

RAMware, LLC 7117 Florida Blvd., Suite 306 Baton Rouge, LA 70806 Phone: 225-215-0100 Toll Free: 1-800-227-7059 Fax: 225-215-0090

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Chapter 1 User Guide Overview

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

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.

Email

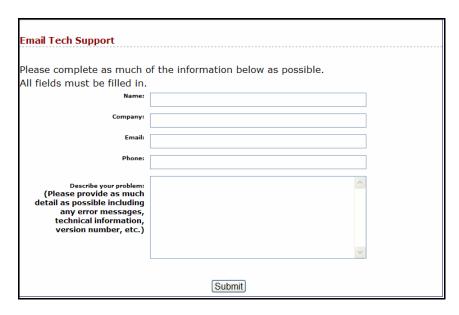
You can contact RAMware directly by sending email to:

• parishefile@la.gov for general comments and questions; for technical questions, requests or suggestions; and for technical support.

Or:

• On ParishE-File.com. Place your mouse-pointer over **Support** on the menu bar.

Select **Email Us** from the drop-down menu. An **Email Tech Support** screen appears.



Type in the fields. Click **Submit** when you are finished.

Telephone/Fax

You can contact RAMware directly by calling:

Local: 225-215-0100

Toll Free: 1-800-227-7059

Or by faxing:

Fax: 225-215-0090

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 2.0 and newer, Mozilla Firefox version 5.0 and newer, or Netscape version 3.0 and newer.

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 www.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. The Solo Owner or First Owner of the company should register the account.

▼To sign up:

1. Click **Sign Up Now**.

Forgot your password?

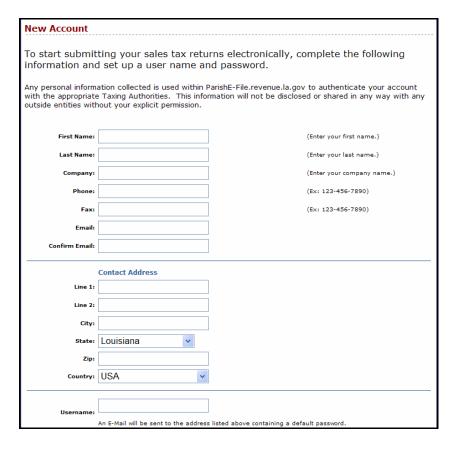
Click here.

Not a member?

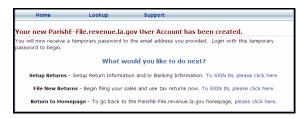
Sign up now! Registration is free and it only takes a minute.

Practitioner Registration Click Here

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



- 3. In the **Contact Information** fields, type your contact information.
- 4. In the **User Name** field, type a User Name.
- 5. Read the User Agreement Disclaimer. Click Next.
- 6. Click the link to **Return to Homepage**.



7. The system emails a default password to the email address you provided in your Contact Information.

Logging In

▼To log in:

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



2. Click **Log In**. The **Login Secret Question and Answer** page appears.



- 3. In the **Secret Question** and **Secret Answer** fields, type a secret question and its answer. Choose a secret question whose answer only you will know. If you forget your password or reset an expired password, you will be required to answer this secret question.
- 4. In the **Current Default Password** field, type the default password you used to log in.
- 5. In the **New Password** field, type a new password. In the **Confirm New Password** field, type the new password again.

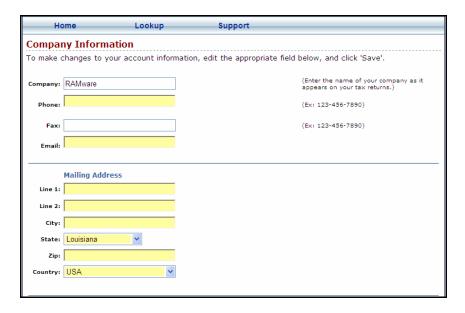
Note: Passwords must be at least six characters long, contain at least one number, and contain at least one capitalized letter.

6. Click Save.

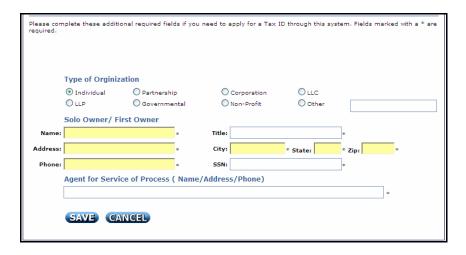
Entering Company Information

▼To enter company information:

1. In the **Company Information** fields, type your company information. Type the name of the **Company** as it appears on your current tax returns.



- 2. If you **do not need to apply for a Tax ID** for the company location or other business locations, leave the bottom form blank. Click **Save**. The **Business Location Information** page appears. See **Entering Business Location Information**.
- 3. If you **need to apply for a Tax ID** for the company location or other business locations, complete the bottom form.

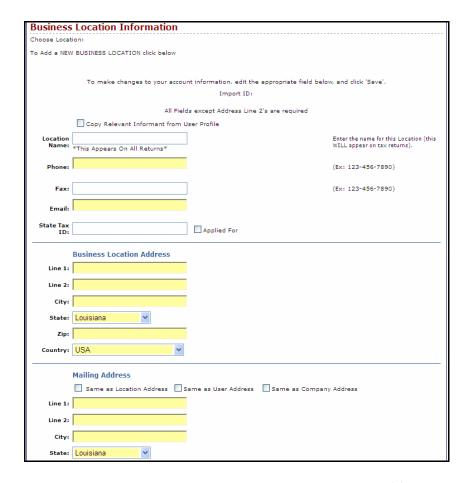


- 4. Type information for up to four company owners (Except for Individual Organizations). The Agent for Service is usually the attorney who incorporated the company.
- 5. Click **Save**. The **Business Location Information** page appears.

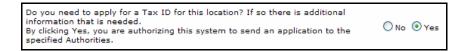
Entering Business Location Information

▼To enter business location information:

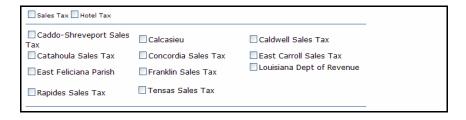
1. Enter information for one business location at a time.

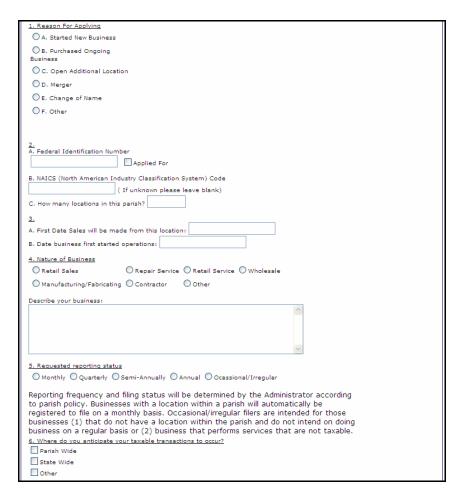


- 2. In the **Location Name** field, type a name for the location. This name will appear on tax returns, but can be any name you choose.
- 3. In the **Business Location Information** fields, click the checkboxes to copy relevant information from previous pages, or type your business location information.
- 4. If you do not need to apply for a Tax ID 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.
- 5. If you **need to apply for a Tax ID** for this business location, click the circle marked **Yes**.



