

Client Training HQ

How to Run Reports in Tax Form Management

This document overviews how to run, schedule, and download reports in Tax Form Management.

Running the Report

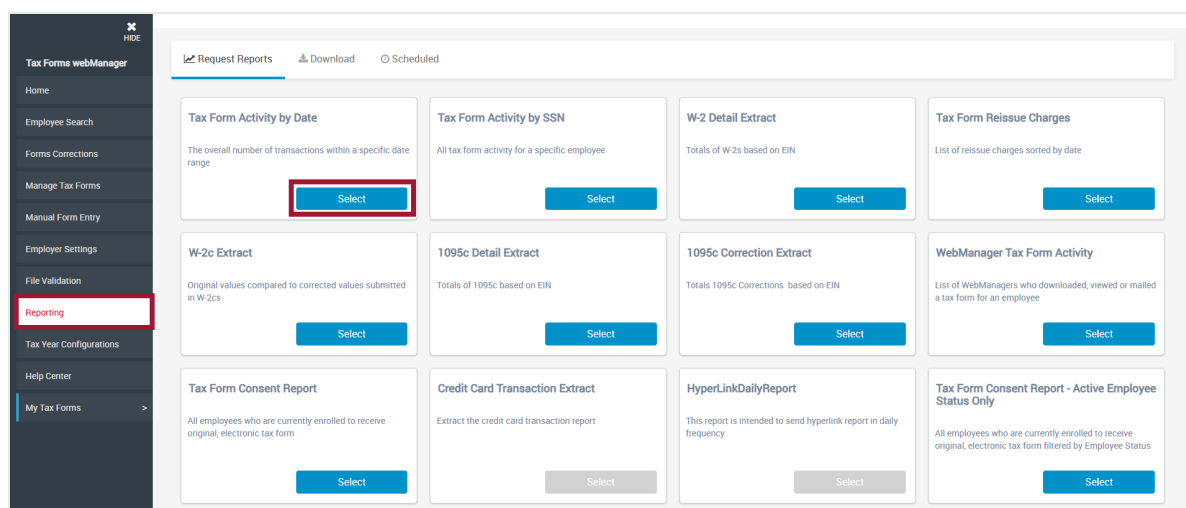
Access Reporting in Tax Form Management

To begin, log in to mytaxform.com.

Then, using the left navigation menu, select **Reporting**.

Select Report

Click **Select** on the report you would like to run from the options on the page.



Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Complete Report Options

Complete the Report Options page and select **Continue**.

Note: The report options page may vary depending on the selected report.

Request Reports Download Scheduled

Tax Form Activity by Date

Configure Schedule Submit

Report Options

- Report Nickname: Example Nickname
- Tax Year: 20XX
- Tax Form Type: W2

Date Range

- Date Range-From: [calendar icon]
- Date Range-To: [calendar icon]

File Options

- Output File Type: CSV
- Notification Email: user.one@example.com

Cancel Continue

Schedule Report

Users have the option to either run the report at the next available time or schedule the report for a future day and time.

If scheduling the report for a future day and time, select when you would like the report to run.

Select **Run Report** to continue.

Request Reports Download Scheduled

Tax Form Activity by Date

Configure Schedule Submit

Report Options

- Next available run time
- Schedule date/time

Schedule Date

- Date: [calendar icon]
- Time: [dropdown] [dropdown] [dropdown]

