



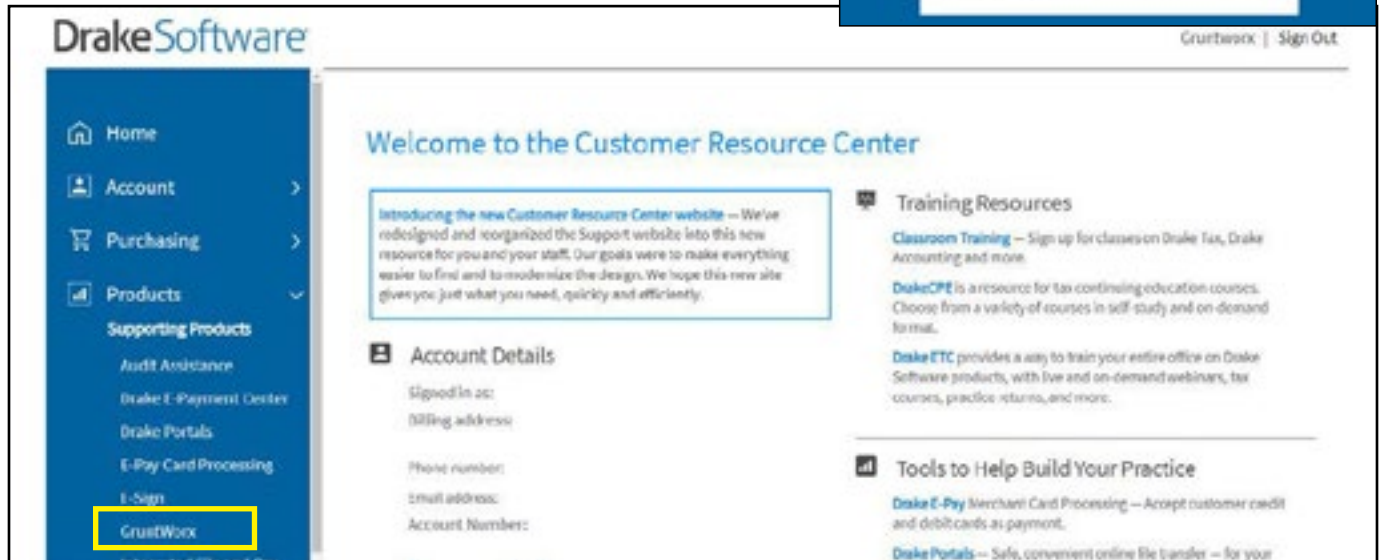
Populate LITE

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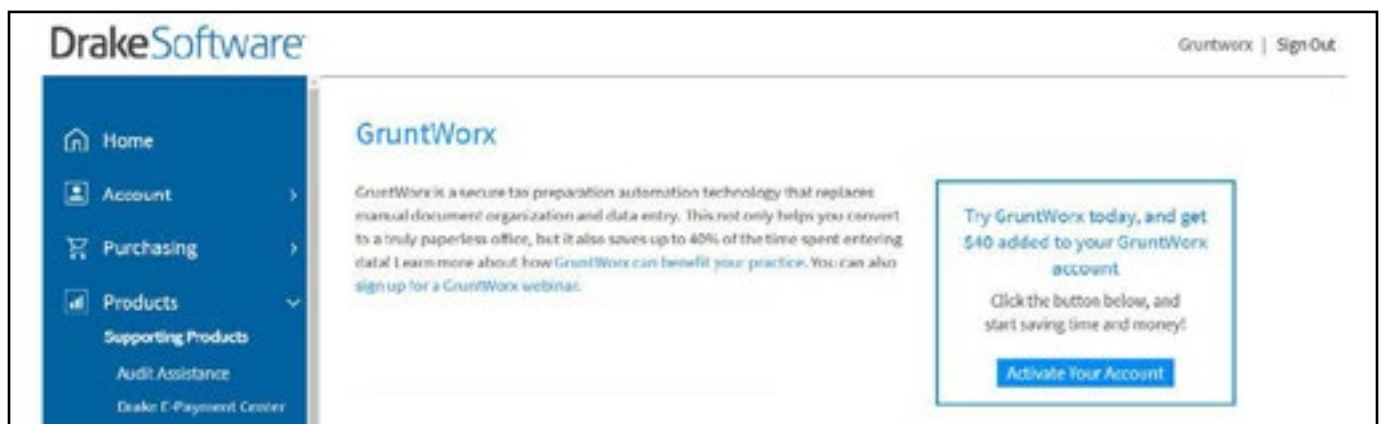
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How to Activate a GruntWorx Account

1. Go to [DrakeSoftware.com](https://www.drakesoftware.com).
2. Sign in to the **Drake Software Customer Support** site.



3. Select **GruntWorx** from the Products drop list.
4. Click **Activate Your Account** to sign up for the free trial.

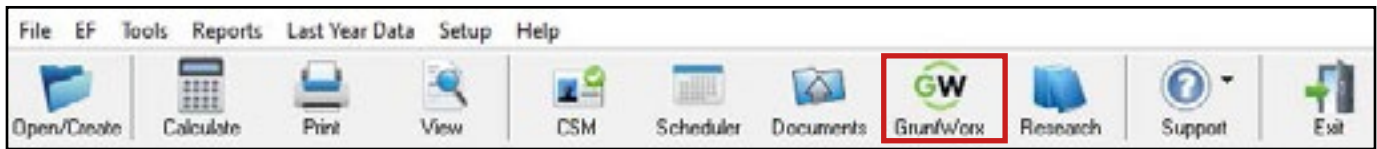


Note: If the **Activate Your Account** option isn't available, it means GruntWorx has already been activated within Drake Tax Software.