- 6. Check the boxes next to the types of returns you will be filing. You will receive a Tax ID for each return you select.
- 7. Type in the fields as instructed on the form.



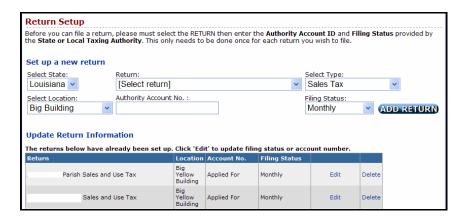


- 8. Click **Save**. The **Business Location Information** page appears, and an Import ID has been assigned to the location
- 9. To add another business location, click the **Add** button.

Setting Up Returns

▼To set up returns without an assigned Tax ID:

- 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 a Tax ID, 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.

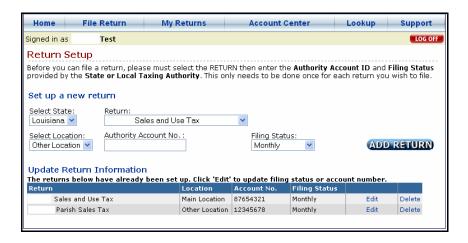
4. When you have been assigned an account number for a business location, edit the account number. See **Editing Returns**.

▼ To set up returns with an assigned Tax ID:

- 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 **Authority Account No.** field, type the assigned Tax ID number for the Location.
- 5. Click **Add Return**. The return appears in the table.

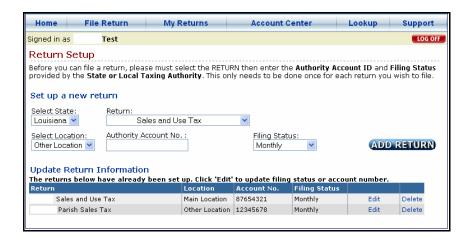


6. Repeat the same steps to add additional returns.

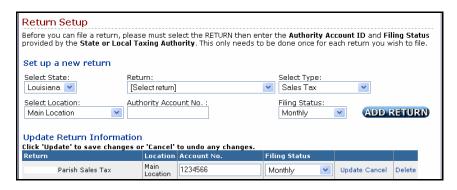
Editing Returns

▼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.



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



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

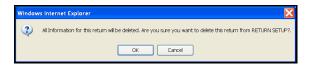
Deleting Returns

▼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.



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

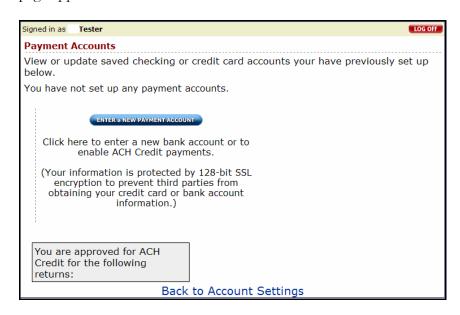


- 5. To delete the return, click **OK**.
- 6. To cancel deletion, click **Cancel**.

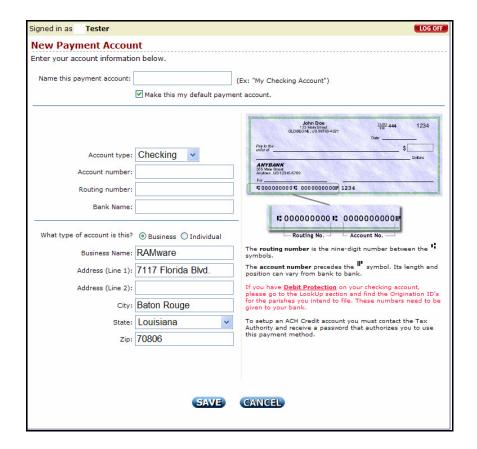
Setting up Payment Accounts from Checking

▼ 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.

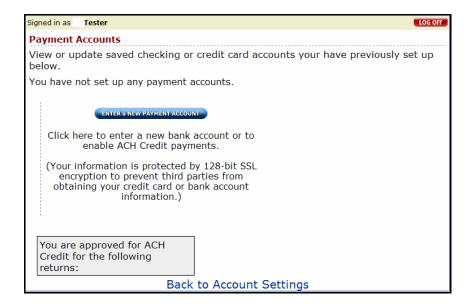


- 4. In the **Name Payment Account** field, type a name for the payment account. This name is visible only to users making payments.
- 5. Click the checkbox to make this account your default payment account.
- 6. Select **Checking** from the drop-down menu.
- 7. Type your bank account information in 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.

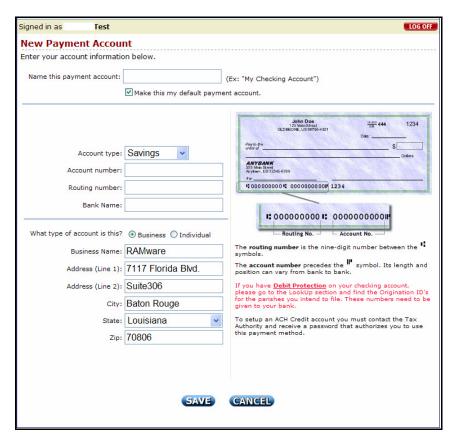
Setting up Payment Accounts from Savings

▼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.

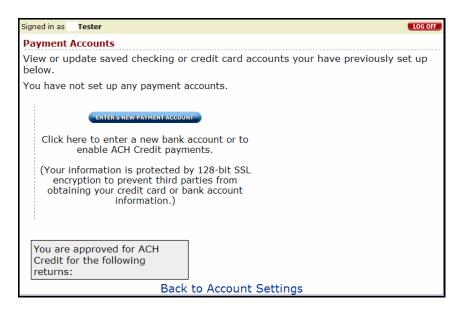


- 4. In the **Name Payment Account** field, type a name for the payment account. This name is visible only to users making payments.
- 5. Click the checkbox to make this account your default payment account.
- 6. Select **Savings** from the drop-down menu.
- 7. Type your bank account information in the 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.

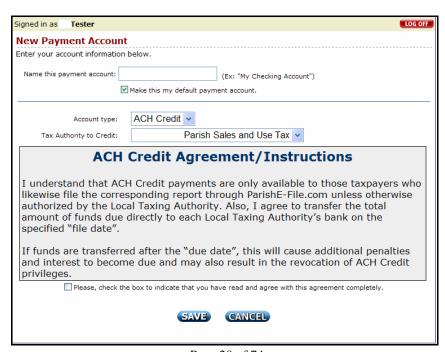
Setting up ACH Credit Payment Accounts

▼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.



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- 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.

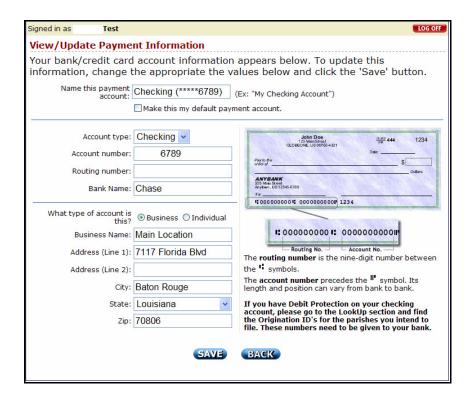
Editing Payment Accounts - Checking and Savings

▼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.

