VITA/TCE User Guide

TaxSlayer Pro Online

Contents

TaxSlayer Pro Online Administration

Login and Passwords

After completing this topic, you will be able to:

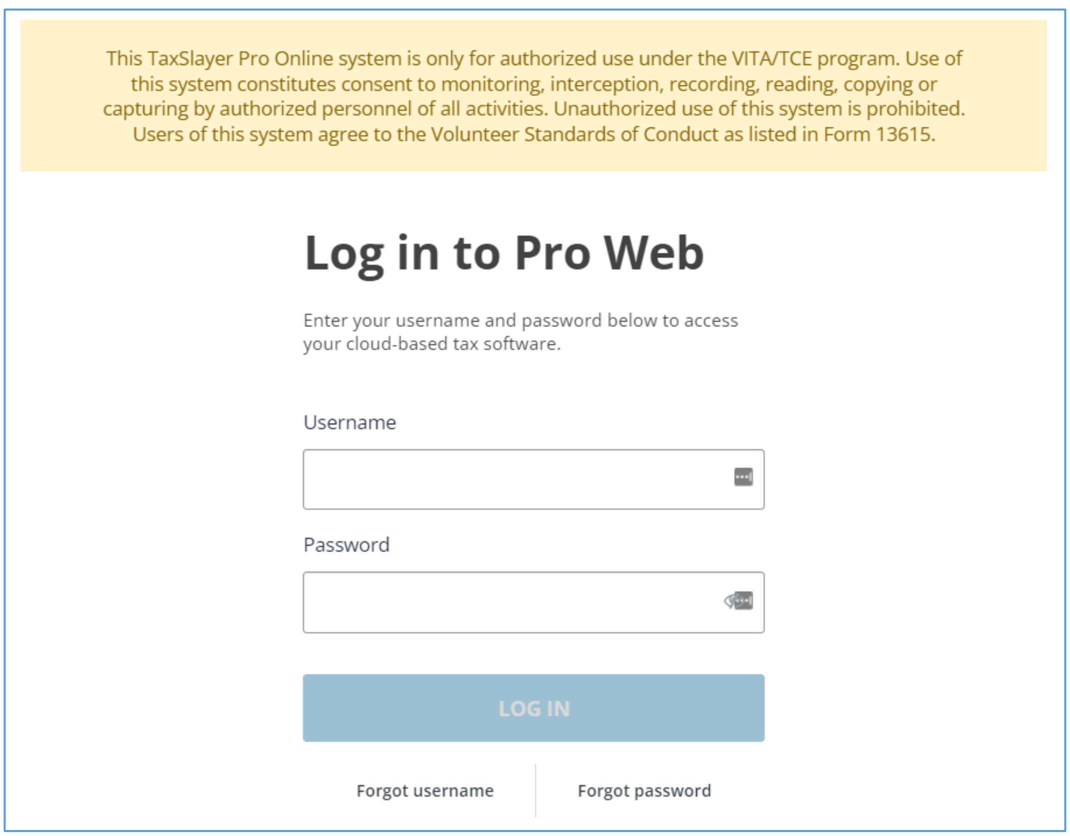
- Navigate to TaxSlayer Pro Online.
- List the password requirements.
- Change your password the first time you log in.
- Reset your password.
- Describe and use Multi-Factor Authentication.

Login

When you are ready to begin working in TaxSlayer Pro Online, use the following steps:

1. Navigate in your web browser to the VITA/TCE Springboard https://vita.taxslayerpro.com/.
2. Click **Pro Online**.

Your web browser displays the TaxSlayer Pro **Login** page:



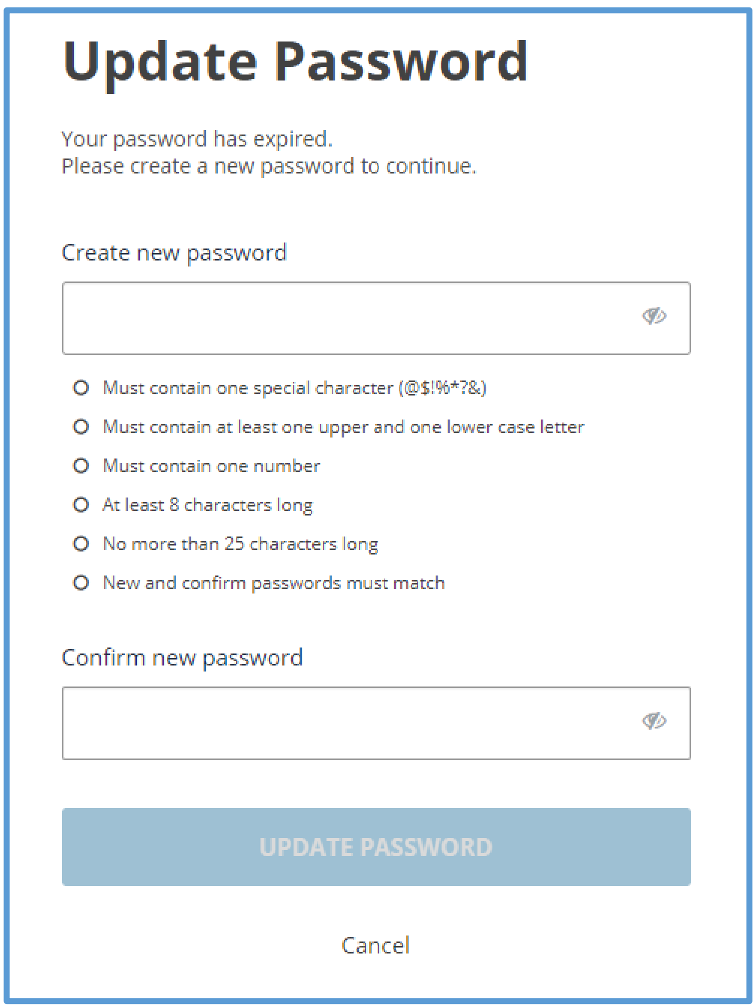
3. In the appropriate boxes, type one of the following:
    a. The user name and password you received from your site administrator, or
    b. Your user name and password from the previous year.

TIP: Passwords are case-sensitive. TaxSlayer Pro Online displays a warning if you attempt to enter your password with your CAPS Lock on.

TIP: Click the **Click here to show/hide password** (eye) icon in the password boxes to display the password as you enter it.

4. Click **LOGIN**.

The first time you log in, TaxSlayer Pro Online displays the **Update Password** page:



5. Type a new password.

When you create a new password, make sure your password meets the following requirements:

- Minimum of eight (8) characters with at least one (1) of each of the following:
    - 1 upper case letter
    - 1 lower case letter
    - 1 number
    - 1 special character

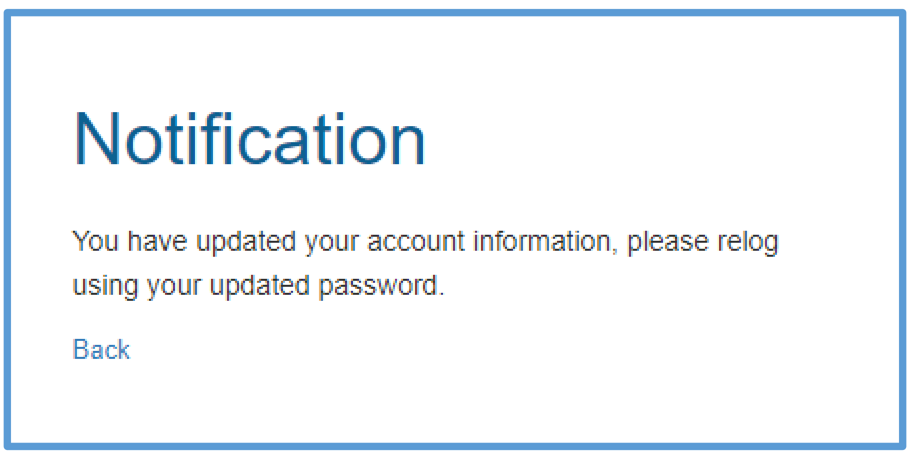
NOTE: You can only use the following special characters: @ $! % * ? &

- Remember that passwords are case-sensitive. Make sure you type the password the same way when you log in later.

6. Type the password again for verification.
7. Click **SUBMIT**.

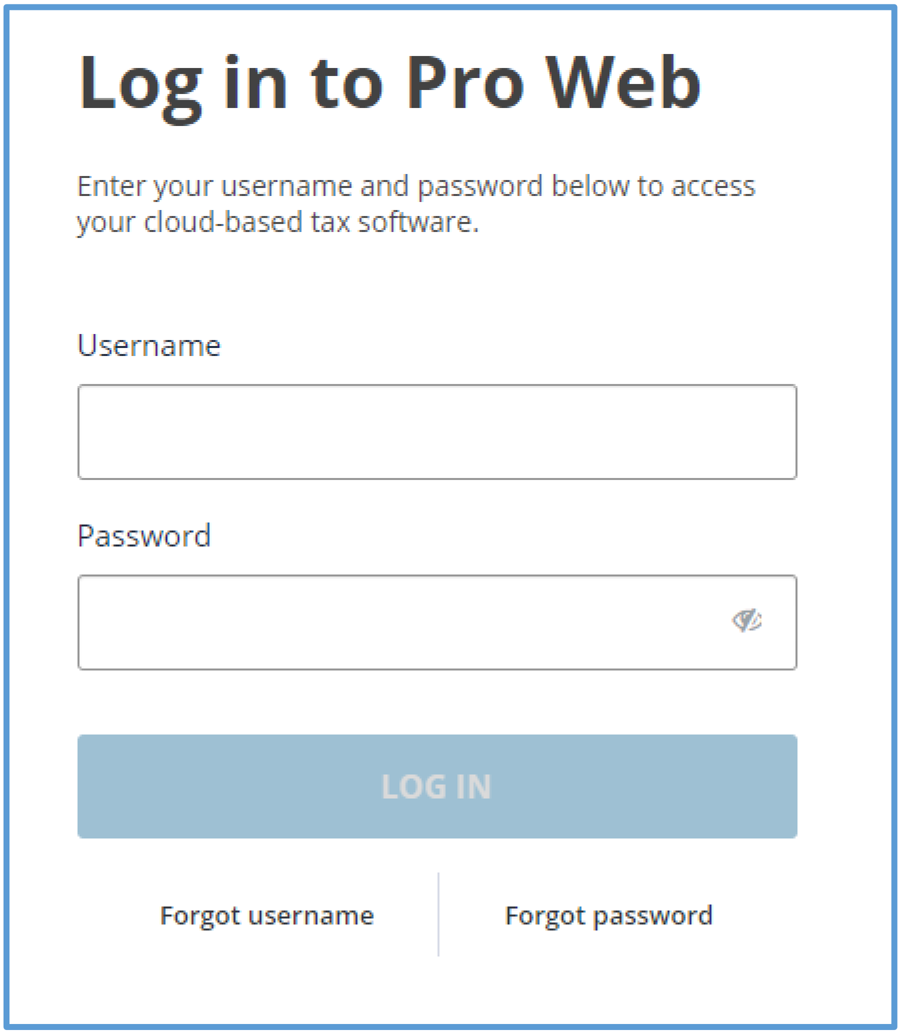
TIP: Click the **Click here to show/hide password** (eye) icon in the password boxes to display the password as you enter it.

TaxSlayer Pro Online displays the **Notification** page:



8. Click **Back**.

TaxSlayer Pro Online displays the **Login** page:



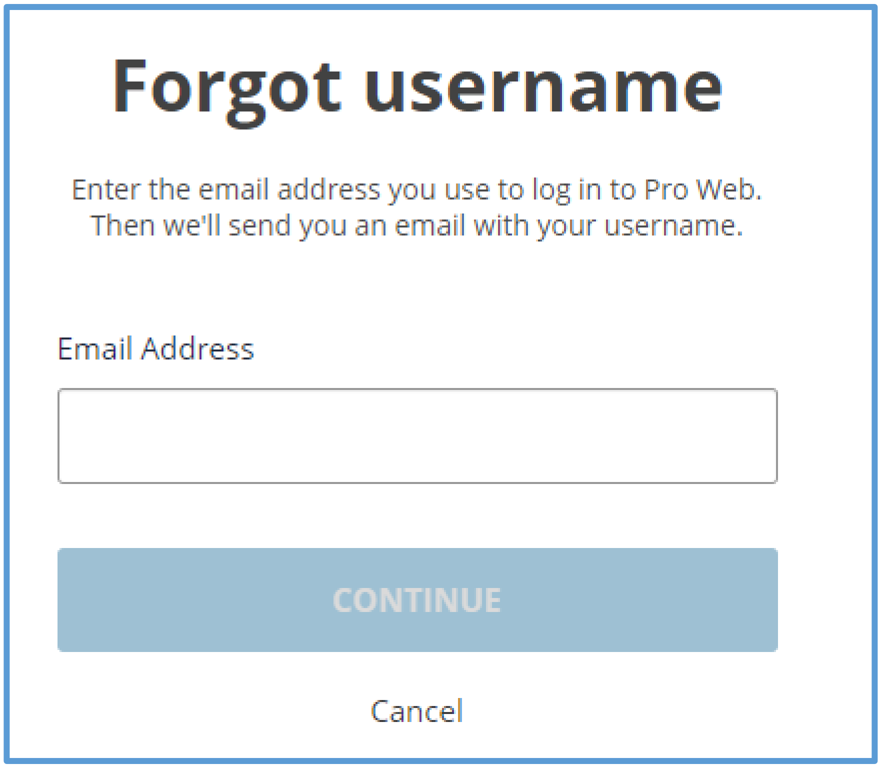
9. Type your user name and **new** password.
10. Click **LOGIN**.

Retrieving Your User Name

If you forget your user name, you can retrieve it from the system. To retrieve your user name, use the following steps from the **Login Page**:

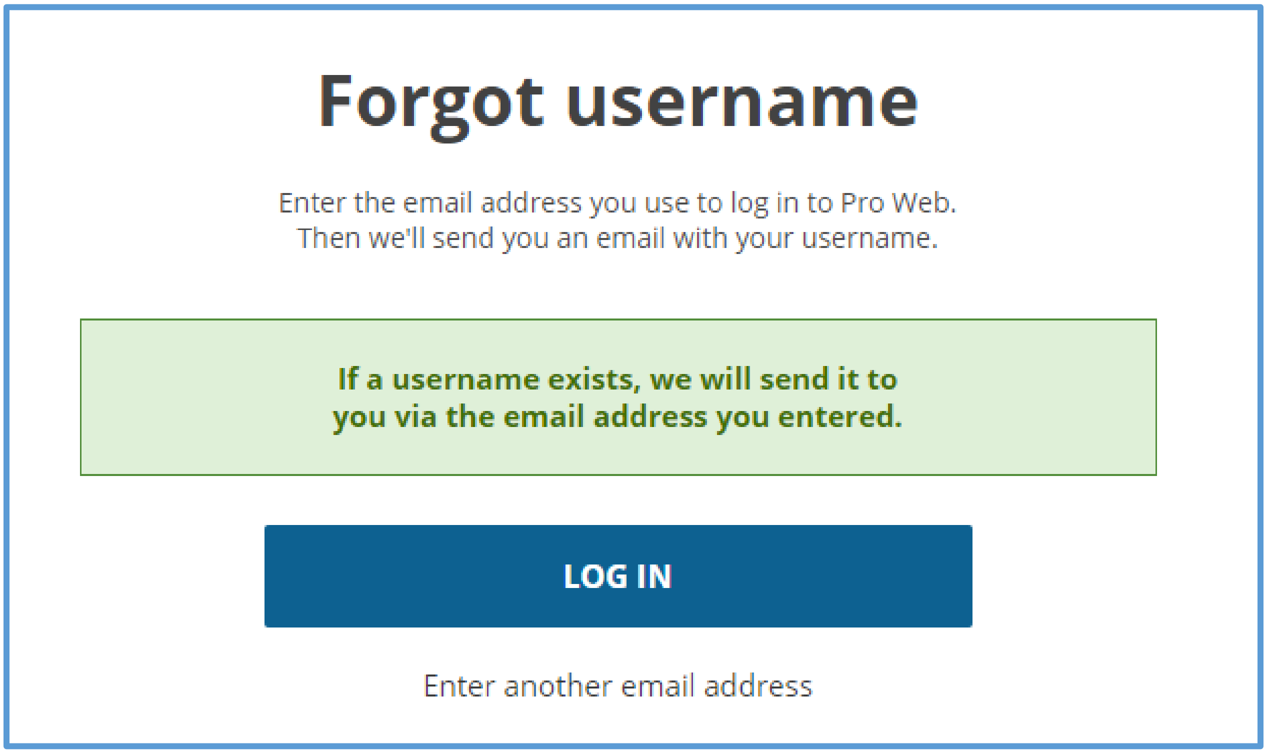
1. Click **Forgot username**.

TaxSlayer Pro Online displays the **Forgot username** page:

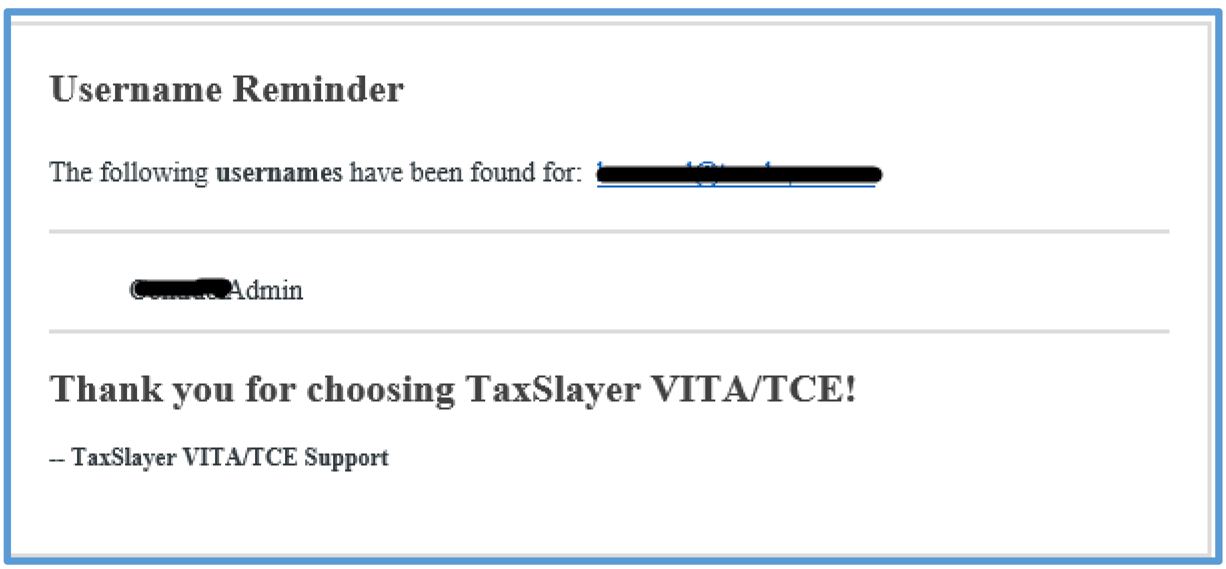


2. Type the email address used during the setup for your Preparer account.
3. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Forgot username** page:



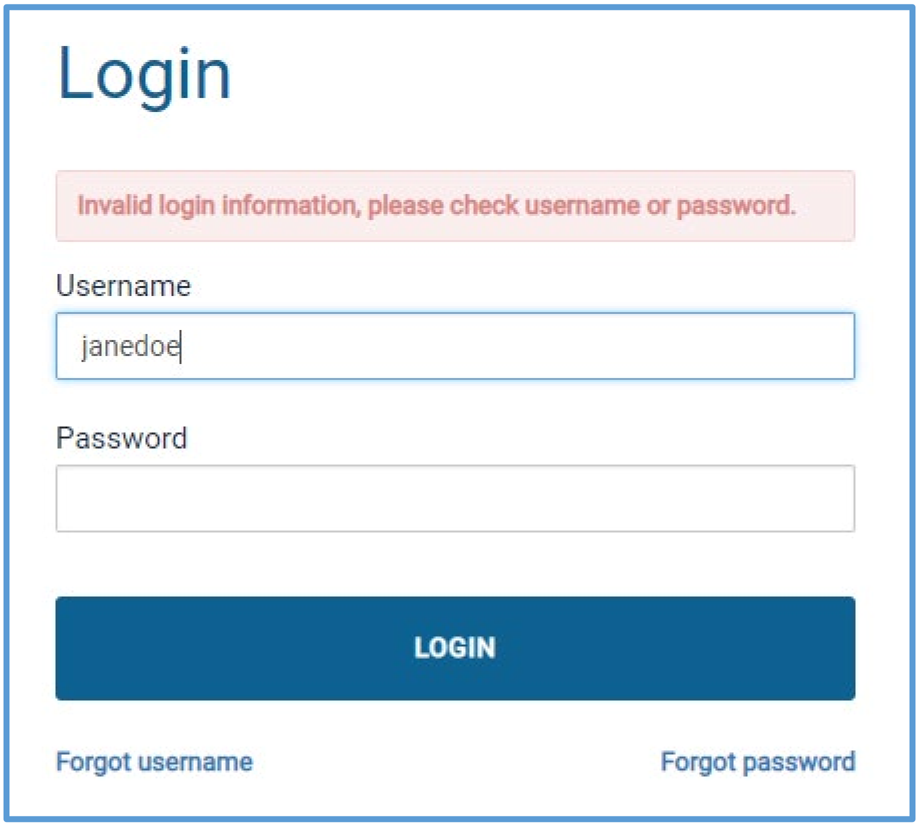
TaxSlayer Pro Online sends an email, similar to the following:



4. On the **Forgot username** page, click **Cancel**.
5. Log in.

Resetting Your Password

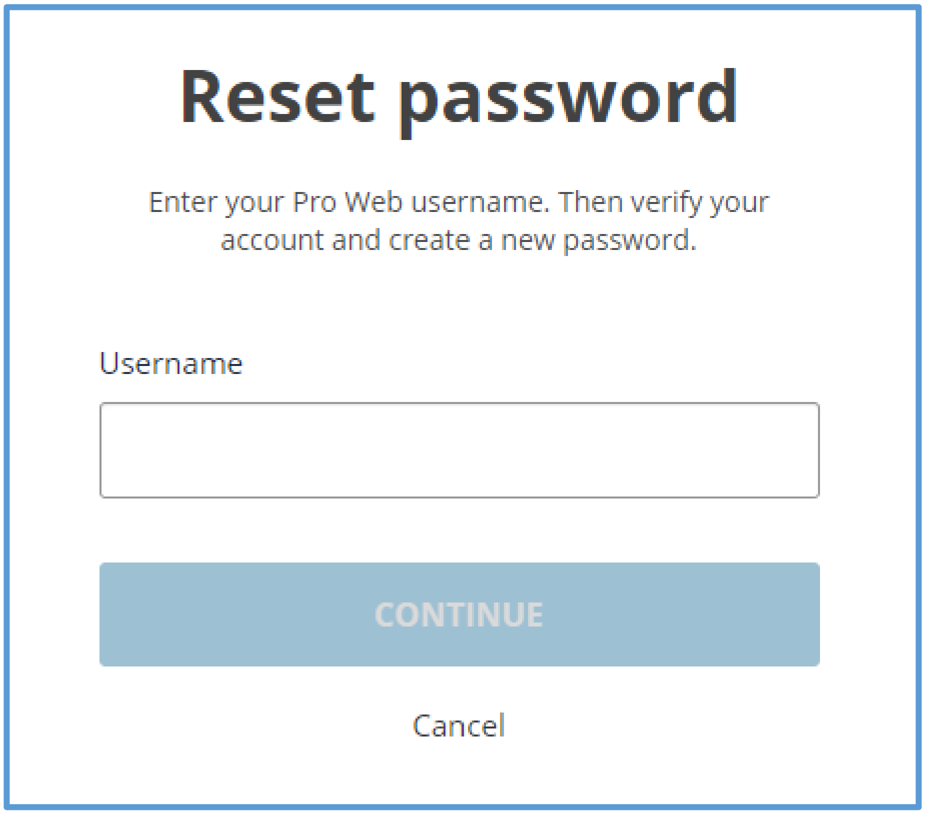
If you forget your password, you may need to reset it. If you type the wrong password, TaxSlayer Pro Online displays the following message:



To reset your password, you need your user name. Use the following steps:

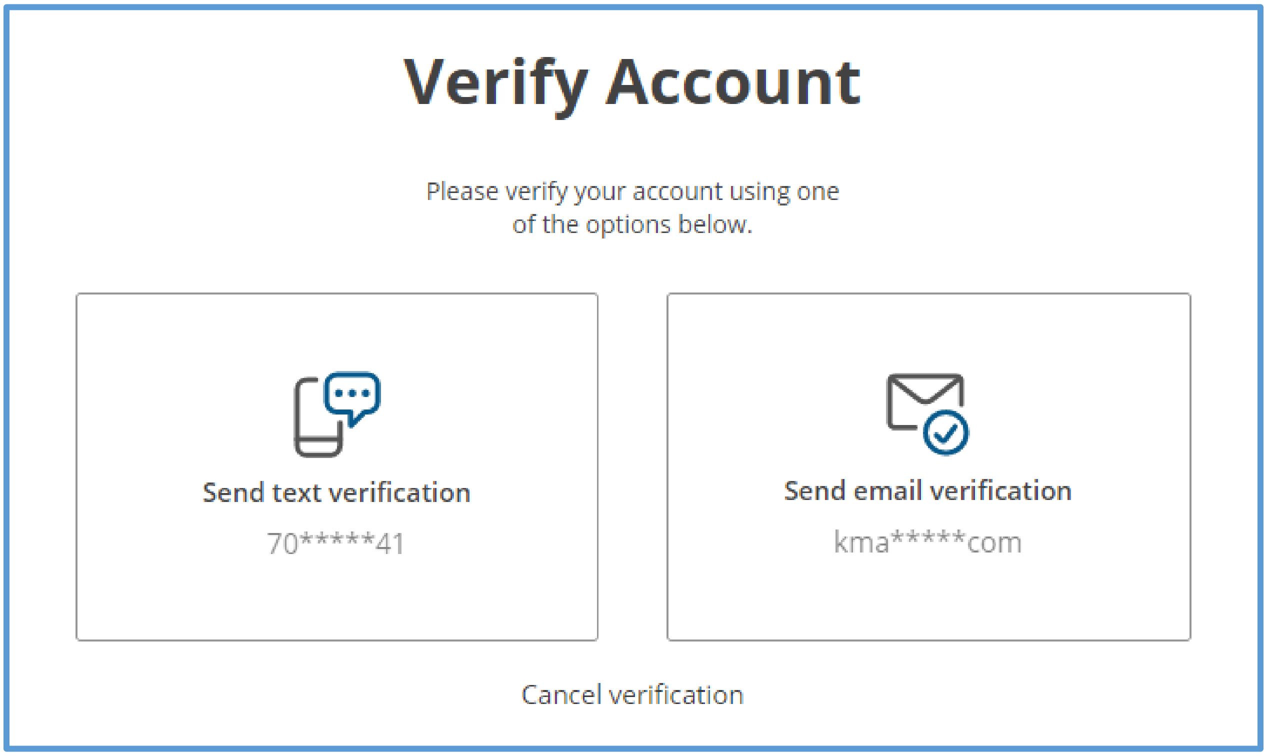
1. Click **Forgot password**.

TaxSlayer Pro Online displays the **Reset password** page:



2. Type your user name.
3. Click **CONTINUE**.

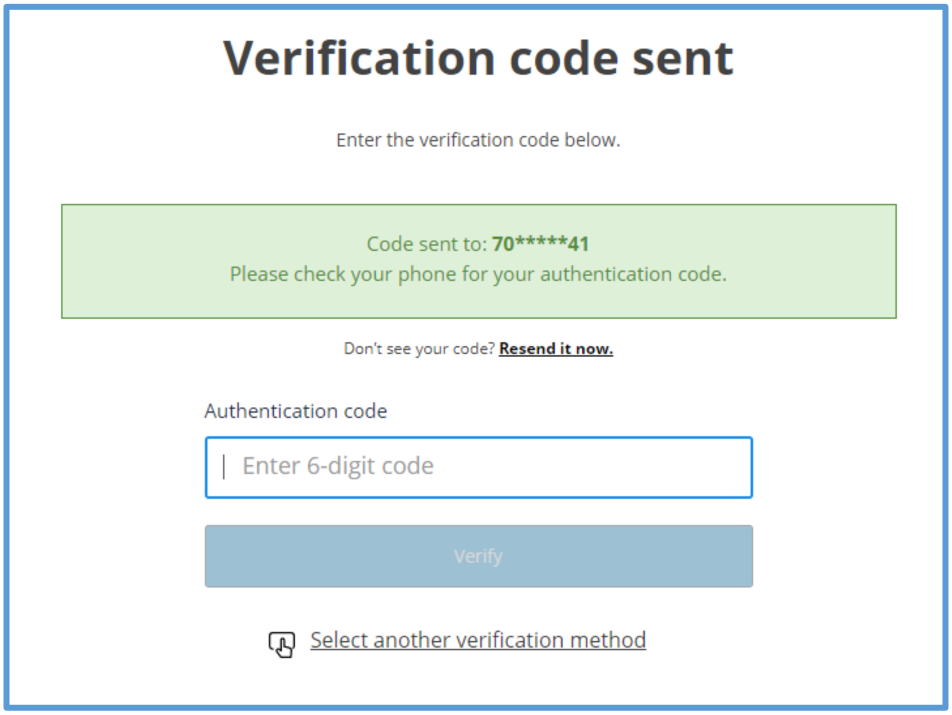
TaxSlayer Pro Online displays the **Verify Account** page:



4. Select a delivery option to receive your verification code.

NOTE: You can receive a verification code to your email. If you have a cell phone number in your preparer information, you can choose either email or text.

5. Click the appropriate delivery option.
6. Retrieve your verification code.
7. Type or paste the verification code in the **Authentication code** box.

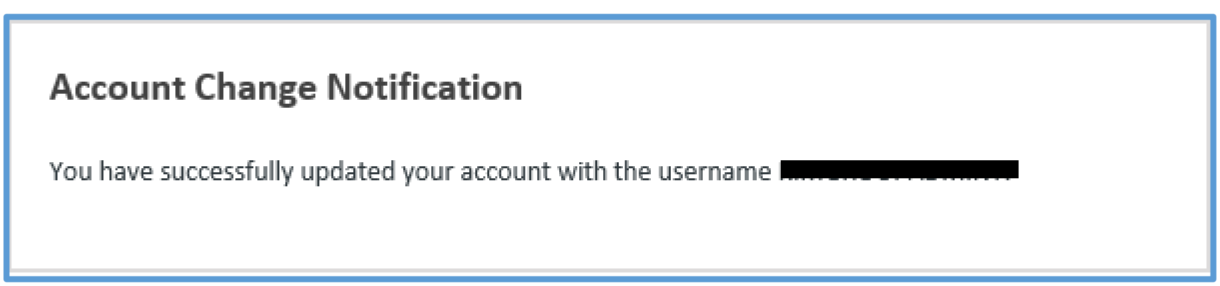


8. Click **VERIFY**.

TaxSlayer Pro Online displays the **Update Password** page.

9. Type a new password.
10. Type the password again for verification.
11. Click **SUBMIT**.
12. Click **Back** on the **Notification** page to return to the login page.
13. On the TaxSlayer Pro Online **Login Page**, type your user name and new password, and then click **LOGIN**.

TaxSlayer sends an email, similar to the following:



Multi-Factor Authentication (MFA)

TaxSlayer Pro Online utilizes Multi-Factor Authentication (MFA) for your login. MFA is an authentication method that uses something other than what you already know to authenticate yourself.

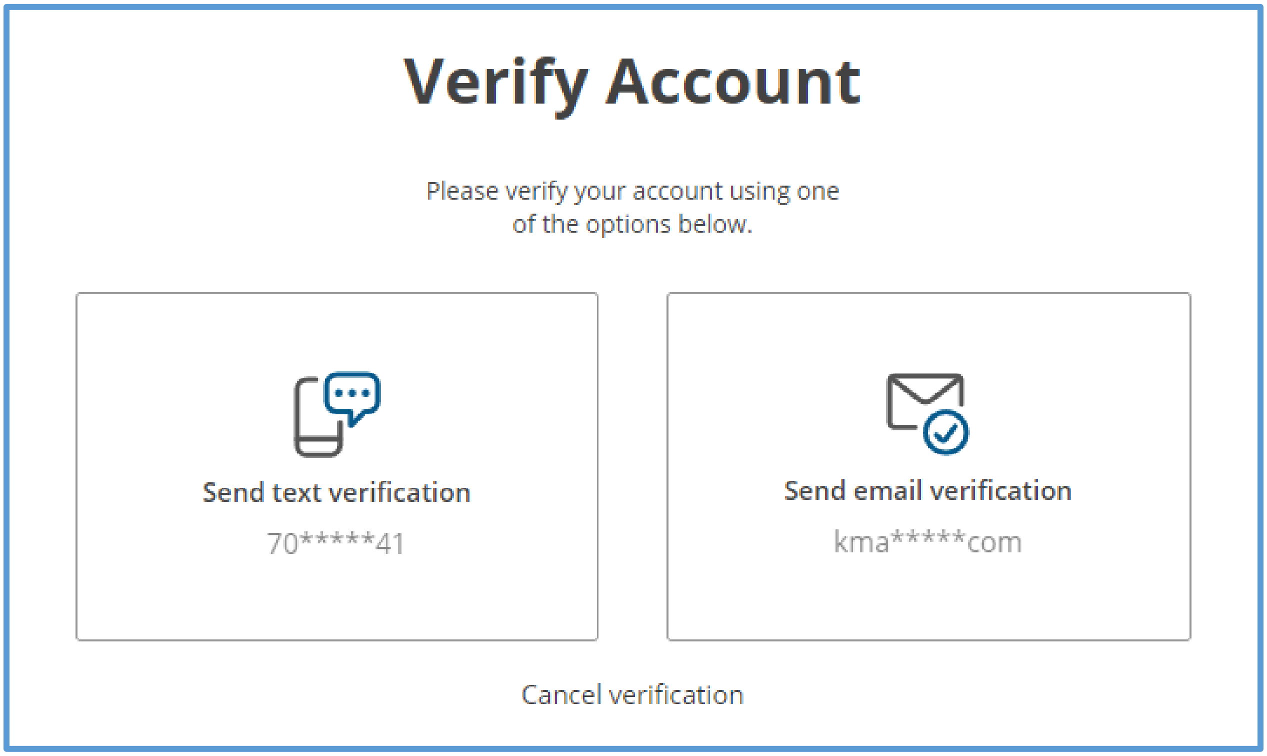
When is Multi-Factor Authentication (MFA) Required?

You must authenticate every fifteen (15) days. In addition, you must authenticate when you do one of the following:

- You log in to a unique device for the first time.
- Your computer is re-imaged.
- You attempt to log in, and fail, three (3) times.
- You click **Forgot Password**.
- You log in with a different browser on the same computer (i.e. log in with Chrome and then open Edge and log in).
- Your browser does not store cookies. In this case, you need to authenticate each time you log in.

Account Verification

When an account verification event is triggered, TaxSlayer Pro Online displays the **Verify Account** page:



1. Select a delivery option to receive your verification code.

NOTE: You can receive a verification code to your email. If you have a cell phone number in your preparer information, you can choose either email or text.

2. Click the appropriate delivery option.
3. Retrieve your verification code from your email or text messages.
4. Type or paste the verification code in the **Authorization code** box.
5. Click **VERIFY**.

TIP: You should only click the delivery option one time. TaxSlayer Pro Online generates a new authentication code each time you click a delivery option.

TIP: Do not close your browser session until you enter your authentication code. TaxSlayer Pro Online invalidates the verification code if you close the **Verify Account** page.

Support Tip: If you are a new site administrator for an existing site, send an email to VITA/TCE support at support@vita.taxslayerpro.com with the following information so you can set up your administrative login credentials:

- Subject: New Site Admin
- EFIN
- Site Name
- Site Admin Name (Enter your name here)
- Site Admin Phone (Enter your phone number here)
- Site Admin Email (Enter your email address here)

Once support processes your request, TaxSlayer sends a link to the email address you provided with instructions to create your admin user account for the site.

Summary

You should now be able to:

- Navigate to TaxSlayer Pro Online.
- List the password requirements.
- Change your password the first time you log in.
- Retrieve your user name.
- Reset your password.
- Describe and use Multi-Factor Authentication.

To see a video of what you just learned, go to Login and Passwords. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Setting up Site Information

After completing this topic, you will be able to:

- Set up your site.
- Set up your EROs.
- Determine the data that carries to the return.
- Set up EROs for ad hoc/virtual sites.

Before you begin using TaxSlayer Pro Online, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carry to tax returns so that you only have to type this information once. This includes items such as the firm/site information.