5. Proceed to the next section, **How to Submit a Populate Lite Job**.

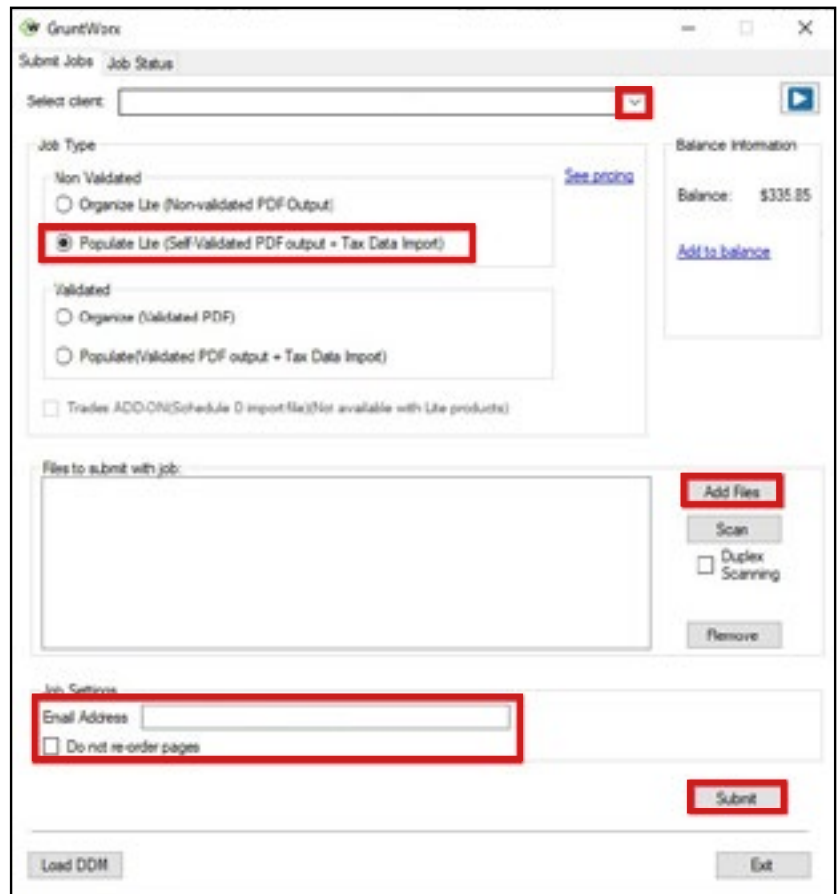
How to Submit a Populate Lite Job

- Launch **Drake Software**.
- Select the **GruntWorx** icon in the toolbar.

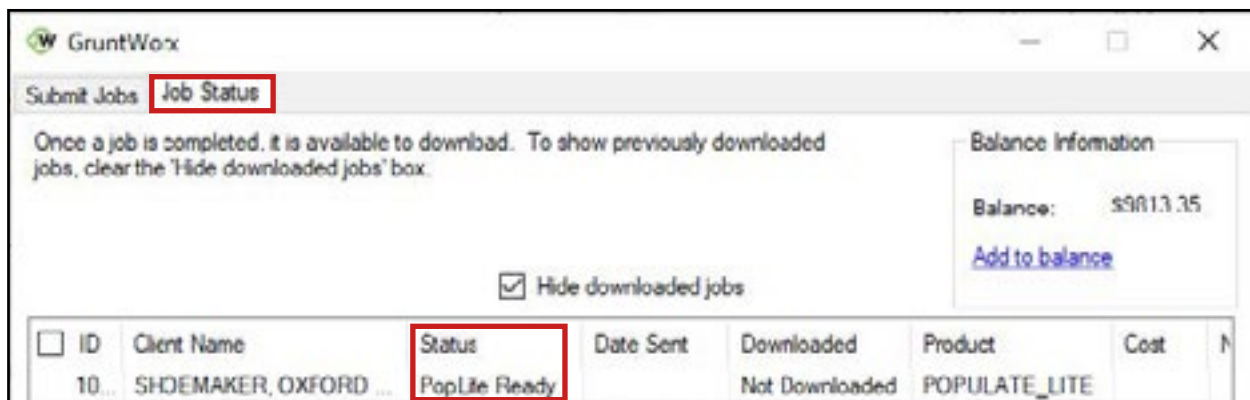


- Choose a client by clicking the arrow next to the **Select client** drop list.
- Select **Populate Lite** as the Job Type.
- Click the **Add Files** button to select and add the client's scanned source documents.
 - The user must have a TWAIN compatible scanner to utilize the **Scan** feature.
- Enter a valid email address to receive Job Completion notifications.
- Check **Do not re-order pages** if the pages should not be organized into the order of a 1040.
- Click **Submit**.
- Once a job has been submitted, it shows on the **Job Status** tab of the GruntWorx application with a status of **Pending**.

