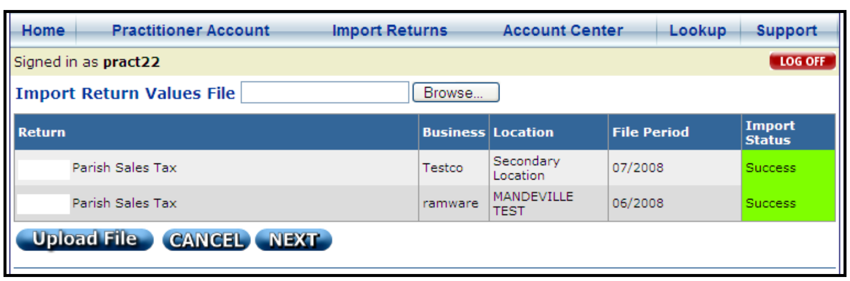
The checkboxes in the Import column are automatically checked. Uncheck the checkboxes next to returns that should not be imported.

7. To import the checked returns, click **Import**.



8. The files are imported into the system when the status of the import is displayed in the **Import Status** column as **Success**. Click **Next** to continue the filing process.

Note: A successful import does **not** mean that the return has been filed.



File Structure

There are two parts to the file, the Header and the Return Data. Each return included in the file must contain both parts and a separator.

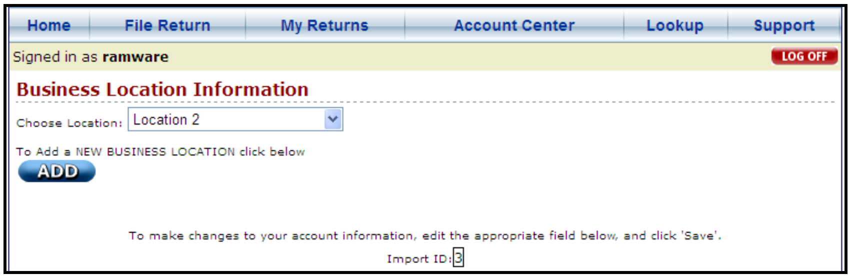
In order to import correctly, the import file must meet the following specifications:

The Header

The Header line contains the Short Name of the Return, the File Period (MM/YYYY), the Location Identifier, and the User Name of the client.

The Short Name for each return is listed in a table at the end of this document.

The Location Identifier is a numeric ID unique to a business and its location. To find the Location Identifier, select a User Account. Click **Account Center** on the menu bar. Then, click **Business Locations**. Select the location from the drop-down menu. The Location Identifier is the **Import ID**.



The User Name is the User Name listed for the company on the Practitioner Account screen.

The example Header line below indicates a Rapides Parish sales tax return for May 2008, business location with Location Identifier 11, and User Name MyClient1.

Example Header:

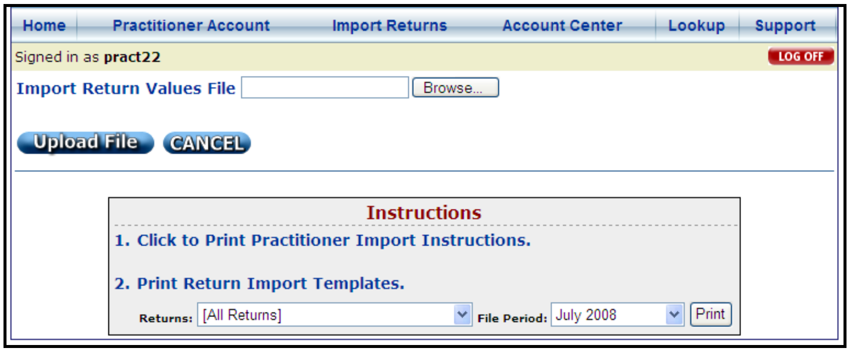
RAPIDE,5/2008,11,MyClient1

The Return Data

Use the line labels printed on the **Return Import Templates** to determine where to enter amounts and which line labels to use.