Setting up Your Site

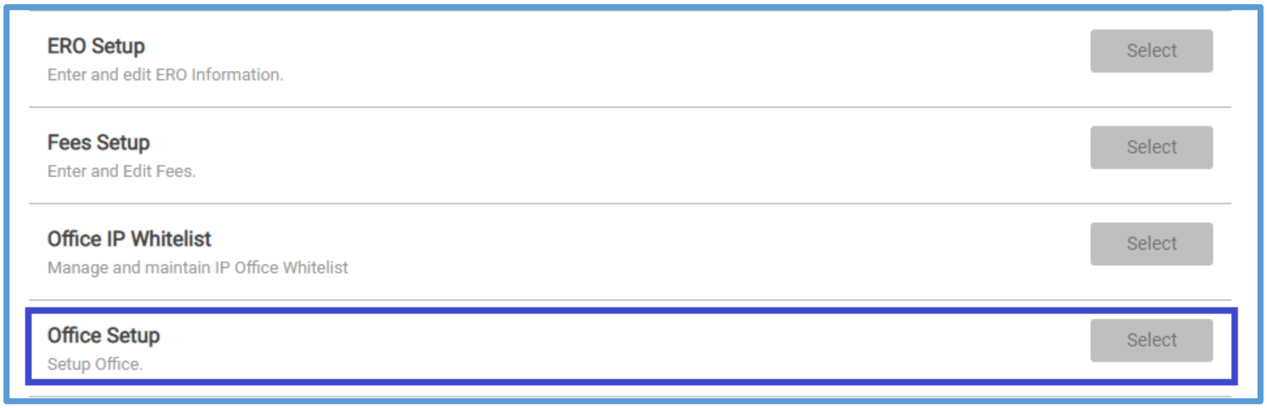
First, set up your site information. To do so, use the following steps:

1. Log in to TaxSlayer Pro Online.

TaxSlayer Pro Online displays the **Welcome** page:

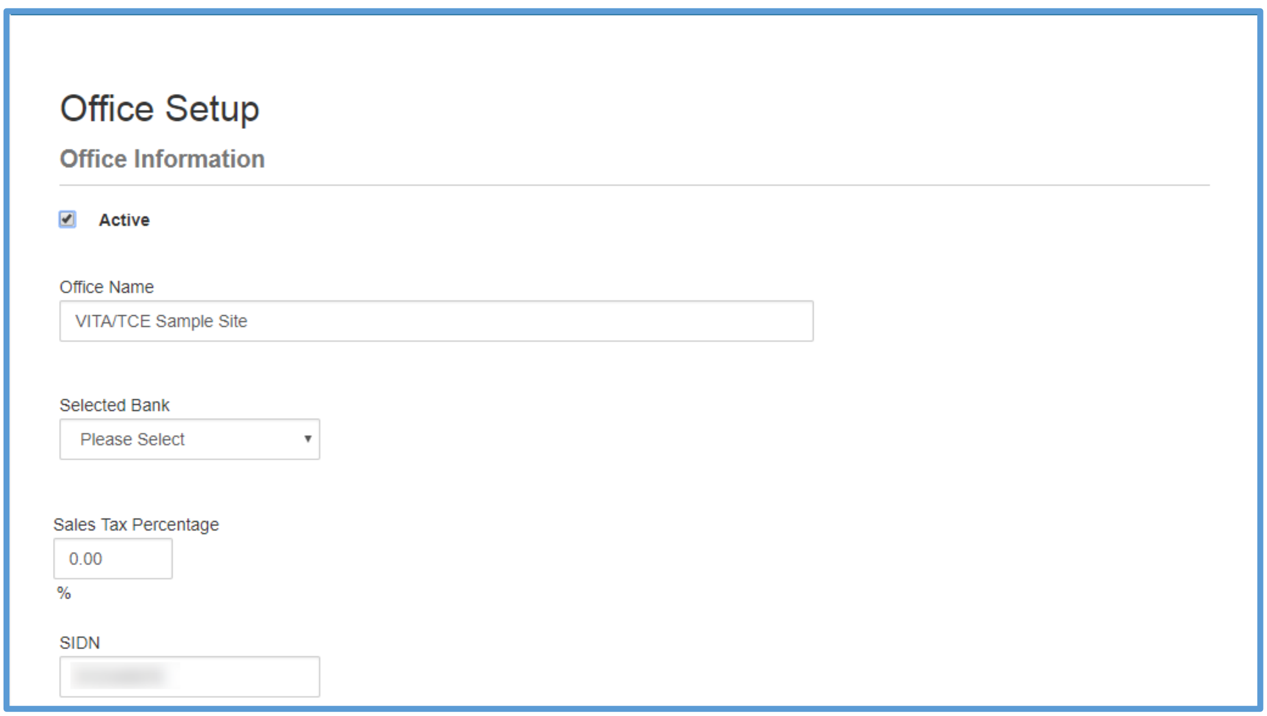
2. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:



3. Click **Select** on the **Office Setup** line.

TaxSlayer Pro Online displays the **Office Setup** page:



4. TaxSlayer populates several boxes on this page based on the information submitted by the IRS. Review this information and make changes as needed.

Note: If you change your Site Name or SIDN, you must email VITA/TCE support to ensure we have the correct information on file.

TIP: Sales Tax Percentage is not applicable to VITA/TCE sites. This feature calculates the sales tax percentage associated with income tax preparation fees.

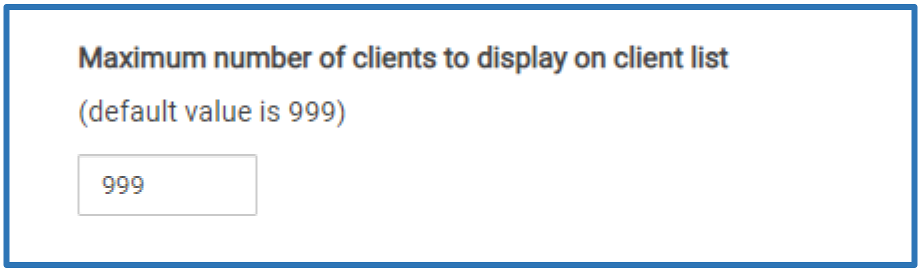
a. Select **Print Digital Signatures on 1040** for Customer Portal
b. Select **Offer 8888** if your site will be offering split refunds.
c. Select **Display Summary using 1040 View**.
d. Select **Hide Preparer Name on 1040 Print**

Note: You should verify these settings each year.

You can select the following other office configuration items:

Configuration Item	Description
Always Print Schedule A	Prints Schedule A with the return, even if standard deduction is higher
Force Verification of IP Address	Refer to the *IP Whitelist* lesson
Default State Return Type to be Sent through Bank	N/A
Require Email Address Entry on Efile Page	Requires an entry in the **Email** box in order to save the **Efile** page
Default Tax Returns in Spanish	Automatically displays and prints returns in Spanish
Require Return Tag(s) for Saving Returns	Require a return tag selection in all returns for return management/quality review purposes
Hide ERO Address on Invoice Print	Does not print the site address on invoices printed to show taxpayer how much they have saved in tax preparation fees

5. Type the appropriate number in the **Maximum number of clients to display on client list** box:



As the site administrator, use this feature to determine when TaxSlayer Pro Online displays the *100 Most Recent Returns* in the Client List to make the list load faster for sites with firewalls, proxy servers, and slow internet connections.

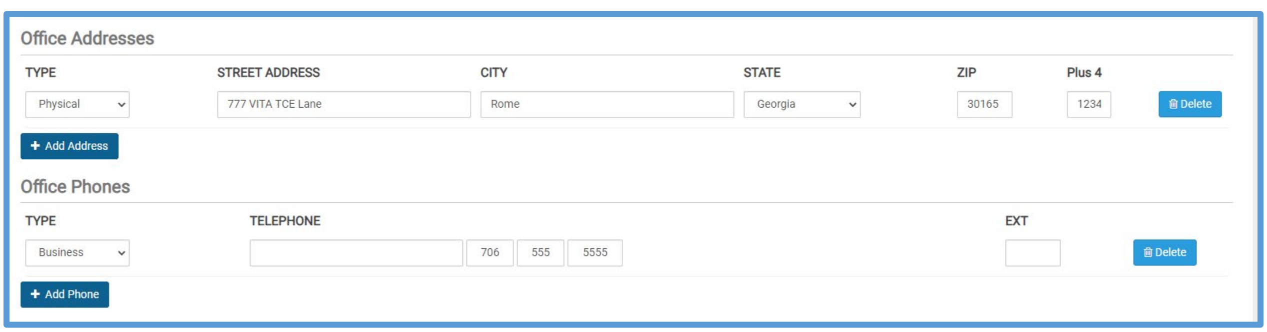
TIP: You can only type a number between 100 and 999.

NOTE: TaxSlayer Pro Online defaults the client search to the last 4 digits of the Social Security number when displaying the 100 most recent returns view.

6. Scroll to the **Office Addresses** and **Office Phones** sections.

TaxSlayer Pro Online displays the **Office Addresses** and **Office Phones** sections:

Note: TaxSlayer imports the information from the order information received from the IRS.



7. Click **Add** in the **Office Address** section.

TaxSlayer Pro Online displays a blank address line:

8. Select the type of address (either physical, mailing, or shipping) from the **Address Type** drop-down list.
9. Type the street address and Zip Code.

TaxSlayer Pro Online fills the city and state based on the Zip Code you type.

TIP: To change an existing address, type over the information in the existing address.

10. Click **Add** in the **Office Phones** section.

TaxSlayer Pro Online displays the **Office Phone** page:

11. Select the type of phone (either home, business, or fax) from the **Type** drop-down list.
12. Type the phone number in the appropriate boxes.

TIP: To change an existing phone number, type over the information in the existing address.

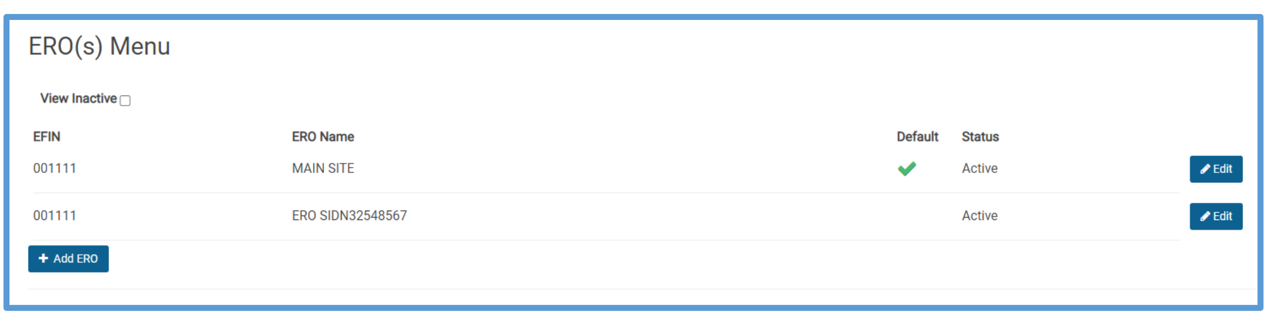
13. When you finish reviewing and adding office information, click **Continue**.

Setting up EROs

After you set up your site's information, you need to set up EROs. To do so, use the following steps:

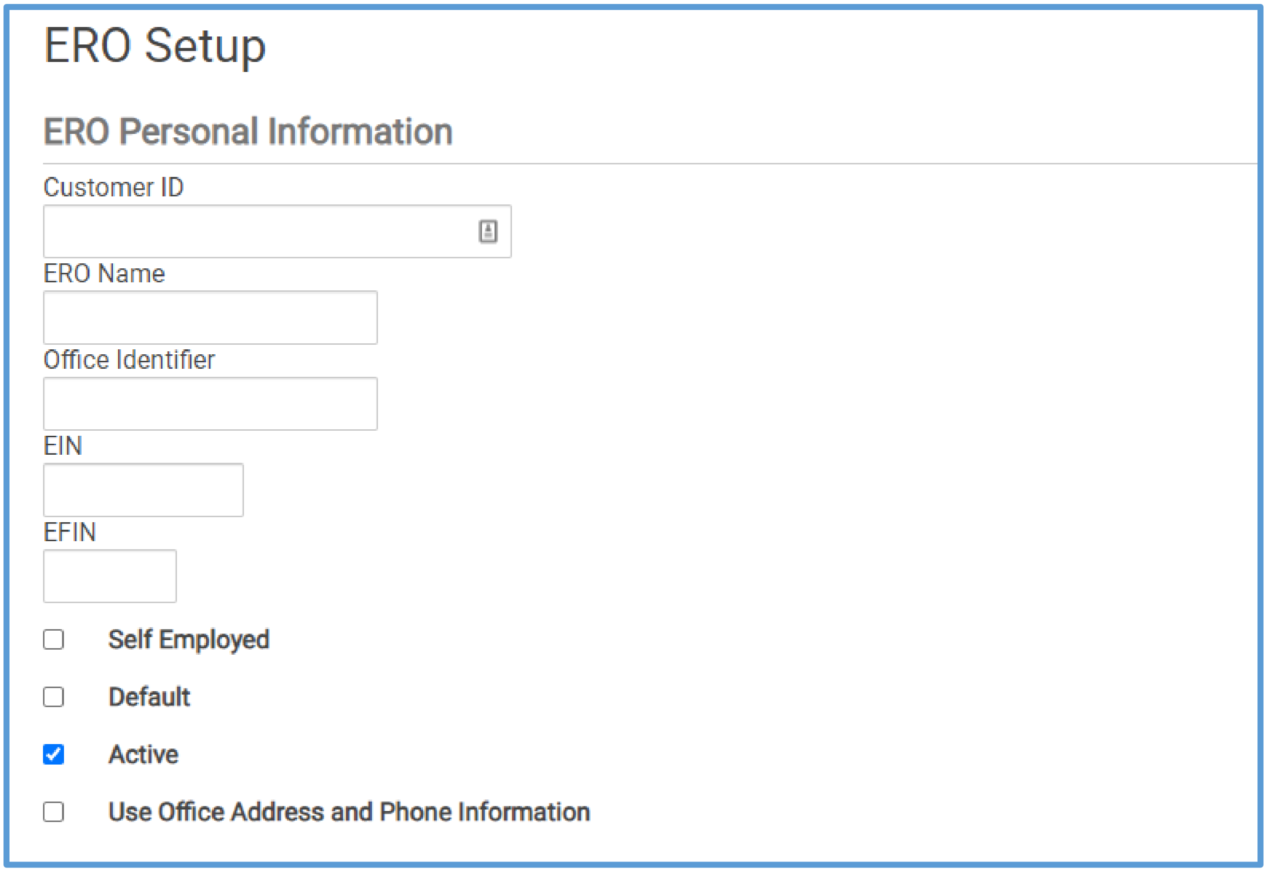
1. Click **Select** on the **ERO Setup** line from the **Configuration Menu** landing page.

TaxSlayer Pro Online displays the **ERO(s) Menu** page:



2. Click **Edit** to make modifications to the pre-populated information.
    a. Click **Add** if TaxSlayer Pro Online does not display any information.

TaxSlayer Pro Online displays the **ERO Setup** page:



3. Type the Customer ID, ERO's name, EFIN, and Office Identifier in the appropriate boxes if the information is blank or if you are setting up an ERO for an "ad hoc" or virtual site.

TIP: If you are setting up an ad hoc or virtual site, you can copy the customer ID from the default ERO screen.

TIP: Do **not** enter information in the **EIN** box or select the **Self-Employed** check box.

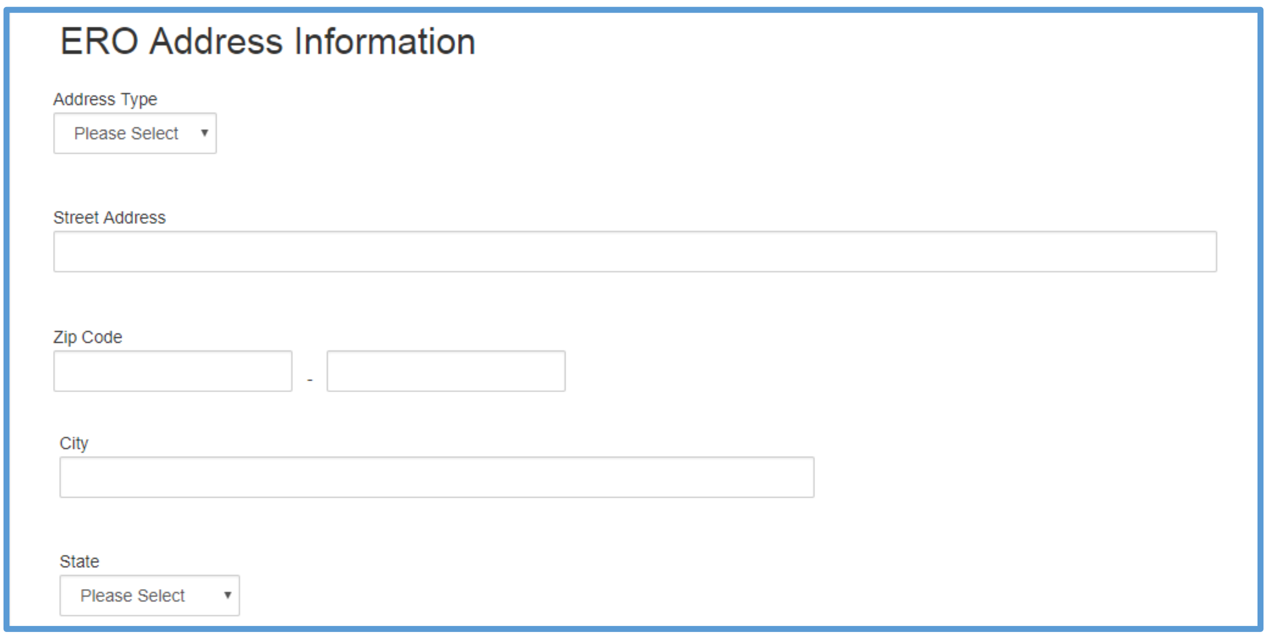
Note: TaxSlayer automatically displays the ERO Name and EFIN sent from the IRS and populates the Customer ID and Office Identifier automatically. The Customer ID, EFIN, and Office Identifier are the same for "ad hoc" and virtual sites.

You cannot change the displayed EFIN without deactivating the current EFIN. If the EFIN displayed on this page does not match your EFIN, contact your SPEC Relationship Manager. TaxSlayer will make all necessary changes once a change request has been approved by IRS Headquarters.

Note: The ERO EFIN, customer ID and Office Identifier must be the same for all active EROs at the site.

4. Select the **Default** check box.
5. Click **Add** or **Edit** in the **ERO Addresses** section.

TaxSlayer Pro Online displays the **ERO Address Information** page:



6. Select the type of address (either physical, mailing, or shipping) from the **Address Type** drop-down list.
7. Type the ERO's address and Zip Code.

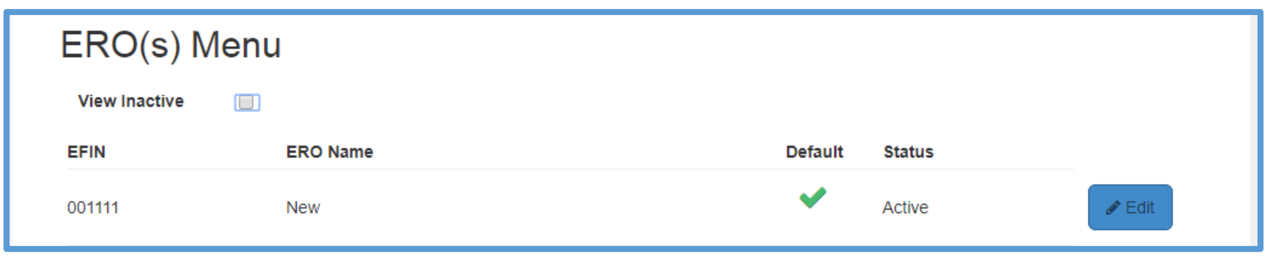
TaxSlayer Pro Online fills the city and state based on the Zip Code you type.

8. Click **Continue**.
9. Click **Add** in the **ERO Phones** section.

TaxSlayer Pro Online displays the **ERO Phone Information** page:

11. Select the type of phone (either home, business, or fax) from the **Type** drop-down list.
12. Type the phone number in the appropriate boxes.
13. Click **Continue**.
14. When you finish adding ERO information, click **Continue**.

TaxSlayer Pro Online displays the **ERO(s) Menu** page with the ERO listed:



15. When you finish, click **Return**.

Setting up EROs for Ad Hoc/Virtual Sites

To ensure that TaxSlayer Pro Online prints the appropriate ERO name on each Form 8879, set up a separate ERO for each ad hoc/virtual site.

Tip: We recommend that you include the ad hoc/virtual site's SIDN in the ERO name box so it is easier for the return preparer to select the appropriate ERO in the **Efile** section of the return.

Note: The ad hoc/virtual site's Customer ID, EFIN and Office Identifier must be the same as the main site's identifier. Make sure you type these correctly to prevent validation errors or IRS rejections.

TIP: Search the VITA/TCE Blog for more detailed information on e-filing your returns with ad hoc and/or virtual site(s).

Summary

You should now be able to:

- Set up your site.
- Set up your EROs.
- Determine the data that carries to the return.
- Set up EROs for ad hoc/virtual sites.

To see a video of what you just learned, go to Setting up Site Information. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Setting up Security Roles and Templates

After completing this topic, you will be able to:

- Identify the pre-defined security roles.
- Determine which security role to use based on the allowed permissions.
- Create a new security role.
- Edit an existing security role.
- Assign security roles.
- List and describe each security role permission.

In TaxSlayer Pro Online, use security roles to set the permissions for each preparer. You can use predefined security roles or create and manage your own roles.

Predefined Security Roles

In most cases, you can use the security roles that TaxSlayer Pro Online delivers with your software. You can choose from any predefined security roles for each user. Below is a listing of the predefined security roles assigned by TaxSlayer on behalf of the IRS.

- ADMINISTRATOR (TS)
- SUPERUSER
- PREPARER CURRENT YEAR
- PREPARER ALL YEARS
- INTERVIEWER
- REVIEWER

Support TIP: For information on any changes and/or additions to the predefined security roles, search the VITA/TCE blog.

When you set up users/preparers, you can select the security role. See *Adding Preparers* for information on selecting security roles for users.

NOTE: You cannot edit the predefined/assigned security roles and will not see them listed in your site's Security Role menu. You will be able to select a role from them when setting up users. See *Adding Preparers* for information on selecting security roles for users.

Creating Security Roles

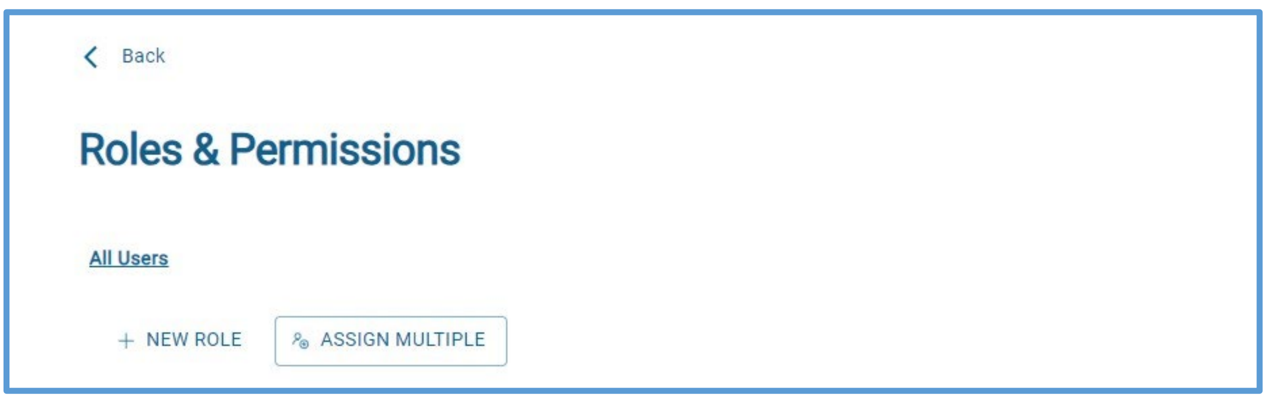
You can create an unlimited number of security roles for your site. To do this, use the following steps from the **Welcome** page:

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:

2. Click the **Roles & Permissions** line.

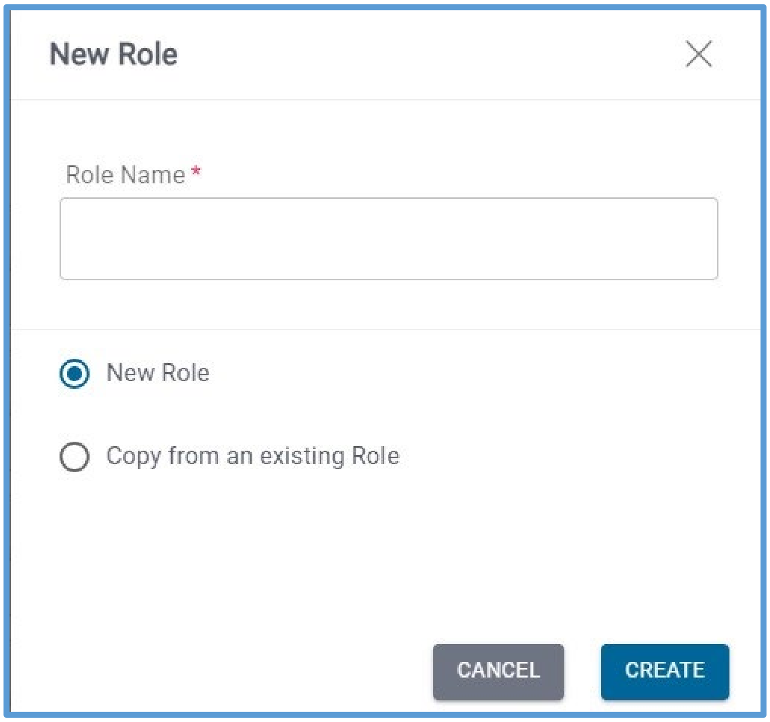
TaxSlayer Pro Online displays the **Roles & Permission** page:



3. Click **NEW ROLE**.

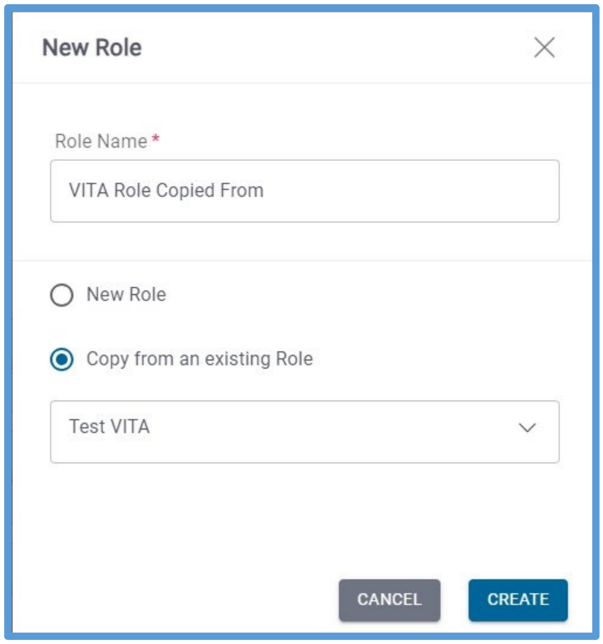
Note: TaxSlayer Pro Online stores previous year's roles as an existing Security Role.

TaxSlayer Pro Online displays the **New Role** page:



4. Type a name for your role in the **Role Name** box.
5. Select either **New Role** or **Copy from an existing Role**.
    a. If you select **New Role**, skip to Step 6.

If you select **Copy from an existing Role**, TaxSlayer Pro Online displays a new drop-down box:



b. Select the security role you want to use as a base for your new role from the drop-down box.

TIP: The **Copy from an existing Role** feature is useful if you know that an existing role is close to what you need for your new role. For example, if the SUPERUSER role is almost what your site needs, but you only need to add or remove a couple of permissions, you can start your new role based on the existing SUPERUSER role and make modifications.

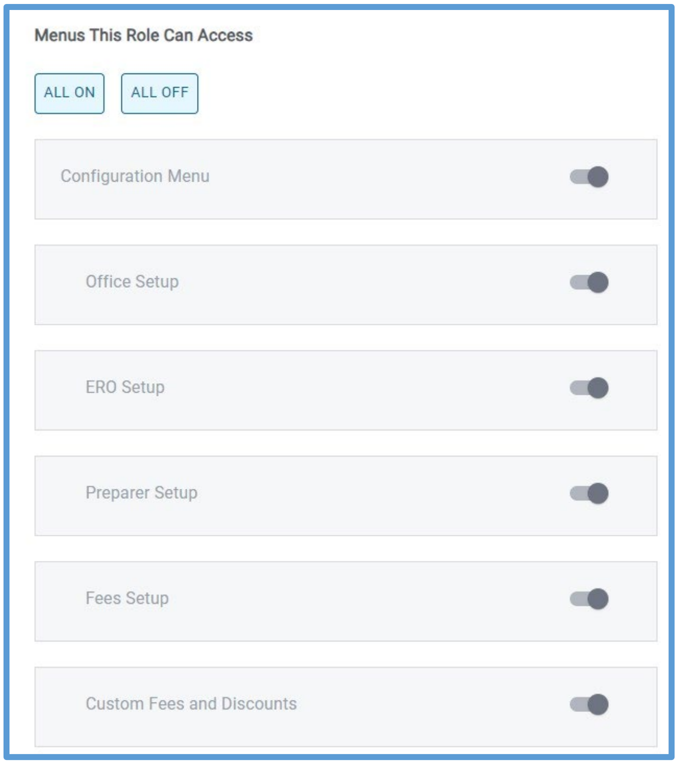
6. Click **CREATE**.

TaxSlayer Pro Online displays the **Role** page:

7. If you want to make this the default role for all new users, select the **Default Role** check box. TaxSlayer Pro Online will then automatically select this role when you create a new user. You can still change that user's role if they need different permissions than the site's default role.
8. TaxSlayer Pro Online automatically selects all permissions. If you know that the permissions for this role will be limited, clear the **Select All** check box so that you can select permissions instead of clearing them.
9. Review each item for which you can allow access for this security template. Select or clear each check box to turn access for a permission on or off for this role.
10. Click **SAVE**.

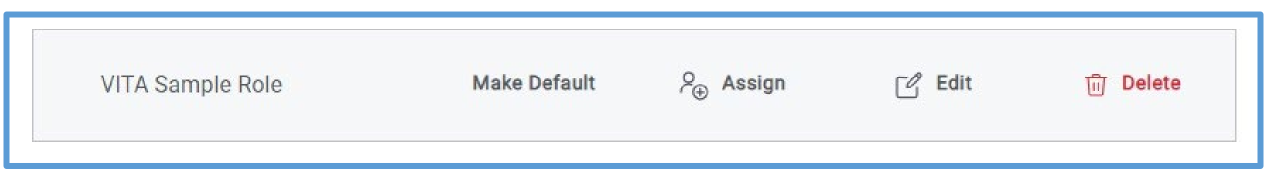
Note that there are changes to Roles and Permissions (formerly Security Templates) beginning with the 2023 Tax Year.

1. Toggle permission for each menu on or off for the security role, as shown below:



2. Some permission names are slightly changed in the list. See the chart at the end of this topic for the previous and updated labels for each permission.

TaxSlayer Pro Online Displays the **Security Roles & Permissions** page with the new security role listed:



11. If you need to add more security roles, click **New Role** and follow the same steps for each security role.
12. When you finish adding security roles, click **Back** to return to the **Welcome** page.

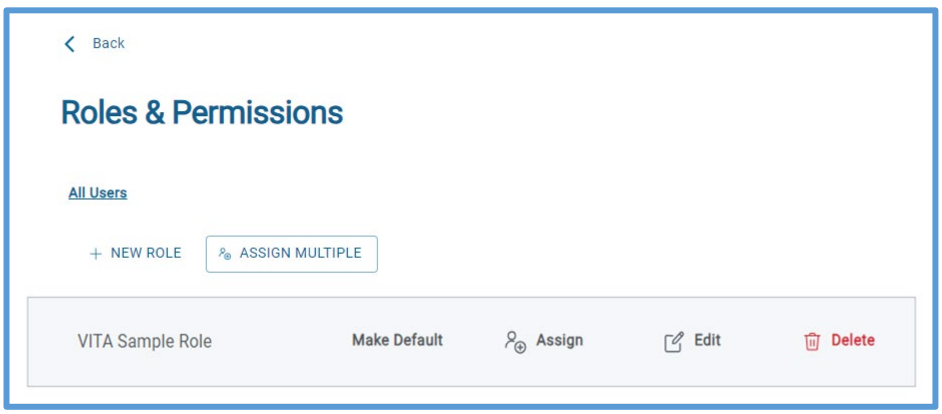
Editing Security Roles

After you add security roles, you can edit those roles at any time. Remember, you cannot edit predefined/assigned security roles. To edit security roles, use the following steps from the **Welcome** page:

1. Click **Select** on the **Configuration** line.

2. Click **Select** on the **Roles & Permissions** line.

TaxSlayer Pro Online displays the **Roles & Permissions** page:



3. Click **Edit** for the security role you want to change.

TaxSlayer Pro Online displays the **Edit Security Role** page:

4. Make any necessary changes to the role. Clear or select any permissions.
5. When you finish, click **SAVE**.

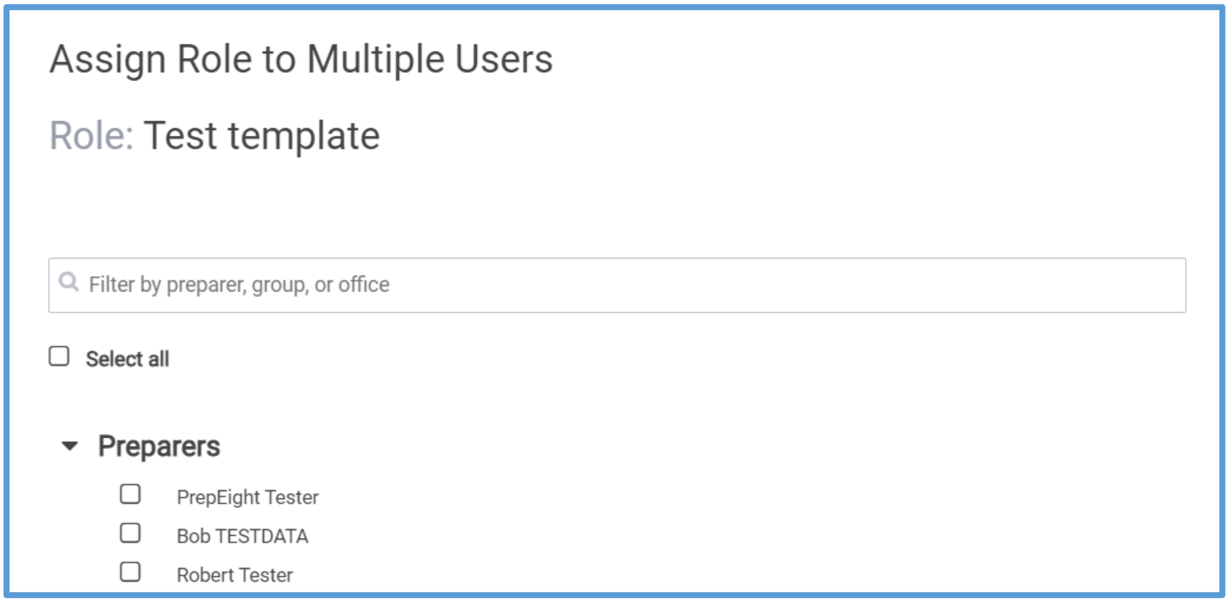
TaxSlayer Pro Online displays the **Security Roles** page.

Assigning Security Roles

You should assign security roles while setting up preparers. However, if you already set up a preparer and need to add a security role or change the existing security role, you can do so from the **Security Roles** page. To do so, use the following steps:

1. On the security role you need to assign, click **Assign**.

TaxSlayer Pro Online displays the **Assign Role to Multiple Users** page:



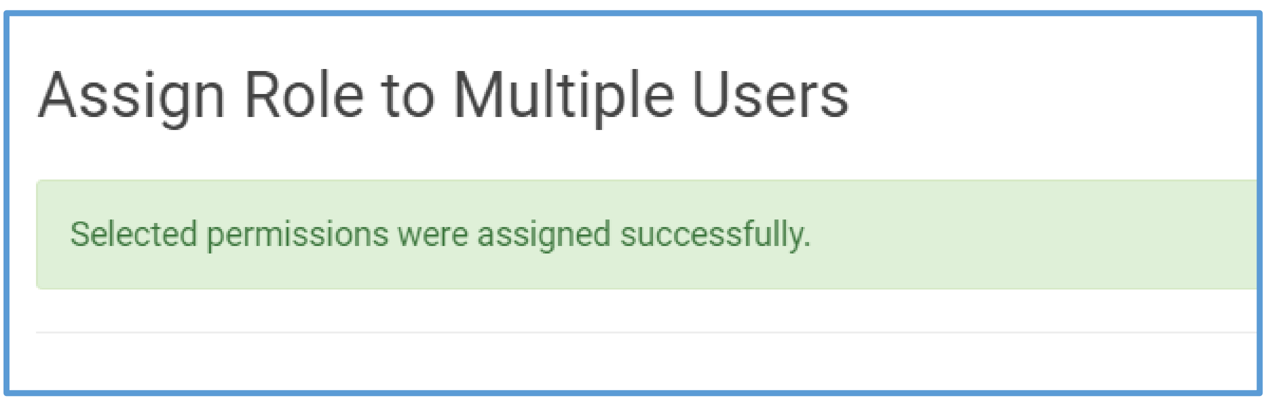
2. Select the check box(es) for any preparers to which you want to assign this role.

TIP: Type a name in the **search…** box to quickly find the preparer.

Select the **Select/Unselect all** check box to assign the role to all users. To display both active and inactive users, select the **Show Inactive Users** check box.

3. Click **Apply Change**.

TaxSlayer Pro Online displays a confirmation page:



4. Click **Back** to return to the **Welcome** page.

TaxSlayer Assigned Security Roles & Permissions

The following chart gives a definition of each TaxSlayer-assigned security role.

Support TIP: For information on any changes and/or additions to the predefined security roles, search the VITA/TCE blog.