TIP: Depending on the complexity and size of the job, it could be pending for 5 to 30 minutes. Click **Refresh** or close and reopen GruntWorx to check job status. You will be notified by email when the job is ready .



- Once the pages have been processed through the GruntWorx software, the status changes to **Pop Lite Ready**.
- Right-click on the client's name and select **Review** to enter the Self-Validation tool.



- The default browser on the user's computer is launched to open the Self-Validation tool.

Client Name	Status	Date Sent	Downloaded	Product
SHOEMAKER, OXFORD ...	PopLea...	10/10/2020	Downloaded	POPULATE_LITE

Cancel

Review

- When loading a job you are presented with a instructional pop-up. The user can disable this at any time.



How to Use the Self-Validation Tool

Once the review tool is open, the user is presented with the first page in the job. The toolbar at the top provides user help throughout the review process, along with functions to complete validation of the job.

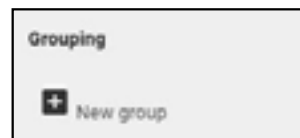
Step 1. On the left-hand side of the screen is the **Classification & Grouping View**, which displays images of the pages in the job.

Click into each thumbnail, verify that the classification of the document is correct, rotate the page if needed, and make any grouping adjustments that are necessary.



- The **Classification & Grouping View** can be extended to the right if the user prefers to see more thumbnails at one time.
- The active page (the page currently being viewed) is bordered in black.
- The form name, or class, is displayed at the top of each image, and the page number is displayed at the bottom of each image.

- K-1 and brokerage pages that belong together are highlighted by color as groups.
- Right-clicking on a page opens the **Page Menu**, which includes:



Grouping: New Group, Remove Selection from Group, Add Group to Previous, Add Group to Next, Add Page to Previous, Add Page to Next, and Ungroup

Image Manipulation: Rotate Clockwise and Rotate Counter Clockwise

Page Settings: Reclassify, Ignore and Don't Ignore

Grouping

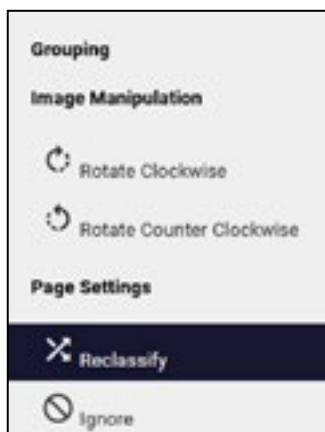
- Brokerage pages and K-1 pages are the only documents that can be grouped together.
- Grouped pages are displayed as a unit in the completed, bookmarked PDF. Common data is shared for all pages within the group.
- To make a new group, click on the first page in the new group, then hold the **Shift** key and click on the last page in the group. Release the **Shift** key and right-click to open the menu.
- Select **New Group** under the **Grouping** section of the menu
- Grouped pages are highlighted to display the bounds of the group - either **blue**, **orange**, **purple**, or **pink**.
- Grouped pages can be changed by selecting the page or pages to be changed and applying the following functions:
 - **Remove Selection from Group** – more than one page can be selected when using this feature
 - **Add Group to Previous** – combines the active group and the prior group together
 - **Add Group to Next** – combines the active group and the next group together
 - **Add Page to Previous** – adds the active page and all other pages to the previous group. Take care not to group pages that do not belong in the group.
 - **Add Page to Next** – adds the active page and all other pages to the next group. Take care not to group pages that do not belong in the group.
 - **Ungroup** – removes all bounds of a group
 - **Split Groups** – with two pages active, separates the group into two groups
- If the menu is not showing the Grouping function needed, double-check that the pages are classified correctly and there are no pages selected that should not be grouped, e.g.: A W2 scanned in the middle of a brokerage.

Image Manipulation

- To rotate any page, click on the page then right-click to open the menu. Select either Rotate Clockwise or Rotate Counter Clockwise.

Page Settings

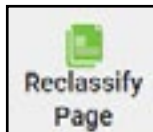
- To change the form class of a page, make the page active by clicking on it, then right-click and select Reclassify from the dropdown menu.



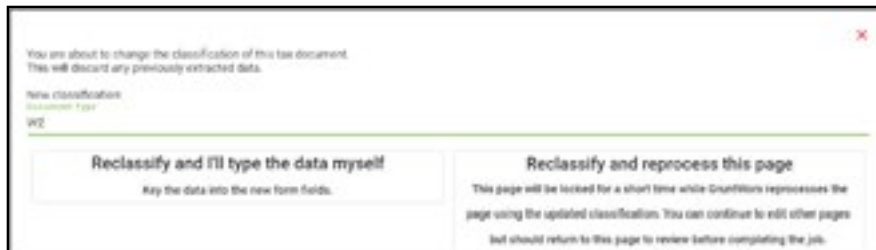
- A new menu appears. Scroll through the classification options to find the needed class.



- Alternately, click the Reclassify Page button in the toolbar.

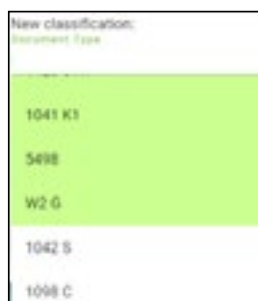


- If a user cannot find a specific class, it means the form is not one that GruntWorx classifies. In this case, the user should classify the form as Supporting Documents.
- Any other source document from a client that is not a GruntWorx classified federal form, including state forms, mileage reports, donation receipts, bank statements, emails, etc., should be classified as Supporting Documents.
- Once a new class is selected, the following message appears:



- Users have the option of typing the new data into the tool themselves, or sending the reclassified page back to the GruntWorx software for re-extraction of available data, which can take 1-15 minutes depending on the amount of data and the clarity of the scan.

