Generating IRS Laser Forms

This step archives ALL IRS forms for edocs, eImages etc. Recommend that ALL credit unions generate Laser Forms because this stores ALL docs into CAMS-ii, so you can print this information from the Document Retrieval Manager. By generating laser forms you are saving the information for future retrieval and archiving needs. You do not have to print, just save.

Use this function to process IRS member information to print IRS forms, archive them, and prepare them for electronic delivery via SDDS/eDocuments.

NOTE: If you use CBS's IRS Forms Printing and Electronic Filing Service to print your IRS Forms, you must use this process to archive the forms for eImages and electronic delivery/availability.

NOTE: Make sure that you have run an IRS Forms Proof List and corrected any exceptions in IRS Forms Maintenance BEFORE you generate any IRS forms.

To generate IRS Laser forms:

1. On the Level One menu, click **Back Office**. The Back Office > Standard menu appears.

2. On the Level Three menu, click **IRS Tax Processes**. The IRS Tax Processes screen appears.

3. From the **Tax Forms** drop-down list, select the form for which you want to print.

4. From the **Tax Process** drop-down list, select **Generate Laser Forms**. The IRS Forms Maintenance screen appears.

5. If you want to narrow the maintenance to a range of members by social security number, type the social security number in the **Beginning Social Security Number** and the **Ending Social Security Number** text boxes. Otherwise, type all zeroes in the Beginning Social Security Number text box and all nines in the Ending Social Security Number text boxes.

6. From the **Option** drop-down list, select one of the following:

   _ **Print Standard** - Prints all of the existing correct IRS forms.
   _ **Print Corrected** - Prints only IRS forms that have been edited.
   _ **Print Voided** - Prints only IRS forms that have been deleted.
   _ **Print Corrected AND Voided** - Prints only IRS forms that have been edited and deleted.

7. Click **Accept**. The message, Your Report Request Has Been Successfully Submitted, appears.

8. Go to the Document Retrieval Manager to view the IRS forms and print them -- if you are printing your IRS Forms.