Role	High Level Definition – Assigned Permissions	Recommendation
ADMINISTRATOR (TS)	• Create new returns (all years) • Edit existing returns (all years) • Print returns • Mark returns as complete • Deactivate returns • Review returns • Configure all items • Generate reports • Transmit returns • Scanned Documents • Customer Portal	Assign to a limited number of co-administrators
SUPERUSER	• Create new returns (all years) • Edit existing returns (all years) • Print returns • Mark returns as complete • Review returns • Generate reports • Transmit returns • Scanned Documents • Customer Portal	Assign to more experienced preparers and quality reviewers

Role	High Level Definition – Assigned Permissions	Recommendation
PREPARER CURRENT YEAR	• Create new returns (current year only) • Edit existing returns (current year only) • Print returns • Mark returns for review • Scanned Documents • Customer Portal	Assign to preparers who are limited to current year returns; consider only allowing the preparer to see their own returns (configure this option in Preparer Setup)
PREPARER ALL YEARS	• Create new returns (all years) • Edit existing returns (all years) • Print returns • Mark returns for review • Scanned Documents • Customer Portal	Assign to preparers who can create returns for any year; consider only allowing the preparer to see their own returns (configure this option in Preparer Setup)
INTERVIEWER	• Create new returns (current year only) • Edit existing returns (current year only)	Assign to preparers who are only entering data to start a return when returns will be assigned to another preparer for completion

Role	High Level Definition – Assigned Permissions	Recommendation
REVIEWER	• Create new returns (current year only) • Edit existing returns (current year only) • Print returns • Review returns • Mark returns as complete • Scanned Documents • Customer Portal	Assign to current year quality reviewers who need fewer privileges than SUPERUSER

Security Permission Definitions

Tax Returns Section

This security permission option…	allows the user to…	and was formerly labeled as…
Create new tax returns	create tax returns for current and/or previous years.	Create Tax Returns
Open and Edit tax returns	view or edit previously created tax returns. You must use this option in conjunction with **Access Current Year Client List**.	View/Edit Existing Returns
Delete tax return notes	delete notes associated with the tax return.	Delete Return Notes
Set tax return passwords	add a password to a return. This option is required for opening and printing returns, as well as viewing client status.	Password Protect Return
View full taxpayer SSNs	view the client's entire Social Security number on the client list and other areas of the return.	View Full SSN
Email tax returns	Not Applicable for VITA/TCE	Email Return
Print tax returns	generate a PDF of the tax return and access to generate a PDF when applicable at the form level.	Print Returns
Transmit tax returns to the IRS	transmit returns to the TaxSlayer Processing Center.	Send Returns to IRS

This security permission option…	allows the user to…	and was formerly labeled as…
Mark returns Ready to Review	mark that the return is ready for review, adding it to the Review Returns queue.	Mark Return for Review
Review other preparers' returns	review return(s) marked **Ready for Review** and either approve or fail the return.	Review Returns and Mark Review Decision
Bypass marking for Review	Clear this check box to require the preparer to always select **Ready for Review** during return preparation.	Do not Force Return Review
Revert returns back to In Progress	Select if you **do** want the preparer to change a return marked **Complete** back to **In Progress.**	Cannot Change Return Status back to In Progress
Mark returns Complete	indicate that the return is complete and ready for transmission.	Mark Return Complete
Mark returns Imperfect	Not Applicable for VITA/TCE	Display Imperfect Return
Deactivate returns	delete a return with an ***In Progress*** or ***Review Failed*** status. You cannot deactivate a rejected return	Deactivate return

Client List Section

This security permission option…	allows the user to…	and was formerly labeled as…
Access Client List (Current Year)	display the current year client list.	Access Current Year Client List
Access Client List (previous years)	display the client list for each of the three prior years.	Access Previous Years Client Lists
View Client Status	view the taxpayer's return status and return history.	View Client Status
View Refund Status on Client List	Not Applicable for VITA/TCE	View Refund Status
Access Accepted returns in Client List	view or edit previously accepted tax returns. You must use this option in conjunction with **Access Current Year Client List**.	Allow entry into Accepted returns
Access TaxesToGo Client List	Not applicable for VITA/TCE	View TaxesToGo Client List

Preparers Section

This security permission option…	allows the user to…	and was formerly labeled as…
Assign Roles to users	assign security roles to certain preparers.	Assign Preparer's Security Template
Change the Preparer assigned to a tax return	change the preparer associated with a return via the Tools menu.	Change return preparer

Notifications Section

This security permission option…	allows the user to…	and was formerly labeled as…
Dismiss Message Center notifications	Not Applicable for VITA/TCE	Dismiss/Restore Main Menu Notifications

Client Apps Section

This security permission option…	allows the user to…	and was formerly labeled as…
Send Customer Portal invites	create a client/customer portal.	Customer Portal
Import returns from Desktop	Not Applicable for VITA/TCE	Import Desktop Returns
Import returns from TaxesToGo	Not applicable for VITA/TCE	Mobile App Import
View client App Chat History	view the taxpayer's chat history with all users from the Chat feature	View App Chat History
Import returns from eAPI	Not applicable for VITA/TCE	Import eAPI Returns

Company/Group Users Section

This security permission option…	allows the user to…	and was formerly labeled as…
Access Office(s)	Not Applicable at the site level; must be assigned by TaxSlayer at the group level	Access Office

Documents Section

This security permission option…	allows the user to…	and was formerly labeled as…
Clear signatures	clear a Customer Portal signature to require the taxpayer to re-sign documents.	Allow Ability to Clear Signatures
Attach scanned documents	access Scanned Document feature and access files uploaded via Customer Portal	Scanned Documents
Delete scanned documents	delete documents from Scanned Documents.	Delete Scanned Document

Reporting Section

This security permission option…	allows the user to…	and was formerly labeled as…
Edit reports list	access Report Customization to remove reports not applicable to the site and also change the order to place the most used reports at the top of the category.	Edit and customize reporting display

Fees Section

This security permission option…	allows the user to…	and was formerly labeled as…
Edit default Minimum Preparer Fee	Not applicable for VITA/TCE	Edit Minimum Preparer Fee
Edit default Maximum Preparer Fee	Not Applicable for VITA/TCE	Edit Maximum Preparer Fee
Override Electronic Filing Fee during E-File	Not Applicable for VITA/TCE	Edit E-file Fee
Override Minimum Preparer Fee during E-File	Not applicable for VITA/TCE	Override Return Minimum Preparer Fee
Override Maximum Preparer Fee during E-File	Not applicable for VITA/TCE	Override Return Maximum Preparer Fee
Override Calculated Preparer Fee during E-File	Not Applicable for VITA/TCE	Edit calculated preparer fee

Menus This Role Can Access Section

This security permission option…	allows the user to…	and was formerly labeled as…
Configuration menu	access the Configuration menu.	Configuration
Office Setup	access Office Setup.	Edit Office Setup
ERO Setup	access ERO setup.	Edit ERO Setup
Preparer Setup	access Preparers menu.	Add/Edit Preparers
Fees Setup	enter fees to capture fee savings for sites tracking this information.	Add/Edit Fees in Office Configuration
Roles & Permissions	access Security Roles.	Add and Configure Security Templates
Question Templates	access Custom Questions.	Change Questions and Available Answers
Taxpayer Profiles	access Taxpayer Profiles	Change tax profiles
Consent Forms	create and edit consents.	Change Consent Forms
Print Sets	access Print Sets.	Add or Edit Print Sets
Tags	access Tags.	Add or Edit Tags
IP Whitelist	access IP Whitelist.	Add or Edit Office IP Whitelist
Custom Credits	access Custom Credits.	Add or Edit Custom Credits
Reports	view reports, including the Acknowledgements Report.	View Reports

This security permission option…	allows the user to…	and was formerly labeled as…
Print Checks	Not applicable/disabled for VITA/TCE	Print Checks

Summary

You should now be able to:

- List the pre-defined security roles.
- Determine which security role to use based on the allowed actions.
- Create a new security role.
- Edit an existing security role.
- Assign security role.
- List and describe each security permission.

To see a video of what you just learned, go to Setting up Security Templates. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Adding Preparers

After completing this topic, you will be able to:

- Create a user/preparer.
- Assign a security role.
- Control return access.
- List password requirements.
- View a preparer's email address.
- Change the status of one or all preparers.
- Select a user name to allow for multiple accounts.
- Set up users for ad hoc/virtual sites.
- Utilize the Username Report

Creating Users

After you configure the information for the office and set up security roles, you need to add preparers. To add preparers for your site, use the following steps from the **Welcome** page:

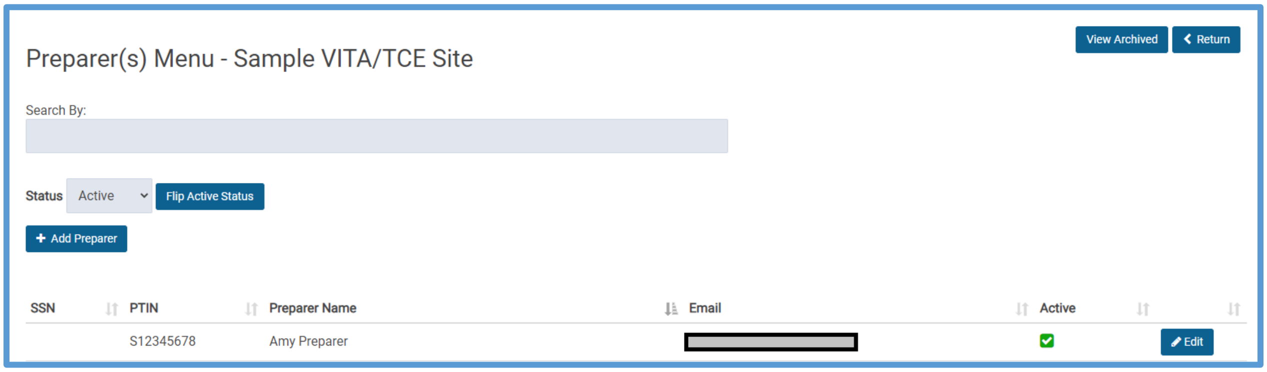
Note: Existing preparers will be listed as active, inactive, or archived.

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:

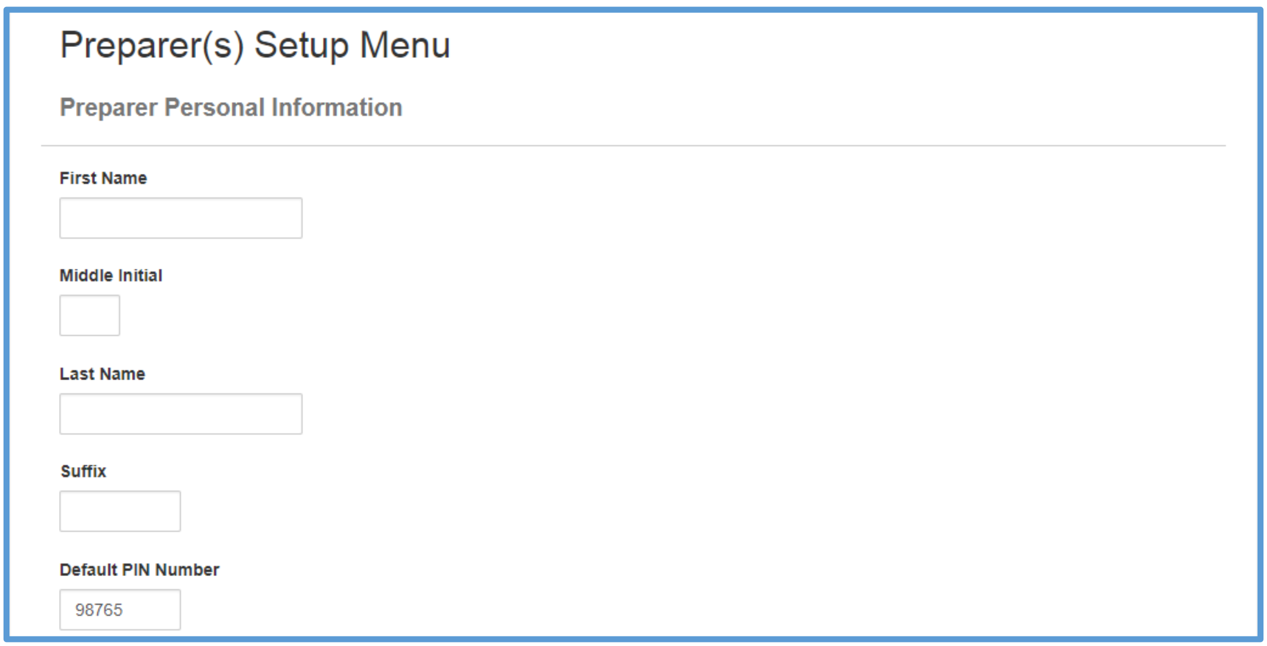
2. Click **Select** on the **Preparer Setup** line.

TaxSlayer Pro Online displays the **Preparer(s) Menu** page:



3. Click **Add Preparer**.

TaxSlayer Pro Online displays the **Preparer(s) Setup Menu** page:



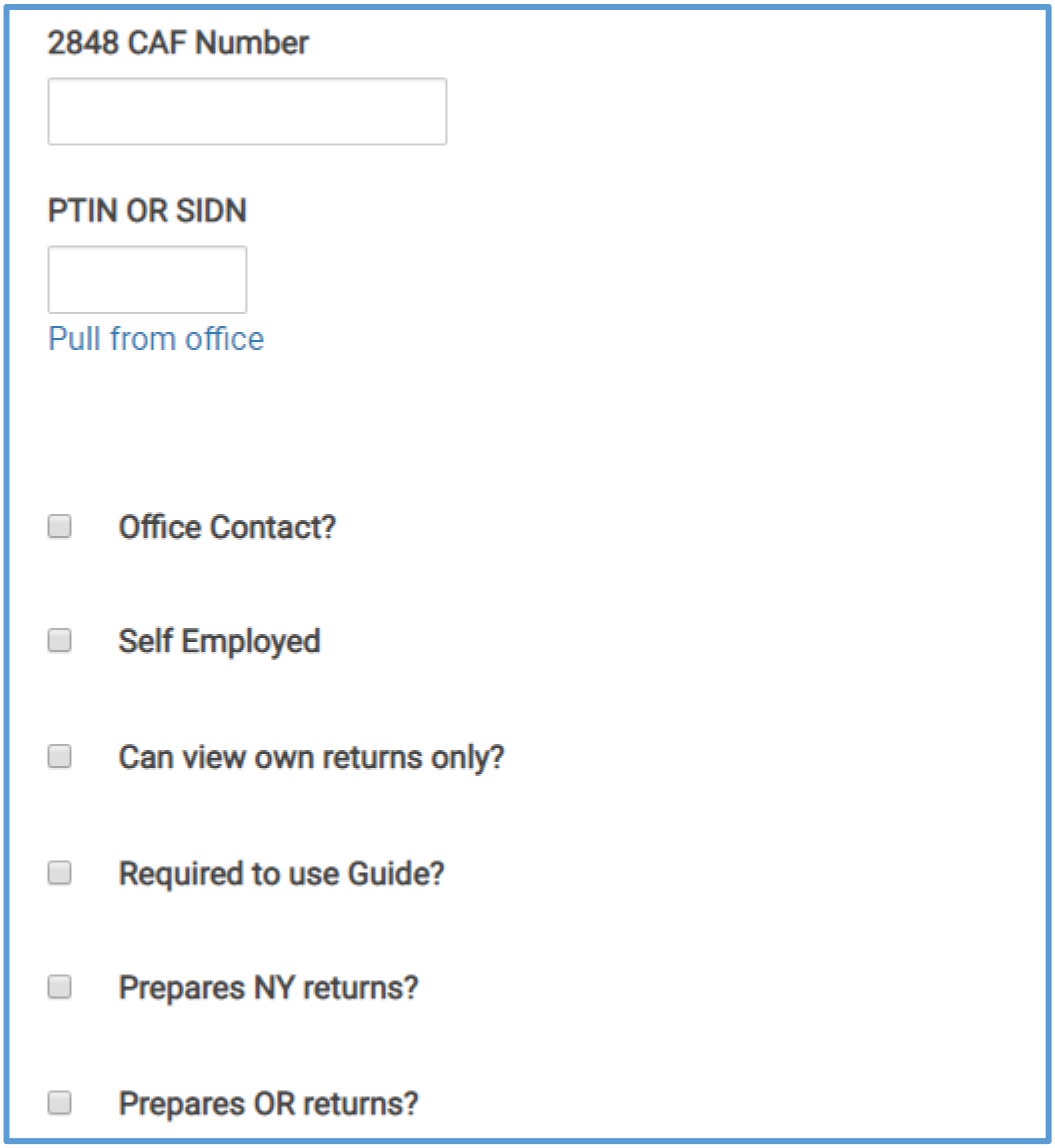
4. Type the preparer's name in the appropriate boxes.

NOTE: The preparer's name is displayed in the right navigation panel of the e-file section. If your preparers share a computer screen wit the taxpayer, you may want to use the word *Volunteer* in the first name box andthen enter the first name and last initial in the **Last name** box.

Example: **First Name**: Volunteer **Last Name**: Kim M. This would display **Volunteer Kim M** on the screen.

5. TaxSlayer Pro Online defaults the PIN to 98765 and carries this PIN to all returns created by this preparer.
6. Scroll to view the remainder of the personal information.

TaxSlayer Pro Online displays the next section of the page:



SIDN

7. From the **PTIN OR SIDN** box, click **Pull from office** to have TaxSlayer Pro Online carry the site's SIDN to the preparer.
8. Do **not** select the **Office Contact** or **Self-Employed** check boxes.

TIP: If you are setting up the preparer for an Ad Hoc or Virtual site, type the SIDN assigned to the Ad Hoc or Virtual site. Search the VITA/TCE Blog for detailed information on setting up your Ad Hoc or Virtual site(s)

Note: VITA/TCE sites do not use the 2848 CAF Number.

Return Access

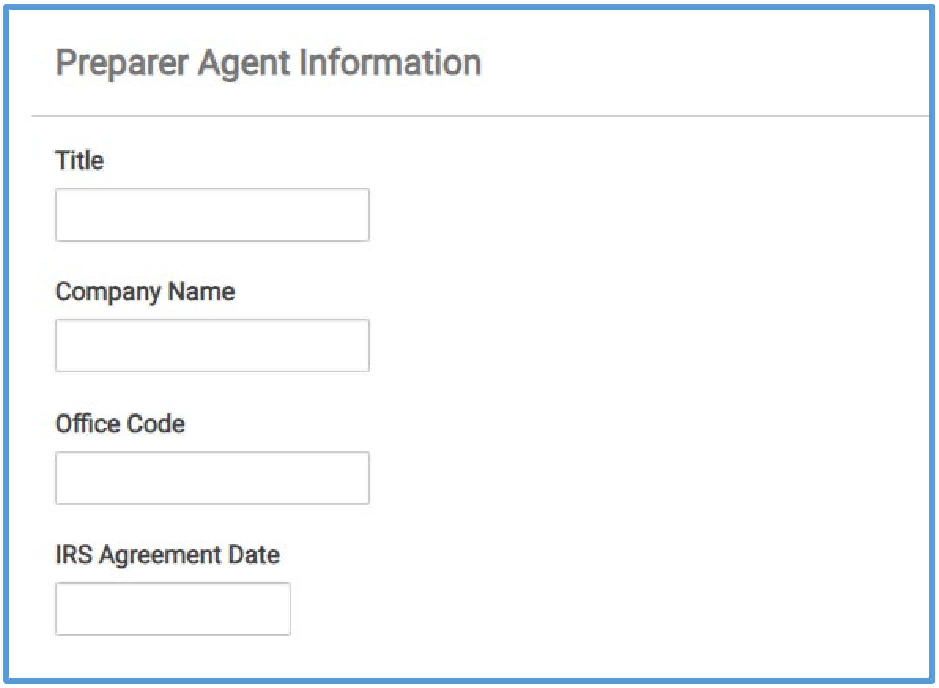
9. Select the check box to allow the preparer to view only his or her own returns.

TIP: We recommend that you select this option for all preparers who do not need to access returns prepared by other users for the purposes of working rejects or quality reviewing the return.

10. Check **Required to use Guide?** if you want to restrict the preparer to using the Guide Me feature for data entry.
11. Select **Prepares NY returns?** and select code 09 for **NYTPRIN exempt** as a volunteer tax preparer if you are preparing returns in New York.
12. If you prepare returns in Oregon, select the **Prepares OR returns?** check box and type the preparer's **OR License Number.**

Preparer Agent Information (Optional)

Complete the **Preparer Agent Information** section if the preparer is a Certified Acceptance Agent who is authorized to assist individuals and other foreign persons who do not qualify for a Social Security number but need to complete or return their ITIN application.

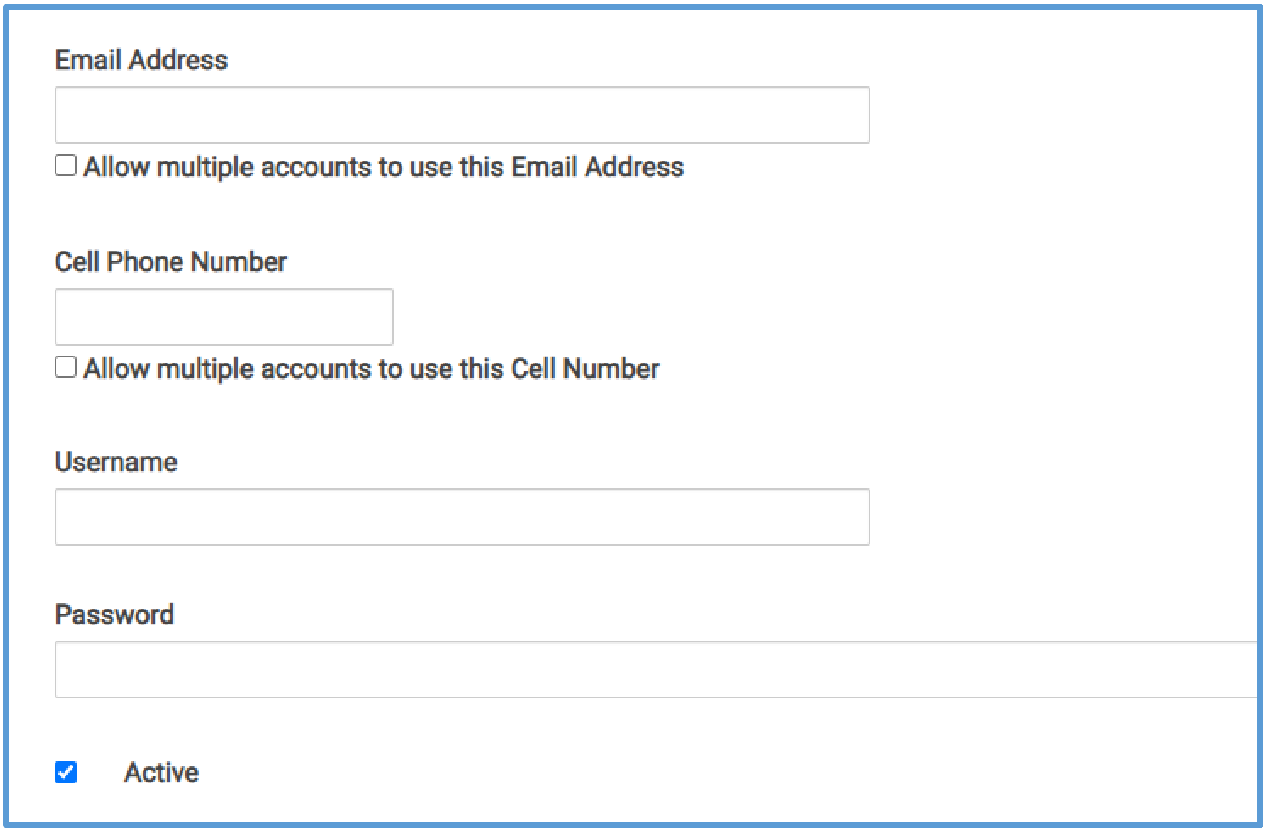


Note: TaxSlayer Pro Online automatically prints this information on the completed Form W-7.

Login Setup

13. Scroll to the **Login Account** section.

TaxSlayer Pro Online displays the **Edit Login Account** section:



14. Type the preparer's email address, cell phone number, and a unique user name with at least 6 characters.

NOTE: User names are unique across the platform and are assigned to the site in which they are created. Preparers **cannot** use the same user name used in the Practice Lab environment. To comply with the standards for Multi-Factor Authentication, all email addresses and cell phone numbers must also be unique unless they are marked to allow for multiple accounts.

TIP: If you know the preparer will have multiple logins, you can select **Allow Multiple Accounts** during the initial preparer setup. You must mark this option on the original user account.

Support Tip: If you no longer have access to the original user account, contact VITA/TCE support via email with detailed information on the email address or cell phone you are trying to use.

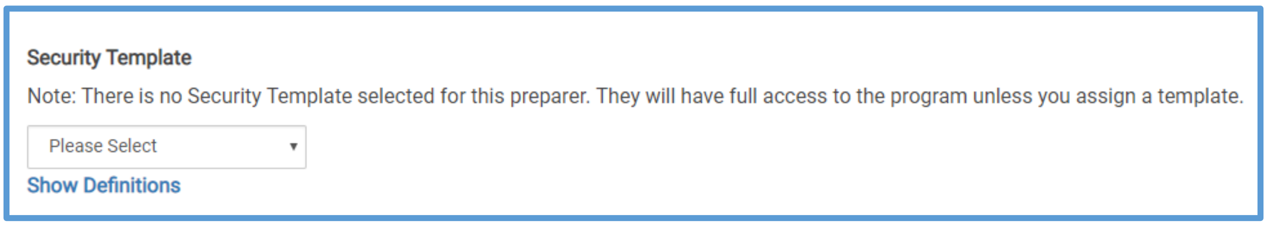
Password Requirements

15. Type a password for the preparer.

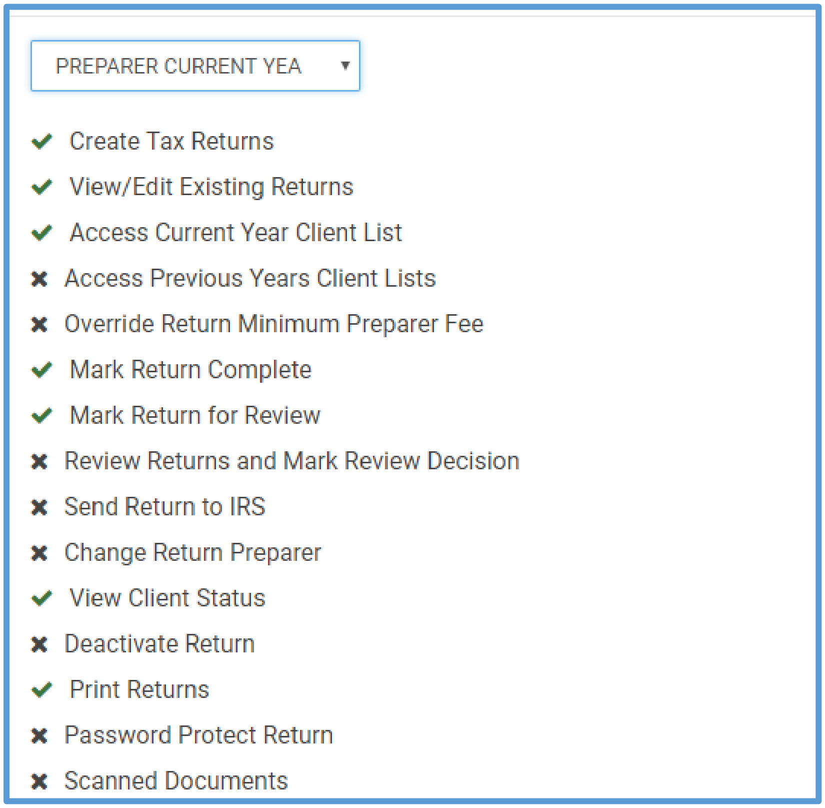
TIP: When you create a password for the preparer, make sure that you use at least one special character (!@#, etc.). Use at least one uppercase letter, one lowercase letter, and numbers. Also, ensure the password contains at least eight (8) characters. This will be the default password for the preparer/user the first time he or she logs in.

Support Tip: Use a common default password for each user since the user is required to change their password on the first login. This prevents the site administrator from having to maintain a list of default passwords. Click the password eyeball icon to see the password you are entering. This option is only available when you are initially creating a user.

16. Select the security role you want this preparer to use from the list.



TIP: If you click **Show Definitions**, TaxSlayer Pro Online displays a new window with the actions for which the security role has permission checked, as shown below:



17. When you finish adding the information for the preparer, click **Continue**.

TaxSlayer Pro Online displays the **Preparer(s) Menu** page, listing the new preparer.

18. If you need to add other preparers, click **Add Preparer** and use the same steps to enter information for the preparer.

Managing Preparers

After you add preparers, you can do the following from the **Preparers Menu**:

- Easily mark a preparer as active, inactive, or archived.
- Mark all preparers as active or inactive.
- View the preparer’s email address.
- Mark a preparer to allow for multiple accounts

To change the status of the preparer, use the following steps from the **Preparers Menu**:

1. If you need to change the status of all active preparers, select **Active** from the **Status** drop-down list.
2. Click **Flip Active Status**.

TaxSlayer Pro Online changes all active preparers to inactive.

Note: TaxSlayer Pro Online displays a warning if you mark all preparers, except the currently logged in preparer, as inactive. Click **OK** to continue or **Cancel** to return to the Preparer(s) Menu page.

3. If you need to change the status of all inactive preparers, select **Inactive** from the **Status** drop-down list.
4. Click **Flip Active Status**.

TaxSlayer Pro Online changes all inactive preparers to active.

5. If you need to change the status of only one preparer, find the preparer in the list, and then select or clear the **Active** check box.

From this page, you can also see the preparer's email address in the **Email** column. Use this to ensure that your preparers use unique email addresses (unless they have multiple logins) and find the preparer's email address when needed.

TIP: Type the preparer's name or email address in the **Search By** box to easily find preparers.

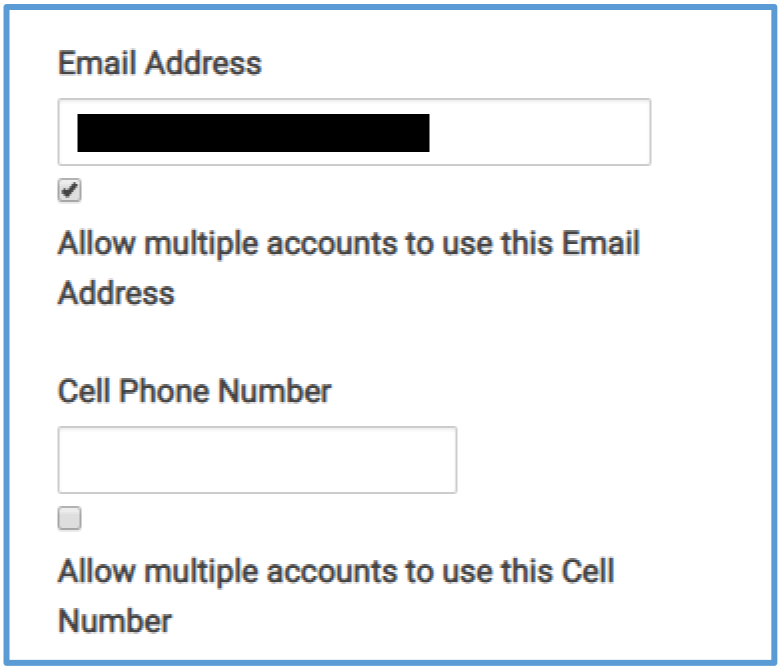
Marking a User Name to Allow Multiple Accounts (Optional)

You can select email addresses or cell phone numbers to be used for multiple accounts. This allows you to use the Multi-Factor Authentication (MFA) verification code to authenticate using the same contact information.

NOTE: We strongly recommend that you use a unique email address and cell phone number for each user instead of using this feature.

To allow the contact information to be used for multiple users, use the following steps:

1. Find the **Email Address** and **Cell Phone Number** boxes in the **Preparer(s) Setup Menu**:



2. Select the appropriate check box(es) below the **Email Address** or **Cell Phone Number** box.

Support Tip: If you no longer have access to the original user name account, contact VITA/TCE support via email with detailed information on the email address or cell phone you are trying to use.

Setting up Ad Hoc and Virtual Sites

If a volunteer prepares returns at the main site and one or more ad hoc/virtual sites, create a user name for each site to ensure TaxSlayer uses the correct SIDN in the e-file. The preparer can use the same email address and/or cell phone number for MFA purposes in this circumstance.

Scenario

The site has a “main” site and also has one or more ad hoc and/or virtual sites:

- The main site has an EFIN and SIDN (Snnnnnn01).
- The ad hoc/virtual site has its own SIDN (Snnnnnn02) because the IRS wants the returns prepared at the ad hoc/virtual site to be reported under the correct SIDN.

Instructions for Setting up in TaxSlayer Pro Online

1. Create additional preparers in TaxSlayer Pro Online for the volunteers who work at the ad hoc/virtual site.
2. In Preparer Setup, type the SIDN of the ad hoc/virtual site in the PTIN box.

NOTE: TaxSlayer Pro Online carries the SIDN on the Preparer record to the appropriate box in the e-file for reporting purposes.

Best Practice Tip: Use a description in the user name to indicate the site where the volunteer will prepare returns. For example, if Kim will prepare returns both at the main site and at an ad hoc/virtual site at Kroger, use *KimMain* for the main site and *KimKroger* for the ad hoc/virtual site.

TIP: Search the VITA/TCE Blog for more detailed information on setting up the ERO information for your ad hoc and/or virtual site(s).

Marking a User Name **Is Archived** (Optional)

In addition to **Active** and **Inactive**, the site administrator can mark preparers who no longer volunteer at your site as **Archived**.

How would I use this at my site?

With this feature, you can distinguish between users who are inactive because the site is not open and users who will not volunteer again in the future. This gives you flexibility to mark all users active/inactive (except yourself) without having to individually review the inactive list.

TaxSlayer Pro Online does not display archived accounts in the main Preparer Setup list and will not mark them as active when you click the **Flip Active Status** button. With this extra layer of security, you can ensure that volunteers do not access TaxSlayer Pro Online outside of site hours.

Who can archive a user?

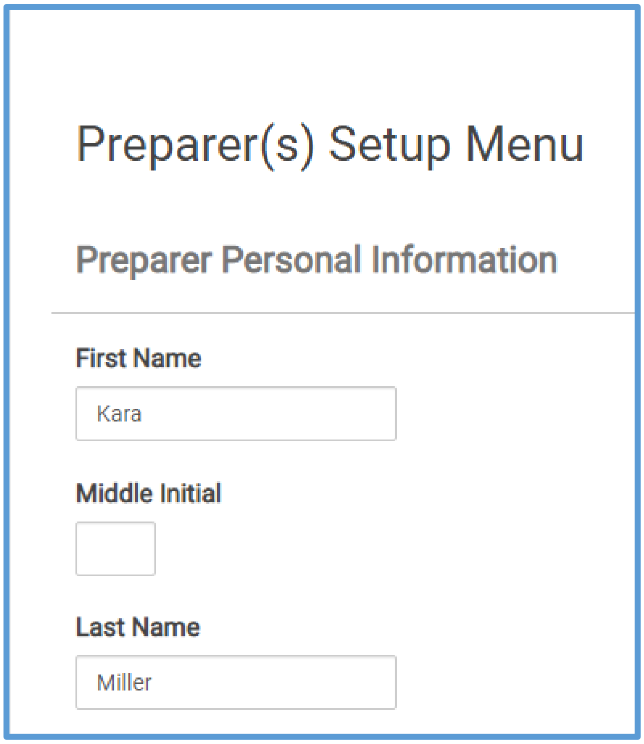
Any user with a security role that allows adding or editing of preparers can archive users. You can only archive inactive users.

How do I archive users?

To archive users, use the following steps from the **Preparer(s)Menu** page:

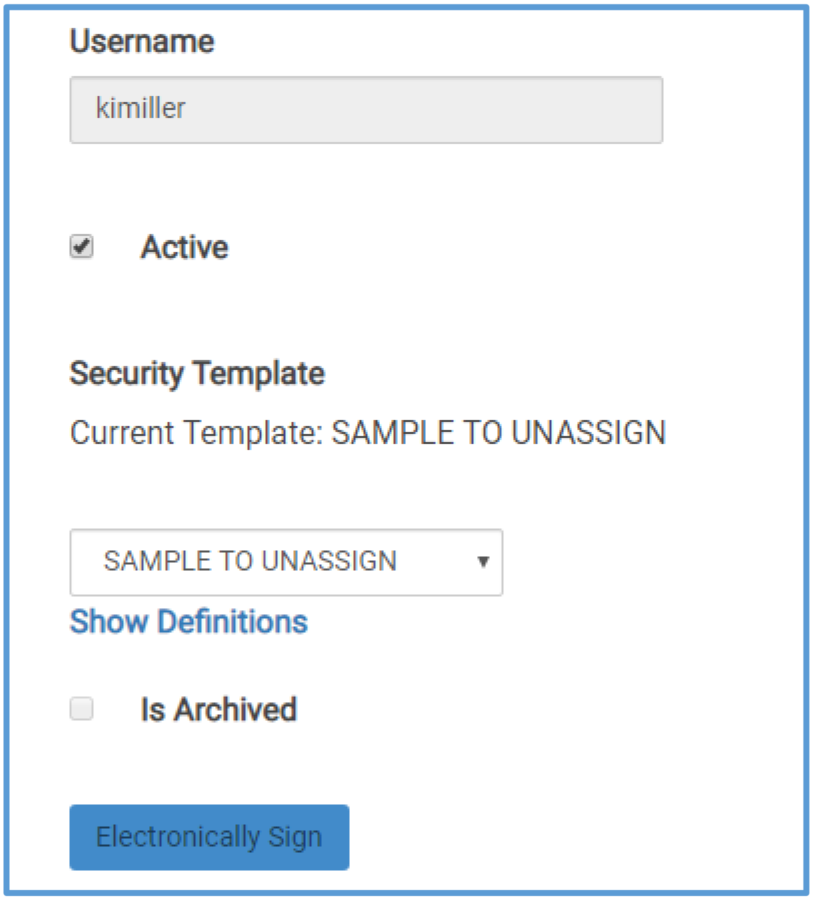
1. Select **Edit** for the appropriate preparer.

TaxSlayer Pro Online displays the **Preparer(s) Setup Menu** for the preparer you selected:



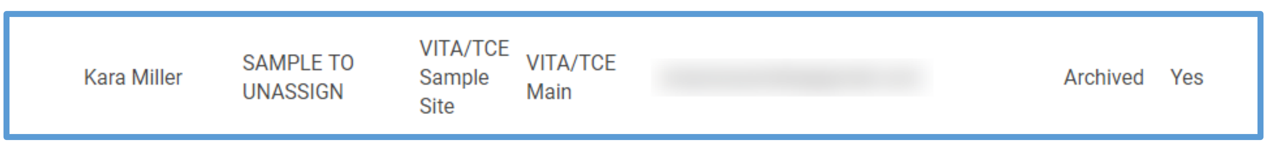
2. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the appropriate section:



3. Clear the **Active** check box to make the user inactive.
4. Select the **Is Archived** check box to archive the user.
5. Click **Continue**.