! TIP: Classes highlighted in green are supported forms for data extraction.



Please note that any previously extracted data will be discarded once the classification is changed.

Once all pages have been reviewed, click the **Change View** icon to collapse the **Classification & Grouping View** and begin reviewing the extracted data.

The image of the active page is displayed in the center of the screen. With the tools to manipulate the image, users can zoom, show extracted data above or below the data on the page image, show/hide a box that displays the area of the form from which the data was extracted, and turn on or off auto-scroll.

How to Review Data in the Tool

Step 2. Review the extracted data.

- Click into the first field in the right-hand panel and tab through the fields to review or edit.



- As the user clicks into fields, a blue checkmark is added at the left of the data entry field to indicate the field was reviewed.
- For each field, the application highlights the section on the active image from which GruntWorx extracted the data. For reasons that may include quality of the image, GruntWorx may not find/extract all data. For this reason, the user should check all fields.

Tips for Specific Forms and Fields

- Addresses on forms should **only** be 3 lines \longrightarrow **Payer Name**
123 Street Name Suite #
City, ST 00000
- States **need** to be abbreviated.
- Marketplace Identifier, Box 1 on the 1095-A, **needs** to be two-character abbreviation for State.
- Brokerage Groups – Data should be extracted from the Summary pages, and users should **use the Ignore Page button** to ignore all other brokerage detail pages. This will prevent any randomly extracted data from detail pages from being entered as DIV, INT, MISC, or OID values from being imported.

Depending on data in the document, data is editable in either multi-record format or individual field format.



- Multi-record fields allow the user to validate one or multiple records displayed on the same page and to add or delete rows.

The forms with fields displayed in multi-record format are:

- 1099-DIV, 1099-INT, 1099-OID, 1095-A, 1098 Mortgage, and the State and Locality information on W-2s and 1099-Rs.
 - Brokerage statements with DIV, INT, MISC or OID records from the Brokerage summary page will not be presented in multi-record format.
- Forms that feature multi-record field entry will also present common payer and owner fields that should be reviewed in the Right Data Entry Panel.
- To add or delete a row, click on add/remove rows in **Top Panel**.
- To change a page from single record to multi-record, click the icon found in the Right Panel.

Brokerage Summary

When reviewing the brokerage statement, the user will be presented with a data entry screen for the input of Trade summary totals for import directly into Form 8949. No data is extracted by GruntWorx, this is up to the user to input to create the trade sheet to import into the Drake Tax Software.



The Brokerage Summary data entry table will display on all pages of the brokerage and Forms 1099-B.

The user may hide the table by clicking on the hide arrow, and show the table by clicking on the show arrow

The table displays above the form by default, the user may move the table by clicking on the undock icon and dock it again by clicking on the dock icon

Brokerage Summary (OPTIONAL DATA)			
	Sales Price	Cost Basis	Wash Sales
ST COVERED	1158.54	4228.61	3070.87
ST NON-COVERED	3853.64	375.79	
LT COVERED	3756.41	1718.46	
LT NON-COVERED	773.85	1171.44	397.59
ST OTHER	1218.33	348.22	
LT OTHER	966.72	41.67	
UNDETERMINED	1905.99	110.82	
Totals	\$13633.48	\$7995.01	\$3467.66

Some Consolidated 1099/brokerage statements provide all the trades data in one location.

1099-B Totals	Proceeds	Cost Basis	Unadjusted Gain/Loss	Accrued Market Discount	Wash Sale Loss Disallowed	Gain/Loss Considered Ordinary	Gain/Loss Attributed to Proceeds from Collectibles	Federal Withholding	State Withholding
Total ST Covered	5,290.08	5,005.39	284.69	0.00	0.00	0.00	0.00	0.00	0.00
Total ST Noncovered	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total ST	5,290.08	5,005.39	284.69	0.00	0.00	0.00	0.00	0.00	0.00
Total LT Covered	65,028.42	58,412.48	6,615.94	0.00	0.00	0.00	0.00	0.00	0.00
Total LT Noncovered	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total LT	65,028.42	58,412.48	6,615.94	0.00	0.00	0.00	0.00	0.00	0.00
Total Uncovered Proceeds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Net Totals	70,318.50	63,417.87	6,900.63	0.00	0.00	0.00	0.00	0.00	0.00

1099-B Section	Total Proceeds	Total Cost Basis	Total Market Discount	Total Wash Sales	Realized Gain/Loss	Federal Income Tax Withheld
Short-term transactions for which basis is reported to the IRS	589.42	590.15	0.00	0.00	-20.73	0.00
Short-term transactions for which basis is not reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is reported to the IRS	18,356.06	20,150.79	0.00	0.00	-794.73	0.00
Long-term transactions for which basis is not reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Transactions for which basis is not reported to the IRS and Term is Unknown	0.00	0.00	0.00	0.00	0.00	0.00
	18,945.48	20,740.94	0.00	0.00	-815.46	0.00