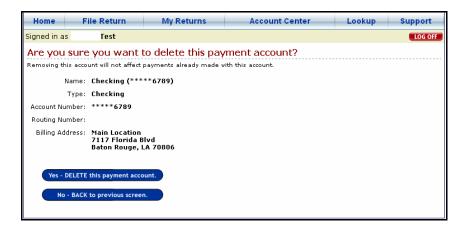
Deleting Payment Accounts - Checking and Savings

▼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.

Making Payments with Saved Payment Accounts

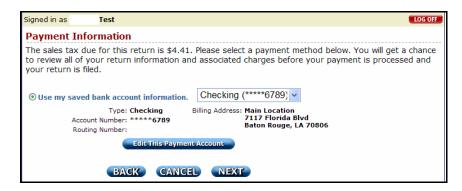
Making a payment is the final part of the filing process.

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.

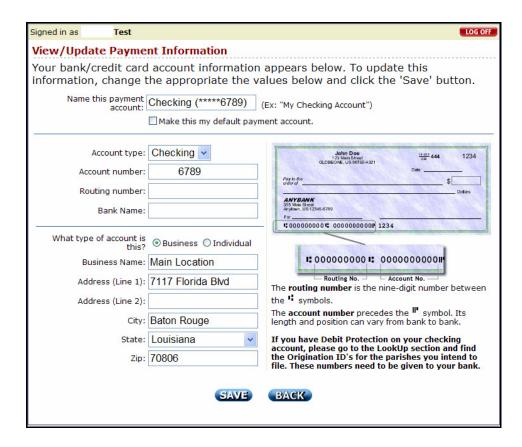
They also assume that you have filed a return that requires payment. If you have filed a zero or negative return, you will not make a payment. Follow normal filing procedures to receive a confirmation number.

▼To make a payment with a saved payment account:

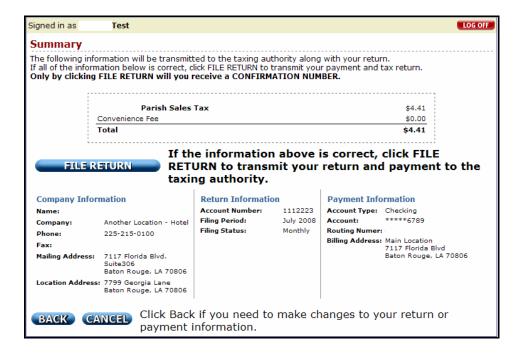
1. The **Payment Information** page appears.



- 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.

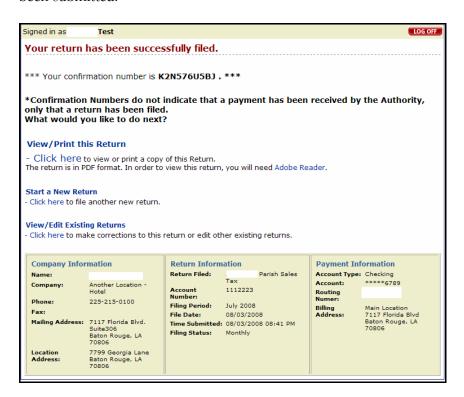


- 6. Type in the fields you wish to edit. Click **Save**. The **Payment Information** page appears again.
- 7. Click **Next** to make a payment. The **Summary** page appears.



- 8. To make changes to your return or payment information, click **Back**.
- 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

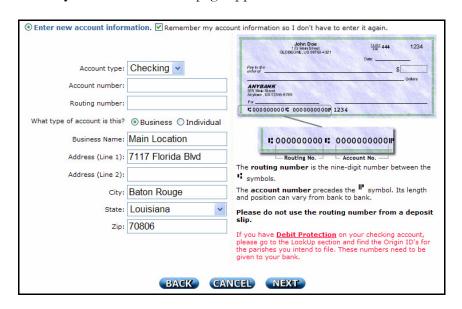
been submitted.



Making Payments without Saved Payment Accounts

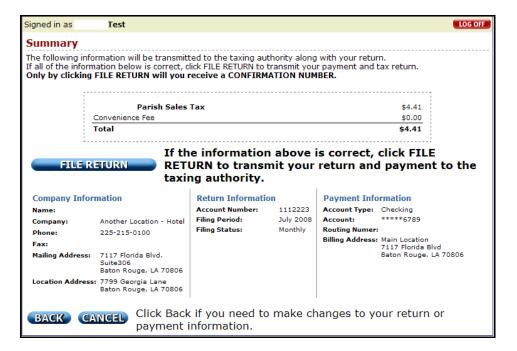
▼To make a payment without a saved payment account:

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

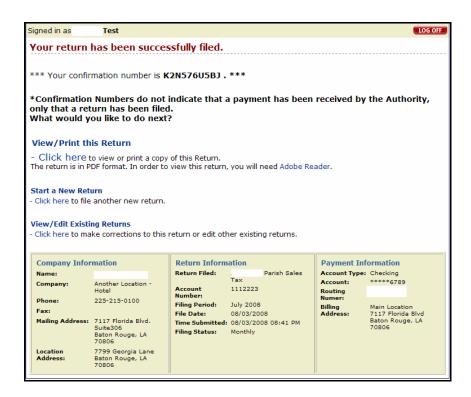


- 2. Click the circle marked **Enter New Account Information**.
- 3. Click the checkbox to **Remember my Account Information** if you wish to save this account information.
- 4. Select **Checking** or **Savings** from the drop-down menu.
- 5. Type your bank account information in the fields.
- 6. Click 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 **Back**.
- 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.



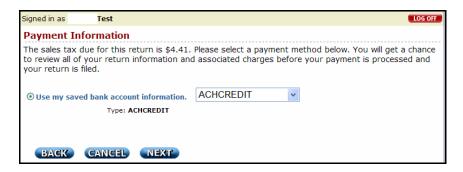
Making Payments with ACH Credit Payment Accounts

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.

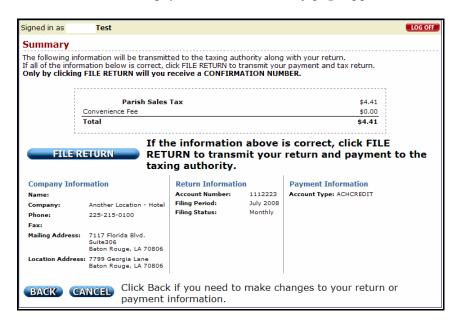
To make an ACH Credit payment you must apply for approval in advance of making a payment. See **Setting up Payment Accounts**.

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

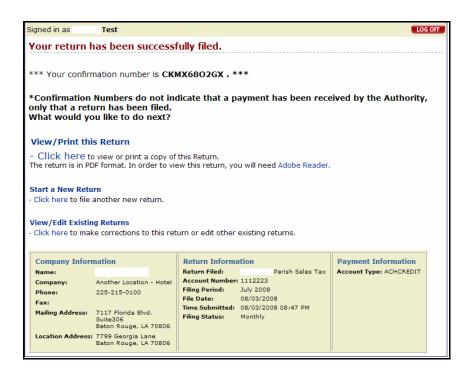
- 1. The **Payment Information** page appears.
- 2. Click the circle marked Use my Saved Bank Account Information.



- 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 due date printed on your return or you will be subject to penalties and interest.

