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.