SUMMARY OF PROCEEDS, GAINS & LOSSES, ADJUSTMENTS AND WITHHOLDING						
Term	Form 1099 type	Proceeds	Cost basis	Market discount	Wash sale loss disallowed	Net gain or loss
Short	A (basis reported to the IRS)	52,675.58	44,112.11	0.00	0.00	8,563.47
Short	B (basis not reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Short	C (Form 1099-B not received)	0.00	0.00	0.00	0.00	0.00
	Total Short-term	52,675.58	44,112.11	0.00	0.00	8,563.47
Long	D (basis reported to the IRS)	67,305.82	71,408.52	0.00	26.78	-4,098.92
Long	E (basis not reported to the IRS)	16,043.47	18,515.74	0.00	0.00	-3,502.27
Long	F (Form 1099-B not received)	0.00	0.00	0.00	0.00	0.00
	Total Long-term	83,349.29	90,916.26	0.00	26.78	-7,599.19
Undetermined	B or E (basis not reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Undetermined	C or F (Form 1099-B not received)	0.00	0.00	0.00	0.00	0.00
	Total Undetermined-term	0.00	0.00	0.00	0.00	0.00
	Grand total	136,024.87	135,028.37	0.00	26.78	964.28
Withholding	Amount					0.00

The user will key the data into the Brokerage Summary. Totals should match the totals on the document.

Brokerage Summary (OPTIONAL DATA)			
	Sales Price	Cost Basis	Wash Sales
ST COVERED	126194.16	137186.12	
ST NON-COVERED			
LT COVERED	26038.72	15299.13	
LT NON-COVERED	51303.01	55642.65	
ST OTHER			
LT OTHER			
UNDETERMINED			
Totals	\$206335.89	\$208127.90	\$0.00

a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

SUMMARY OF PROCEEDS, GAINS & LOSSES, ADJUSTMENTS AND WITHHOLDING

Refer to the 1099-B and Proceeds not reported to the IRS pages to ensure that you consider all relevant items and to determine the correct gains and losses. The amounts shown below are for informational purposes only.

Term	Form 8949 type	Proceeds	Cost basis	Market discount	Wash sale loss disallowed
Short	A (basis reported to the IRS)	126,194.16	137,186.12	0.00	0.00
Short	B (basis not reported to the IRS)	0.00	0.00	0.00	0.00
Short	C (Form 1099-B not received)	0.00	0.00	0.00	0.00
	Total Short-term	126,194.16	137,186.12	0.00	0.00
Long	D (basis reported to the IRS)	26,038.72	15,299.13	0.00	0.00
Long	E (basis not reported to the IRS)	51,303.01	55,642.65	0.00	0.00
Long	F (Form 1099-B not received)	0.00	0.00	0.00	0.00
	Total Long-term	77,341.73	70,941.78	0.00	0.00
Undetermined	B or E (basis not reported to the IRS)	0.00	0.00	0.00	0.00
Undetermined	C or F (Form 1099-B not received)	0.00	0.00	0.00	0.00
	Total Undetermined-term	0.00	0.00	0.00	0.00
	Grand total	206,335.89	208,127.90	0.00	0.00

Withholding

Amount	
Federal income tax withheld	0.00

For other brokerage documents, the user will find sub-totals at the end of each section of the trades – ST/ LT and Covered/Non-covered and Underdetermined.

SELL	1071	05/28/2019	03/02/2020	11,794.00	11,245.90	460.53
Short-Term Covered Total				\$101,413.72	\$102,913.34	\$443.55 * (\$1,056.47)

Note: To accommodate document formats that do not include a summary table, the Pop Lite Brokerage Summary input table is visible on every page of a grouped brokerage document. This allows data entry and retention from any page.

Brokerage Summary (OPTIONAL DATA)			
	Sales Price	Cost Basis	Wash Sales
ST COVERED	126194.16	137186.12	
ST NON-COVERED			
LT COVERED			
LT NON-COVERED	26038.72	15299.13	
ST OTHER	51303.01	55642.65	
LT OTHER			
UNDETERMINED			
Totals	\$206335.89	\$208127.90	\$0.00

Quantity

Quantity	Sales Price	Cost Basis	Wash Sales
2 (market)	26,038.72	15,299.13	13,539.59
100,000	26,038.72	15,299.13	13,539.59
100,000			
200,000			

Total of 2 transactions: 13,539.59

DE INC
DE INC
FORM 1099-B No. 1545-0715
M TRANSACTIONS FOR NONCOVERED TAX LOTS (Ordinary gains or losses are identified in the Additional information column) (Line 3)
is 8949, Part II with Box E checked. Basis is NOT provided to the IRS. (Line 3)
C: "Cost or other basis," "Acquired market discount," "Wash sale loss disallowed" and "Gain or loss (L)" are NOT reported to the IRS.
is of property/CUSIP/Symbol

Use of the Brokerage Summary:

	Sales Price	Cost Basis	Wash Sales
ST COVERED			
ST NON-COVERED			
LT COVERED			
LT NON-COVERED			
ST OTHER			
LT OTHER			
UNDETERMINED			
Totals	\$0.00	\$0.00	\$0.00

The categories include the typical classes of capital gains dispositions required for Schedule D reporting. The data will carry to the Tradesheet ready for import in the format required by Drake Tax Software.