Retrieving Parish Bank Information

▼To retrieve parish bank information:

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. Contact information for the return, city, or zip code appears. Use this information to contact the parish and retrieve bank information.
- 5. Use the parish's bank information to make ACH Credit payments.

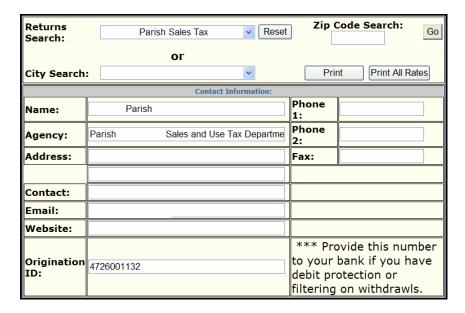
Troubleshoot Payments: Debit Protections, Withdrawal Filtering

▼ 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.

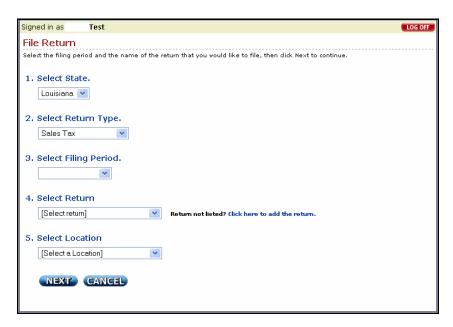
Note: The Origination ID must have ten characters. If the Origination ID in the Contact Information table shows only nine characters, the ID is actually a space followed by the nine characters shown. The table below illustrates this:

If your Origination ID is:	Then report it to your bank as:
OID5555555 (ten characters)	OID5555555 (ten characters)
OID555555 (nine characters)	"space"OID555555 (ten characters)

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.



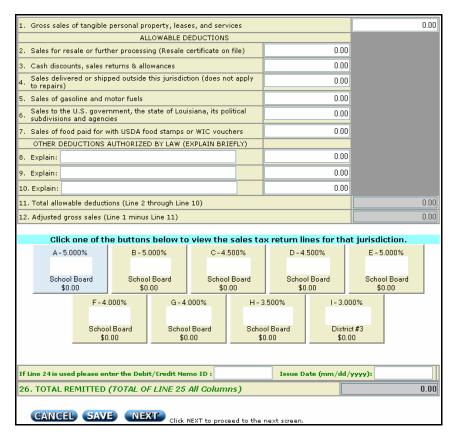
- 3. Select the **State**, **Return Type**, **Filing Period**, **Return**, and **Location** from the drop-down menus.
- 4. Click **Next**. The return appears.



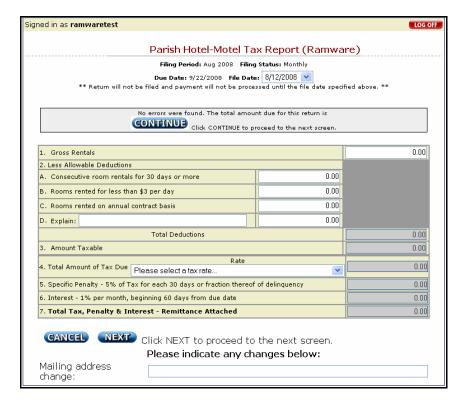
5. Select the **File Date** by clicking the calendar icon next to the **File Date** field. A calendar will appear. Click a date on one of the months that display or use the arrows to navigate through months. Then click the date.



6. Follow normal filing procedures.



Or

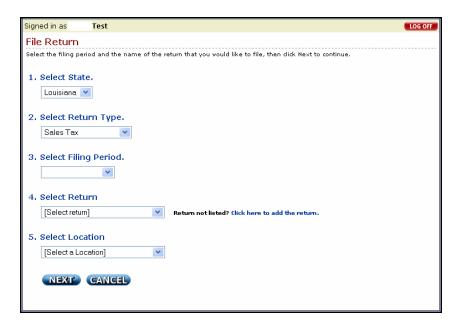


- 7. Click **Next**.
- 8. Continue following the on-screen instructions to file and pay your return. See **Making Payments**.

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 **State**, **Return Type**, **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: Federal Employer ID: Owner First Name: Owner Last Name:	CLICK HERE to search for your NAICS	

- 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:

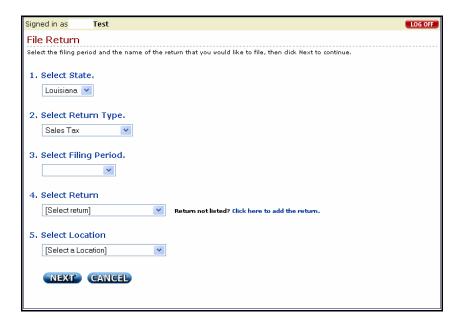
- The original return must have been filed on ParishE-File.com,
- The original return must have been filed on time,
- Line 24 (Credit Memo) must be blank on the original return,
- Line 24 (Credit Memo) must be blank on the amended return.

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

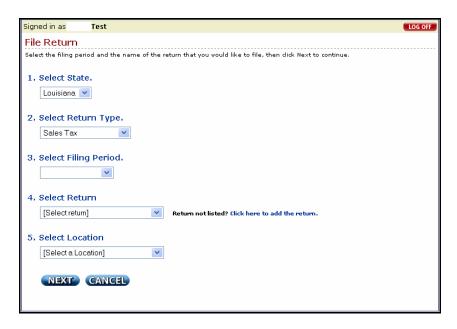


- 5. To continue filing the amended return, click **Yes**.
- 6. Make amendments to the return and follow normal filing procedures.
- 7. To cancel filing the amended return, click **No**.

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

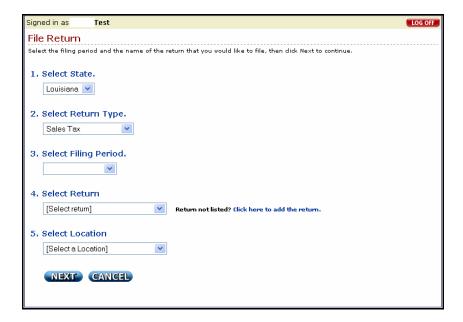


5. Follow normal filing procedures. Penalties and interest will be added to the total amount due during payment.

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 **State**, **Return Type**, **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.
- 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

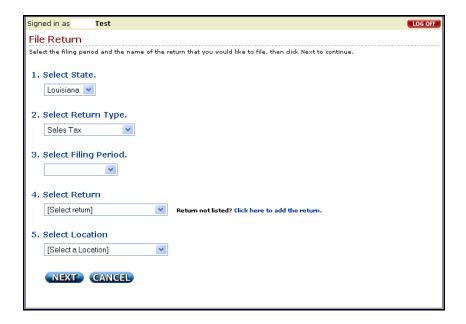
▼To save a return while filing:

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

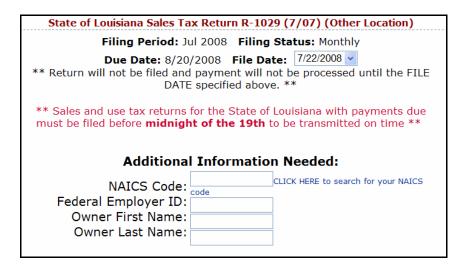
Filing a Final Return (State)

▼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.



- Select the State, Return Type, 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. At the bottom of the return, click the checkbox marked **Final Return**.