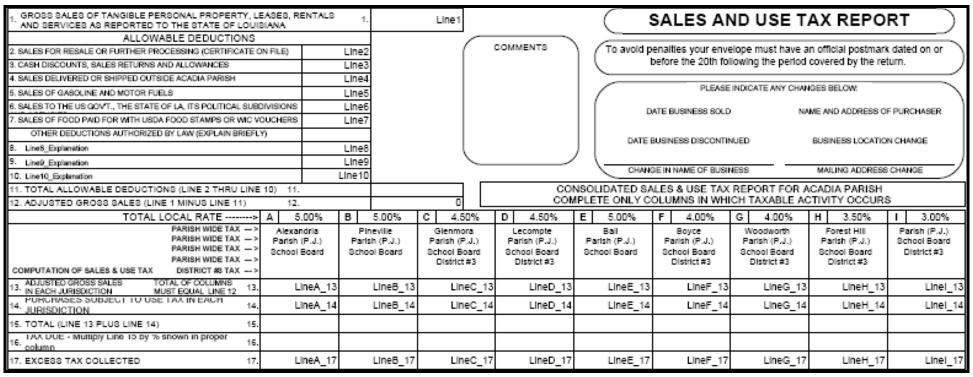
▼**To access the Templates**:

1. Click **Import Returns** on the menu bar. The **Import Page** appears.



2. Select a **Return** and **File Period** from the drop-down menus. Then, click **Print**.

This is part of the Rapides Parish sales tax return for June 2008:



SALES AND USE TAX REPORT

COMMENTS

To avoid penalties your envelope must have an official postmark dated on or before the 20th following the period covered by the return.

PLEASE INDICATE ANY CHANGES BELOW:

DATE BUSINESS SOLD | NAME AND ADDRESS OF PURCHASER
DATE BUSINESS DISCONTINUED | BUSINESS LOCATION CHANGE
CHANGE IN NAME OF BUSINESS | MAILING ADDRESS CHANGE

1. GROSS SALES OF TANGIBLE PERSONAL PROPERTY, LEASES, RENTALS AND SERVICES AS REPORTED TO THE STATE OF LOUISIANA 1.	Line1
ALLOWABLE DEDUCTIONS	
2. SALES FOR RESALE OR FURTHER PROCESSING (CERTIFICATE ON FILE)	Line2
3. CASH DISCOUNTS, SALES RETURNS AND ALLOWANCES	Line3
4. SALES DELIVERED OR SHIPPED OUTSIDE ACADIA PARISH	Line4
5. SALES OF GASOLINE AND MOTOR FUELS	Line5
6. SALES TO THE US GOVT., THE STATE OF LA, ITS POLITICAL SUBDIVISIONS	Line6
7. SALES OF FOOD PAID FOR WITH USDA FOOD STAMPS OR WIC VOUCHERS	Line7
OTHER DEDUCTIONS AUTHORIZED BY LAW (EXPLAIN BRIEFLY)	
8. Line8_Explanation	Line8
9. Line9_Explanation	Line9
10. Line10_Explanation	Line10
11. TOTAL ALLOWABLE DEDUCTIONS (LINE 2 THRU LINE 10) 11.	
12. ADJUSTED GROSS SALES (LINE 1 MINUS LINE 11) 12.	0