The categories of trades are grouped by Term which is indicated as either ST (short) or LT (long) and covered/non-covered which indicates whether basis is reported to the IRS.

Undetermined is a category presented on the source document where neither the Term nor Basis is known.

ST and LT OTHER can be used to present Categories C and F where indicated. A corresponding code adjustment to the Tradesheet should be made prior to import.

Once every page has been reviewed by the user, it is ready to be sent back to GruntWorx for completion. When the user tabs out of the last field on the last page of the job, the **Job Actions** menu appears.

- **Review complete: Save and upload job** - The job returns to GruntWorx for production of a bookmarked PDF, the Diagnostics Excel Sheet (if applicable), and the Population XML file.
- **Have us verify the job for you** - sends the files to GruntWorx as a Populate job. GruntWorx US based staff will review and validate the job for you. Additional charges apply and the turn-around time will be subject to normal wait times.
- **Cancel and Delete Job** - removes the job from processing. There will be no charges for the job.



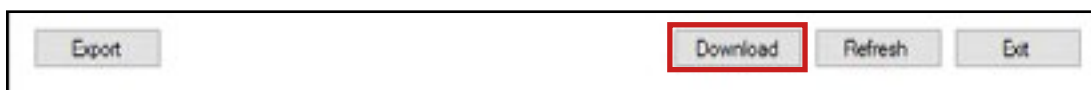
This menu can be accessed anytime by clicking Job Actions in the toolbar of the application.

How to Download and Import Completed Files

- To download a completed GruntWorx job, navigate to the Drake Software Home Window and click on the **GruntWorx** icon in the toolbar.
- Click on the **Job Status** tab.



- Select the job and click **Download**.



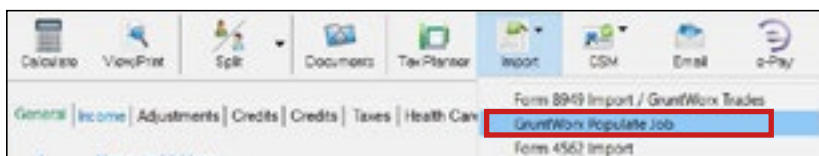
- When the download is complete, click **OK** and close out of GruntWorx.

⚠ TIP: GruntWorx sends all the processed files to DDM. When the download is complete, a new folder with the GruntWorx files will have been inserted in the Client folder in the DDM. There will be an XML file containing the Populate Lite extracted data, and this file should not be edited. The Organized PDF will also be in this folder.

If a brokerage statement was submitted there will be an .XLS file if the Brokerage Summary screen was completed during the validation process.

	Date Acquired	Date Sold	Type	Ordinary	Proceeds	Cost	AMT Cost Basis	Account Discount	Wash Sale Loss	US Real Property	Adj 1 Code	Adj 1 Amount	Adj 1 AMT Amount	Adj 2 Code	Adj 2 Amount	Adj 2 AMT Amount	Adj 3 Code
1																	
2			S		\$1,158.54	\$4,228.81											
3			S		\$3,853.64	\$375.79											
4			L		\$3,736.41	\$1,718.46											
5			L		\$773.85	\$1,171.64											
6			S		\$1,218.33	\$348.22											
7			L		\$956.72	\$41.87											
8			L		\$1,905.89	\$170.82											

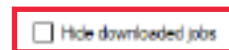
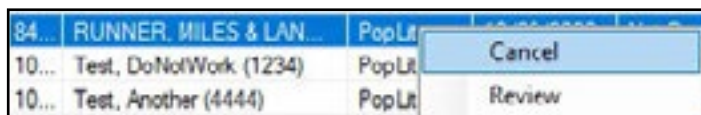
- Open the client's return – a prompt appears saying there is a Populate job ready for import for this client.
 - If there is no prompt – On the Data Entry Screen, click **Import**.
 - Select **GruntWorx Populate Job**.
 - Click **Import**.



- Once the import is complete, the user will be directed to the client's Data Entry Screen.

Canceling Jobs

- Drake users can cancel jobs from within Drake Tax Software.
 - For **Organize** and **Populate** – Before they are worked by GruntWorx staff
 - For **Populate Lite** – Both prior to opening the Self-Validation Tool and during Review
- Users can cancel jobs from the **Job Status** tab of the GruntWorx application within Drake Software.
 - Highlight the job you wish to cancel.
 - Right-click to open the menu.
 - Select **Cancel**.
- Canceled jobs can be viewed by un-checking the box for **Hide downloaded jobs**.



User-Friendly Features

The Self-Validation Tool for Populate Lite has been created to be as user-friendly as possible. It has single-screen functionality, intuitive user help, and the ability for self-pace during an independent review of extracted data.

- W-2s, 1099-Gs and Rs, and K-1s have fields that are checkboxes. Users can check or un-check a box by clicking the spacebar or click the checkbox with the mouse.
- Check the **Mark all as Viewed** checkbox located on the Right Data Entry Panel to add the blue Reviewed checkmark to all fields on a page. Uncheck to remove blue checkmarks.



Built-in features on the **Zoom Image Menu** include -

Zoom - adjust the size of the image by clicking on the green ball and moving it to the right to enlarge, or to the left to make smaller.

Show data - view data in the active field without looking away from the scanned image. The arrow next to the toggle allows data be shown below the extraction box or above the extraction box. This feature can be turned off.