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

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

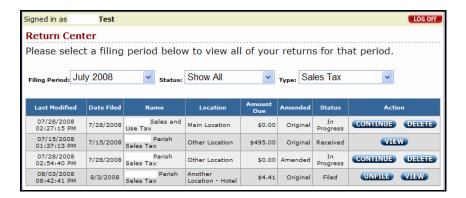
VIEW - To review and/or print a return that has been filed and processed by the tax authority

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.



- 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.
- 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.
- 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**.

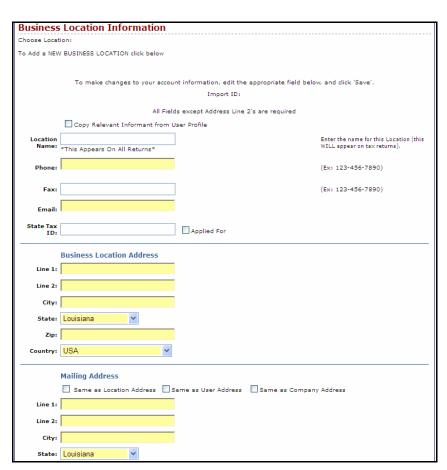
Adding Business Locations

▼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.

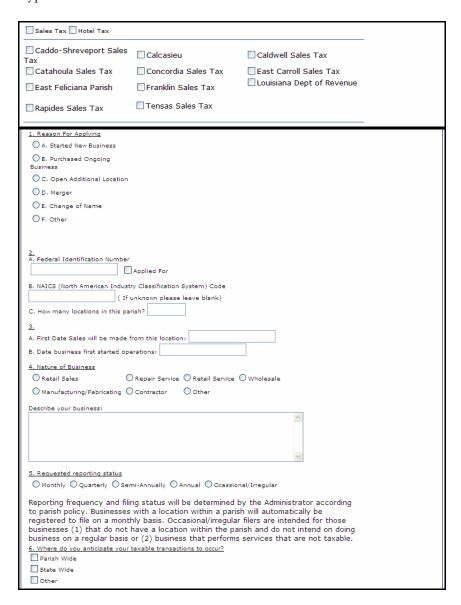


4. In the **Location Name** field, type a name for the location. This name will appear on tax returns, but can be any name you choose.

- 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 a Tax ID 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 a Tax ID for this business location, click the circle marked **Yes**.

Do you need to apply for a Tax ID for this location? If so there is additional	
information that is needed.	○ No ② Yes
By clicking Yes, you are authorizing this system to send an application to the	O No O Yes
specified Authorities.	

- 9. Check the boxes next to the types of returns you will be filing. You will receive a Tax ID for each return you select.
- 10. Type information in the fields as instructed on the form.



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

Applying for a Tax ID at an Existing Location

▼Before applying for a Tax ID at an existing location:

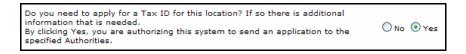
- 1. Confirm that your **Company Information** is accurate and complete:
- 2. Place your mouse-pointer over **Account Center** on the menu-bar.
- 3. Place your mouse-pointer over **Account Settings** in the drop-down menu.
- 4. Click **Company Information** in the right drop-down menu.
- 5. In the bottom of the form, click in the **Type of Organization** circle.
- 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 a Tax ID at an existing location:

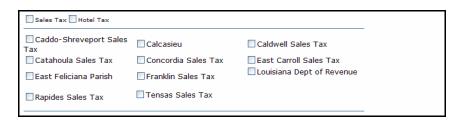
- 1. Place your mouse-pointer over **Account Center** on the menu bar.
- 2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.



- 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 Tax ID for each return you select.
- 6. Type information in the fields as instructed on the form.



1. Reason For Applying
O A. Started New Business
Business Ongoing
O C. Open Additional Location
O D. Merger
© E. Change of Name
O 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
O Retail Sales O Repair Service O Retail Service O Wholesale
Manufacturing/Fabricating O Contractor O Other
Describe your business:
5. Requested reporting status Monthly Quarterly Semi-Annually Annual Quassional/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 a Tax ID at a New Location

▼ Before applying for a Tax ID at a new location:

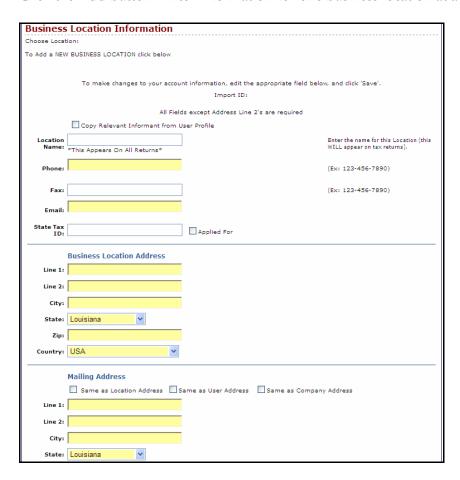
- 1. Confirm that your **Company Information** is accurate and complete:
- 2. Place your mouse-pointer over **Account Center** on the menu-bar.
- 3. Place your mouse-pointer over **Account Settings** in the drop-down menu.
- 4. Click **Company Information** in the right drop-down menu.
- 5. In the bottom of the form, click in the **Type of Organization** circle.
- 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 a Tax ID at a new location:

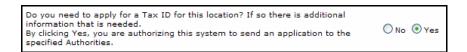
- 1. Place your mouse-pointer over **Account Center** on the menu bar.
- 2. Select **Manage Locations** from the drop-down menu. The **Business Location Information** page appears.



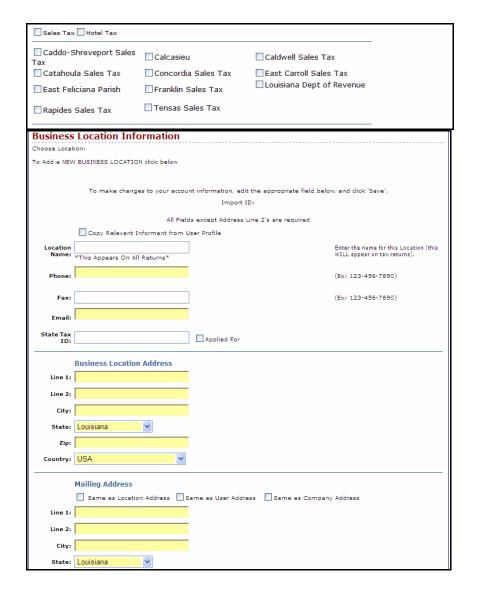
3. Click the **Add** button. Enter information for one business location at a time.



- 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. Click the circle marked **Yes**.



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



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

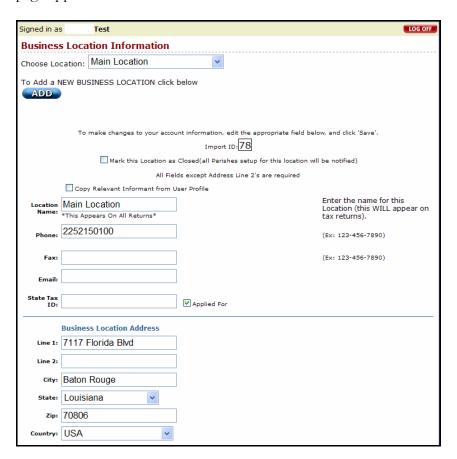
Editing Business Locations

▼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.