TaxSlayer Pro Online no longer displays the user in the **Preparer(s) Menu**, but does display the user and archived status on the **Username Report**:



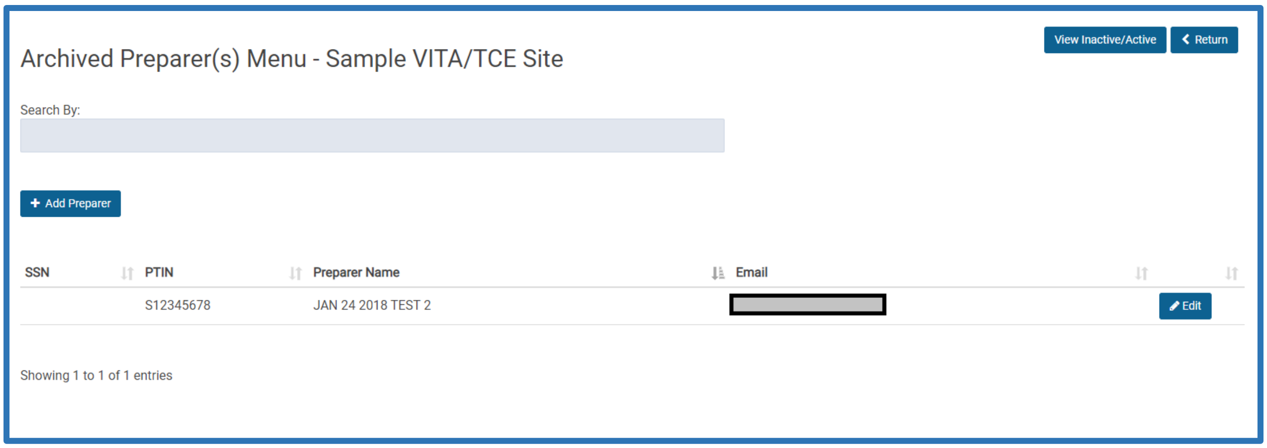
TIP: Take a few minutes before tax season begins to mark non-returning volunteers as archived so you can easily mark all users (except the administrator) as inactive when the site is not open.

Changing the Status of an Archived User

If you later need to change an archived user to an active user, use the following steps from the **Preparer(s) Menu**:

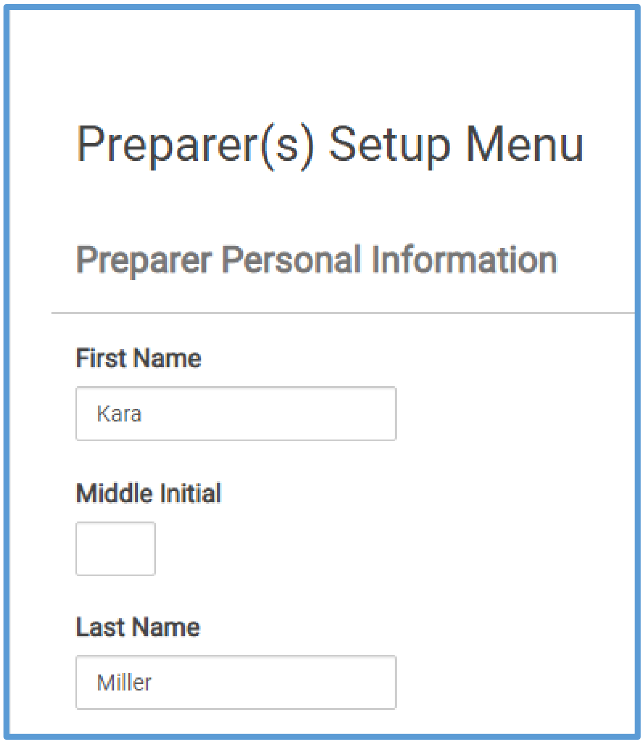
1. Click **View Archived**.

TaxSlayer Pro Online displays the **Archived Preparer(s) Menu**:



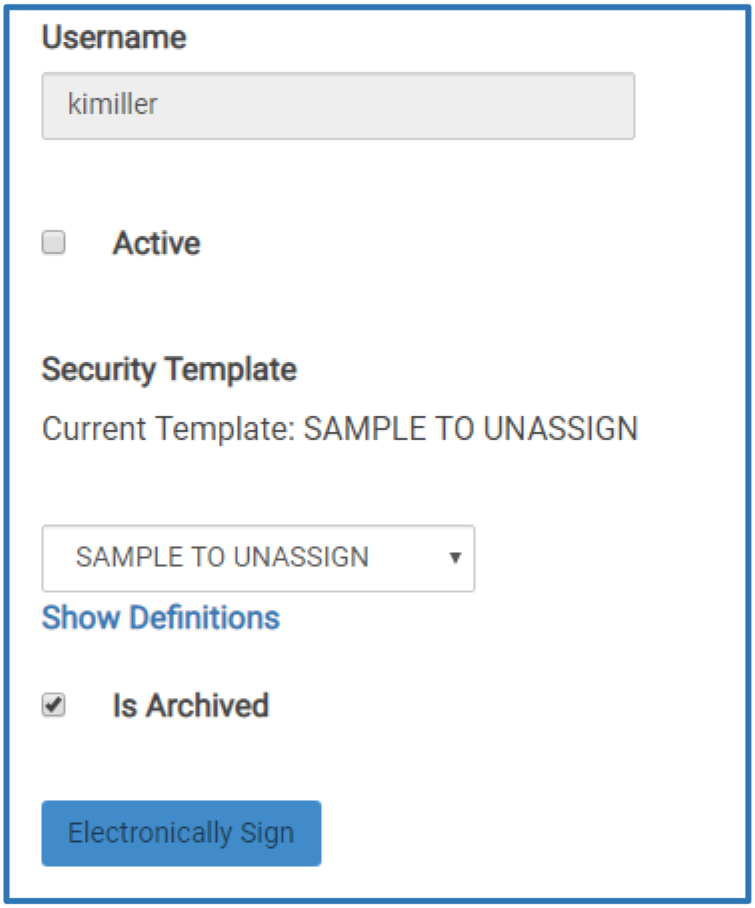
1. Click **Edit** on the line for the preparer you want to activate.

TaxSlayer Pro Online displays the **Preparer(s) Setup Menu** for the preparer you selected:



2. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the appropriate section:



3. Click **Active**.
4. Click **Continue**.

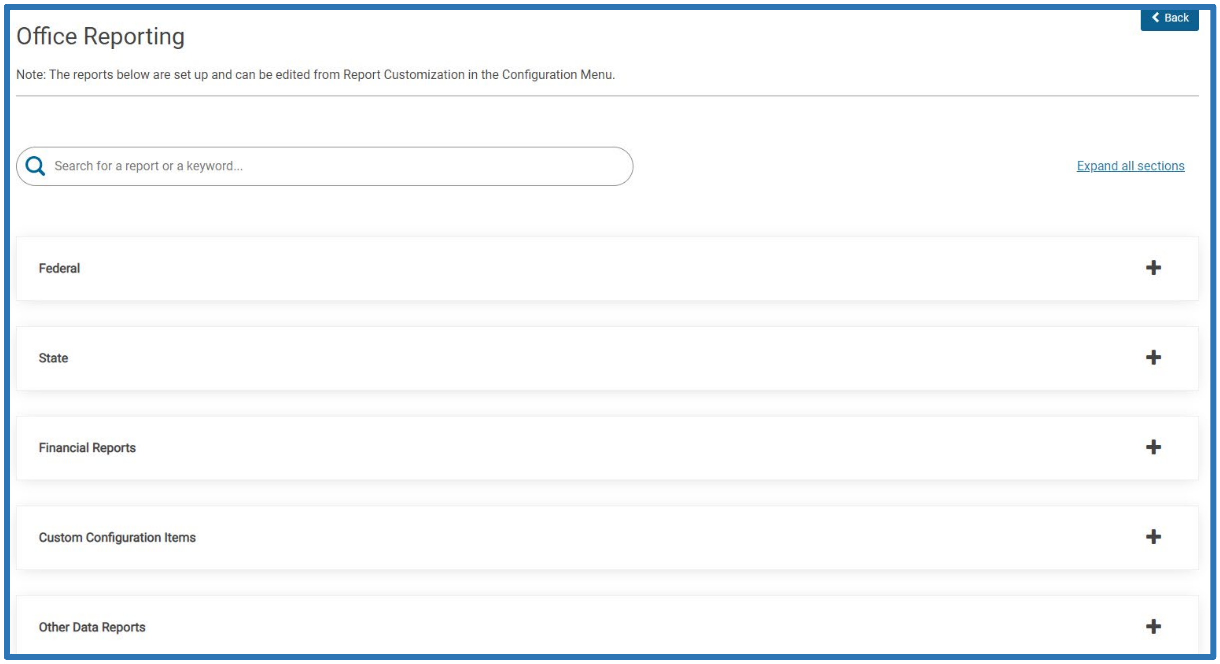
TaxSlayer Pro Online activates the preparer and displays the information in the **Preparer(s) Menu**.

Utilizing the Username Report to Manage Preparers

As the site administrator, you can use the Username Report to easily manage the users created at the site. To use the Username Report, use the following steps from the **Welcome** page:

1. Click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the **Office Reporting** page:



2. Click the **Other Data Reports** section to expand it.

TaxSlayer Pro Online displays the **Other Data Reports** section:

TIP: If you do not see the Username Report, check your report customization to see if you removed it. For more information on report customization, see the *Working with Reports* topic in this section.

3. Click **Select** on the **Username Report** line.

TaxSlayer Pro Online displays the **Username Report** page:

20 Username Report

Search:

Showing 1 to 51 of 51 entries

#	User Log In	Full Name	Security Template	Office Name	Company Name	Email Address
1	adavis11	Anthony Test	admincredentials	VITA/TCE Sample Site	VITA/TCE Main	
2	Adavisvita	ANTHONYmain DAVIS	admincredentials	VITA/TCE Sample Site	VITA/TCE Main	

You can view the following information on this report:

- User Log In
- Full Name (Displays what was entered for the volunteer's first and last name)
- Security Role
- Office Name (Site Name listed in Office Setup)
- Company Name (Always VITA/TCE Main)
- Email Address
- Phone Number
- Status (Active, Inactive, or Archived)
- Can View Own Returns Only (No = Sees all returns/Yes = Only sees the returns created by this user)

See the *Working with Reports* lesson for detailed instructions on sorting the report and exporting the data for further analysis.

Summary

You should now be able to:

- Create a user/preparer.
- Assign a security role.
- Control return access.
- List password requirements.
- View a preparer's email address.
- Change the status of one or all preparers.
- Select a user name to allow for multiple accounts.
- Set up users for ad hoc/virtual sites.
- Utilize the Username Report.

To see a video of what you just learned, go to Adding Preparers. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Custom Questions

After completing this topic, you will be able to:

- Configure custom questions and answers.
- List reports for custom questions.
- Generate a report for custom questions.

TaxSlayer Pro Online allows you to set up custom questions that preparers can use to capture data during the return preparation process. You can use the predefined questions or add more questions.

While you can add more questions and answers during tax season, we recommend that you finalize your questions before tax season begins to ensure accuracy of reports.

Adding Custom Questions

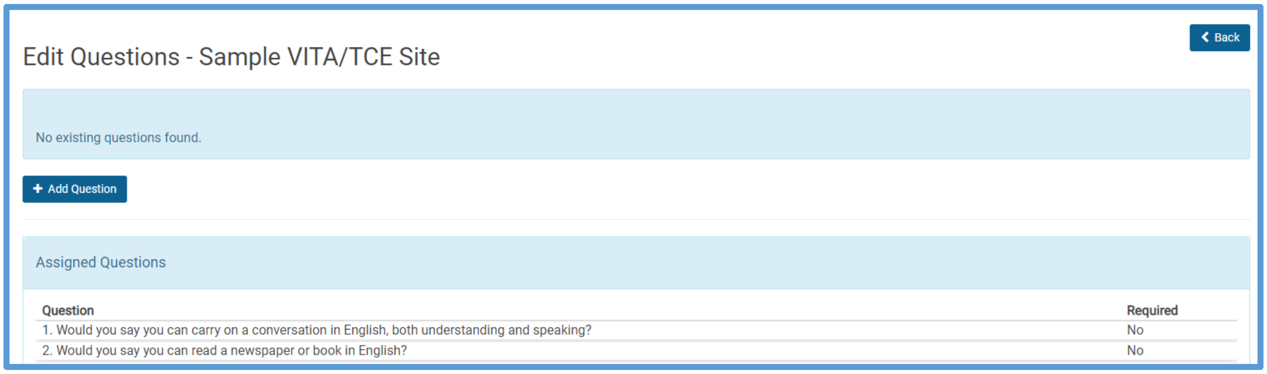
To access custom questions from the **Welcome** page, use the following steps:

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:

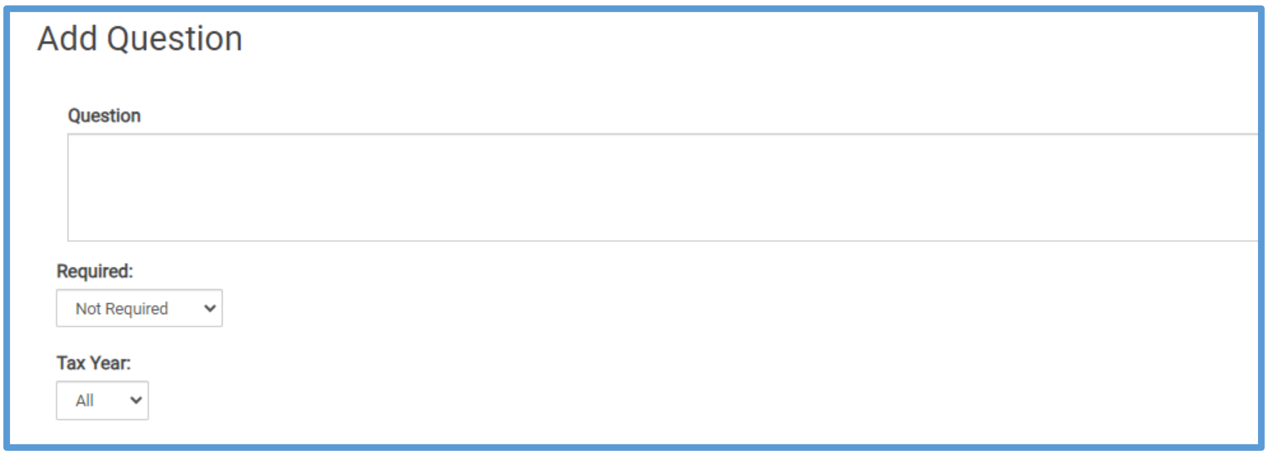
2. Click **Select** on the **Question Templates** line.

TaxSlayer Pro Online displays the **Edit Questions** page, listing any custom questions your site has been assigned:



3. To add more questions, click **Add Question**.

TaxSlayer Pro Online displays the **Add Question** page:

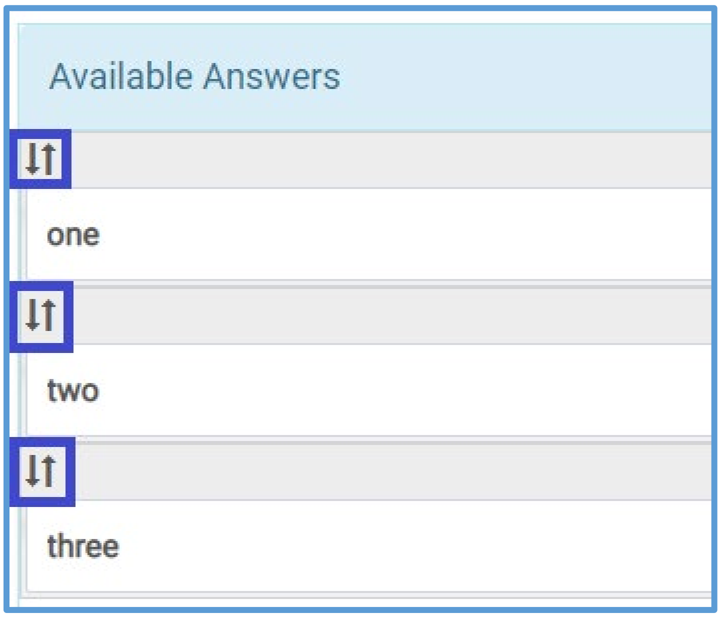


4. Type the question in the **Question** box.
5. If you want to require preparers to answer this question, select either **Is Required** or **Required if MFJ** from the drop-down box.

TIP: If you require the answer to a question, the preparer **cannot** save the **Custom Questions** page in e-file and mark the return Complete or Review unless he or she answers the question. If you select **Required if MFJ**, the question is only required if the filing status is married filing jointly.

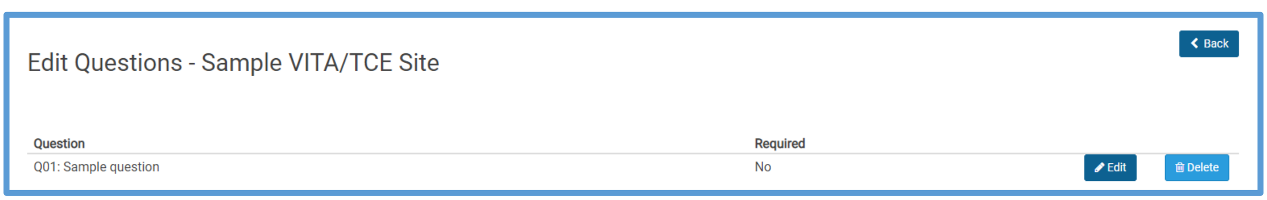
Use **Required if MFJ?** if the question is specifically to capture data for the spouse associated with the return.

6. Select the applicable tax year.
    a. TaxSlayer Pro Online defaults to **All**.
    b. Selecting a tax year allows you to have different questions and/or answers each year.
7. Click **Add Answer** in the **Available Answers** section.
8. Type the first answer choice.
9. Click **Add Answer** and type the answer choice for as many answer choices as you need.
10. To change the display order of the answers, drag each answer to the position you want it to appear during return preparation.



11. When you finish adding the question and answer choices, click **Save**.

TaxSlayer Pro Online displays the **Edit Questions** page, listing the new question:



12. To add more questions, click **Add Question** and follow the same steps.

Assigned Questions

TaxSlayer assigns questions to each site on behalf of the IRS. The Group Master can also assign questions. Sites cannot modify these assigned questions.

Assigned Questions

Question	Required
1. Would you say you can carry on a conversation in English, both understanding and speaking?	No
2. Would you say you can read a newspaper or book in English?	No
3. Do you or any member of your household have a disability?	No
4. Are you or your spouse a Veteran from the US Armed Force?	No
5. Your Race?	No
6. Your Spouse's race?	No
7. Your ethnicity?	No
8. Your spouse's ethnicity?	No
9. Was the taxpayer physically present during the entire return preparation and quality review process?	No

TIP: If the **Required** column displays **Yes**, prepares must answer the question before saving **Custom Questions** page in e-file and marking the return Complete or Review.

Question Reports

You must run all reporting for questions and their corresponding answers at the site level, even if the site is in your relational group. TaxSlayer Pro Online contains three reports you can use to analyze the data. These reports are:

- Question Statistics
- Return Questions with Consent Indicator Report
- Return Questions

NOTE: These reports cannot be run at the group level.

Question Statistics

The Question Statistics report generates a summary level report for each question at the site level.

Return Questions with Consent Indicator Report

The Return Questions with Consent Indicator report generates a detailed listing of the information gathered from the questions and answers at the site level, along with the corresponding taxpayer demographic information. This report also includes the answers to any assigned or custom consents. You can use this report to send any additional information to the taxpayer if they have given their consent to use their tax information for that purpose.

Return Questions

The Return Questions report generates a detailed listing of the information gathered from the questions and answers at the site level, along with limited demographic information.

Refer to the *Working with Reports* lessons for detailed instructions on sorting reports and exporting the data for further analysis.

TIP: You cannot export to CSV if you use any type of punctuation in custom questions and/or answers.

Summary

You should now be able to:

- Configure custom questions and answers.
- List reports for custom questions.
- Generate a report for custom questions.

To see a video of what you just learned, go to Working with Custom Questions. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Configuring Printing

After completing this topic, you will be able to:

- List the predefined assigned print sets.
- Determine which print sets to use for the taxpayer.
- Create custom print sets.

Predefined Print Sets

TaxSlayer Pro Online contains several print sets that will be presented to the preparer during the print return process. Review these before printing tax returns so you know what forms and how many copies of each form print with each print set. In most cases, you should use one of the print sets assigned by TaxSlayer. TaxSlayer Pro assigns print sets based on collaboration with the IRS.

The following print sets will be available for printing the return from the Submission page, but cannot be modified:

a) One Copy – Federal and State
b) Two Copies – Federal and State
c) Three Copies – Federal and State
d) One Copy – Federal Only
e) One Copy – 1040 Only
f) One Copy – State Only
g) One Copy – Form 8879 Only
h) Print Invoice
i) TAXPAYER COPY PRINT (TaxSlayer assigned)
j) PAPER FILE COPY (TaxSlayer assigned)
k) QUALITY REVIEW (TaxSlayer assigned)
l) Any print set created at the site
m) Any print set assigned from a Group Level

You can use the following print sets to print the return from the Client List, but you cannot modify them:

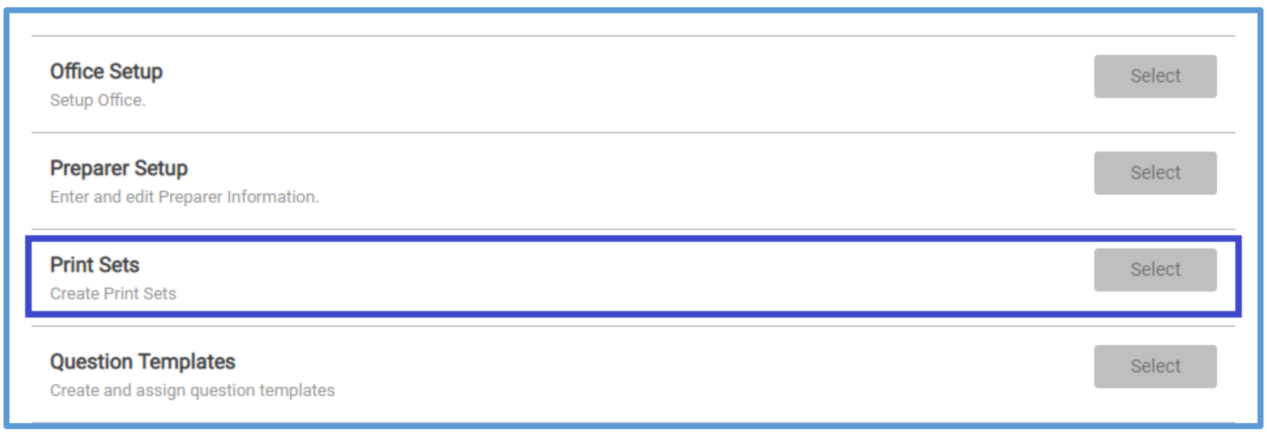
a) TAXPAYER COPY PRINT (TaxSlayer assigned)
b) PAPER FILE COPY (TaxSlayer assigned)
c) QUALITY REVIEW (TaxSlayer assigned)
d) Any print set created at the site
e) Any print set assigned from a Group Level

View Assigned Print Sets

To view the contents of an assigned print set, use the following steps from the **Welcome** page:

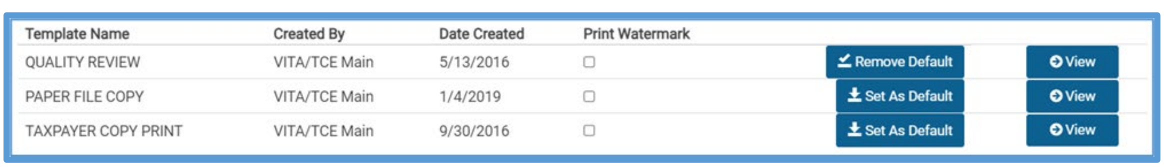
1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:



2. Click **Select** on the **Print Sets** line.

TaxSlayer Pro Online displays the **Print Sets** landing page:



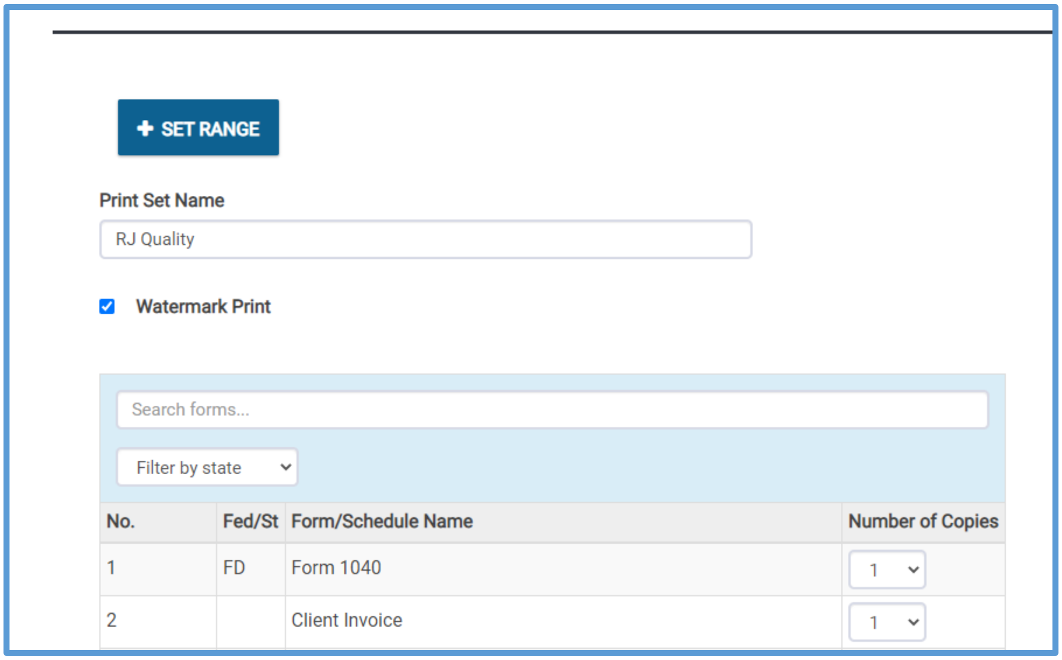
3. To view the assign print set, click **View**. You cannot edit this print set.

Create a Custom Print Set

To create a custom print set, use the following steps from the **Print Sets** landing page:

1. Click **Add Print Set**.

TaxSlayer Pro Online displays the **Print Set Setup** landing page:

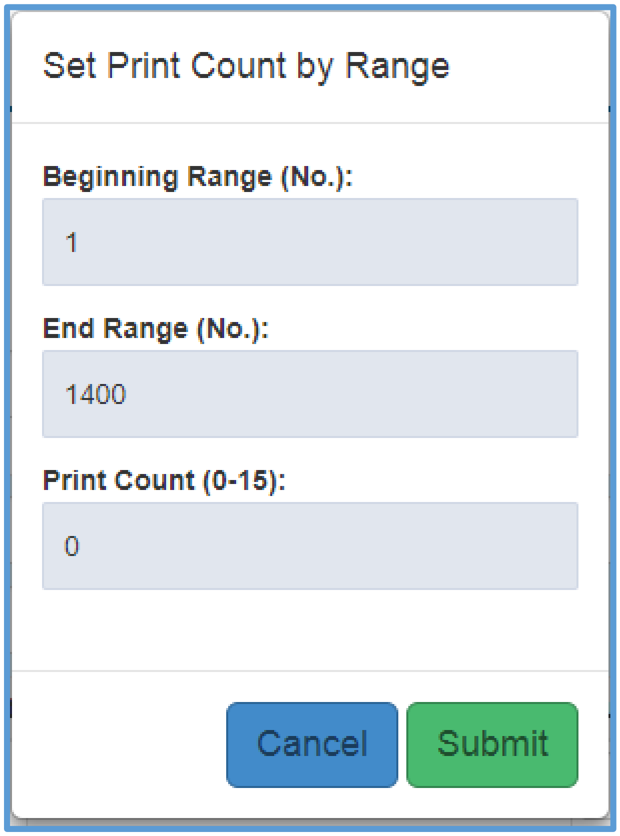


2. Type a name for your print set in the **Print Set Name** box.
3. Change the number of copies for each form you want to include in the print set.
4. If this print set will only be used to provide a taxpayer with a copy of an electronically filed return, select the **Watermark Print** check box. TaxSlayer Pro Online will then print the print set with a **File Copy Only Do Not Mail** watermark.

TIP: You can type a form name in the **Search forms** box to search for that form, or filter by federal or state forms.

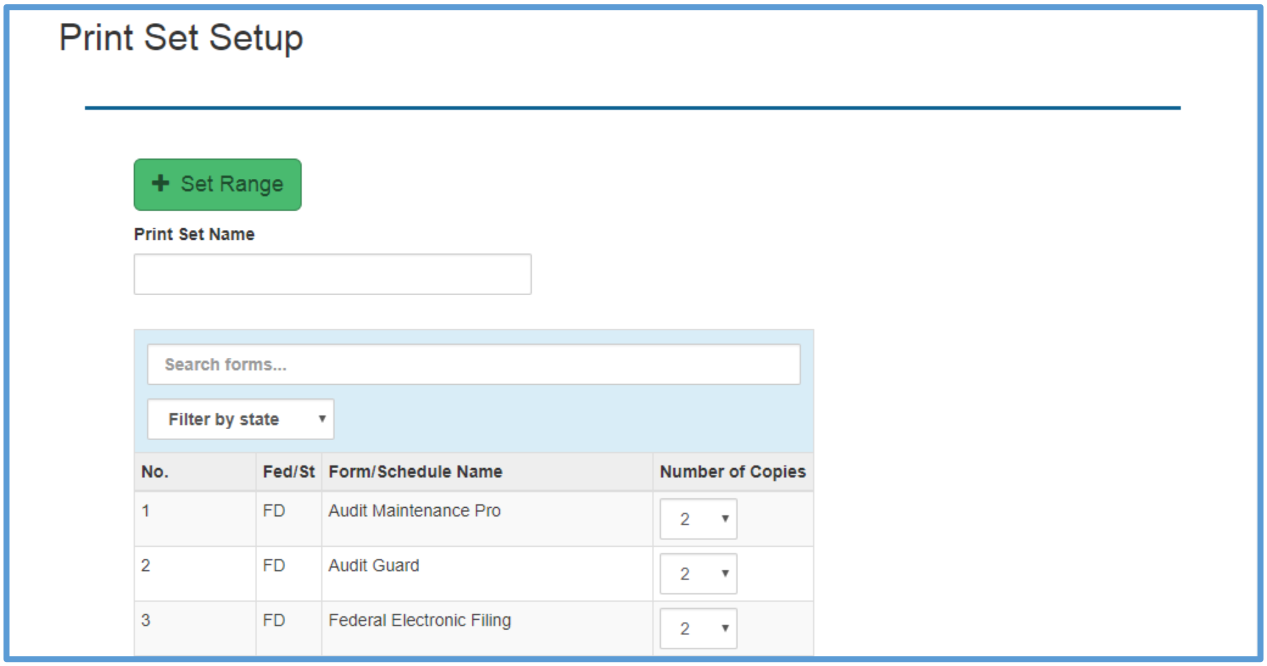
5. If you want to add multiple forms at the same time, click **Set Range**.

TaxSlayer Pro Online displays the **Set Print Count by Range** window:



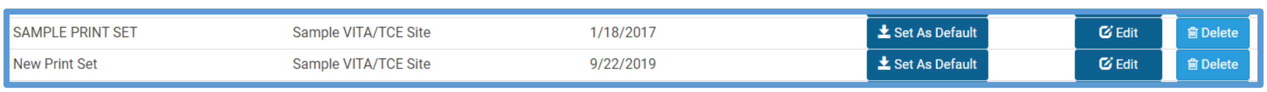
6. Verify the **Beginning Range** and **Ending Range** boxes. These numbers correspond to the number of the form as displayed in the first column of **Print Set Setup** landing page. You can view the number assigned to each form or schedule to change the range. If you want to change the number of copies of all forms for this print set, leave the range as it is.
7. Type the correct number in the **Print Count** box.
8. Click **Submit**.

TaxSlayer Pro Online displays the new number of copies in the print set:



9. When you finish making changes to the print set, click **Save**.

TaxSlayer Pro Online displays the **Print Sets** page, listing the new print set:



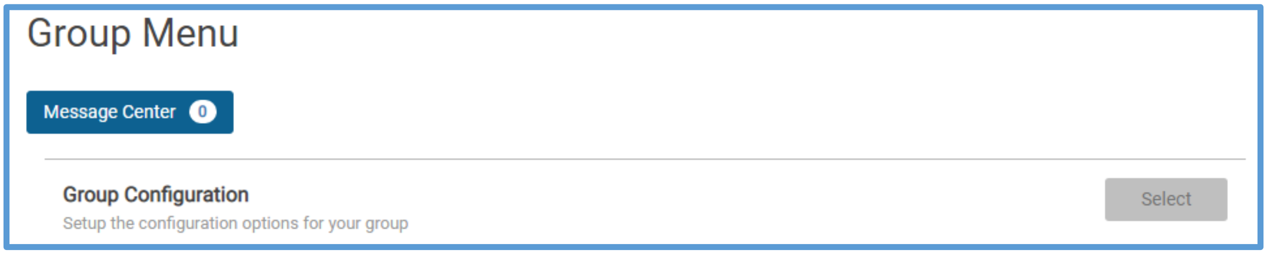
10. Click **Add** and follow the same steps for any additional print sets you want to use.
11. To set a print set as the default set for all returns printed from the Client List and/or Submission page, click **Set As Default** on the line for that print set.
12. If you need to edit or delete a print set you created, click **Edit** or **Delete** to do so.
13. When you finish adding print sets, click **Back** to return to the **Configuration Menu** landing page.

Setting the Default Print Set from the Group Level

A group level administrator can set the default print set to any print set they create and assign. To set the default print set from the group level, use the following steps:

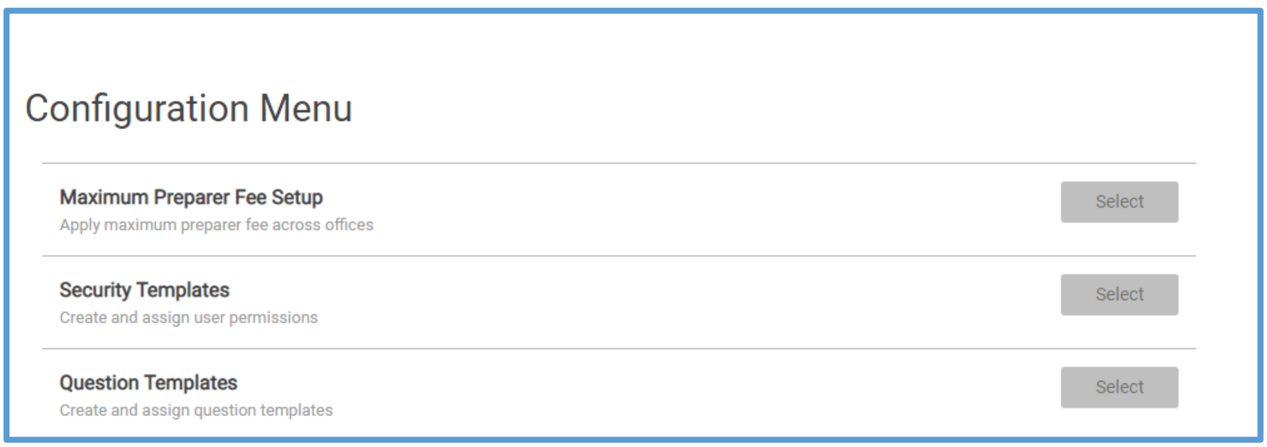
1. Log in to TaxSlayer Pro Online with the assigned Group Level login.

TaxSlayer Pro Online displays the **Group Menu**:



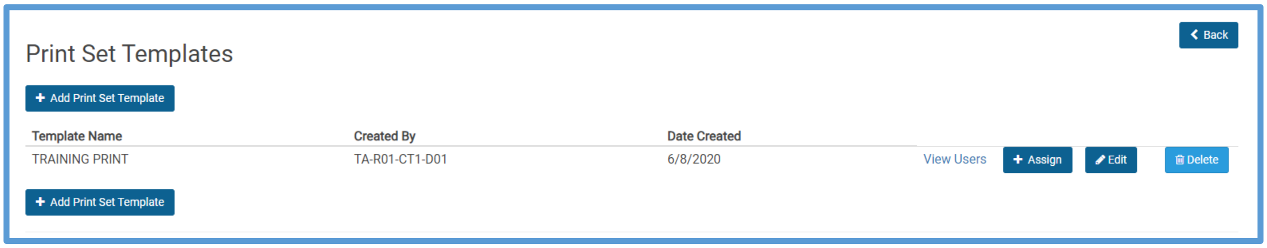
2. Click **Select** on the **Group Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu**:



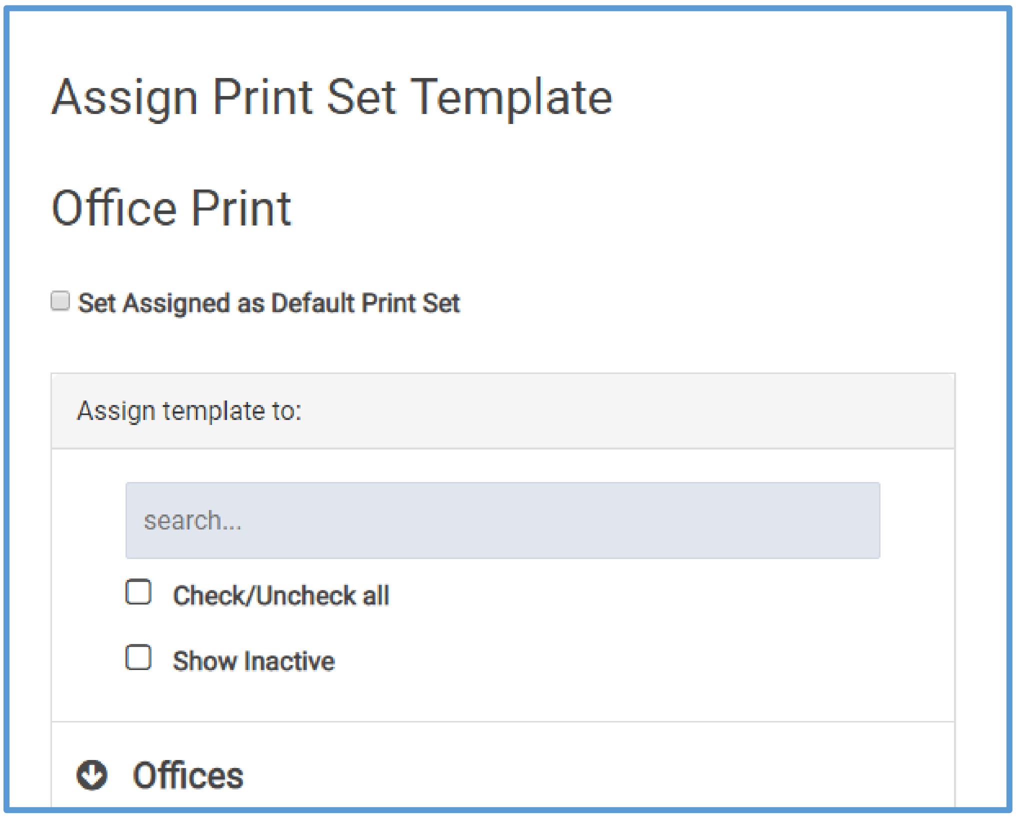
3. Click **Select** on the **Print Set Templates** line.