Show box - this feature is on by default to display the area on the page from which the data was extracted. The color of the box matches the Confidence Level. This feature can be turned off.

Auto-scroll - While tabbing or clicking through fields, the active image moves to allow the extraction box to be visible at all times. If the user prefers to move the page themselves, toggle this switch off.

zoom

show data

show box

auto-scroll

Data Entry Panel

The **Right Data Entry Panel** displays the form fields that GruntWorx populates, and users can tab through all fields or click into any field to edit. The active field is highlighted in blue. At the top of the Right Panel, arrows allow the user to go forward or back a page in the job. The Panel Lock/Unlock will allow the user to hide the data entry panel. The Mark all as Viewed checkbox will add blue checkmarks next to each field.



Expanding Panels

Users can expand the **Classification & Grouping View** and Data Entry Panels. To expand the panels, hover mouse on the inner border of the panel. User's mouse will change to . Drag the panel to desired size. Drag to return to size or make smaller.



Unlocking & Locking Panels

Users can unlock panels to view the entire screen. To unlock a panel, click the button found in the top of the Thumbnail and Right Panels. To lock the panel back in place, move the mouse to that section of the screen and click .



TIP: With both Panels unlocked, the full screen can be utilized for data review.

Tips for Self-Validation

- Users should only be scanning **one form per page**. GruntWorx products will only extract the data of one class per page. If the user receives documents from a client and they are 2 or 3 forms per page, the user can duplicate those pages before submitting the job, and would then be able to extract one form per page.

When entering or validating EINs and SSNs, users **do not** need to enter dashes, Xs, or asterisks. If SSNs are masked, users should **only** key in the last 4 that are visible.

On form: 12-3456789

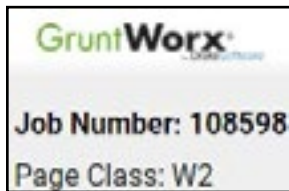
Type into tool: 123456789

On form: XXX-XX-1234 *-**-1234**

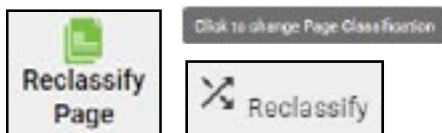
Type into tool: 1234

Changing a Page Classification

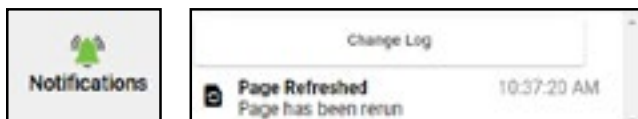
The classification of a document is displayed in the top left corner of the toolbar and on the top of the Thumbnail image.



To change the classification of a page, either right-click on the Thumbnail page and select Reclassify, or click **Reclassify Page** in the Toolbar. Both bring up the Reclassification menu.



If a user selects to have a page rerun by GruntWorx, the page becomes unavailable during the re-extraction. The user can continue working on other pages in the job at this time. Once the page has been updated with the new class and newly extracted data, a notification is displayed at the bottom of the screen that says **Page has been rerun**. There is a **Page Refreshed** alert in the Notifications section of the toolbar.



Go to Page Feature

The Page Navigation buttons allow the user to navigate to the Previous page or Next page. Users can navigate to a specific page by clicking between the Previous and Next buttons (i.e., Page 1 of 55). A menu will open that shows all pages and their classification. The user can then scroll and select to jump to a page they specify.



Ignoring Pages

Occasionally GruntWorx will extract data from pages that should not be populated in the tax return. Users can ignore these pages to prevent incorrect population of extra data. Duplicate forms, detail pages in a brokerage group, and supporting documents in a K-1 group should all be ignored. Click **Ignore Page** in the toolbar to ignore a page or select Ignore from the **Page Menu**.



To unignore a page, either click **Un-ignore Page** in the toolbar or right-click the mouse on the thumbnail image and select **Don't Ignore** from the **Page Menu**.



Click to Ignore This Page



Skipping Pages

The **Skip Pages** feature, when activated, will automatically skip over non-extraction pages (Back Page, Blank Page, Handwritten Notes, Organizer, Poor Quality Image, Supporting Documents and supporting K-1 pages) and pages ignored by the user. The icon in the toolbar changes to **View All Pages** – click to turn this off and view every page.



Stop at every page (click to skip pages with no data)

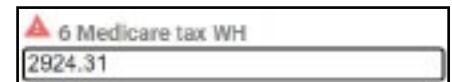
Report Extraction Issue

Users can send an extraction Issue Report to GruntWorx by clicking **Report Issue** in the toolbar. After clicking the icon, an Extraction Problem Report form will open. Enter your email address, and the extraction issue to send directly to GruntWorx from within the tool. GruntWorx will not respond. This is simply for the collection of data to help improve the product in the future.

A screenshot of a web form titled 'Extraction Problem Report'. It has a 'User name' field, a 'Email address' field, and a larger text area for 'What is the extraction problem?'. There are 'Submit' and 'Cancel' buttons at the bottom.

Business Rules Red Flags

Red triangles will be present on fields that are missing data or field calculations that do not match business rules. Hovering over the red flag will display the reason for the flag.