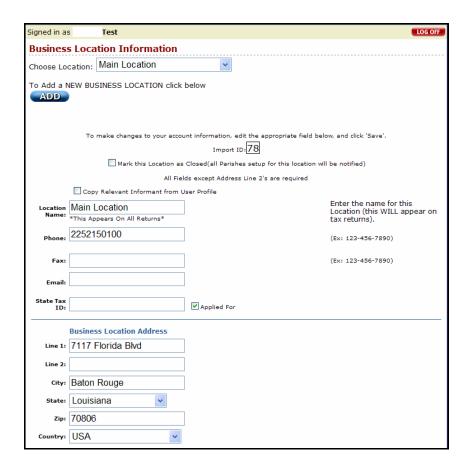
Marking a Business Location as Closed

▼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.

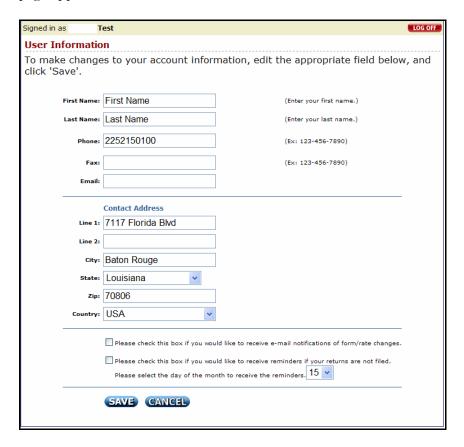


- 5. To confirm that you wish to mark the location as closed, click **OK**.
- 6. To cancel closing the location click **Cancel**.
- 7. Click **Save**. A success message appears.

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.

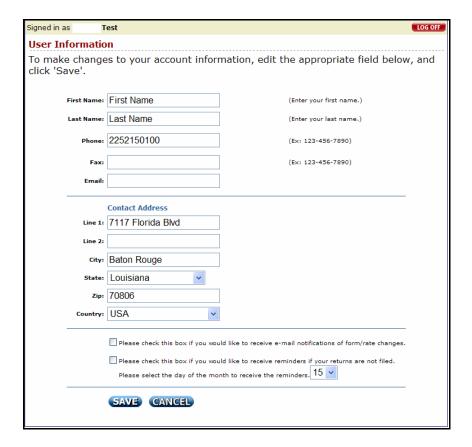


- 4. Type in the fields you wish to edit.
- 5. Click **Save**. A success message appears.

Editing User Contact Information

▼To edit user contact 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.

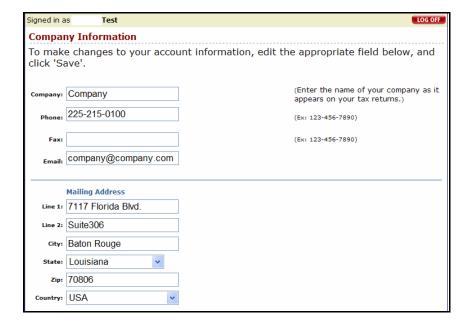


- 4. Type in the fields you wish to edit.
- 5. Click **Save**. A success message appears.

Editing Company 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 **Company Information** on the right drop-down menu. The **Company Information** page appears.



- 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.



- 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.

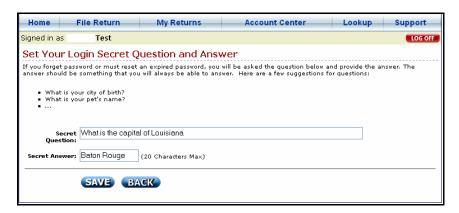
Changing Your Secret Question and Answer

▼ 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.

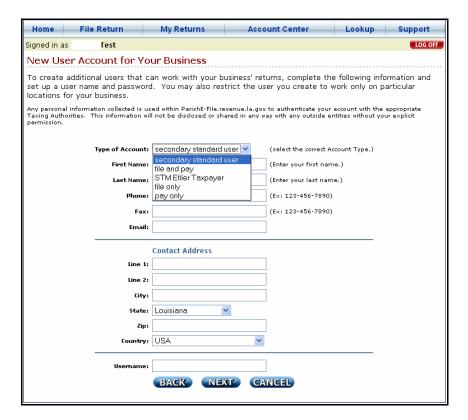


- 5. Type in the fields you wish to edit.
- 6. Click **Save**. The **File Return** page appears. Your Secret Question and Answer have been successfully saved.

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.
- 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.

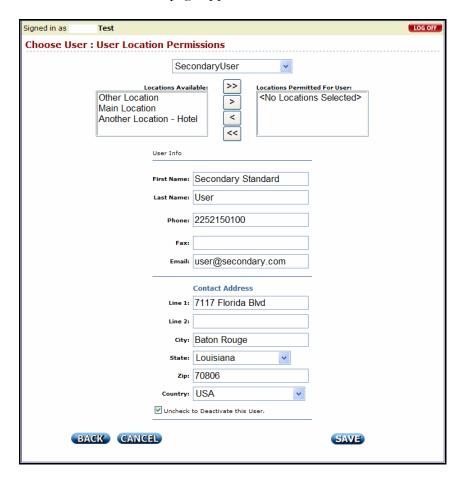
- 6. In the **User Name** field, type a user name for the clerical user.
- 7. Click Next. See Assigning Clerical User Locations, Step 4.

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.

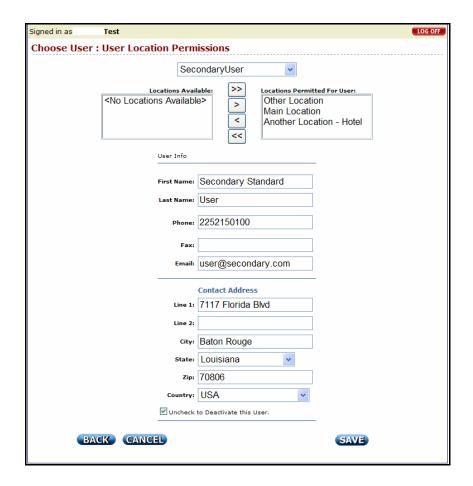


- 4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below. Available locations for the user appear in the box marked **Locations Available**.
- 5. To assign a location to a user, click on an available location. Click the > arrow to move it to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

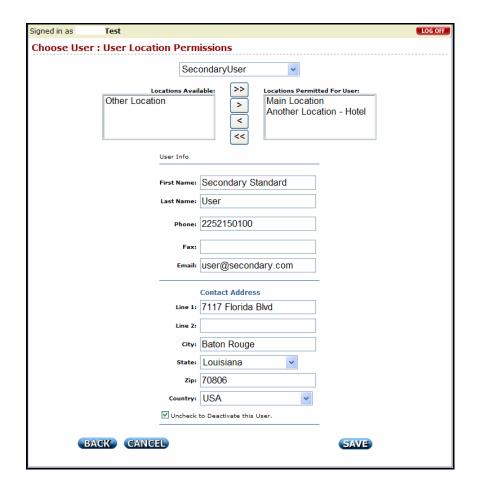


- 4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below. Permitted locations for the user appear in the box marked **Locations Permitted**.
- 5. To un-assign a location from a user, click on a permitted location. Click the < arrow to move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

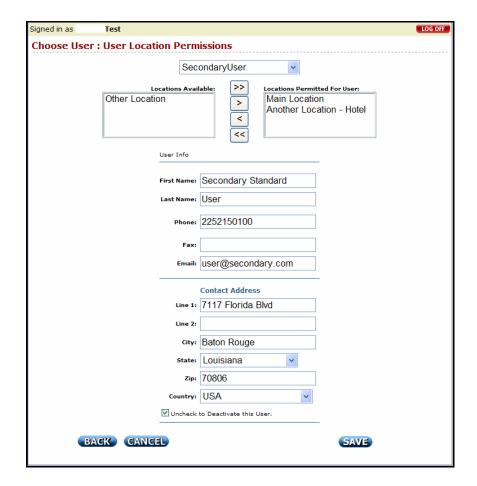


- 4. Select a user from the drop-down menu. Current settings and information for that user appear in the fields below.
- 5. Type in the fields you wish to edit.
- 6. Click Save.