TaxSlayer Pro Online displays the **Print Set Templates** page:



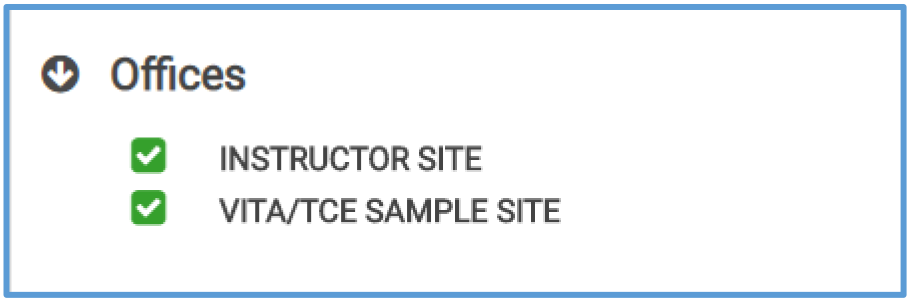
4. Click **Assign** for the appropriate print set.

TaxSlayer Pro Online displays the **Assign Print Set Template** page:



5. Select the **Set Assigned as Default Print Set** check box.

6. In the **Offices** section, select check box for all applicable sites, as shown below:



7. Click **Continue**.

Note: The site cannot modify the assigned print set, but they can change their default print set.

Support Tip: Always unassign print sets at the group level before you delete the print set.

Summary

You should now be able to:

- List the predefined assigned print sets.
- Determine which print sets to use for the taxpayer.
- Create custom print sets.

To see a video of what you just learned, go to Configuring Printing. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Taxpayer Profiles

After completing this topic, you will be able to:

- Create taxpayer profiles.
- Add forms to a taxpayer profile.
- Edit taxpayer profiles.
- Delete taxpayer profiles.
- Assign a taxpayer profile to another site as a multi-site administrator.
- Select a taxpayer profile when starting a new return.
- List forms you can add to a taxpayer profile.

In TaxSlayer Pro Online, you can set up taxpayer profiles. Preparers can select taxpayer profiles when starting a new return to easily navigate through the common forms you use at your site. You can use the Master Profile or add additional profiles.

You can add more profiles during tax season as the type of returns prepared at your site changes.

Adding a Taxpayer Profile

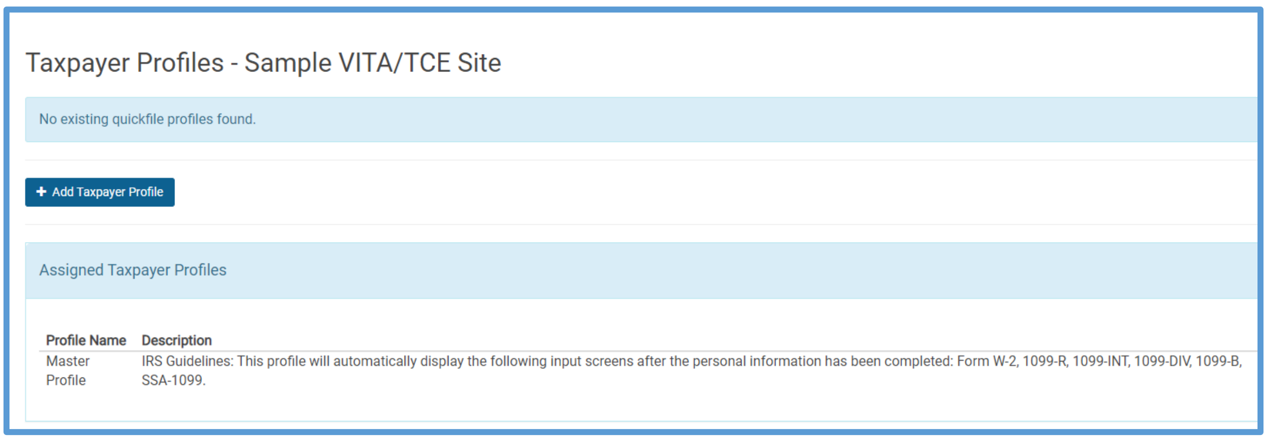
You can add taxpayer profiles when you log in as a site administrator. To add taxpayer profiles from the **Welcome** page, use the following steps:

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:

2. Click **Select** on the **Taxpayer Profiles** line.

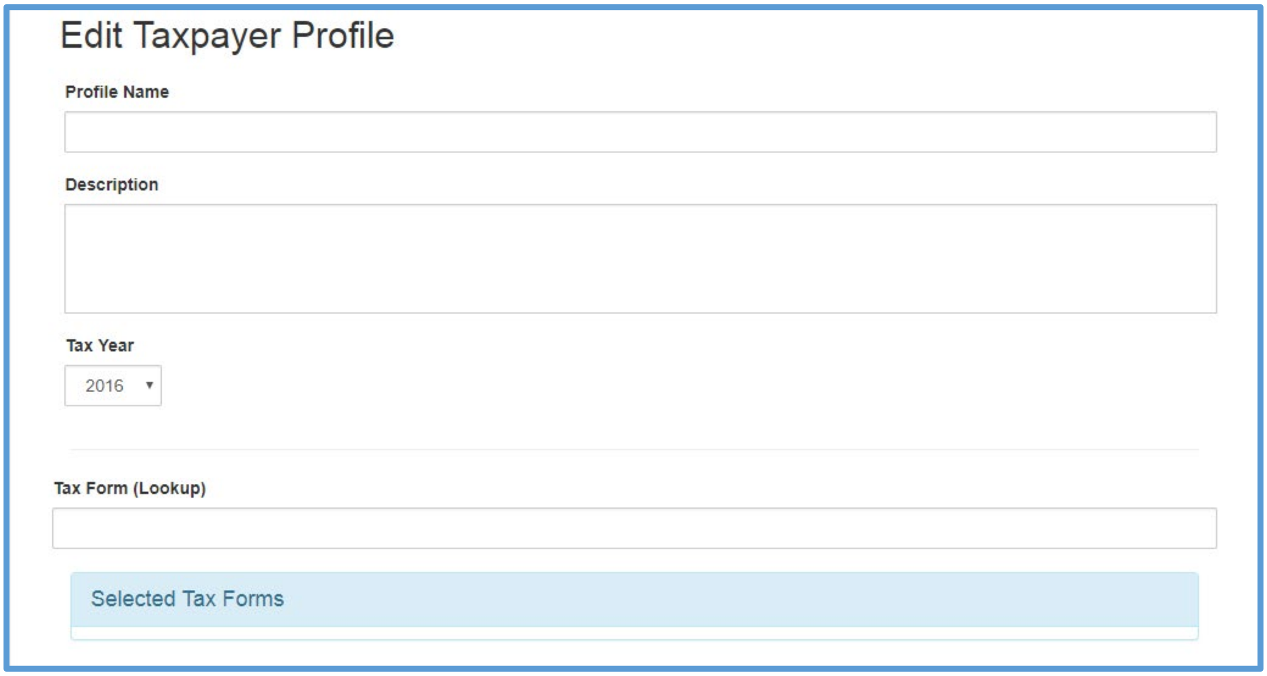
TaxSlayer Pro Online displays the **Taxpayer Profiles** page, listing any taxpayer profiles assigned to your site:



NOTE: On this page, you can view the description for the Master Profile, which includes several forms based on IRS guidelines. You can also view any other assigned taxpayer profiles. You cannot edit or delete assigned taxpayer profiles.

3. To add a taxpayer profile, click **Add Taxpayer Profile**.

TaxSlayer Pro Online displays the **Edit Taxpayer Profile** page:



Adding General Taxpayer Profile Information

4. Type a name for your new taxpayer profile in the **Profile Name** box.
5. Type a description in the **Description** box.

TIP: TaxSlayer Pro Online displays the description when the preparer begins creating a return. In the description, you can list the names of forms included in this taxpayer profile.

6. Select the most current tax year from the list.

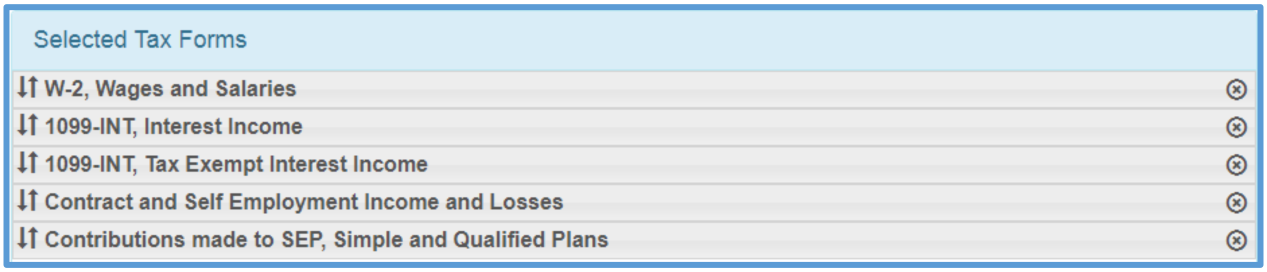
TIP: TaxSlayer Pro Online displays the profile in all years, not just the specified current tax year.

Adding and Sorting Forms

You can add many forms to the taxpayer profile. For a full list of forms you can add, see the list in TaxSlayer Pro Online.

7. Begin typing a form name you want included in the **Tax Form (Lookup)** box.
8. Click the name of the form in the list to add it.

TaxSlayer Pro Online displays the forms you select in the list:



9. To sort the order in which forms display to the preparer, drag each form to the appropriate location in the list.
10. If you need to remove a form from the list, click the **Delete** icon for that form.
11. When you finish adding and sorting forms, click **Save.**

TaxSlayer Pro Online displays the **Taxpayer Profiles** page, listing the new profile:

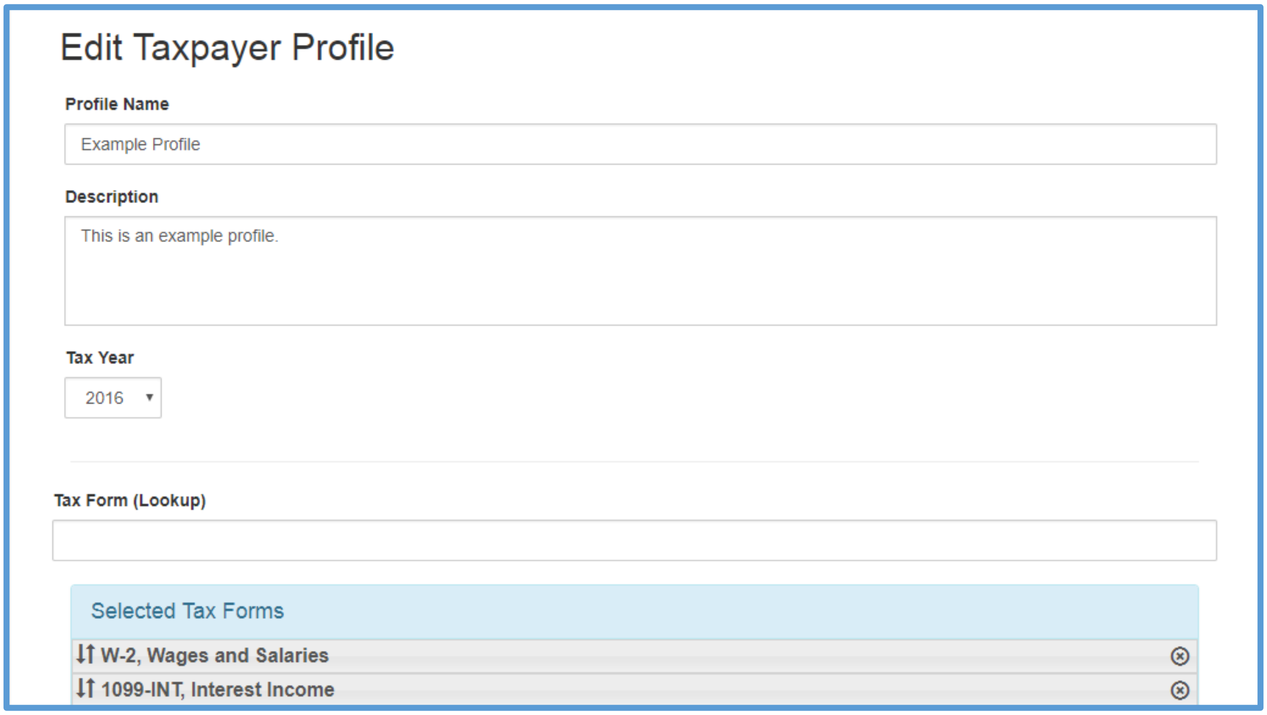
12. To add more taxpayer profiles, click **Add** and follow the same steps.

Editing a Taxpayer Profile

If you later need to edit a taxpayer profile, use the following steps from the **Taxpayer Profiles** page:

1. Click **Edit** on the line for the taxpayer profile you want to edit.

TaxSlayer Pro Online displays the **Edit Taxpayer Profile** page:



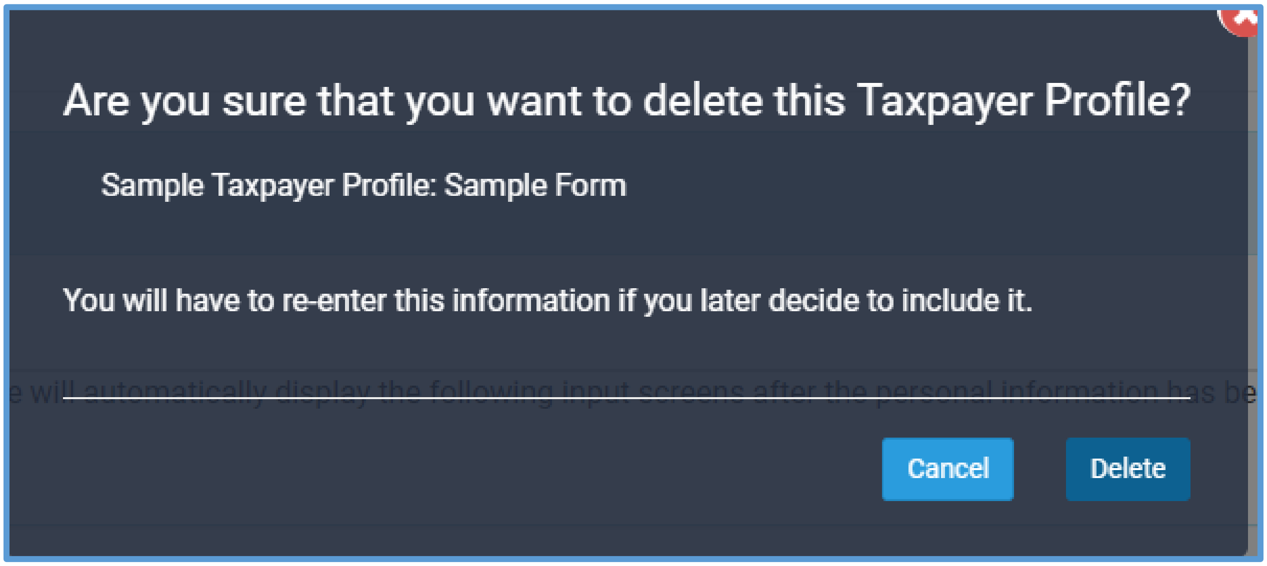
2. Edit the profile name, description, or tax year as needed.
3. Add and sort forms as described previously in this lesson.
4. Click **Save** to save the edited profile.

Deleting a Taxpayer Profile

If you need to delete a taxpayer profile, use the following steps from the **Taxpayer Profiles** page:

1. Click **Delete** on the line for the taxpayer profile you want to delete.

TaxSlayer Pro Online displays a confirmation message:



2. Read the question and information carefully.
3. Click **Delete**.

TaxSlayer Pro Online deletes the taxpayer profile and removes it from the list.

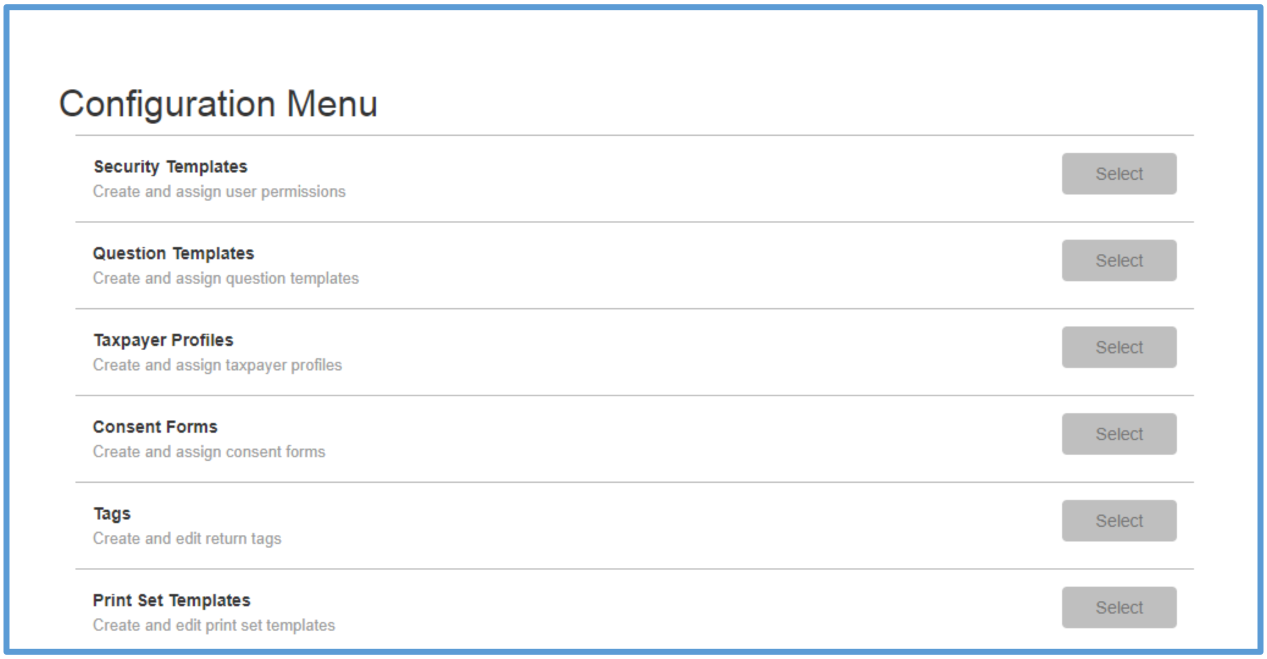
NOTE: If you delete a taxpayer profile, you cannot retrieve it later. If you need the same taxpayer profile again, you will need to add the taxpayer profile again as a new, blank taxpayer profile.

Assigning a Profile

If you are a multi-site group administrator, you can assign taxpayer profiles you create to sites. After you create taxpayer profiles, use the following steps to assign them:

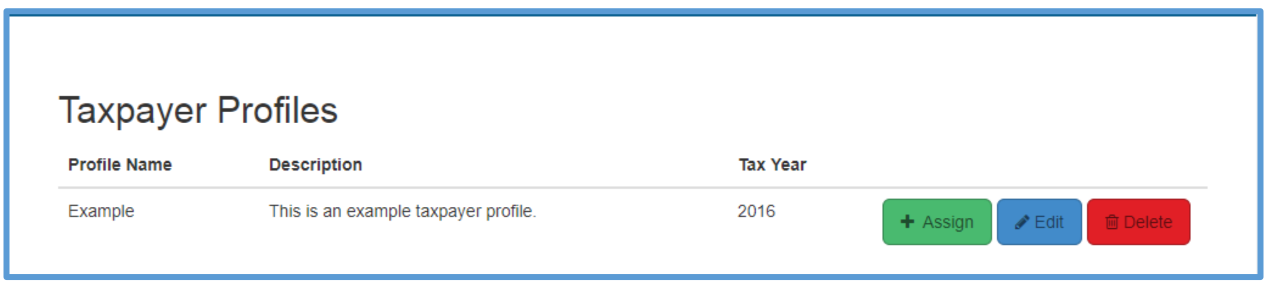
1. Log in with your multi-site group administrator login.
2. From the **Welcome** page, click **Group Configuration**.

TaxSlayer Pro Online displays the **Group Configuration** page:



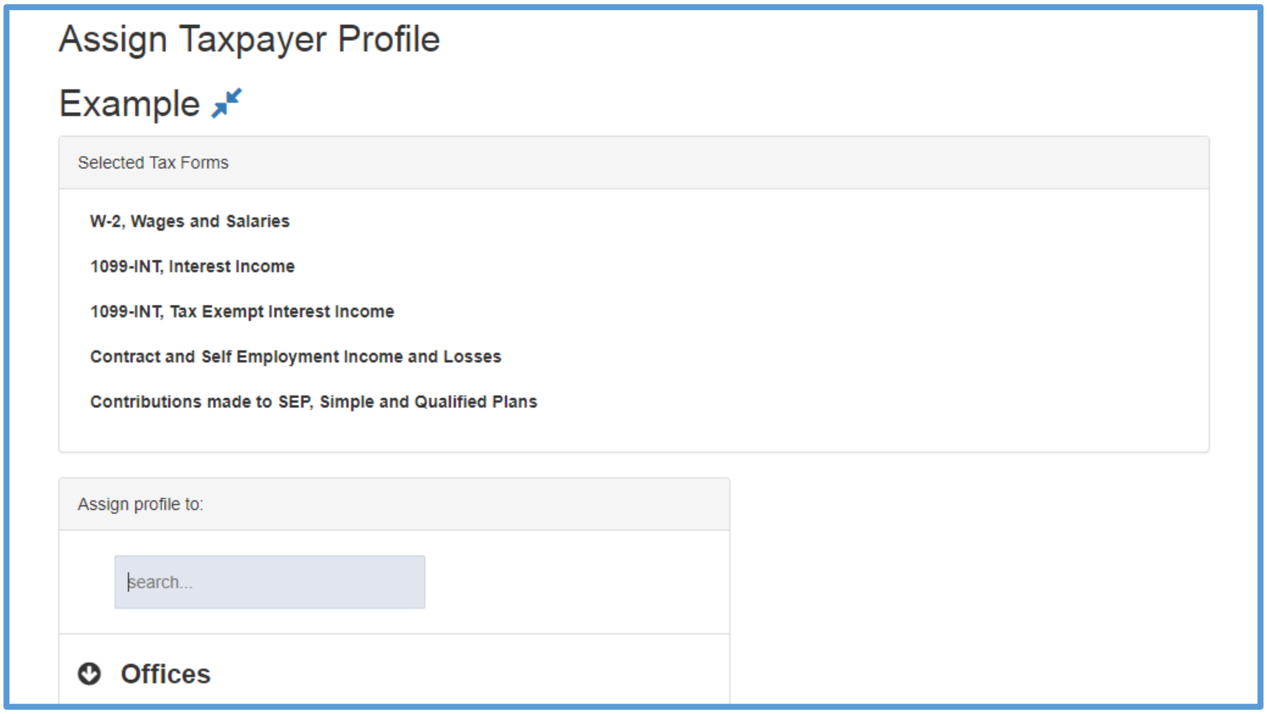
3. Click **Select** on the **Taxpayer Profiles** line.

TaxSlayer Pro Online displays the **Taxpayer Profiles** page:



4. Click **Assign** for the taxpayer profile you want to assign to sites.

TaxSlayer Pro Online displays the **Assign Taxpayer Profile** page:

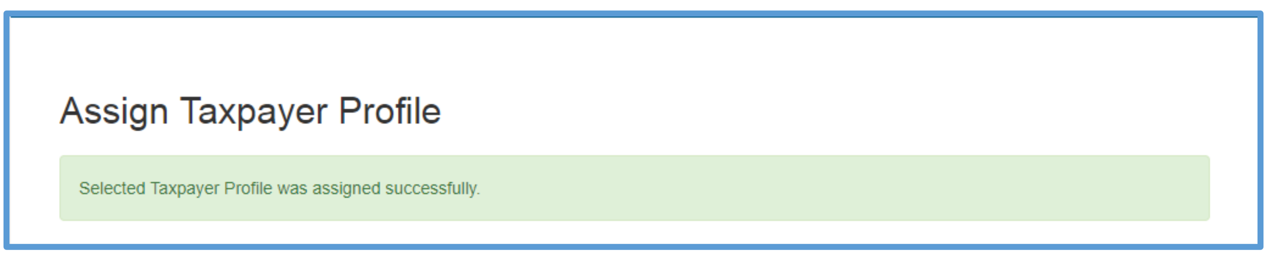


5. Select the site to which you want to assign the profile.

TIP: If you want to assign the taxpayer profile to all sites, select the **Check/Uncheck** all check box. You must unassign the profiles from applicable offices before you delete the profile. Once you delete the profile, there is no way to unassign it from the site.

6. When you finish selecting sites, click **Continue**.

TaxSlayer Pro Online displays the confirmation page:

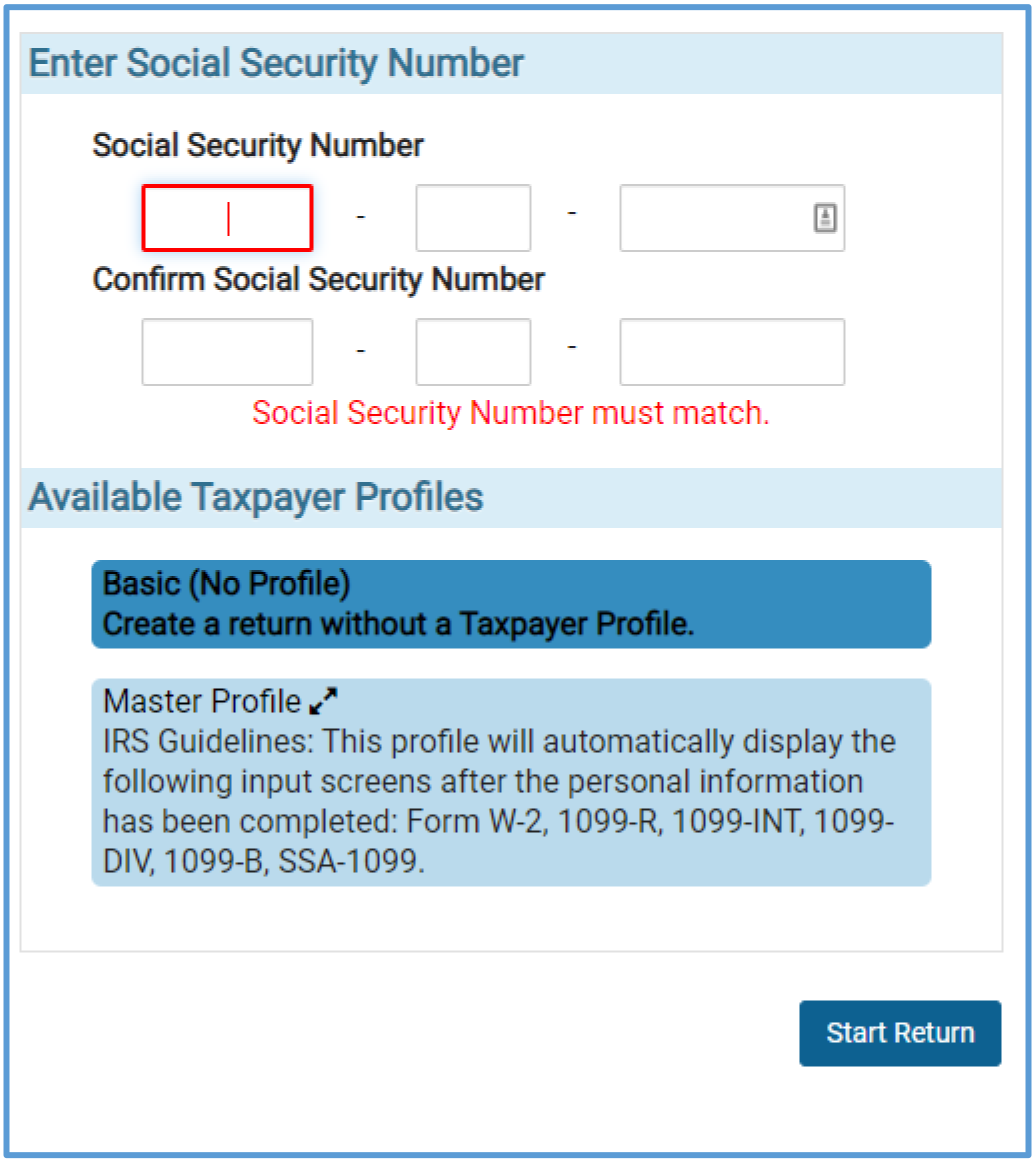


Selecting a Taxpayer Profile

You can only select a taxpayer profile when creating a new return. If you start a return without a taxpayer profile, you cannot add one later. When a preparer starts a new tax return, he or she can select a taxpayer profile using the following steps:

1. Start a new return from the **Welcome** page.

TaxSlayer Pro Online displays the **Start New Return** page:



2. Type the taxpayer's Social Security number.
3. Type the taxpayer's Social Security number again for confirmation.

4. In the **Available Taxpayer Profiles** section, select the taxpayer profile you want to use.

TIP: Select the profile's title, not the description.

5. Click **Start Return**.
6. As the preparer navigates through the return, TaxSlayer Pro Online displays the entry pages for the selected profile.

NOTE: For more detailed information on starting a new return, see the *Starting a Tax Return* lesson.

Summary

You should now be able to:

- Create taxpayer profiles.
- Add forms to a taxpayer profile.
- Edit taxpayer profiles.
- Delete taxpayer profiles.
- Assign a taxpayer profile to another site as a multi-site administrator.
- Select a taxpayer profile when starting a new return.
- List forms you can add to a taxpayer profile.

To see a video of what you just learned, go to Working with Taxpayer Profiles. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Consents

After completing this lesson, you should be able to:

- Add a new consent form.
- Edit an existing consent form.
- Delete a consent form.
- Complete a consent in a tax return.
- Use the Global Carryforward Consent.
- Work in the Consent Report.

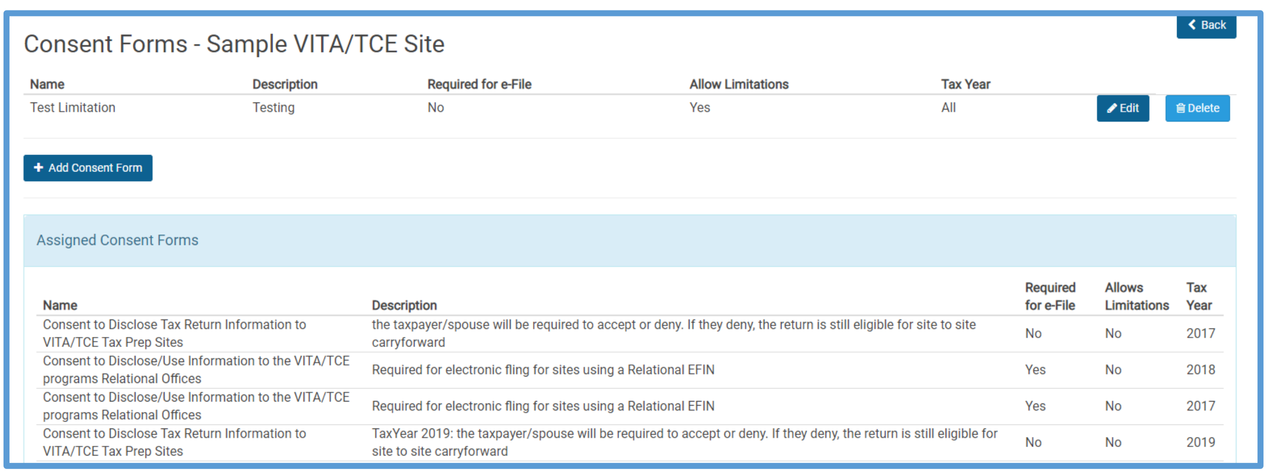
Adding a Consent

If you need to request consent from taxpayers for certain actions, you need to add a consent form. To add a consent to be used by your site, use the following steps from the **Configuration Menu** page:

Note: If your order was placed with a relational EFIN, the Reporting Consent is assigned to your site and required for electronic filing.

1. Click **Select** on the **Consent Forms** line.

TaxSlayer Pro Online displays the **Consent Forms** page, listing any assigned consent forms:



Back

Consent Forms - Sample VITA/TCE Site

Name	Description	Required for e-File	Allow Limitations	Tax Year		
Test Limitation	Testing	No	Yes	All	Edit	Delete

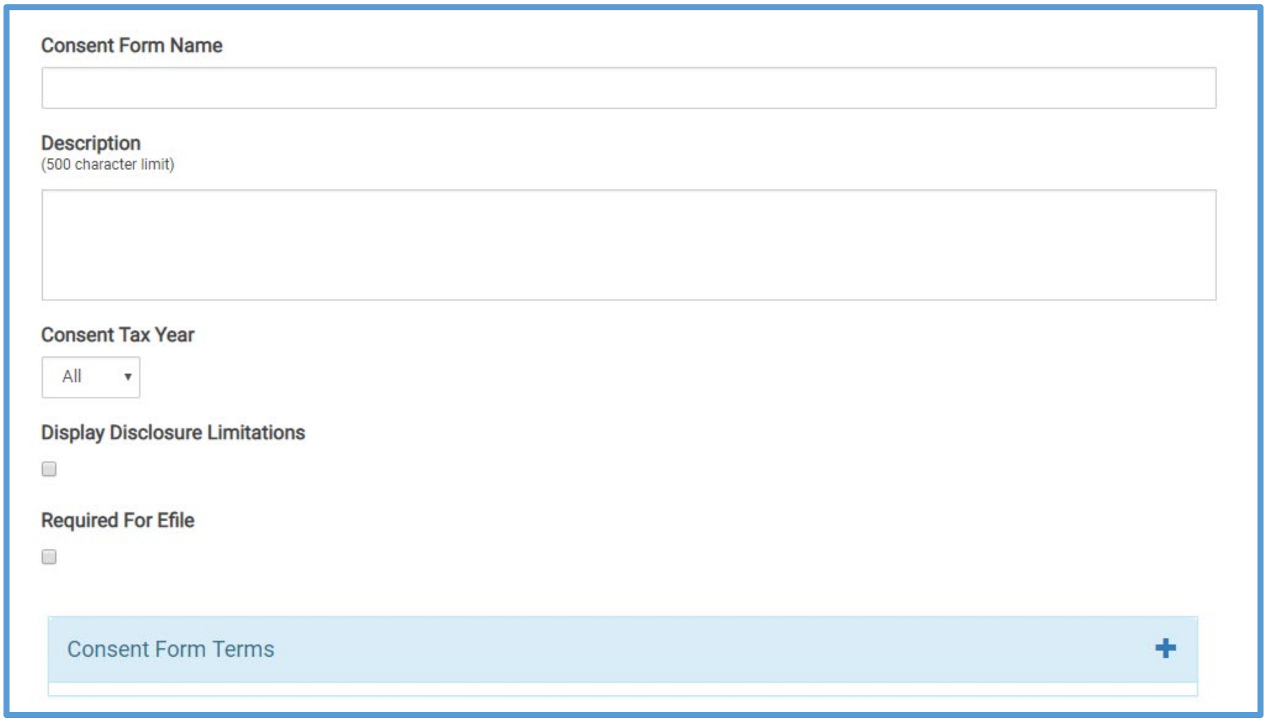
+ Add Consent Form

Assigned Consent Forms

Name	Description	Required for e-File	Allows Limitations	Tax Year
Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites	the taxpayer/spouse will be required to accept or deny. If they deny, the return is still eligible for site to site carryforward	No	No	2017
Consent to Disclose/Use Information to the VITA/TCE programs Relational Offices	Required for electronic fling for sites using a Relational EFIN	Yes	No	2018
Consent to Disclose/Use Information to the VITA/TCE programs Relational Offices	Required for electronic fling for sites using a Relational EFIN	Yes	No	2017
Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites	TaxYear 2019: the taxpayer/spouse will be required to accept or deny. If they deny, the return is still eligible for site to site carryforward	No	No	2019

2. Click **Add Consent Form**.

TaxSlayer Pro Online displays the **Edit Consent Form** page:



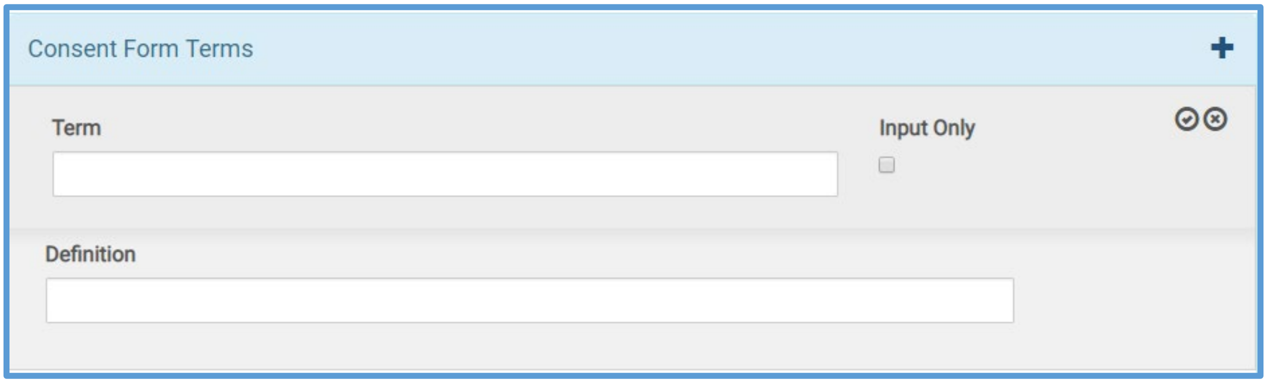
3. Type a name and description for your consent form.
4. Select the **Consent Tax Year**. You can select either **All** to display the consent in all tax years, the current year, or one of the five prior years.
5. Select the **Display Disclosure Limitations** check box if you need to display the disclosure limitations.

