

## User Guideline for Excel Import Template

- Only use the template found via the link in My Tax Account. Do not use any other version of the import template.
- The name of the template cannot be changed.
- Changes cannot be made to the name tab, the order of the columns or the header rows (1-3).
- You may copy and paste into the import template. Data going in to columns with drop-down choices must exactly match what is displayed in the drop-down menu.
- You must enter data in every column for each line of data you report. If any data fields are blank, the template will not load into My Tax Account properly.
- If letters are entered in a field that requires numbers (e.g., price) when you import the template that field will be blank and the template will not load into My Tax Account properly.
- FEIN numbers must have exactly nine digits. If the value entered exceeds nine digits there will be an error during the import process.