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.

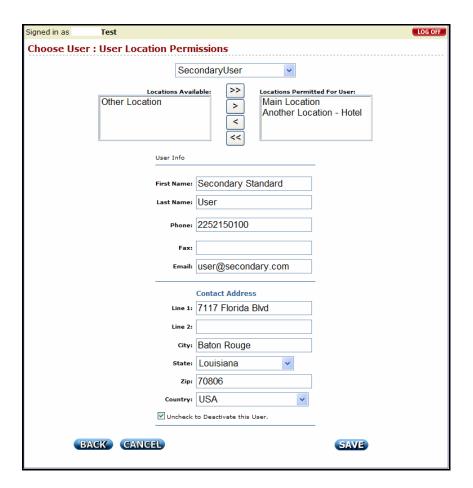


6. Click Save.

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.

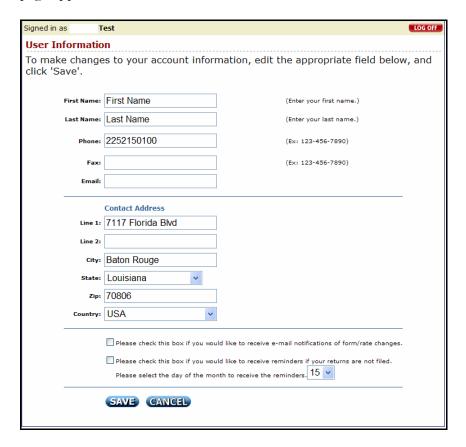


6. Click Save.

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**.

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				_

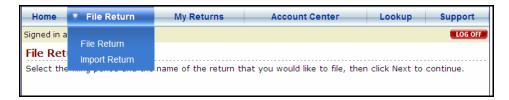
Appendix A

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 to a location you will remember. Refer to the **File Structure** guide on Page 64 to ensure your file is formatted correctly and meets the specifications for the return and period.

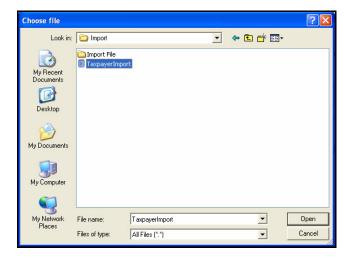
Move the cursor over **File Return** on the menu bar. Click **Import Return** on the drop-down menu.



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



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



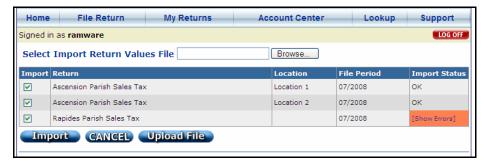
Click Upload File.



A summary of import file information, sorted by Return, Location, and File Period appears. The column labeled **Import Status** shows any errors detected. 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**.



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. See page 9 for more information about Location Identifiers.

Edit the information and save the file. To upload the new file, click **Browse**.

Select the file. Then, click **Open**. Click **Upload File**.

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.

To import the checked returns, click Import.



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.

*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), and the Location Identifier.

The Short Name for each return is listed on Page 66.

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



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

Example Header: RAPIDE,5/2008,11

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, move the cursor over **File Return** on the menu bar. Then, click **Import Return** on the drop-down menu.

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 July 2008:

1 1									
 GROSS SALES OF TANGIBLE PERSONAL PROPERTY, LEASES AND SERVICES AS REPORTED TO THE STATE OF LOUISIANA 	RENTALS	1.	Line1			SALES AN	ND USE T	AX REPO	RT)
ALLOWABLE DEDUCTIONS					\sim				=
2. SALES FOR RESALE OR FURTHER PROCESSING (CERTIFICATE ON FILE		Line2	(COMMENTS		enalties your enve			
3. CASH DISCOUNTS, SALES RETURNS AND ALLOWANCES		Line3	before the 20th following the period covered by the return.					turn.	
4. SALES DELIVERED OR SHIPPED OUTSIDE ACADIA PARISH		Line4							=
S. SALES OF GASOLINE AND MOTOR PUELS		Line5				PLEASE	INDICATE ANY CHA	NGES BELOW:	1
5. SALES TO THE US GOVT., THE STATE OF LA, ITS POLITICAL SUBDIVISIO	NS	Line6			I (——	ATE BUSINESS SOLD		AME AND ADDRESS O	
7. SALES OF POOD PAID FOR WITH USDA FOOD STAMPS OR WIC VOUCHE	RS	Line7			1 1 "	ATE BUSINESS SOLD	No.	AME AND ADDRESS O	FPURCHASER
OTHER DEDUCTIONS AUTHORIZED BY LAW (EXPLAIN BRIEFLY)									
8. Lines_Explanation		LineB	() DATE	BUSINESS DISCONTIN	(UED	BUSINESS LOCATIO	N CHANGE
9. Line@Explanation		Line9			/ \				
10. Line10_Exploration	L	Jne10			CHAN	GE IN NAME OF BUSH	ecss	MAILING ADDRESS	CHANGE
11. TOTAL ALLOWABLE DEDUCTIONS (LINE 2 THRU LINE 10)	11.					ALES & USE TAX			
12. ADJUSTED GROSS SALES (LINE 1 MINUS LINE 11)	S SALES (LINE 1 MINUS LINE 11) 12.			COMPLETE ONLY COLUMNS IN WHICH TAXABLE ACTIVITY OCCURS					S
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%	1 3.00%
	rendria	Pineville	Glenmora	Lecompte	Ball	Boyce	Woodworth	Farest Hill	Parish (P.J.)
	ish (P.J.)	Parish (P.J.)	Parish (P.J.)	Parish (P.J.)	Parish (P.J.)	Parish (P.J.)	Parish (P.J.)	Parish (P.J.)	School Board
PARISH WIDE TAX —> Sch PARISH WIDE TAX —>	ool Board	School Board	School Board District #3	School Board District #3	School Board	School Board District #3	School Board District #3	School Board District #3	District #3
COMPUTATION OF SALES & USE TAX DISTRICT #3 TAX>	- 1		District #3	Lindrotes		District #5	District #5	Listing #5	
13. IN EACH JURISDICTION MUST EQUAL LINE 12 13.	LineA_13	LineB_13	LineC_13	LineD_13	LineE_13	LineF_13	LineG_13	LineH_13	Linel_13
14. PURCHASES SUBJECT TO USE TAX IN EACH 14. 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 LUE - Multiply Line 15 by % shown in proper 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 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. 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 locations. This file indicates a Louisiana State return for July 2008, location ID 55 and a Rapides Parish sales tax return for July 2008, location ID 54.