TIP: Displaying the disclosure limitations is optional and must be tracked manually by the site.

6. Click the **Add** icon in the **Consent Form Terms** section.

NOTE: The **Required For Efile** check box prevents the preparer from marking the return complete if the taxpayer denies the consent. Preparers are required to complete all consents created or assigned to the site before creating an e-file.

TaxSlayer Pro Online expands the **Consent Form Terms** section:



7. Type the term, which is typically 1 year.
8. Type the definition.

NOTE: Type a descriptive definition so the preparer and taxpayer can see the exact terms of the consent and knowingly accept those terms. **Do Not** select **Input Only**, since this requires the return preparer to manually type consent form terms on each consent for each taxpayer and must be tracked manually by the site.

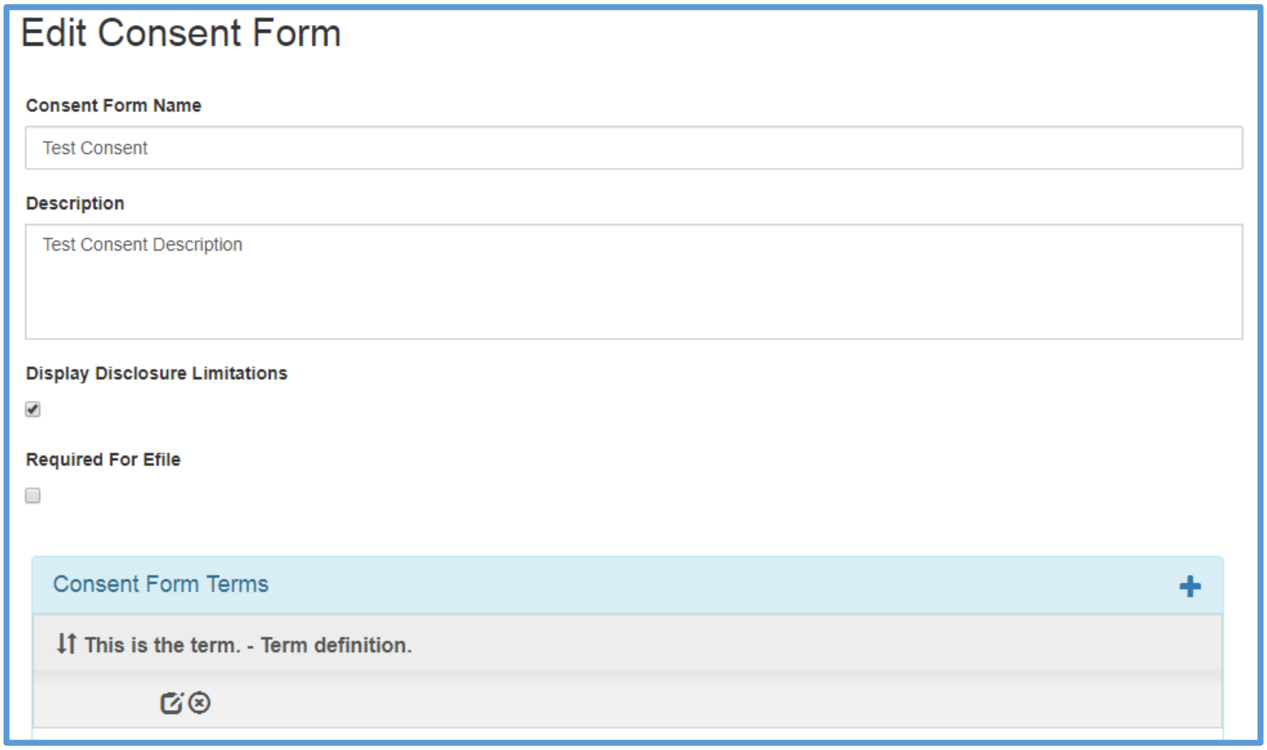
9. When you finish adding the term, click the **Save** icon (check box) to save the term.
10. If you need to add more terms, click the **Add** icon to add another term.
11. When you finish adding terms, click **Save**.

Editing a Consent Form

If you later need to edit a consent form that was created at your site, use the following steps from the **Consent Forms** page:

1. Click **Edit** for the consent form you want to edit.

TaxSlayer Pro Online displays the **Edit Consent Form** page:



2. Make any changes to the consent the same as when you created a new consent.

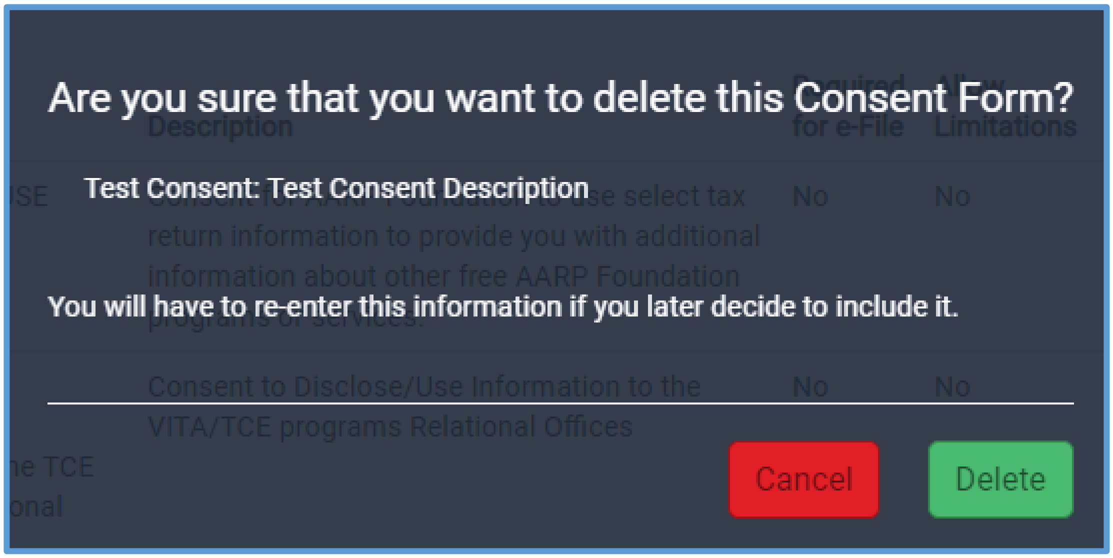
TIP: TaxSlayer Pro Online makes changes to a consent immediately available in returns. We do not recommend making changes to consents after you start preparing returns.

Deleting a Consent

If you later need to delete a consent form that was created at your site, use the following steps from the **Consent Forms** page:

1. Click **Delete** for the consent form you want to delete.

TaxSlayer Pro Online displays a confirmation message:



2. Ensure that you want to delete the consent form, and then click **Delete**.

TaxSlayer Pro Online deletes the consent form and removes it from the list.

NOTE: You cannot retrieve a consent form after you delete it. Make sure that you want to delete the consent form to avoid re-entering the information.

TIP: If you have assigned a consent to a group, you must unassign the consent from the group before deleting it. Once you delete it, there is no way to unassign it from a site.

TaxSlayer Pro Online prints the consent form with the tax return.

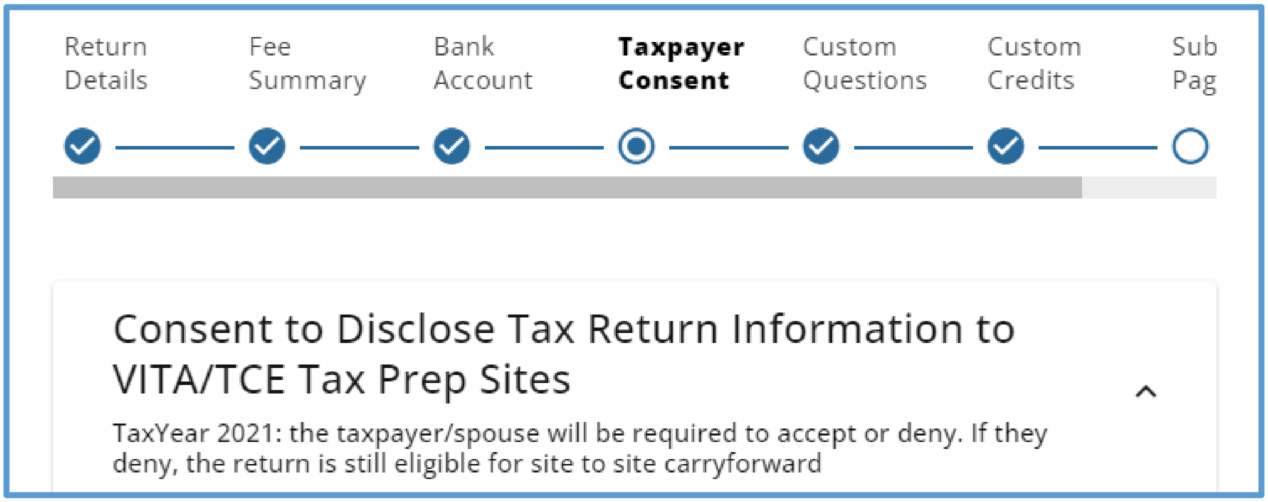
Support Tip: The program prints the required legal language on the consent with specified page margins and fonts You cannot change these items.

Completing the Consent in the Tax Return

When you finish a tax return, you can complete the consent. To do so, use the following steps from the **E-File** page:

1. Work through the sections of the **E-File** page until you reach the **Taxpayer Consent…** section.

TaxSlayer Pro Online displays the **Consent to…** section:



2. Follow your site procedures to complete the Consent pages.

TIP: If your site has set up Consents, you must answer them before creating the e-file. If the taxpayer denies consent, you **do not** need a PIN or date.

NOTE: The Consent forms print with taxpayer and spouse signature lines.

Global Carryforward Consent

SPEC and TaxSlayer agreed to implement global carryforward of taxpayer information to all VITA/TCE tax preparation sites beginning with Filing Season 2018. Taxpayers must affirmatively consent during the return preparation process to allow their information to be available for global carryforward in the subsequent tax year.
Based on the agreement with SPEC, TaxSlayer assigns the electronic version of the Global consent to all VITA/TCE Pro Online sites. You cannot edit or delete this consent.

If the taxpayer granted Global Consent in the prior year and visits a different volunteer site in the current filing season, TaxSlayer alerts the preparer that carryforward data exists for use in the current year's tax return.

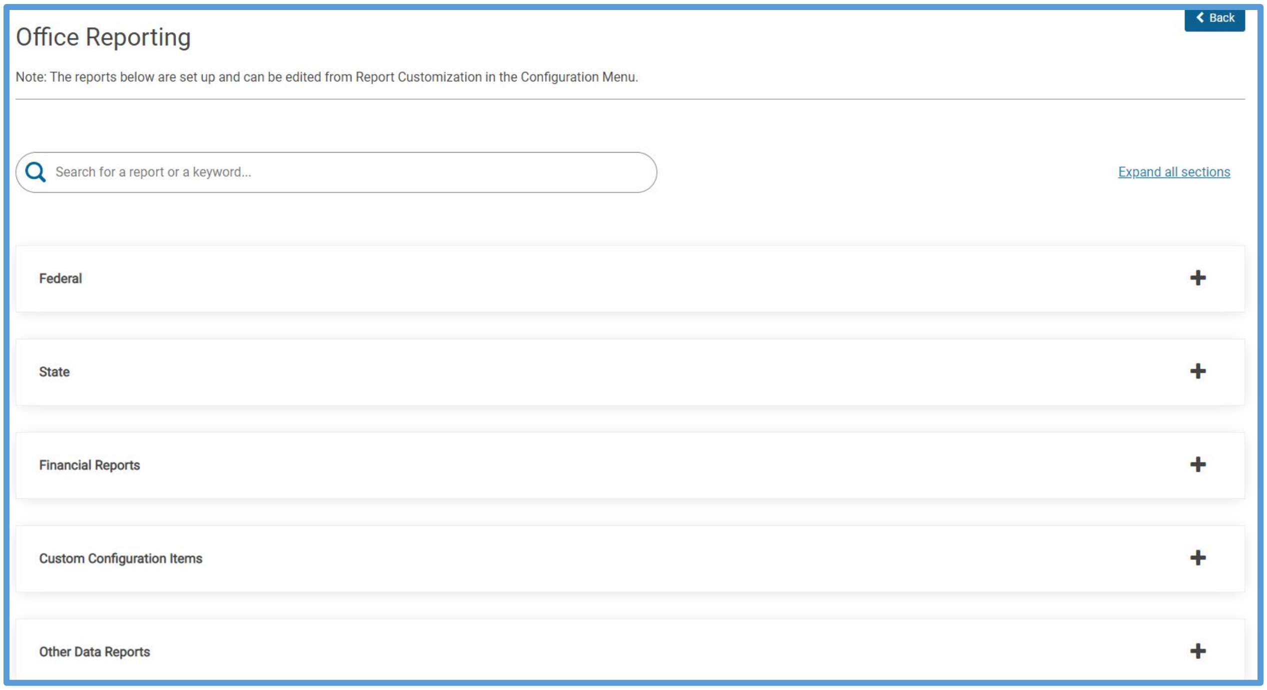
Note: If the taxpayer denied the Global Consent in the prior year, there is no impact on the same-site carryforward option.

Consent Report

Each site can run a report that indicates which consents a taxpayer granted or denied. To run the reports, do the following from the **Welcome** page:

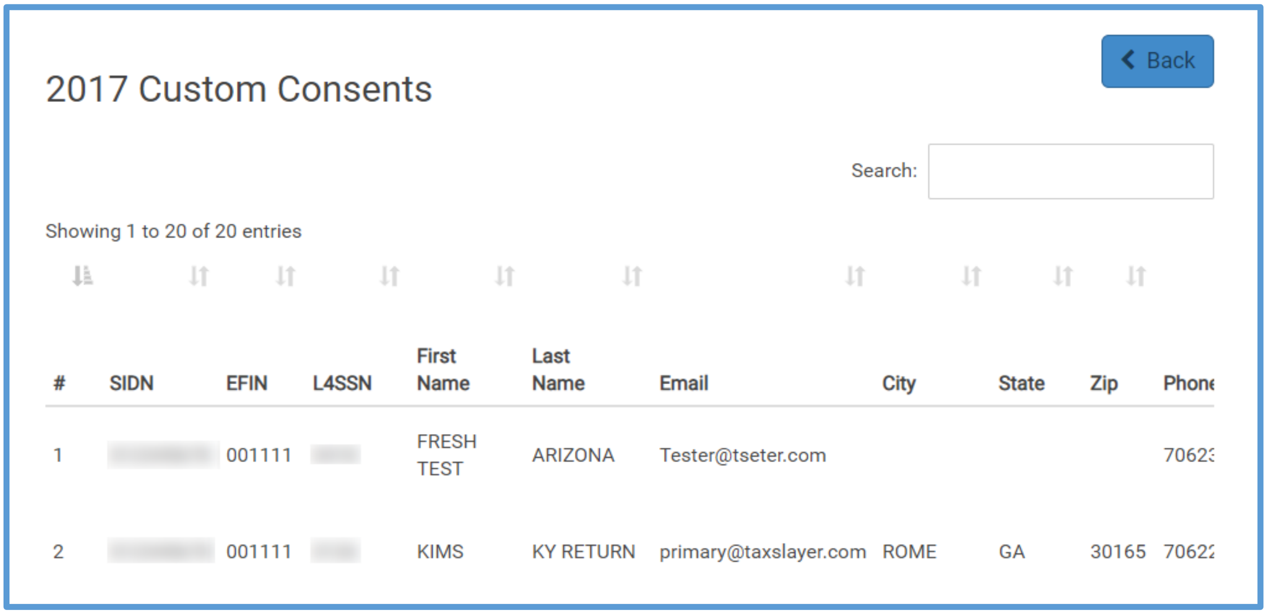
1. Click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the **Office Reporting** page:



2. Click the **Custom Configuration Items** section to expand it.
3. Click **Select** on the **Custom Consents** line.

TaxSlayer Pro Online displays the **Custom Consents** page:



2017 Custom Consents

Back

Search:

Showing 1 to 20 of 20 entries

#	SIDN	EFIN	L4SSN	First Name	Last Name	Email	City	State	Zip	Phone
1	[redacted]	001111	[redacted]	FRESH TEST	ARIZONA	Tester@tseter.com				70623
2	[redacted]	001111	[redacted]	KIMS	KY RETURN	primary@taxslayer.com	ROME	GA	30165	70622

TaxSlayer Pro Online includes the following columns in the Custom Consents report:

- SIDN
- EFIN
- Last 4 digits of the SSN
- First Name
- Last Name
- Email
- City
- State
- Zip
- Phone
- Office (Site) Name
- Column for each consent with a Yes/No indicator

See the *Working with Reports* topic for information on how to print and/or export the report data.

Summary

You should now be able to:

- Add a new consent form.
- Edit an existing consent form.
- Delete a consent form.
- Complete a consent in a tax return.
- Use the Global Carryforward Consent.
- Work in the Consent Report.

Working with Custom Credits

After completing this lesson, you should be able to:

- Set up custom credits.
- Add a custom credit in the return.

Custom credits allow the preparer to capture items that are not contained in other reports. You can use custom credits to capture state credits and other numerical items your site needs for grant purposes. You can add an unlimited number of custom credits, and the Custom Credit Report displays the following information when you run the report:

- EFIN
- Last four digits of primary Social Security number
- Last name
- Credit description
- Credit value

You can mark the Custom Credit box as required, but you cannot create an answer bank. All answers must be numeric with a maximum of 9 numbers.

Setting up Custom Credits

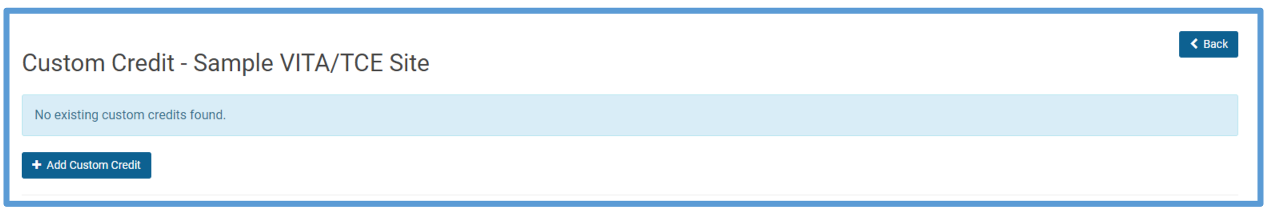
To set up Custom Credits, use the following steps as an administrator from the Welcome page:

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu**:

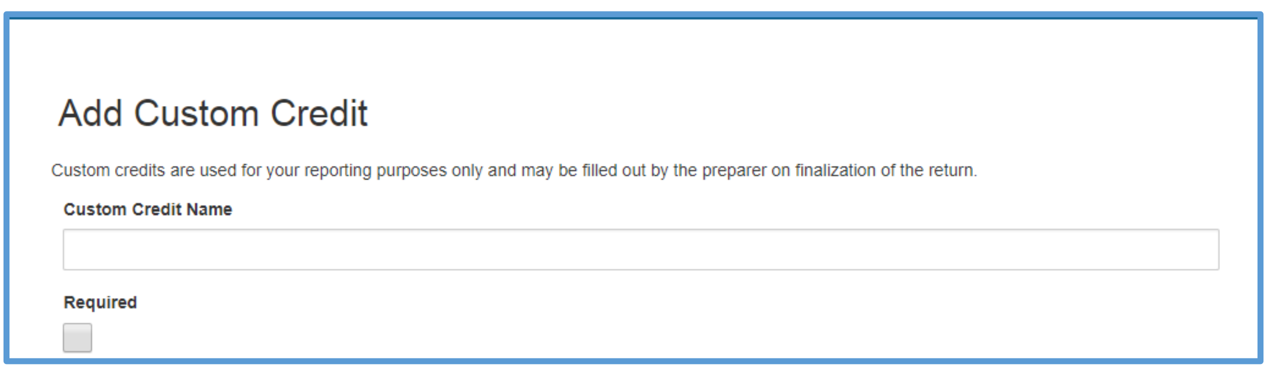
2. Click **Select** on the **Custom Credit** line.

TaxSlayer Pro Online displays the **Custom Credit** page:



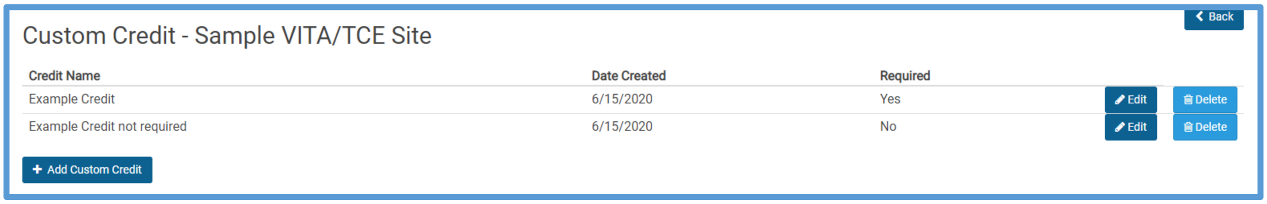
3. Click **Add Custom Credit**.

TaxSlayer Pro Online displays the **Add Custom Credit** page:

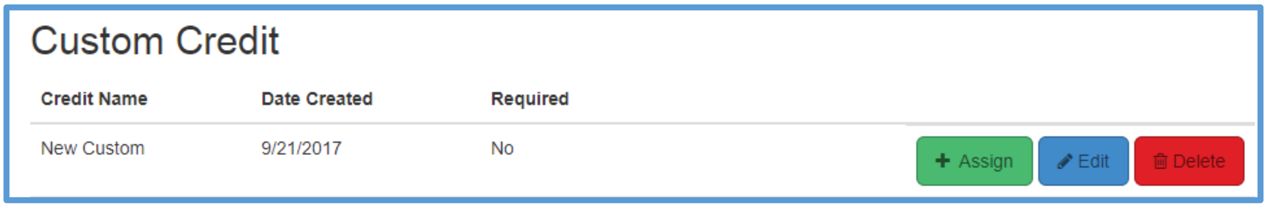


4. Type a name for the custom credit.
5. If you want preparers to be required to add the custom credit, select the **Required** check box.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Custom Credit** list with the new credit:



7. If you are a multi-site administrator, you can also click **Assign** to assign the custom credit to other sites, as shown below:



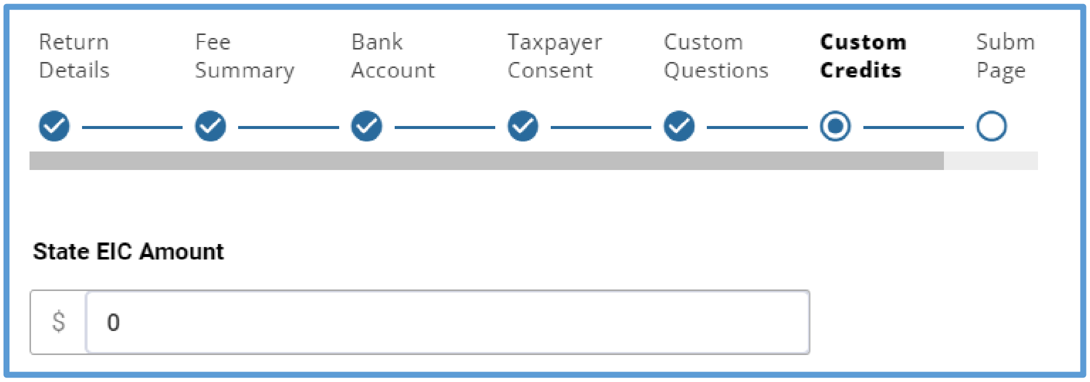
WARNING: You must unassign custom credits from all sites before deleting them. Once you delete a custom credit, you cannot remove it from an assigned site.

Adding the Custom Credit in a Return

When you finish a tax return, you can enter the custom credit. To do so, use the following steps from the **E-File** section:

3. Work through the sections of the **E-File** page until you reach the **Custom Credits** section.

TaxSlayer Pro Online displays the **Custom Credits** section:



4. Type the appropriate amount in the box.

NOTE: Remember that if the administrator marks a custom credit as required, you cannot e-file until you type an amount in the required box, even if the amount is zero.

Summary

You should now be able to:

- Set up custom credits.
- Add a custom credit in the return.

Adding an Office IP Whitelist

After completing this lesson, you should be able to:

- Discuss the purpose of an Office IP Whitelist.
- Add IP addresses to the Office IP Whitelist.
- Configure TaxSlayer Pro Online to verify IP addresses.
- Delete IP addresses from the Office IP Whitelist.

For added security measures, you can restrict access to TaxSlayer Pro Online only to IP addresses associated with your site. If you do this, you and other site users can only log in to TaxSlayer Pro Online from the IP addresses you specify.

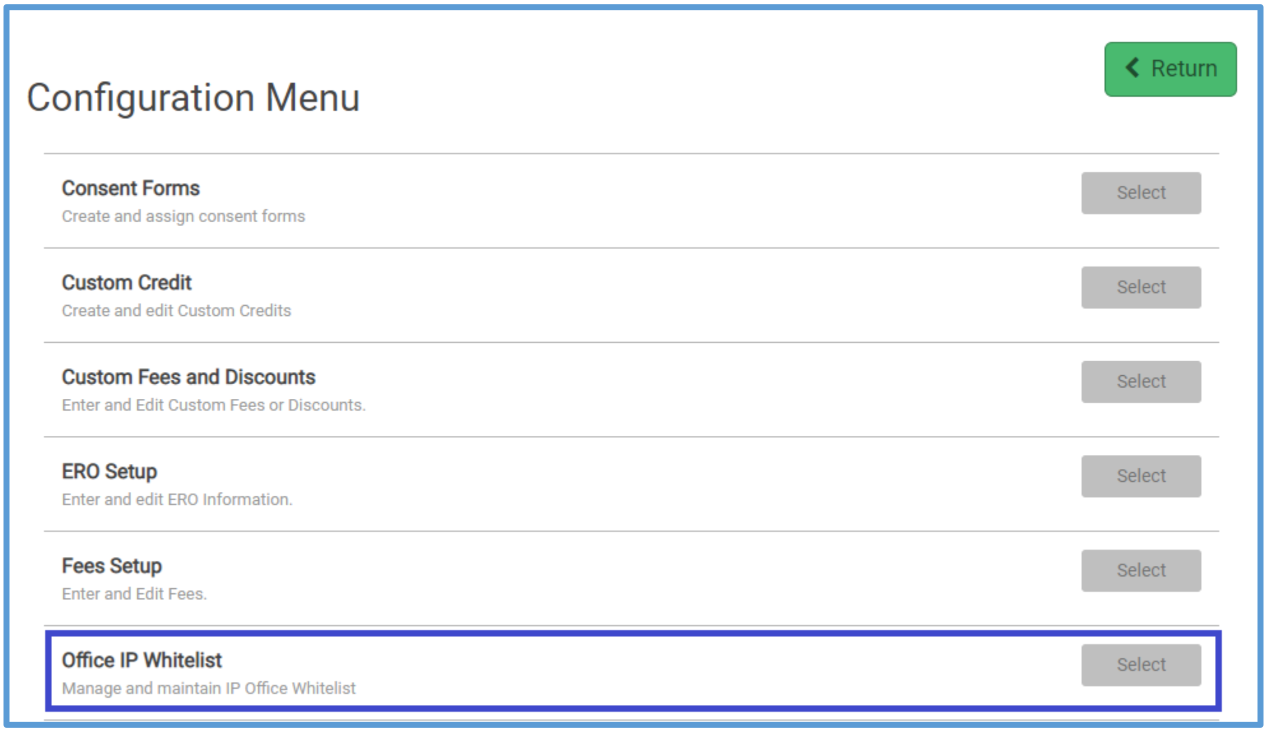
WARNING: If you use this feature, add the office's IP addresses **before** you enable the feature. If you do not have any IP addresses whitelisted, no one will have access to the program.

Adding IP Addresses

First, add any IP addresses associated with your site. To do this, use the following steps from the **Welcome** page:

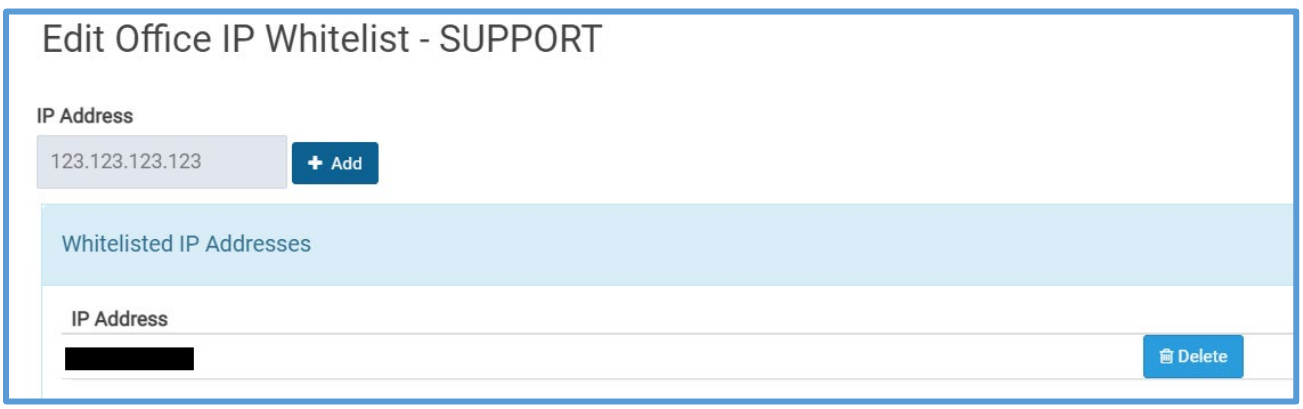
1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** page:



2. Click **Select** on the **Office IP Whitelist** line.

TaxSlayer Pro Online displays the **Edit Office IP Whitelist** page:



3. Type the allowed IP address in the **IP Address** box.
4. Click **Add**.

TaxSlayer Pro Online displays the allowed IP address in the **Whitelisted IP Addresses** section.

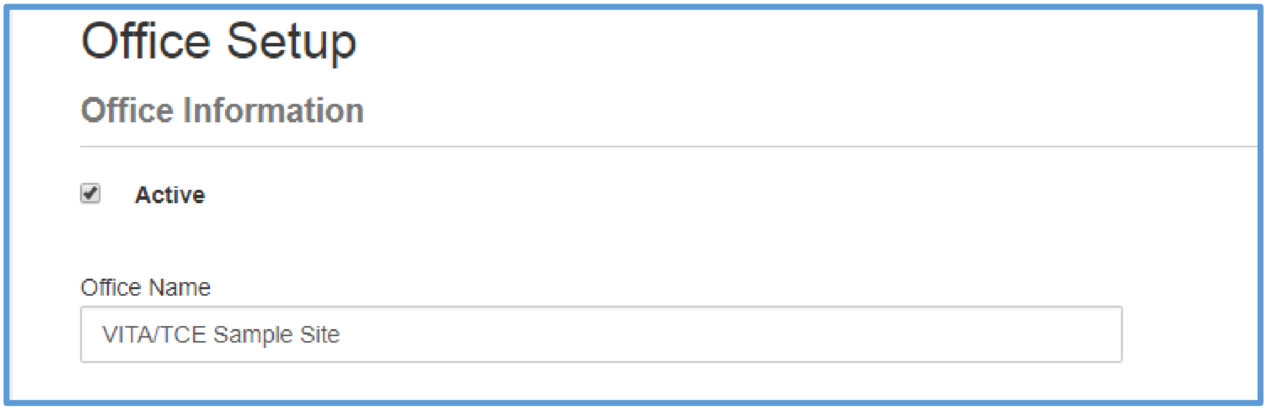
5. Repeat the last two steps for all allowed IP addresses.

Allow Only Whitelisted IP Addresses

After you add the IP addresses you want to allow, you need to configure TaxSlayer Pro to restrict access to only those. To do this, use the following steps from the **Configuration Menu**:

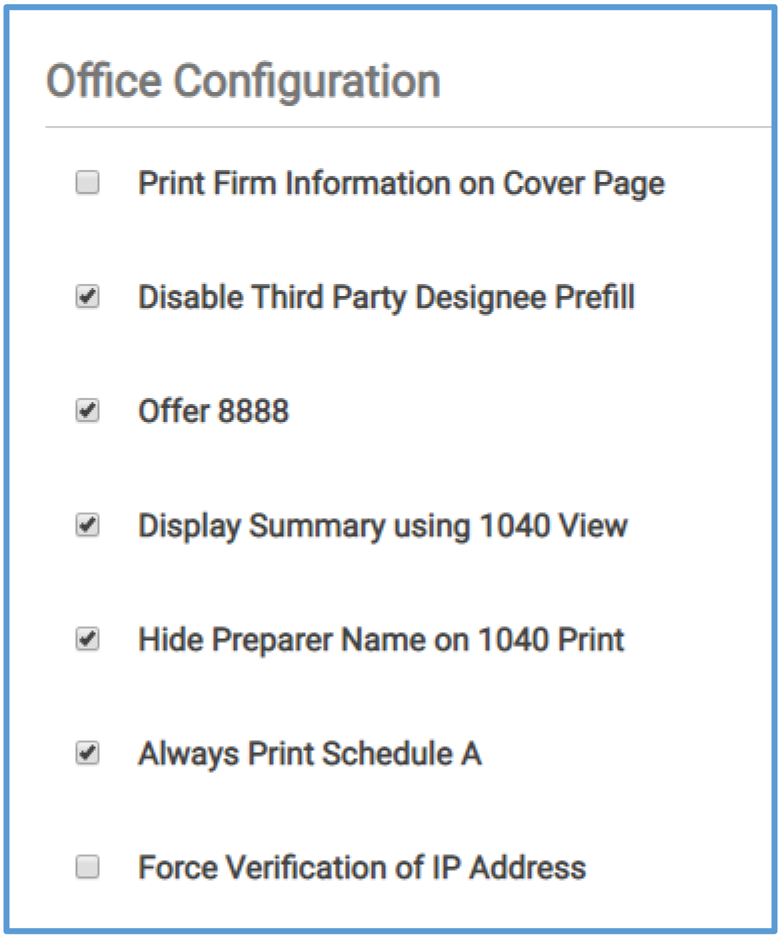
1. Click **Select** on the **Office Setup** line.

TaxSlayer Pro Online displays the **Office Setup** page:



2. Scroll to the **Office Configuration** section.

TaxSlayer Pro Online displays the **Office Configuration** check boxes:



3. Select the **Force Verification of IP Addresses** check box.

Now, when a user attempts to log in using an IP address that is not in the whitelist, TaxSlayer Pro Online prevents the login and displays a message that you cannot log in from this location.

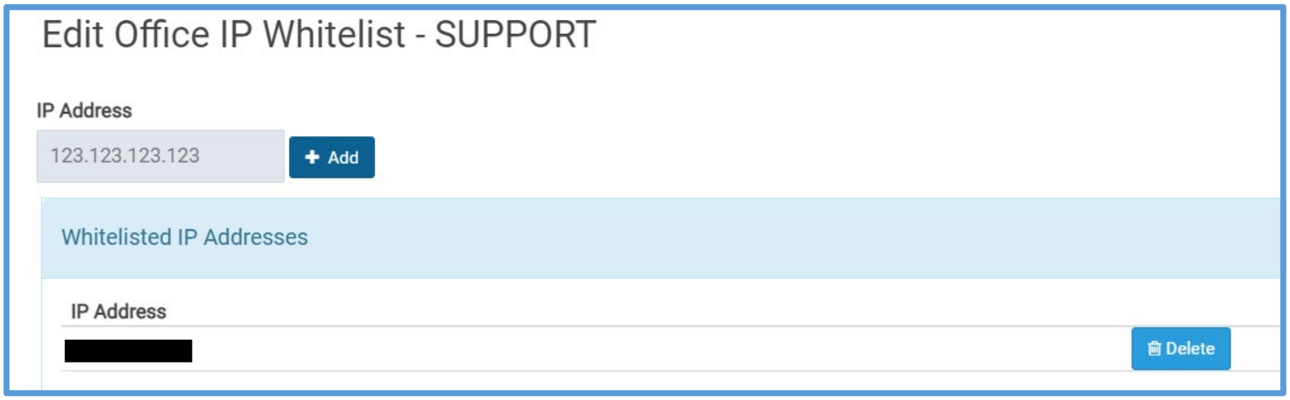
If you would like to allow the user to log in using that IP address, add it to the whitelist. Otherwise, discuss secure locations with that user.

Deleting IP Addresses

If you no longer want to allow access to an IP address, use the following steps from the **Configuration Menu**:

1. Click **Select** on the **Office IP Whitelist** line.

TaxSlayer Pro Online displays the **Edit Office IP Whitelist** page:



2. Find the applicable IP address in the **Whitelisted IP Addresses** section.
3. Click **Delete** on the line for that IP address.

TaxSlayer Pro Online deletes the allowed IP address.

Summary

You should now be able to:

- Discuss the purpose of an Office IP Whitelist.
- Add IP addresses to the Office IP Whitelist.
- Configure TaxSlayer Pro Online to verify IP addresses.
- Delete IP addresses from the Office IP Whitelist.

Managing Returns

After completing this topic, you will be able to:

- Set up return tags.
- Filter returns by return tags.
- Deactivate returns.
- Restore returns.
- Add taxpayer notes.
- Send messages.
- Change the language on the return.

Working with Return Tags

TaxSlayer Pro Online allows you to set up return tags to manage the status of your returns or track the returns by Quality Reviewer. You can create a customized list of return tags at your site.