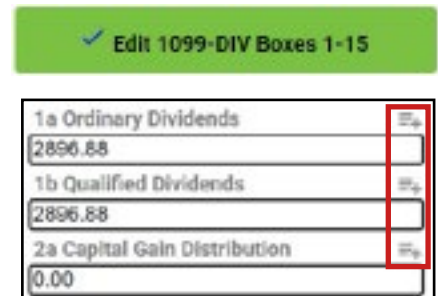
Confidence Levels

If the field is red GruntWorx has a low confidence in the data extracted. Users need to make sure to review.

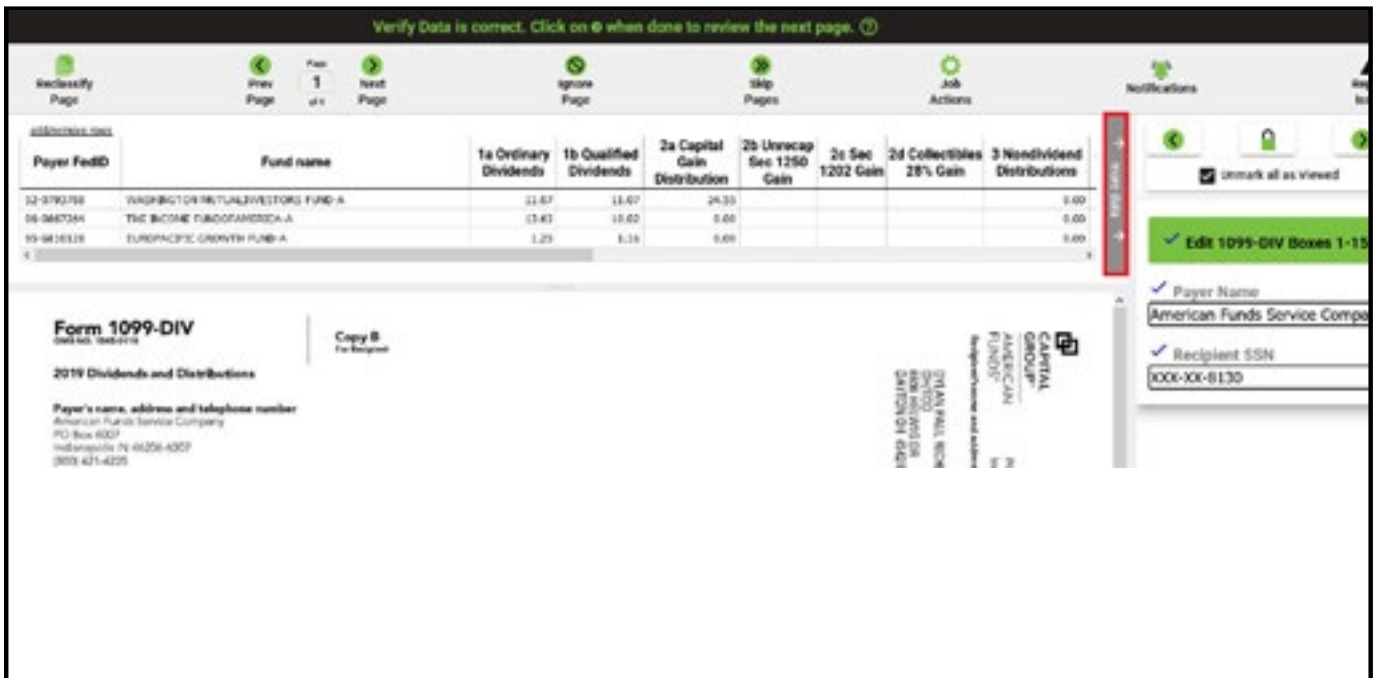
Multi-Record Format

1099-DIVs, INTs, OIDs, 1095-As and 1098 Mortgage statements can sometimes display multiple records from the same payer on one page. To accommodate these records, the Self-Validation tool provides the user with a multi-record data entry format in the **Top Data Entry Panel**. These records can only be validated in the **Top Panel**, to access them click on the green box in the **Right Data Entry Panel**.

To change a page from single record to multi-record, click any of the  icons found in the **Right Panel**. Users can click the **Tab** button or click through fields, with blue highlighting indicating what field the user is actively in. If adding or deleting rows is necessary, this can be done by clicking on **add/remove rows** in the top panel.



Click on more data to review additional data in the top panel.





Here is a list of all supported forms for Populate Lite



- W-2
- W-2G
- 1095-A
- 1098
- 1099-MISC
- 1099-NEC
- 1099-B
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-R
- RRB-1099
- SSA-1099
- 1099-OID
- Consolidated 1099
- 1120S K-1
- 1065 K-1
- 1041 K-1

Forms classified in the Bookmarked PDF

- W-2
- W-2G
- W-2C
- 1042 S
- 1095-A
- 1095-B
- 1095-C
- 1098
- 1098-C
- 1098-E
- 1098-T
- Brokerage
- 1099-A
- 1099-B
- 1099-C
- 1099-CAP
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-H
- 1099-K
- 1099-LTC
- 1099-MISC
- 1099 -NEC
- 1099-OID
- 1099-PATR
- 1099-Q
- 1099-R
- 1099-S
- 1099-SA
- RRB-1099
- RRB-1099R
- SSA-1099
- 2439
- 5498
- 5498-SA
- 5498-ESA
- 1041 K-1
- Grantor Letter as 1041 K-1
- 1065 K-1
- 1120S K-1
- Supporting Documents
- Organizers