Example:

LA,7/2008,55 Line1,1000 Line2,50 /////// RAPIDE,7/2008,54 Line1,1100 Line8_Explanation,Special Deduction LineA_13,1000 ////////

Short names for all returns will be available October 1, 2008.

Return	Short Name	Return	Short Name	
Acadia Parish Sales Tax		LaSalle Sales Tax	LASALL	
Allen Parish Sales Tax		Lincoln Parish Sales Tax		
Ascension Parish Sales Tax	ASCENS	Livingston Parish Sales Tax		
Assumption Parish Sales Tax	ASSUMP	Madison Parish Sales Tax		
Avoyelles Parish Sales Tax		Morehouse Parish Sales Tax		
Beauregard Parish Sales Tax		Natchitoches Parish Sales Tax		
Bienville Parish Sales Tax		NO Exhibition Hall Authority		
Bossier City Hotel/Motel		Orleans Parish Hotel Tax		
Bossier Parish Sales Tax		Orleans Parish Sales/Parking Tax		
Caddo-Shreveport Sales Tax	CADDO	Ouachita Parish Sales Tax		
Calcasieu Parish Sales Tax	CALCAS	Plaquemines Parish Sales Tax		
Caldwell Sales Tax	CALDWE	Pointe Coupee Parish Sales Tax		
Cameron Parish - NO PARISH SALES TAX COLLECTED		Rapides Hotel/Motel Sales Tax		
Catahoula Sales Tax	САТАНО	Rapides Parish Sales Tax	RAPIDE	
Claiborne Parish Sales Tax		Red River Parish Sales Tax		
Concordia Sales Tax	CONCOR	Richland Parish Sales Tax		
DeSoto Parish Sales Tax		Sabine Parish Sales Tax		
East Baton Rouge Hotel/Motel Tax		St. Bernard Parish Sales Tax		
East Baton Rouge Parish		St. Charles Parish Sales Tax		
East Carroll Sales Tax	ECARRO	St. Helena Parish Sales Tax		
East Feliciana Parish Sales Tax		St. James Parish Sales Tax		
Evangeline Parish Sales Tax		St. John Parish Sales Tax		
Franklin Parish Sales Tax		St. Landry Parish Sales Tax		
Grant Parish Sales Tax		St. Martin Parish Sales Tax		
Iberia Parish Sales Tax		St. Mary Parish Sales Tax		
Iberville Parish Hotel/Motel		St. Tammany Parish Sales Tax		
Iberville Parish Sales Tax		State of Louisiana Sales Tax		
Jackson Parish Sales Tax		Tangipahoa Parish Sales Tax		
Jackson Parish Hotel/Motel		Tensas Sales Tax	TENSAS	
Jefferson Davis Parish Sales Tax		Terrebonne Parish Sales Tax		
Jefferson Davis Hotel / Motel Tax		Union Parish Sales Tax		
Jefferson Hotel/Occupancy East Bank		Vermilion Parish Sales Tax		
Jefferson Hotel/Occupancy West Bank		Vernon Parish Sales Tax		
Jefferson Airport Tax District		Vernon Parish Hotel/Motel		
Jefferson Airport Tax Food/Drug		Washington Parish Sales Tax		
Jefferson Parish Food and Drug		Washington Rolling Paper Tax		
Jefferson Parish General Sales		Webster Parish Sales Tax		
LA Hotel/Motel		West Baton Rouge Sales Tax		
LA Hotel/Motel (Orleans & Jefferson Parish)		West Carroll Parish Sales Tax		
Lafayette Parish Sales Tax		West Feliciana Parish Sales Tax		
Lafourche Parish Sales Tax		Winn Parish Sales Tax		

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 to a location you will remember. Refer to the **File Structure** guide on Page 70 to ensure your file is formatted correctly and meets the specifications for the return and period needed.

Click Import Returns on the menu bar.

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



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



Click Upload File.



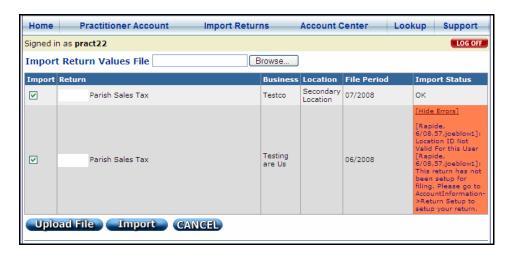
A summary of import file information, sorted by Return, Business, Location, and File Period appears. The column labeled **Import Status** shows any errors detected. If there are no errors detected, move to the section below labeled **No Errors**.

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**.



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. To upload the new file, click **Browse**. Select the file. Then, click **Open**. Click **Upload File**.

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.

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



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 file the imported returns.

*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 on Page 66.

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, click **Import Returns** on the menu bar. 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:

	1.	Line1		(;	SALES A	ND USE T	AX REPO	RT)
			_	\sim				
ON FILE)	Line2	(COMMENTS					
	Line3				before the 20th fo	llowing the period	covered by the re	tum.)
	Line4				D. E. C.			=
	Line5			/	PLEASE	INDICATE ANY CHAR	KGES BELOW:	1
DIVISIONS	Line6			11 0	ATE BUSINESS SOLD	. NA	ME AND ADDRESS O	F PURCHASER
OUCHERS	Line7			"				
Y) (Y				DATE	DI KOINEGO DIOCONTR	HIED	DISPUESE LOCATIO	N CHANCE
	Line8	l l)	DOSINESS DISCONTI	NOLD!	BOSINESS ESCRITS	in Charlest
	Line9			/ \	OF INVENER OF BUILDING	1000	MAIL NIO ADDDCCC	/
	Line10	_						CHANGE
10) 11.								
12.		0		n cere oner o		011 11 0 11 10 10 11		
A 5.00%	B 5.00%	C 4.50%	D 4.50%	E 5.00%	F 4.00%	G 4.00%	H 3.50%	1 3.00%
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 HIII Parish (P.J.) School Board District #3	Parish (P.J.) School Board District #3
LineA_13	LineB_13	LineC_13	LineD_13	LineE_13	LineF_13	LineG_13	LineH_13	Linei_13
LineA_14	LineB_14	LineC_14	LineD_14	LineE_14	LineF_14	LineG_14	LineH_14	Linei_14
LineA_17	LineB_17	LineC_17	LineD_17	LineE_17	LineF_17	LineG_17	LineH_17	Linei_17
	10) 11. 12. A 5.00% Alexandria Parish (P.J.) School Board LineA_13	DIANA	DIAPATA CINET DIAPATA CINET	DIAMAN	EARER, RENTALD 1, Line1 COMMENTD TO avoid p	EASER, RENTALD 1, Line2 Line3 Line3 Line3 Line4 Line5 Line5 Line5 Line6 Line6 Line6 Line6 Line6 Line6 Line7 77 Line6 Line7 Line7 Line7 Line8 Line8 Line8 Line8 Line9 Line9 Line9 Line9 Line9 Line8 L	EASER, RENTALS 1,	EASER, RENTALS 1,

Any field 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. 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 ID 55, MyClient1, **and** a Rapides Parish sales tax return for June 2008, location ID 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 ////////