Setting up Return Tags

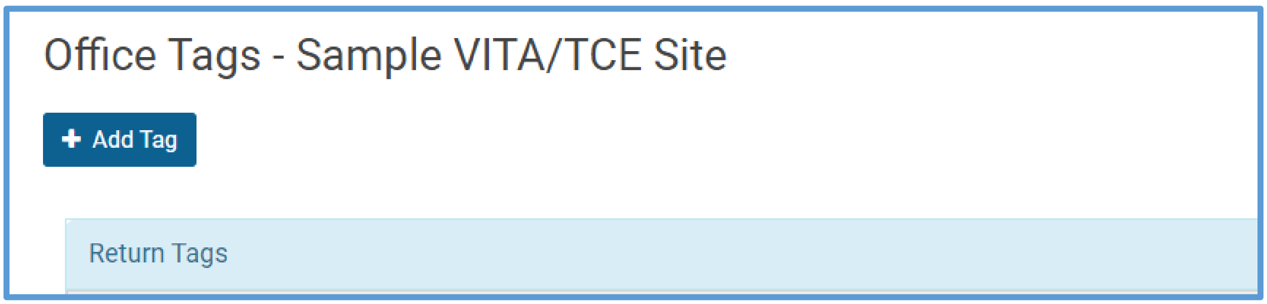
TaxSlayer Pro Online does not have default return tags. You can create these while configuring the site. To add return tags, use these steps from the **Welcome** page:

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** landing page:

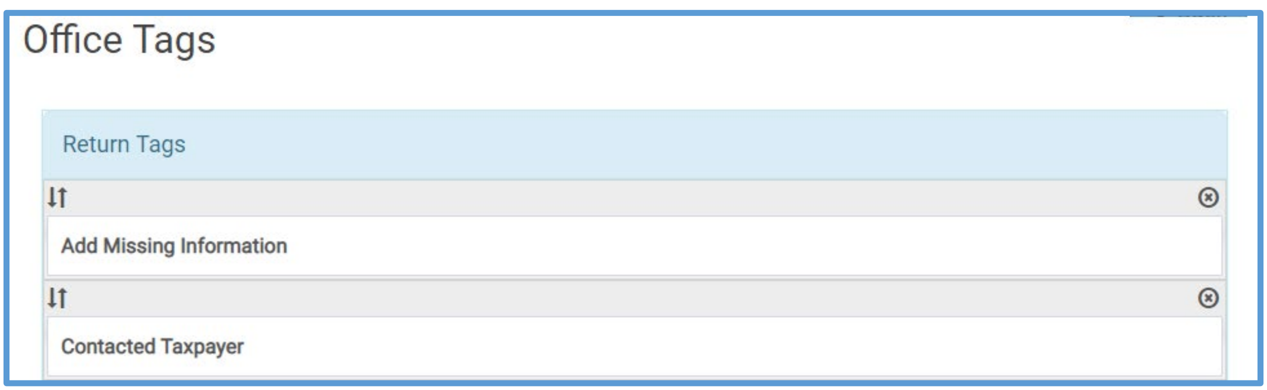
2. Click **Select** on the **Tags** line.

TaxSlayer Pro Online displays the **Office Tags** page:



3. Click **Add Tag**.
4. Type a tag name in the **Add new tag** box; for example: Add missing information.

TaxSlayer Pro Online displays the new return tag in the list:



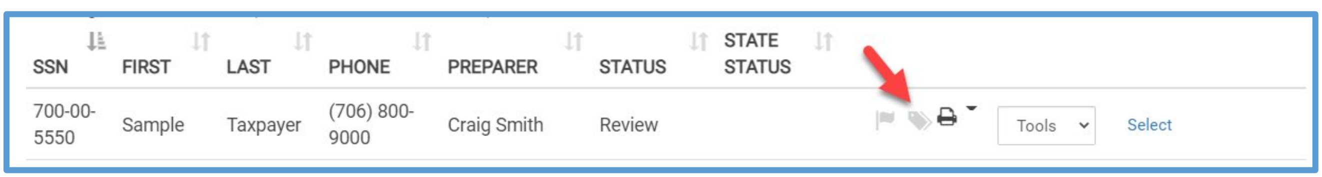
5. Repeat the steps until you add all the return tags you want.
6. To change the display order of the tags, drag each tag to the position you want it to appear in the **Submission** page or **Add Tags** list.
7. When you finish adding return tags, click **Save** to save your changes.
8. Click **Back** to return to the **Configuration Menu** landing page.

When a preparer is working in a return, he or she can designate a return tag on the **Submission** page:

TIP: TaxSlayer Pro Online displays a **Show all Tags** link if your site has more than six tags set up for use.

NOTE: When a Group Master assigns return tags, TaxSlayer Pro Online displays them on the **Submission** page and in the **Add Tags** list.

You can also add a return tag by clicking the **Add Tags** icon in the **Office Client List** and/or **Review Returns**:



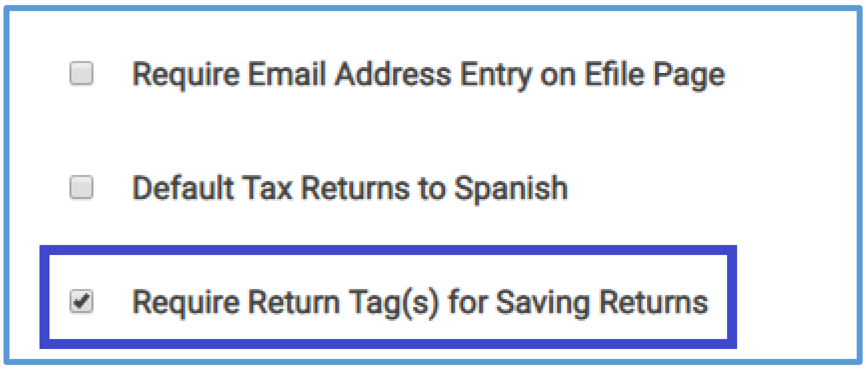
Making Return Tags Required

As a site administrator, you can require preparers to use tags to track specific items from the **Submission** page, such as the Quality Reviewer. To do this from the **Configuration Menu**, use the following steps:

1. Click **Select** on the **Office Setup** line.

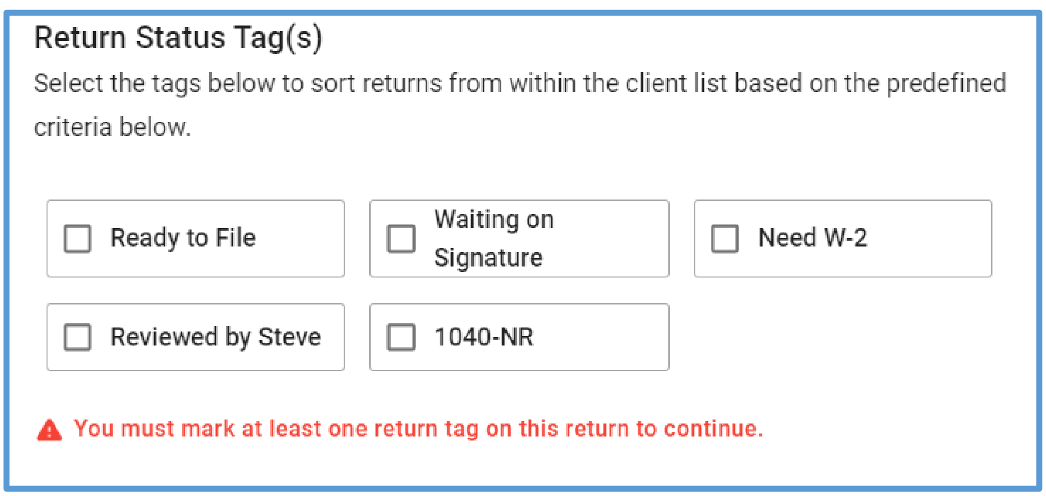
TaxSlayer Pro Online displays the **Office Setup** page. Scroll to the **Office Configuration** section.

2. Select the **Require Return Tag(s) for Saving Returns** check box.



3. Click **Continue**.

Note: If you use return tags to capture and run reports on the Quality Review process, create a *Pending Review* or *Not Reviewed* tag so the preparer has a valid selection to click **Save and Exit** in the return.

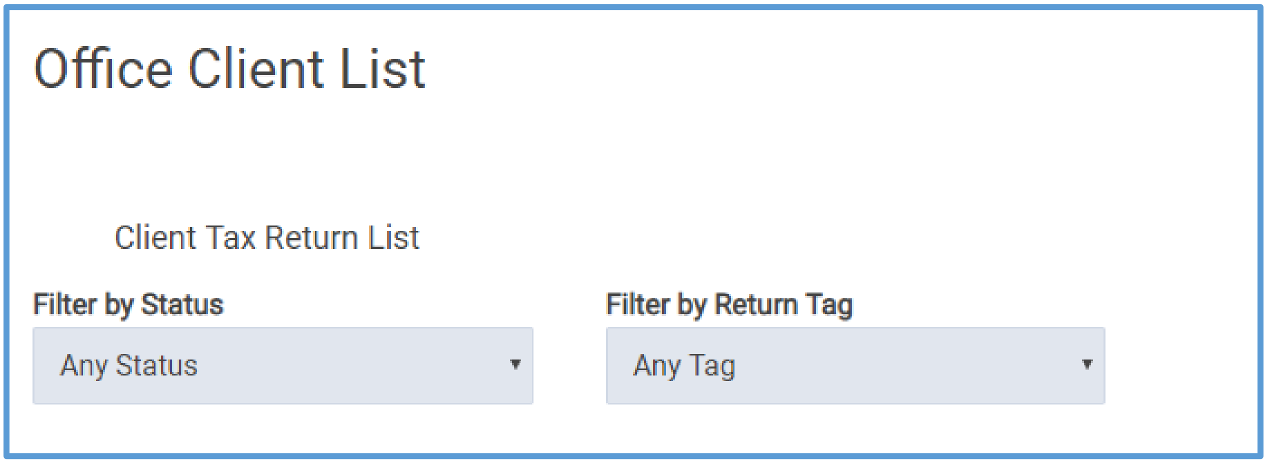


Filtering Returns Using Return Tags

You can filter returns by return tags. When you do this, you can determine any actions that you need to take to complete returns. To filter returns, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

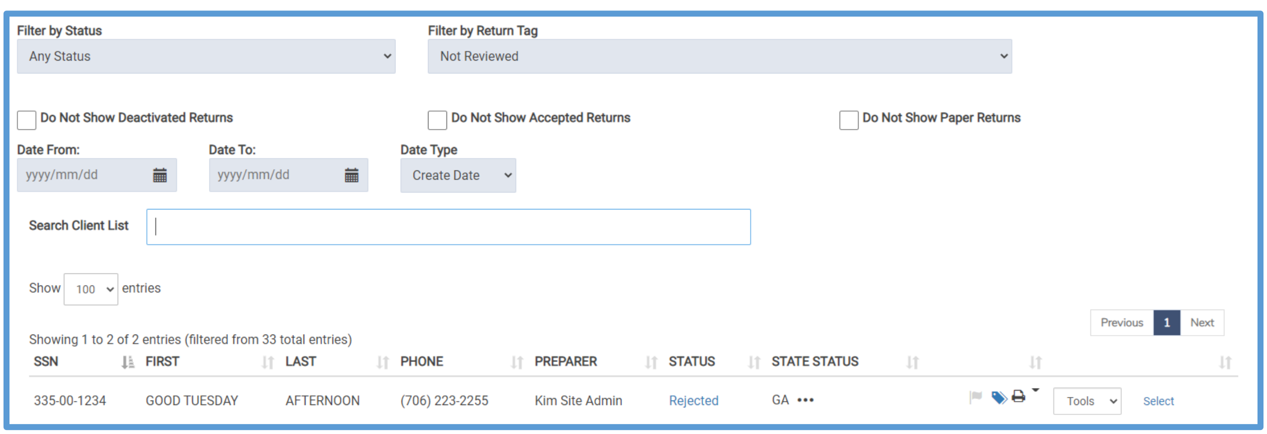
TaxSlayer Pro Online displays the **Office Client List** page:



2. Select the return tag for which you want to search from the **Filter by Return Tag** drop-down list.

TIP: You can select **No Tag** to filter returns that do not have a return tag.

TaxSlayer Pro Online displays any returns with the return tag you selected:



TIP: If you use return tags to manage the quality review process, you can sort and/or filter returns by quality reviewer.

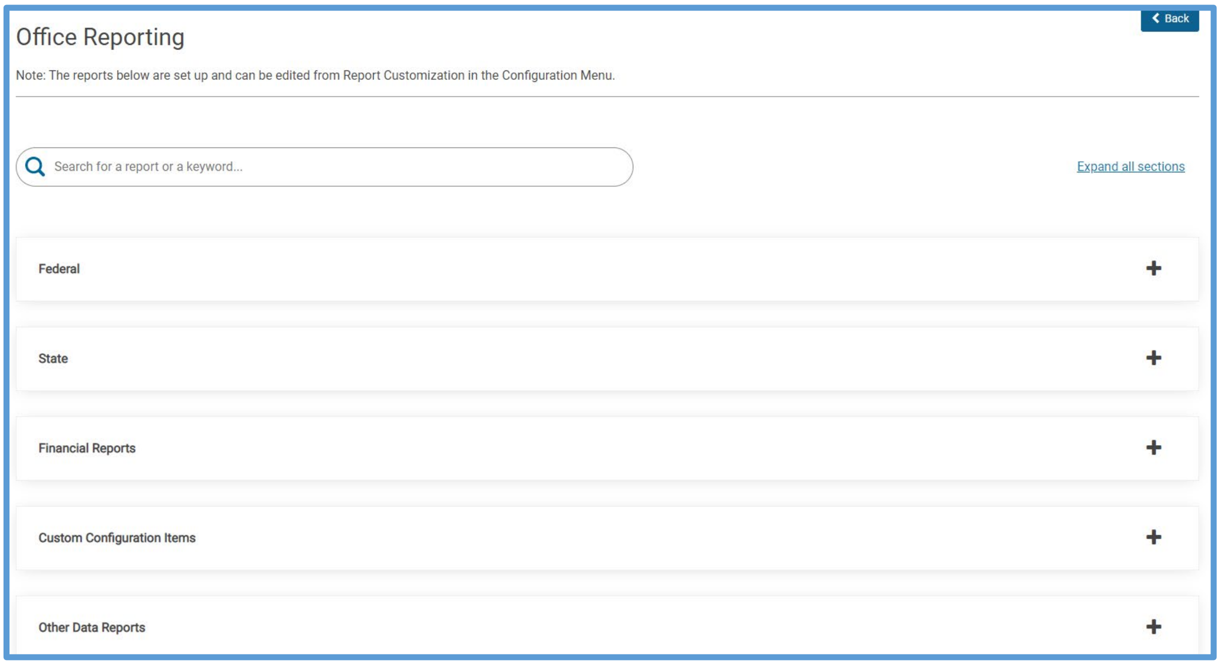
Utilizing the Return Tag Report

As the site administrator, you can use the Return Tag Report in the **Reports** menu to easily manage the returns created at the site.

To run the Return Tag Report from the **Welcome** page, use the following steps:

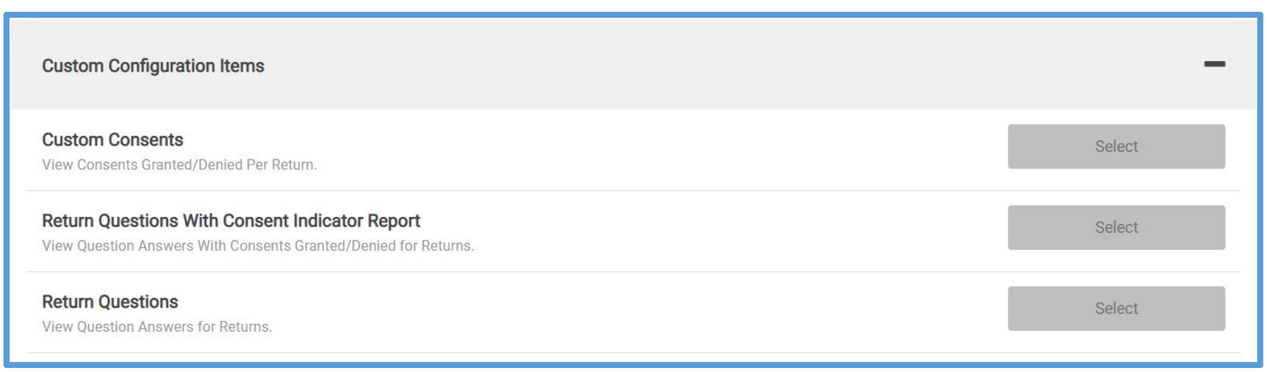
1. Click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the **Office Reporting** page:



2. Click **Custom Configuration Items** to expand the section.

TaxSlayer Pro Online displays the **Custom Configuration Items** section:



TIP: If TaxSlayer Pro Online does not display the report you need, check your report customization to see if you disabled the report. See the *Working with Reports* lesson for information on customization.

3. Click **Select** on **Return Tag Report** line.

TaxSlayer Pro Online displays the **Return Tag Report** page:

20 Return Tag Report

Search:

Showing 1 to 9 of 9 entries

#	L4SSN	First Name	Last Name	Phone	Status	Return Tags
1	1234	TESTING	PREFILL		Complete	JAN 11
2	1234	TESTING	NEW AMEND		Complete	JAN 12
3	1234	TAXPAYER	TESTING TAGS		Complete	JAN 12

TaxSlayer Pro Online includes the following information in this report:

- Last four digits of Social Security number
- Taxpayer First Name
- Taxpayer Last Name
- Phone number
- Return Status
- Return Tags (will list multiple if more than one tag is assigned)
- EFIN

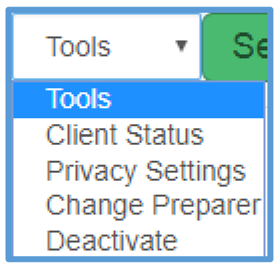
Refer to the *Working with Reports* lesson for detailed instructions on sorting the report and exporting the data for further analysis.

Deactivating Returns

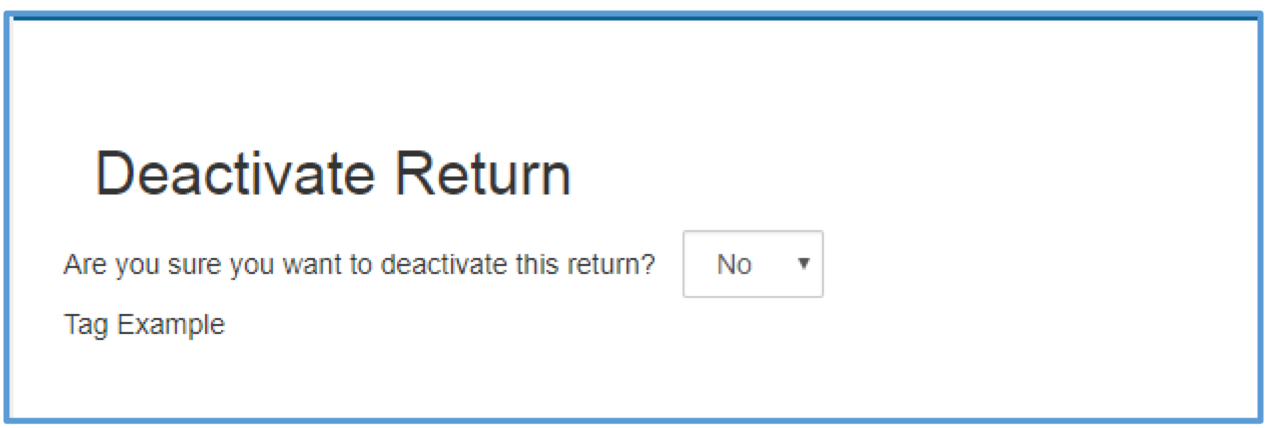
In rare events, you may need to deactivate a return. You can do this in the **Office Client List** when the return status is **In Progress** or **Review Failed**.

When you deactivate a return, TaxSlayer Pro Online makes it unavailable for edits. To deactivate a return, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.
2. Find the return you want to deactivate.
3. From the **Tools** drop-down list, click **Deactivate**, as shown below:

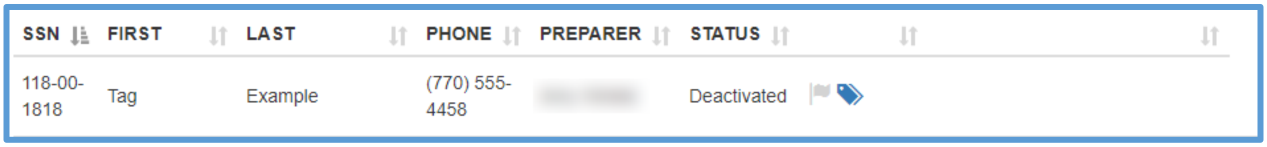


TaxSlayer Pro Online displays the **Deactivate Return** page, asking you to confirm that you want to deactivate the return:



4. Select **Yes** from the drop-down list.
5. Click **Continue**.

TaxSlayer Pro Online deactivates the return and changes the status on the **Office Client List** to **Deactivated**:



SSN	FIRST	LAST	PHONE	PREPARER	STATUS		
118-00-1818	Tag	Example	(770) 555-4458	[illegible]	Deactivated		

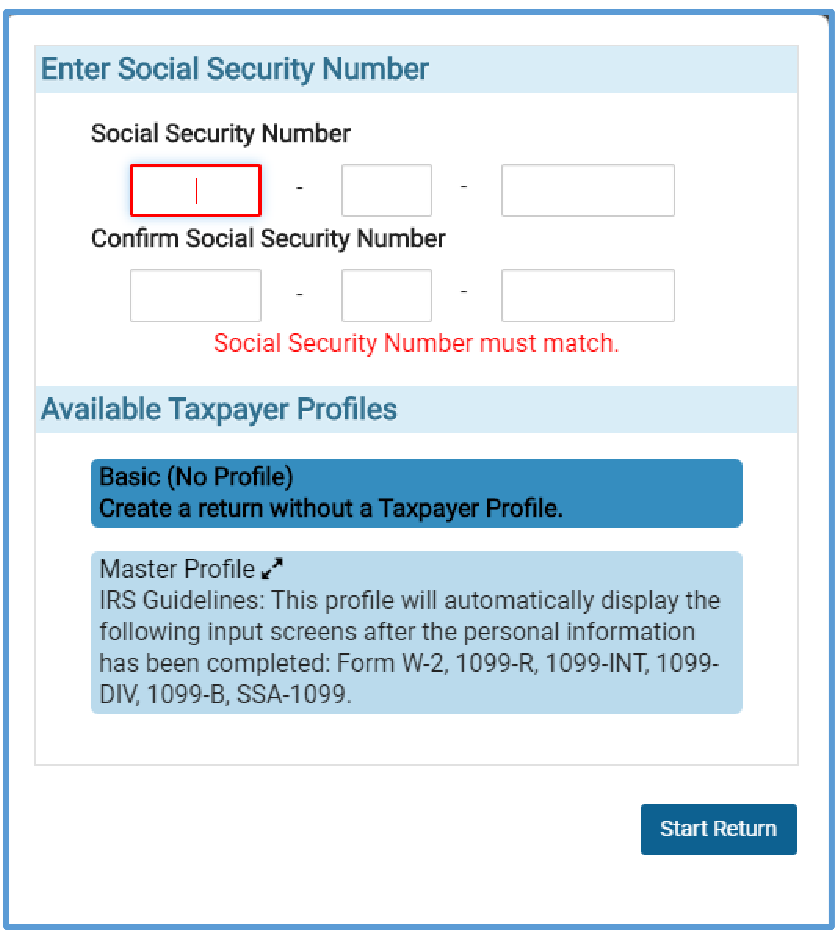
TIP: Select **Do Not Show Deactivated Returns** on the **Office Client List** to hide deactivated returns from view.

Reactivating Returns

If you later need to prepare a return for this taxpayer, use the following steps from the **Welcome** page:

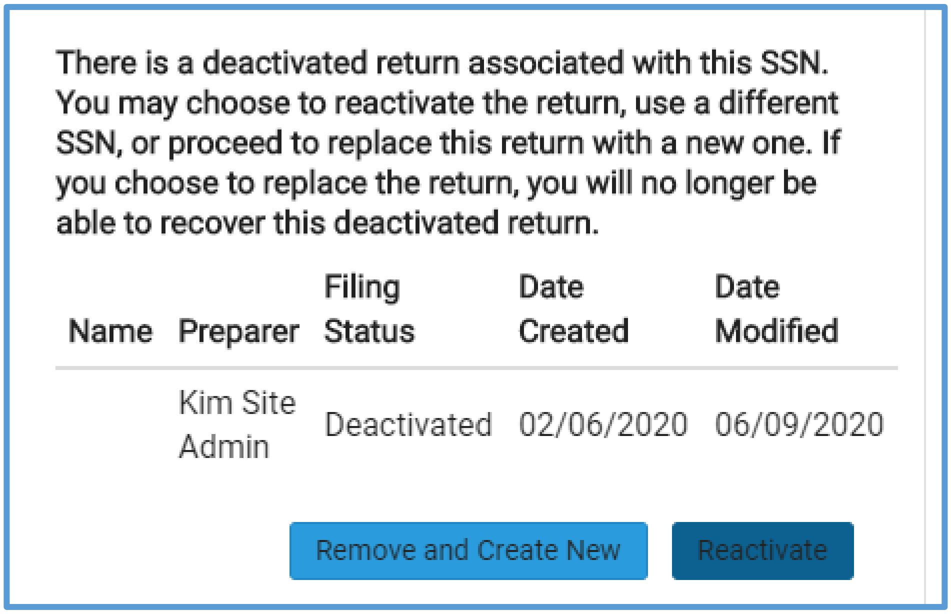
1. Click **Select** on the **Start New Return** line.

TaxSlayer Pro Online displays the **Create New Return** page with the **Enter Social Security Number** section active:



2. Type the Social Security number twice for verification in the appropriate boxes.
3. Select the taxpayer profile you want to use for this return.

TaxSlayer Pro Online displays information for the deactivated return:



4. Do one of the following:
    a. If you want to remove the old information and start a new, blank return for the taxpayer, click **Remove and Create New**.
    b. To start the return using the information in the system, click **Reactivate**.
5. Click **Start Return**.

TIP: You can only reactivate a return that was previously started by your site.

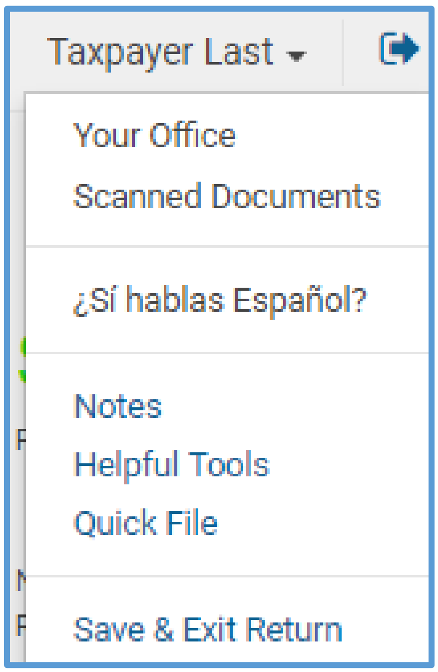
Adding Notes

You can add notes to a tax return so you can review information later. For example, if you add a **Missing Information** return tag, you may want to add a note to remind you of what information you still need from the taxpayer. You can either add a taxpayer note while in the return or from the return list.

NOTE: TaxSlayer Pro Online does not transmit notes to the IRS, but does print them in **Preparer Notes** in the **Quality Review** print set and carries them forward to the next tax year.

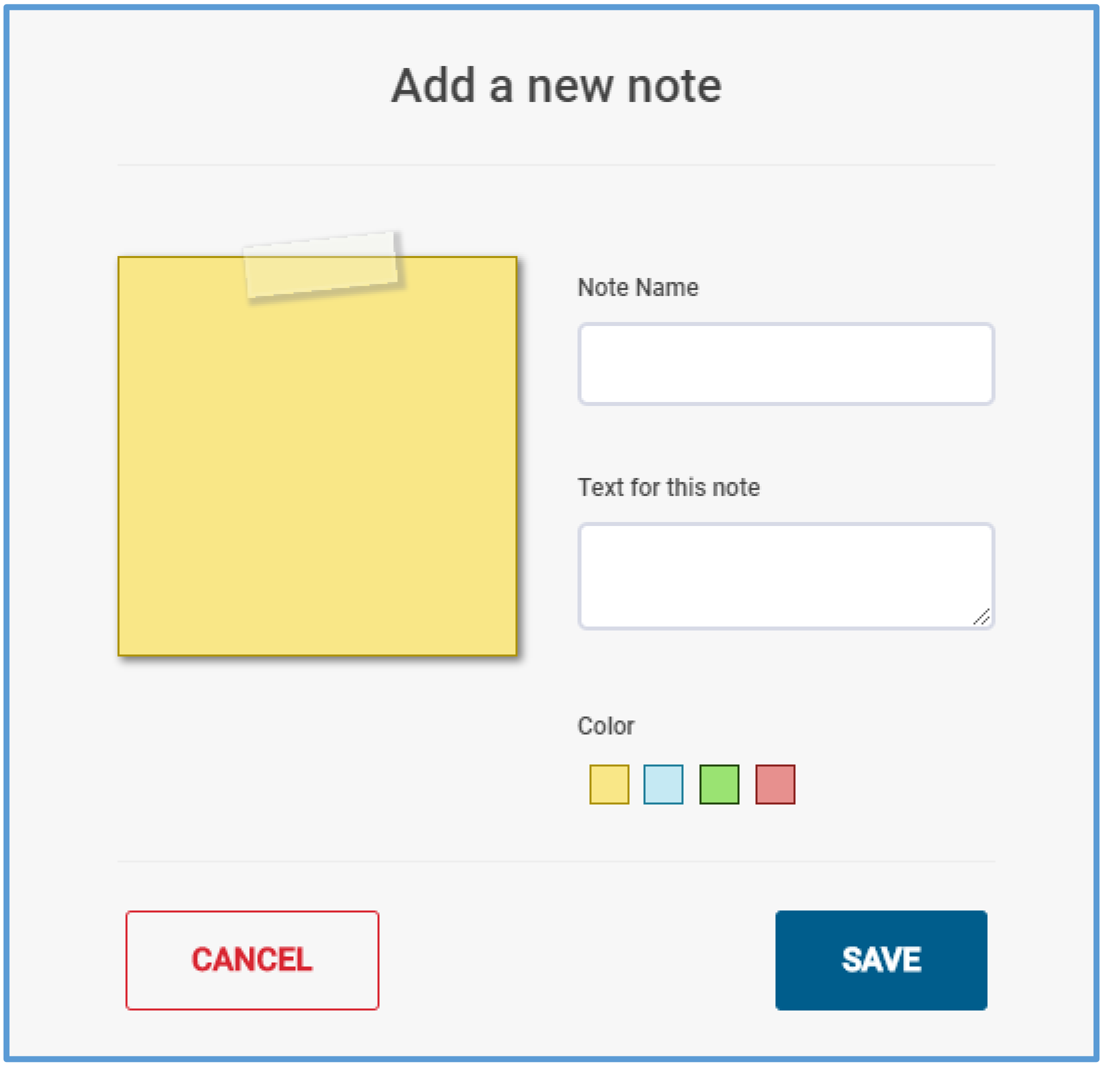
To add a note while in a tax return, use the following steps:

1. Click the **Tools** drop-down list, as shown below:



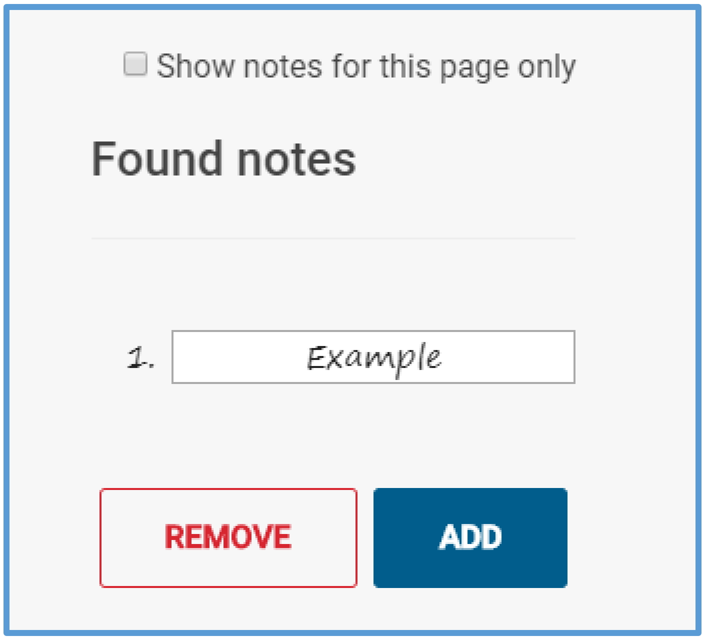
2. Click **Notes**.

TaxSlayer Pro Online displays the **Add a new note** window:



3. Type a name and the text for the note in the appropriate boxes.
4. Click **Save**.

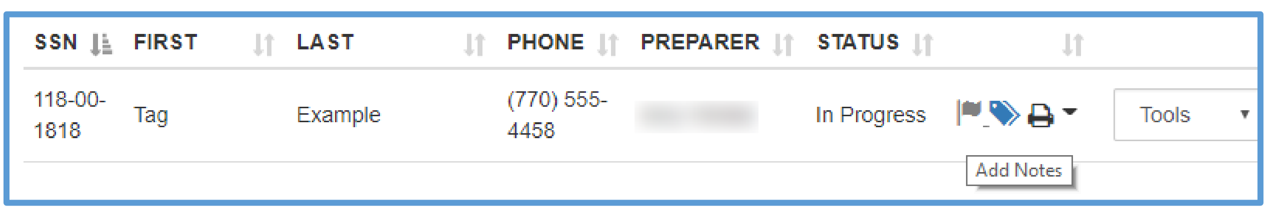
TaxSlayer Pro Online displays the **Found notes** window with the new note listed:



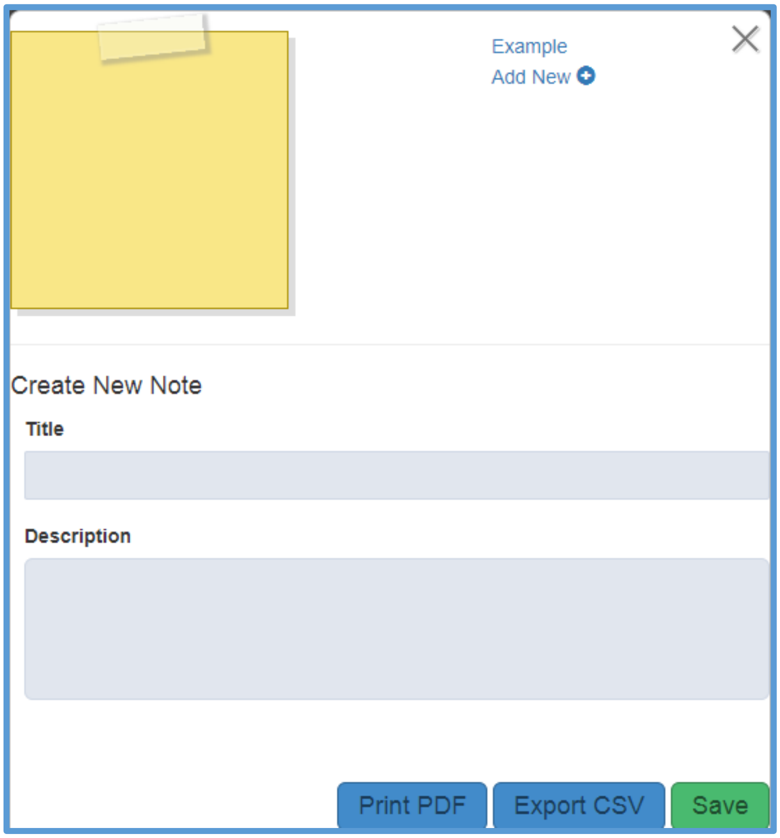
5. If you need to add another note, click **Add** and use the same steps to add the new note.
6. If you need to remove a note, click on the note title and select **Remove**.