CONSOLIDATED SALES & USE TAX REPORT FOR ACADIA PARISH
COMPLETE ONLY COLUMNS IN WHICH TAXABLE ACTIVITY OCCURS

TOTAL LOCAL RATE -------->	A 5.00%	B 5.00%	C 4.50%	D 4.50%	E 5.00%	F 4.00%	G 4.00%	H 3.50%	I 3.00%
PARISH WIDE TAX --> PARISH WIDE TAX --> PARISH WIDE TAX --> PARISH WIDE TAX --> COMPUTATION OF SALES & USE TAX DISTRICT #8 TAX -->	Alexandria Parish (P.J.) School Board	Pineville Parish (P.J.) School Board	Glenmora Parish (P.J.) School Board District #3	Lecompte Parish (P.J.) School Board District #3	Ball Parish (P.J.) School Board	Boyce Parish (P.J.) School Board District #3	Woodworth Parish (P.J.) School Board District #3	Forest Hill Parish (P.J.) School Board District #3	Parish (P.J.) School Board District #3
13. ADJUSTED GROSS SALES IN EACH JURISDICTION TOTAL OF COLUMNS MUST EQUAL LINE 12 13.	LineA_13	LineB_13	LineC_13	LineD_13	LineE_13	LineF_13	LineG_13	LineH_13	LineI_13
14. PURCHASES SUBJECT TO USE TAX IN EACH JURISDICTION 14.	LineA_14	LineB_14	LineC_14	LineD_14	LineE_14	LineF_14	LineG_14	LineH_14	LineI_14
15. TOTAL (LINE 13 PLUS LINE 14) 15.									
16. TAX DUE - Multiply Line 15 by % shown in proper column 16.									
17. EXCESS TAX COLLECTED 17.	LineA_17	LineB_17	LineC_17	LineD_17	LineE_17	LineF_17	LineG_17	LineH_17	LineI_17

Any field on the template without a line label cannot be imported because it is a calculated field.

The Return Data lines contain the line label and dollar amount. To enter Adjusted Gross sales of 1000.00 in Line 13 Column B on the return, enter **LineB_13,1000.00** in the import file.

If an entry is made on lines 8-10 (other deductions), an explanation is required. Explanations in Lines 8-10 cannot exceed 50 characters.

To enter an Explanation in line 8 on the return, enter **Line8_Explanation,Newspapers** in the import file.

Example Return Data:

Line1,2033.43
Line8,33.43
Line8_Explanation,Newspapers
LineA_13,1000.00
LineB_13,1000.00
//////////

The return separator must follow each return, including the last return in the file. It consists of ten forward slashes (/).

Below is an example of a complete import file for multiple taxpayers. This file shows a Louisiana State return for June 2008, Location Identifier 55, MyClient1, **and** a Rapides Parish Sales Tax return for June 2008, Location Identifier 54, MyClient2.

Example:

```
LA,6/2008,55,MyClient1
Line1,1000
Line2,50
//////////
RAPIDE,6/2008,54,MyClient2
Line1,1100
Line8,100
Line8_Explanation,Special Deduction
LineA_13,1000
//////////
```

Short Name List

Hotel/Motel Tax and other specialty tax returns are unavailable until November 1, 2008.