Current date and time is 6/4/20XX, 12:27:30 PM

Cancel Back Run Report

Confirmation

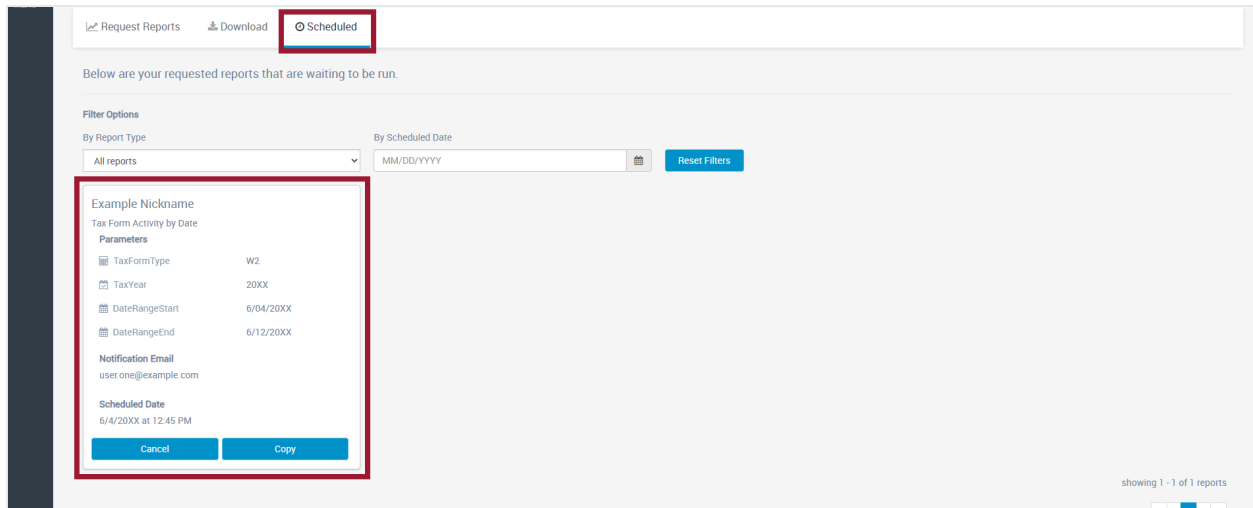
Once the report is requested, the **Request Submitted** page will appear. You will receive an email notification when the report is available to download.

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Accessing the Report

Viewing Scheduled Reports

Once a report has been scheduled, it can be viewed in the **Scheduled** section of the Reporting page.

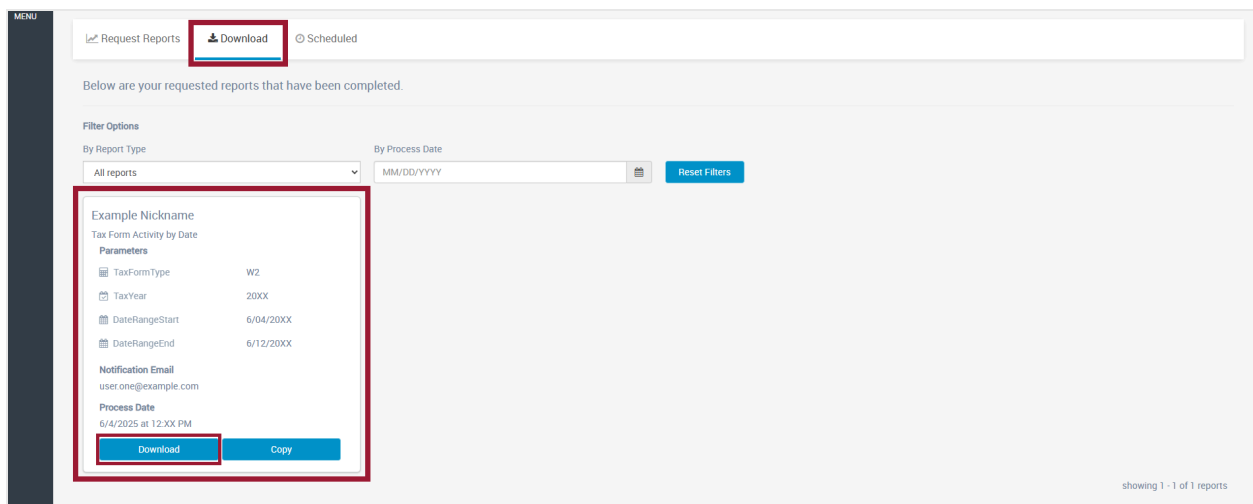


Download Report

To download the report once it is available, navigate to the **Download** section of the Reporting page.

From there, you can filter available reports or view available reports under the **Filter Options** section.

Once you locate the report, to download, click **Download** at the bottom of the tile.



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The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.

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