Return	Short Name	Return	Short Name
Acadia Parish Sales Tax	ACADIA	Lafayette Parish Hotel/Motel Tax	LAFAYEHOT
Allen Parish Sales Tax	ALLEN	Lafourche Parish Sales Tax	LAFOUR
Ascension Parish Sales Tax	ASCENS	Lafourche Parish Hotel/Motel Tax	LAFOURHOT
Ascension Parish Hotel/Motel Tax	ASCENSHOT	LaSalle Parish Sales Tax	LASALL
Assumption Parish Sales Tax	ASSUMP	Lincoln Parish Sales Tax	LINCOL
Avoyelles Parish Sales Tax	AVOYEL	Lincoln Parish Hotel/Motel Tax	LINCOLHOT
Beauregard Parish Sales Tax	BEAURE	Livingston Parish Sales Tax	LIVING
Bienville Parish Sales Tax	BIENVI	Livingston Parish Hotel/Motel Tax	LIVINGHOT
Bossier Parish Sales Tax	BOSSIE	Louisiana State Sales Tax	LA
Bossier City Hotel/Motel	BOSSIEHOT	Louisiana State Hotel/Motel Tax	LAHOT
Caddo Parish Sales Tax	CADDO	Louisiana State Hotel/Motel Tax (Orleans Parish & Jefferson Parish)	LAHOTDS
Caddo Parish Hotel/Motel Tax	CADDOHOT	Madison Parish Sales Tax	MADISO
Calcasieu Parish Sales Tax	CALCAS	Morehouse Parish Sales Tax	MOREHO
Calcasieu Parish Hotel/Motel Tax	CALCASHOT	Morehouse Parish Hotel/Motel Tax	MOREHOHOT
Caldwell Parish Sales Tax	CALDWE	Natchitoches Parish Sales Tax	NATCHI
Cameron Parish - NO PARISH SALES TAX COLLECTED		Natchitoches Parish Hotel/Motel Tax	NATCHIHOT
Catahoula Parish Sales Tax	CATAHO	New Orleans Exhibition Hall Authority	NOEXIB
Claiborne Parish Sales Tax	CLAIBO	Orleans Sales/Parking Tax	ORLSAL
Concordia Parish Sales Tax	CONCOR	Orleans Parish Hotel/Motel Tax	ORLHOT
DeSoto Parish Sales Tax	DESOTO	Ouachita Parish Sales Tax	OUACHI
East Baton Rouge Parish Sales Tax	EBATON	Ouachita Parish Hotel/Motel Tax	OUACHIHOT
East Baton Rouge Parish Hotel/Motel Tax	EBRHOT	Plaquemines Parish Sales Tax	PLAQUE
East Carroll Parish Sales Tax	ECARRO	Pointe Coupee Parish Sales Tax	POINTE
East Feliciana Parish Sales Tax	EFELIC	Pointe Coupee Parish Hotel/Motel Tax	POINTEHOT
Evangeline Parish Sales Tax	EVANGE	Rapides Parish Sales Tax	RAPIDE
Franklin Parish Sales Tax	FRANKL	Rapides Parish Hotel/Motel Tax	RAPIDEHOT
Grant Parish Sales Tax	GRANT	Red River Parish Sales Tax	REDRIV
Iberia Parish Sales Tax	IBERIA	Richland Parish Sales Tax	RICHLA
Iberville Parish Sales Tax	IBERVI	Sabine Parish Sales Tax	SABINE
Iberville Parish Hotel/Motel Tax	IBERVIHOT	Sabine Parish Hotel/Motel Tax	SABINEHOT
Jackson Parish Sales Tax	JACKSO	St. Bernard Parish Sales Tax	STBERN
Jackson Parish Hotel/Motel Tax	JACKSOHOT	St. Charles Parish Sales Tax	STCHAR
Jefferson Davis Parish Sales Tax	JDAVIS	St. Charles Parish Hotel/Motel Tax	STCHARHOT
Jefferson Davis Hotel/Motel Tax	JDAVISHOT	St. Helena Parish Sales Tax	STHELE
Jefferson Parish Food and Drug	JEFFER	St. James Parish Sales Tax	STJAME
Jefferson Parish General Sales Tax	JEFFERGS	St. John the Baptist Parish Sales Tax	STJOHN
Jefferson Parish Hotel/Occupancy Tax - East Bank	JEFFERHOE	St. John the Baptist Parish Hotel/Motel Tax	STJOHNHOT
Jefferson Parish Hotel/Occupancy Tax - West Bank	JEFFERHOW	St. Landry Parish Sales Tax	STLAND
Jefferson Parish Food/Drug Airport Tax	JEFFERAFD	St. Martin Parish Sales Tax	STMART
Jefferson Parish General Sales Airport Tax	JEFFERAGS	St. Mary Parish Sales Tax	STMARY
Lafayette Parish Sales Tax	LAFAYE	St. Mary Parish Hotel/Motel Tax	STMARYHOT

St. Tammany Parish Sales Tax	STTAMM		
Tangipahoa Parish Sales Tax	TANGIP		
Tensas Parish Sales Tax	TENSAS		
Terrebonne Parish Sales Tax	TERREB		
Terrebonne Parish Hotel/Motel Tax	TERREBHOT		
Union Parish Sales Tax	UNION		
Vermilion Parish Sales Tax	VERMIL		
Vermilion Parish Hotel/Motel Tax	VERMILHOT		
Vernon Parish Sales Tax	VERNON		
Vernon Parish Hotel/Motel Tax	VERNONHOT		
Washington Parish Sales Tax	WASHIN		
Washington Rolling Paper Tax	WPJCT		
Webster Parish Sales Tax	WEBSTE		
West Baton Rouge Sales Tax	WBR		
West Baton Rouge Parish Hotel/Motel Tax	WBRHOT		
West Carroll Parish Sales Tax	WCARRO		
West Feliciana Parish Sales Tax	WFELIC		
Winn Parish Sales Tax	WINN		