If you want to add a note outside of the return, use the following steps from the **Office Client List** or **Review Returns**:

1. Find the taxpayer in the list.
2. Click the **Edit Notes** icon, as shown below:

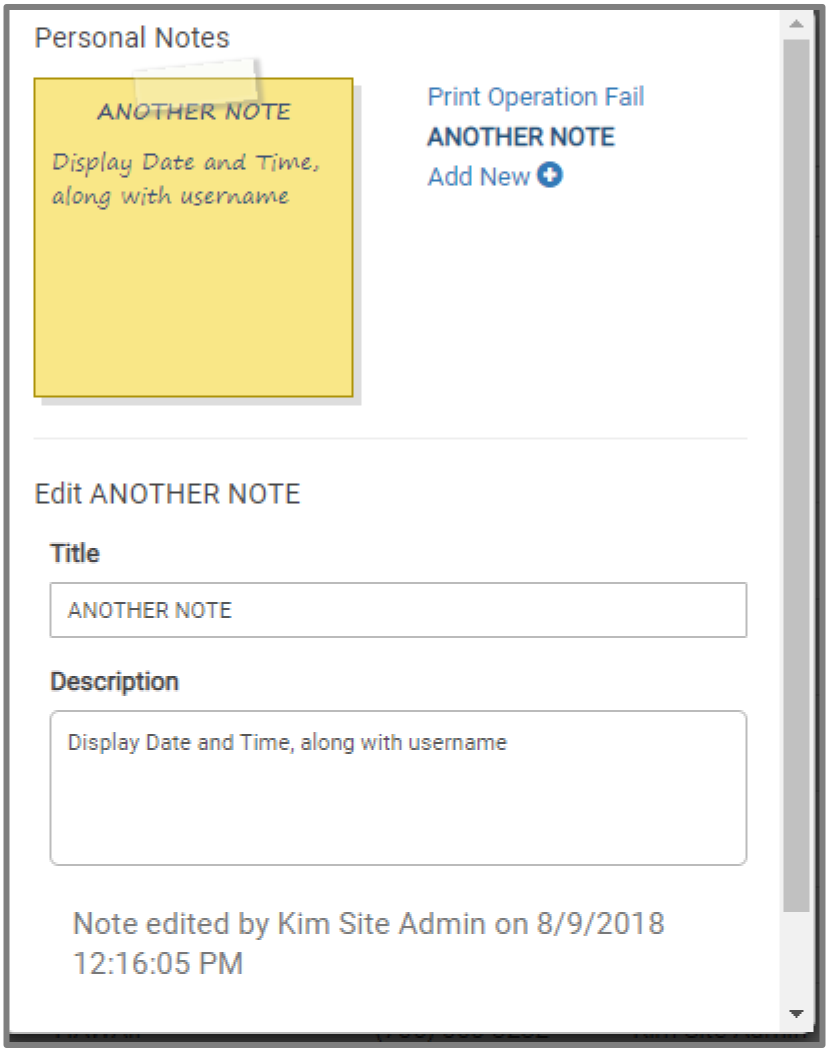


TaxSlayer Pro Online displays the **Notes** window:

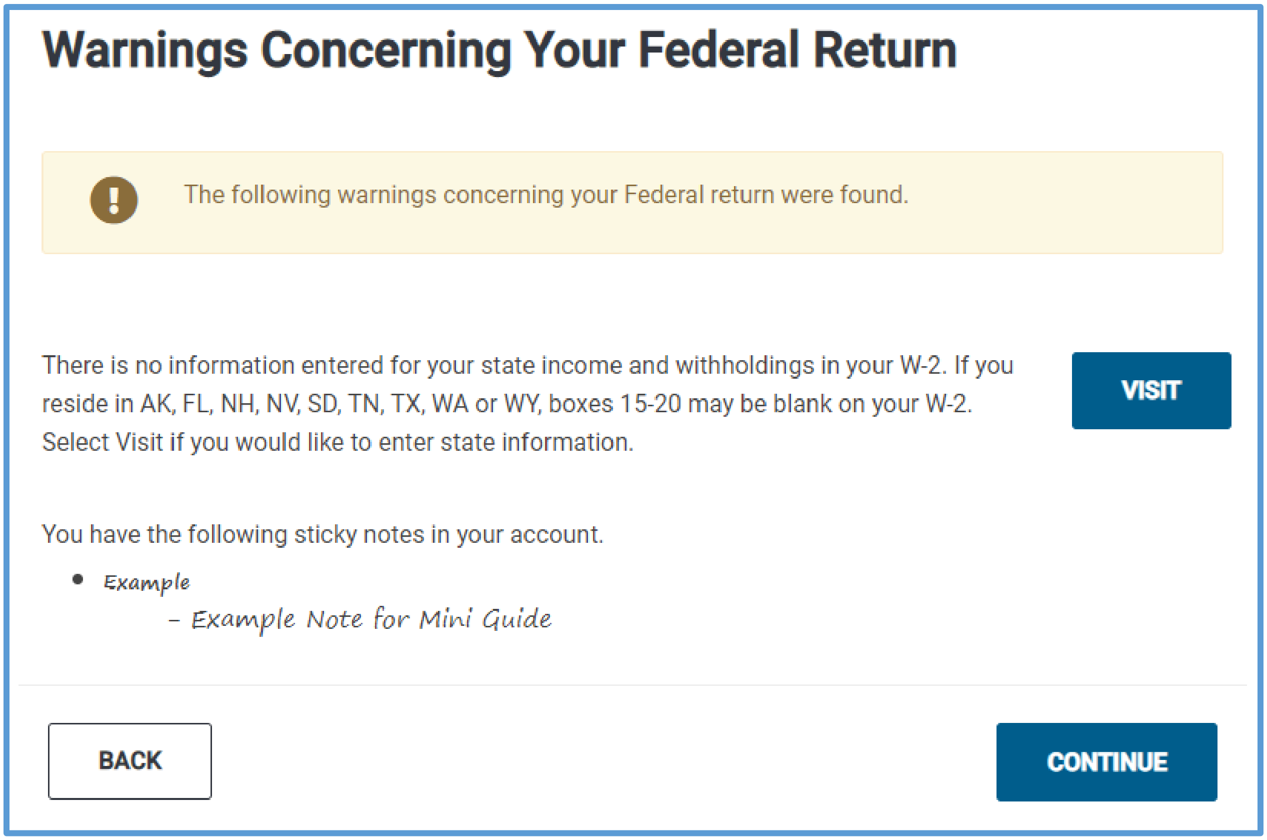


3. Click existing notes (listed at the upper right) to review them. In the screenshot above, the existing note is named **Example**.
4. To add a new note, type the title and description in the appropriate boxes.
5. Click **Save**.
6. If you need to add more notes, click **Add New** and use the same steps to add the new note.
7. If you want to save the notes outside the return, click either **Print PDF** or **Export CSV**.
8. When you finish adding notes, click **X** to close the window.

TIP: From the client list, you can see the user who created the note as well as the date and time created.



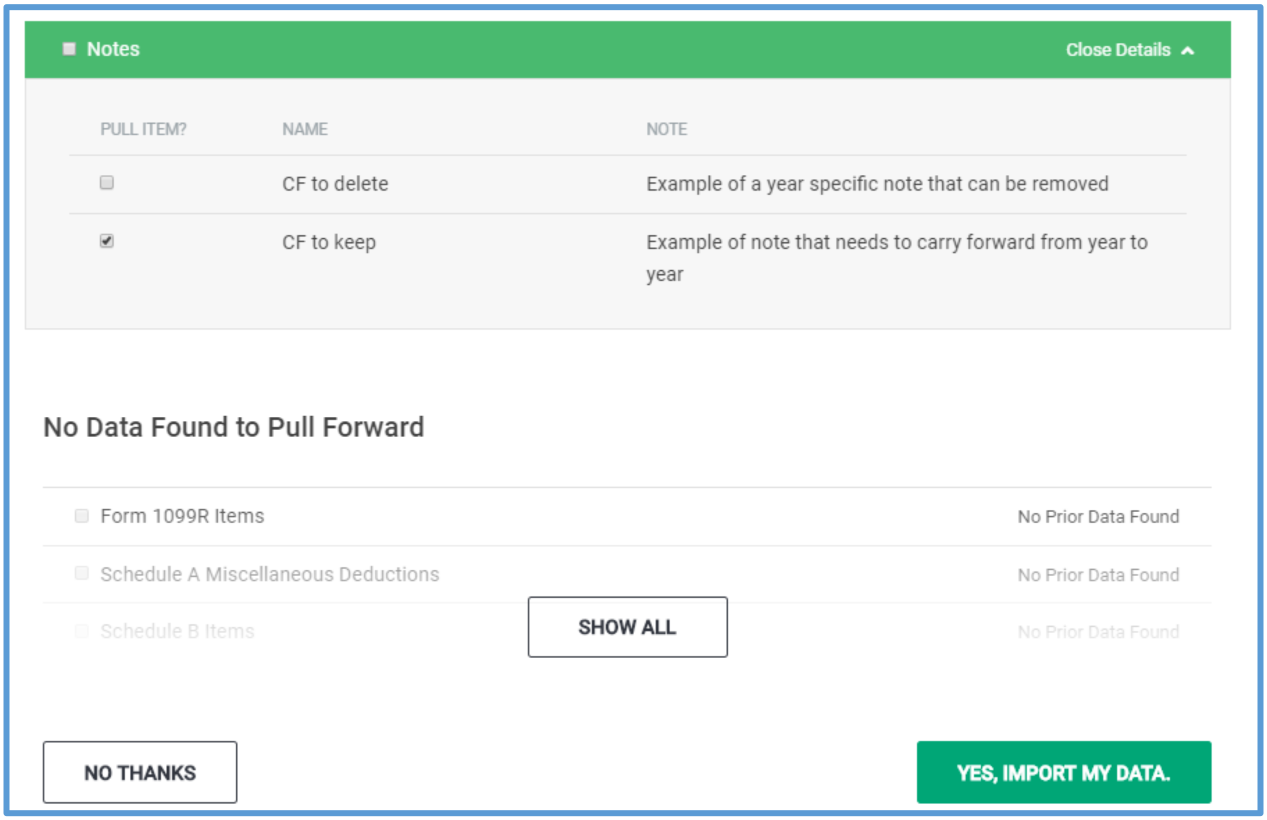
TaxSlayer Pro Online displays notes on the **Warnings Concerning Your Federal Return** page:



Pulling Notes to Current Return

You can remove any year-specific notes from the return during the carry forward process. To do this, use the following steps:

1. Review the carry forward data.
2. Clear the check box for any note that no longer applies.



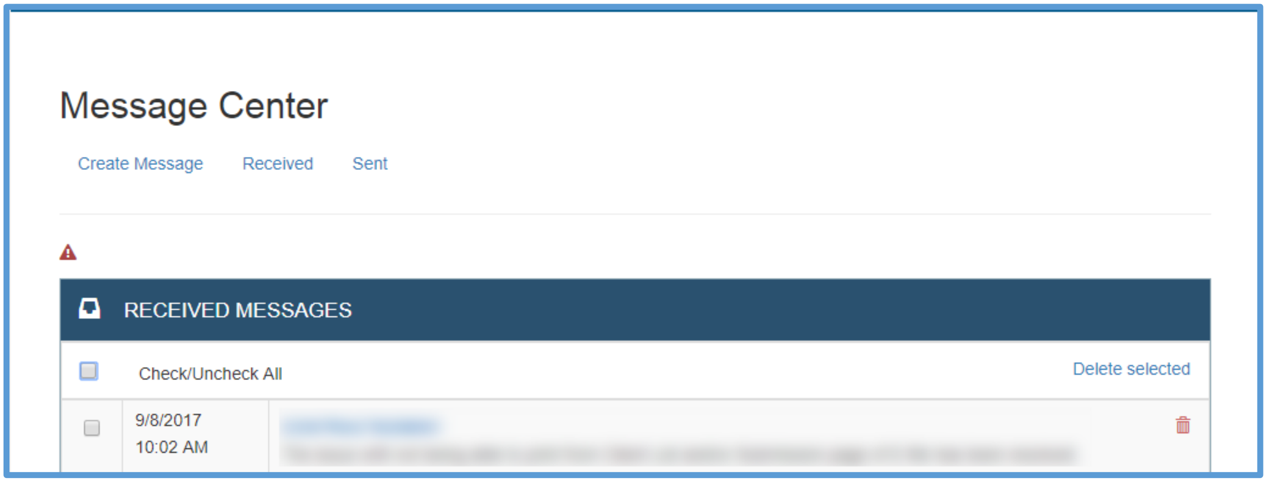
3. Click **YES, IMPORT MY DATA**.

Sending Messages

You can send a message through TaxSlayer Pro Online to any or all preparers at your site. To do so from the **Welcome** page, use the following steps:

1. Click **Message Center**.

TaxSlayer Pro Online displays the **Message Center** page:



2. Review any received messages in the list.
3. To create a new message, click **Create Message**.

TaxSlayer Pro Online displays the **CREATE MESSAGE** page:

4. Click **Select recipients** and select any other preparers at your site to which you want to send the message.
5. Type the message you want to send in the message box. You can type up to 500 characters.
6. When you finish typing your message, click **Send**.

Changing the Language in a Return

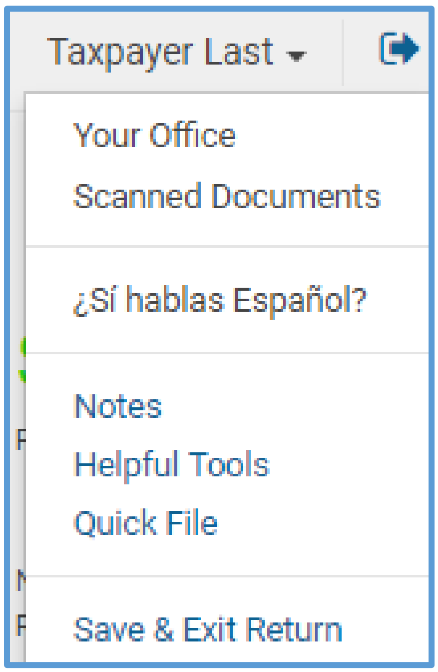
TaxSlayer Pro Online defaults to displaying and printing all returns in English unless you select **Default Tax Returns to Spanish** when configuring your office setup.

Changing the Language in an Open Return

You can change the language on a single return if you need to print the return in Spanish.

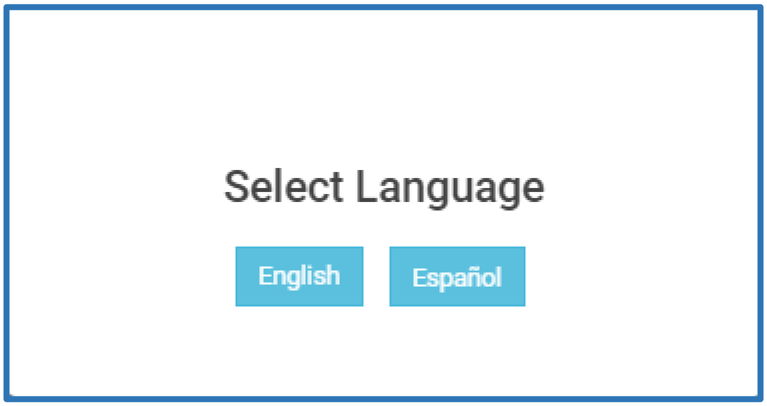
To change the language while in a tax return, use the following steps:

1. Click the **Tools** drop-down list, as shown below:



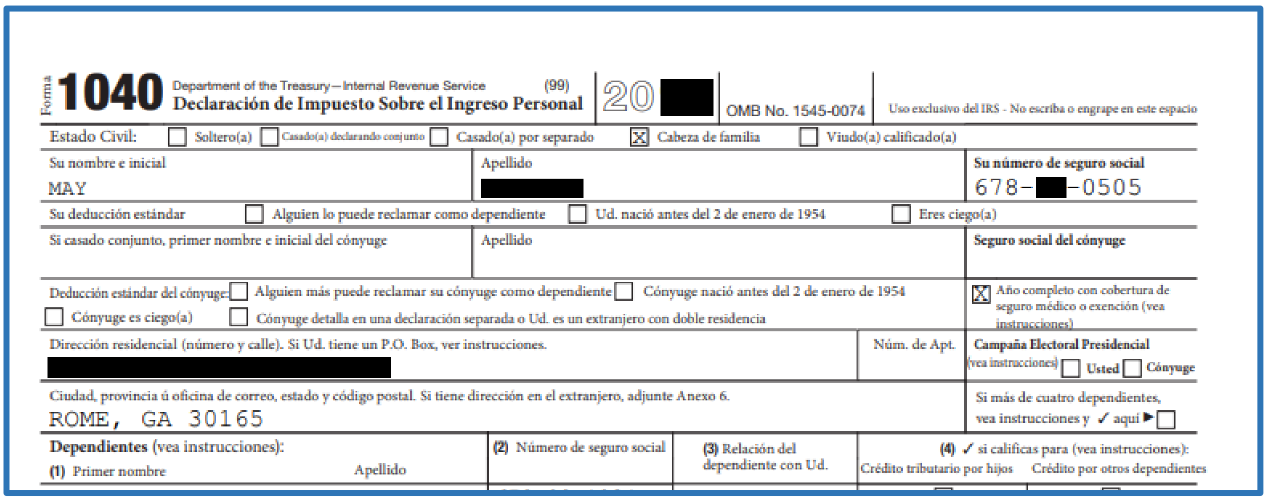
2. Click **¿Sí hablas Español?**

TaxSlayer Pro Online displays the **Select Language** window:



3. Click **Español**.

TaxSlayer Pro Online now displays certain items in Spanish and prints IRS approved forms in Spanish:



Forma **1040** Department of the Treasury—Internal Revenue Service (99)
Declaración de Impuesto Sobre el Ingreso Personal 20[redacted] OMB No. 1545-0074 Uso exclusivo del IRS - No escriba o engrape en este espacio

Estado Civil: ☐ Soltero(a) ☐ Casado(a) declarando conjunto ☐ Casado(a) por separado ☒ Cabeza de familia ☐ Viudo(a) calificado(a)

Su nombre e inicial: MAY | Apellido: [redacted] | **Su número de seguro social**: 678-[redacted]-0505

Su deducción estándar ☐ Alguien lo puede reclamar como dependiente ☐ Ud. nació antes del 2 de enero de 1954 ☐ Eres ciego(a)

Si casado conjunto, primer nombre e inicial del cónyuge | Apellido | **Seguro social del cónyuge**

Deducción estándar del cónyuge: ☐ Alguien más puede reclamar su cónyuge como dependiente ☐ Cónyuge nació antes del 2 de enero de 1954
☐ Cónyuge es ciego(a) ☐ Cónyuge detalla en una declaración separada o Ud. es un extranjero con doble residencia
☒ Año completo con cobertura de seguro médico o exención (vea instrucciones)

Dirección residencial (número y calle). Si Ud. tiene un P.O. Box, ver instrucciones. [redacted] | Núm. de Apt. | **Campaña Electoral Presidencial** (vea instrucciones) ☐ **Usted** ☐ **Cónyuge**

Ciudad, provincia ú oficina de correo, estado y código postal. Si tiene dirección en el extranjero, adjunte Anexo 6. ROME, GA 30165 | Si más de cuatro dependientes, vea instrucciones y ✓ aquí ▶ ☐

Dependientes (vea instrucciones): (1) Primer nombre Apellido | (2) Número de seguro social | (3) Relación del dependiente con Ud. | (4) ✓ si calificas para (vea instrucciones): Crédito tributario por hijos / Crédito por otros dependientes

Note: When you exit the return, TaxSlayer Pro Online changes the return language back to English.

Defaulting the Tax Returns to Spanish

As a site administrator, you can default the tax returns to display and print in Spanish. To do this from the **Configuration Menu**, use the following steps:

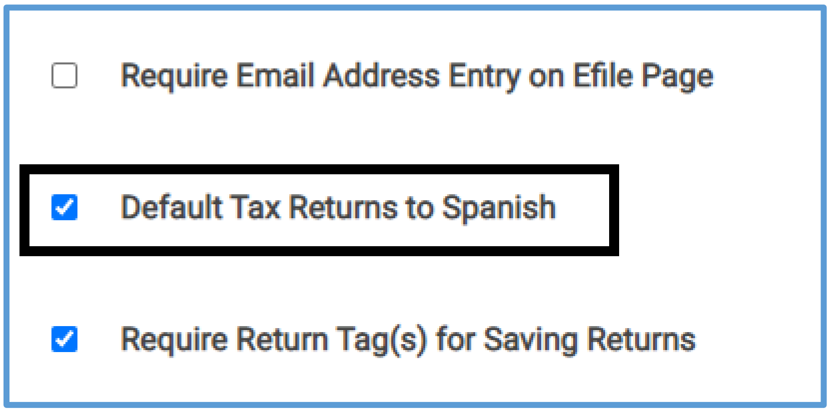
1. Click **Select** on the **Office Setup** line.

TaxSlayer Pro Online displays the **Office Setup** page.

2. Scroll to the **Office Configuration** section.

TaxSlayer Pro Online displays the **Office Configuration** settings.

3. Select the **Default Tax Returns to Spanish** check box.



4. Click **Continue**.

Note: If you default the tax returns to Spanish, you can change a return to English by following the steps in the *Changing the Language in an Open Return* section.

Summary

You should now be able to:

- Set up return tags.
- Filter returns by return tags.
- Deactivate returns.
- Restore returns.
- Add taxpayer notes.
- Review notes to carry forward from prior year return.
- Send messages.
- Change the language on the return.

To see a video of what you just learned, go to Managing Returns. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Reports

After completing this topic, you will be able to:

- Run reports.
- Filter reports.
- Export reports.
- Run Management Reports (Web Reports).
- Customize reports.

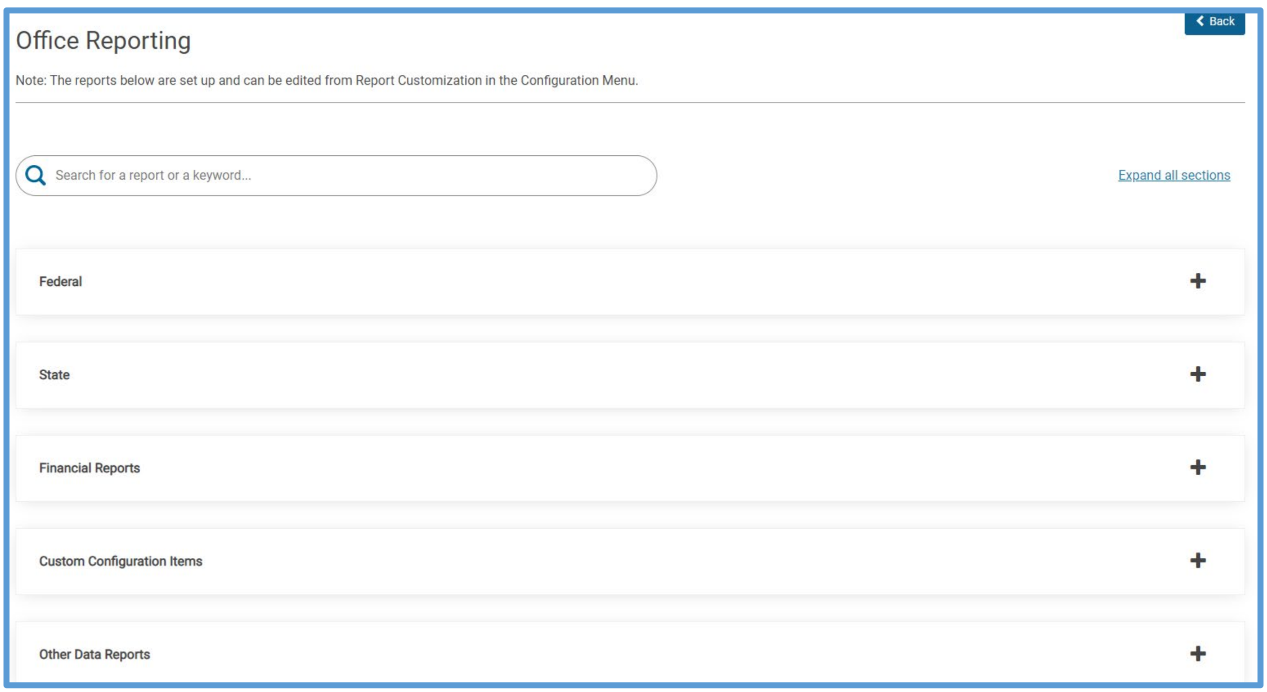
TaxSlayer Pro Online provides several reports that you can run to help manage returns.

Running Reports

To run a report, use the following steps from the **Welcome** page:

1. Click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the **Office Reporting** page:



2. Click the appropriate report category to expand it. For purposes of this topic, expand the **Custom Configuration Items** section.

3. Click **Select** for the report you want to run. For purposes of this topic, run the **Return Questions** report, but you should use the same steps for other reports.

TaxSlayer Pro Online displays the **Return Questions** page:

20 Return Questions

Search:

Showing 1 to 13 of 13 entries

#	EFIN	L4SSN	First Name	Last Name	Email	Phone	Address	City	State	Zip
1	001111	0211	TESTING WRONG	RTN AND ACCOUNT						
2	001111	1234	TESTING	CONSENT			123 VITA WAY	ROME	GA	30

4. Review the information on the report.

TIP: If the report has many columns, you may need to scroll to the right to see all of the report data.

Searching and Sorting

5. To search for information in the report, type the data for which you want to search in the **Search** box. For example, you can search for a Social Security number or sort by answers to questions in this report.
6. Click the column heading to sort by that column.

Printing

7. To print the report, click either **PDF** or **HTML**.
   a. If you click **PDF**, TaxSlayer Pro Online saves a PDF copy of the report to your computer. Open the file and print using Adobe Reader's tools.
   b. If you click **HTML**, TaxSlayer Pro Online displays your browser's **Print** page so you can print the report.

TIP: Remember, you must follow all the security, privacy, and confidentiality rules to ensure taxpayer data is stored in a secure location.

Exporting

8. To export the report, click either **CSV** or **Excel**, depending on the format you want to use for the report.

TaxSlayer Pro Online saves the .csv or .xlsx file to your computer. Open the file and use Microsoft's tools to work with the report.

TIP: Remember, you must follow all the security, privacy, and confidentiality rules to ensure taxpayer data is stored in a secure location.

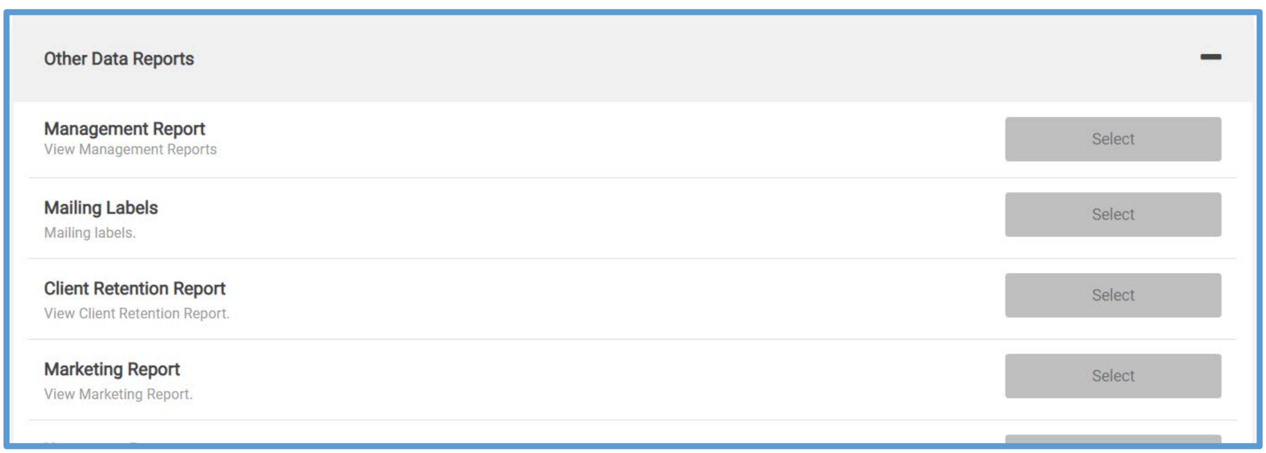
Management Reports

TaxSlayer Pro Online offers a library of web-based reports to assist sites with managing returns and running the reports needed for grant purposes.

To run web-based management reports, use the following steps from the **Office Reporting** page:

1. Click the **Other Data Reports** section to expand it.

TaxSlayer Pro Online displays the **Other Data Reports** section:



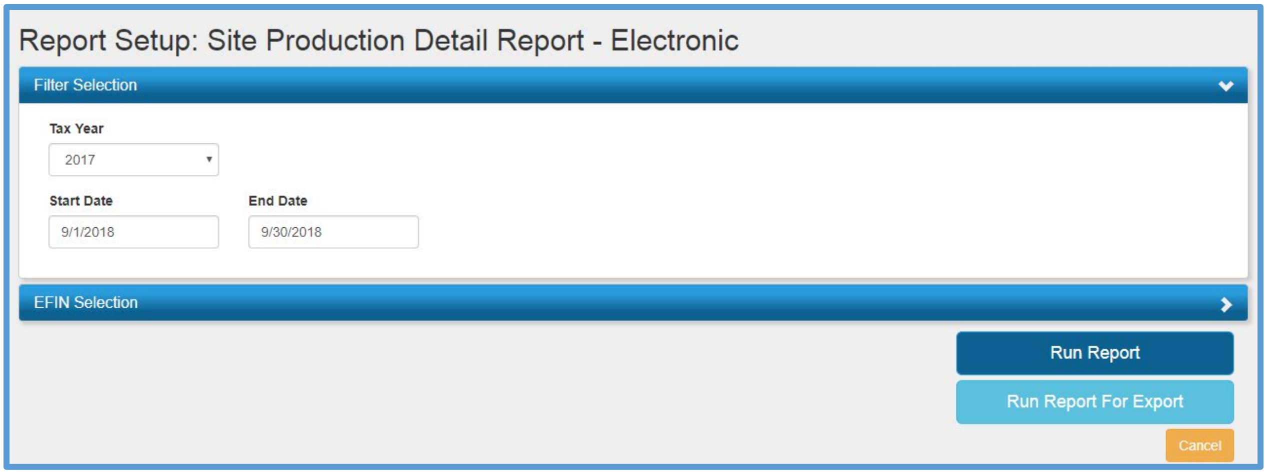
2. Click **Select** on the **Management Reports** line.

TaxSlayer Pro Online launches a separate window displaying the **Web Reports** page:

NOTE: Because TaxSlayer Pro Online launches a separate window for management reports, you must disable pop-up blockers to see the displayed reports.

3. Click the report title for the report you want to run. For purposes of this topic, run the **Site Production Detail Report - Electronic** report, but you use the same steps for other reports.

TaxSlayer Pro Online displays the **Report Setup: Site Production Detail Report – Electronic** page:

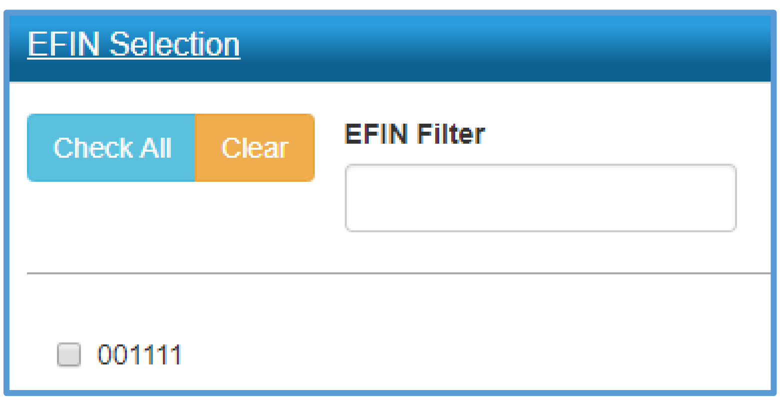


4. Select the Tax Year, Start Date, and End Date.

NOTE: The filters discussed in this topic are not applicable to all reports. Select the appropriate filters for the report you need to run.

5. Click **EFIN Selection**.

TaxSlayer Pro Online displays the **EFIN Selection** section:



6. Select the check box for the EFIN(s) for which you want to run the report.

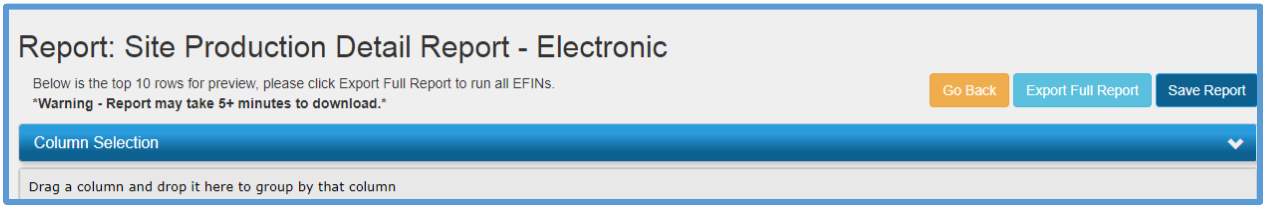
NOTE: Use the **EFIN Filter** box to search for a specific EFIN in the list.

TIP: You must select the EFIN even if you are running the report at the site level for a single EFIN.

7. Do one of the following. For this exercise, select **Run Report to Export**.

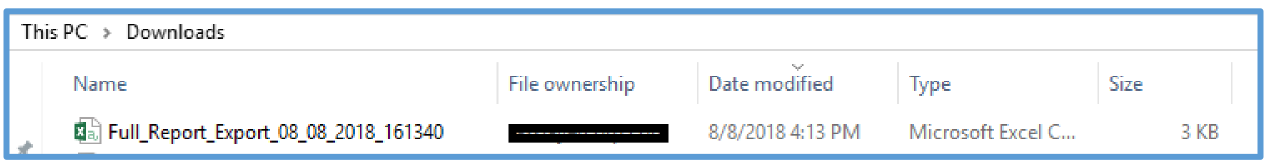
a. Click **Run Report** to display the report on the screen.
b. Click **Run Report to Export** to enable an export and display the first ten (10) rows of the report on the screen.

TaxSlayer Pro Online displays the **Report: Site Production Detail Report – Electronic** page displaying the first ten rows:



8. Review the report on the screen.
9. Click **Export Full Report**.

TaxSlayer Pro Online generates a CSV file and downloads it to your Downloads folder.



10. Click the **X** in the upper right corner of the page to close web reports.

TIP: Search the Pro Online User Guide on the VITA/TCE Springboard for detailed information on all TaxSlayer Pro Online reports.

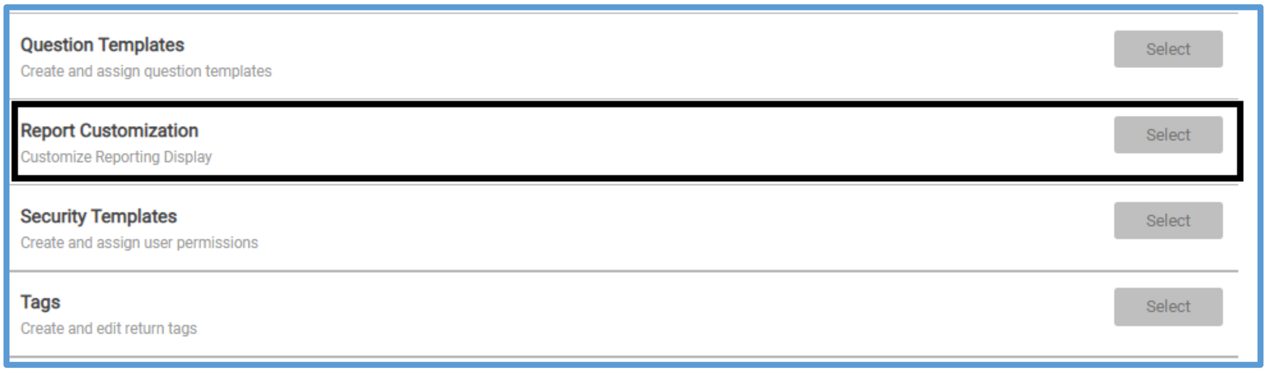
Report Customization

You can customize the reporting display under Reports. You can limit the report list to the ones used at your site and manage the display order to fit your site's workflow.

To customize reports, use the following steps from the **Welcome** page:

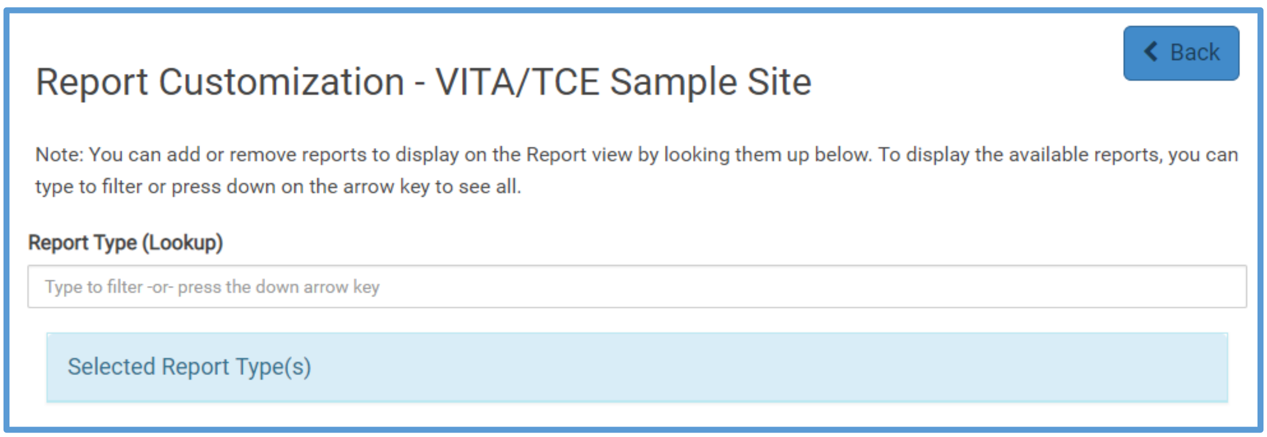
1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu** page:



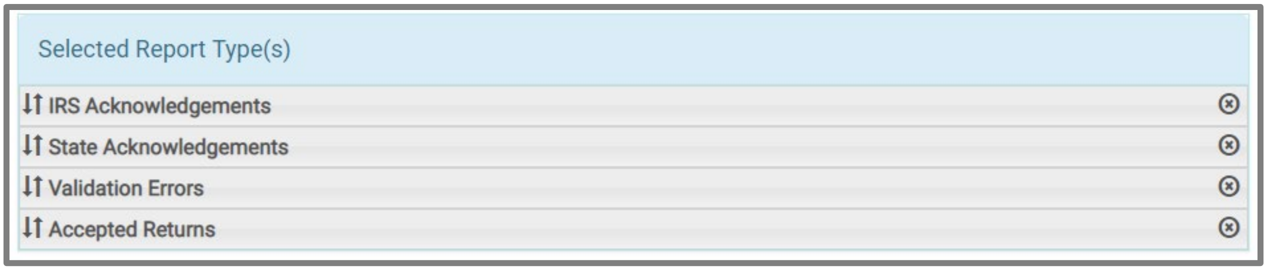
2. Click **Select** on the **Report Customization** line.

TaxSlayer Pro Online displays the **Report Customization** page:



3. Do one of the following to find the report you want to customize:
    a. Type the name of the report in the **Report Type (Lookup)** box.
    b. In the **Report Type (Lookup)** box, press the Down arrow to display a list of all reports.
4. Select the report(s) you want to display.

TaxSlayer Pro Online displays the selected reports in **Selected Report Type(s).**



5. Drag the reports to display in the order you want.

TIP: Click and hold the report name to drag the box.

6. Click **Save**.
7. From the **Welcome** page, click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the reports in the order you selected within the appropriate reporting category.

TIP: If you later want to display all reports, return to **Report Customization** and remove the reports you have listed. Then, press the Down arrow and click each report in order to display all.

Summary

You should now be able to:

- Run reports.
- Filter reports.
- Export reports.
- Run management Reports (Web Reports).
- Customize reports.

To see a video of what you just learned, go to Working with Reports. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Managing Multiple Sites

After completing this topic, you will be able to:

- Log in as the multi-site/group administrator.
- List management options.

If you manage multiple sites, your group administrator login allows you access to different features, and your **Welcome** page looks different based on your login profile. Log in to TaxSlayer Pro Online as you would with any other user name and password. When you log in, TaxSlayer Pro Online displays the **Welcome** page:

Using Multiple Office Features

You can access the same features as any other site. However, as the manager of multiple offices with a Relational EFIN, TaxSlayer Pro Online provides additional features.

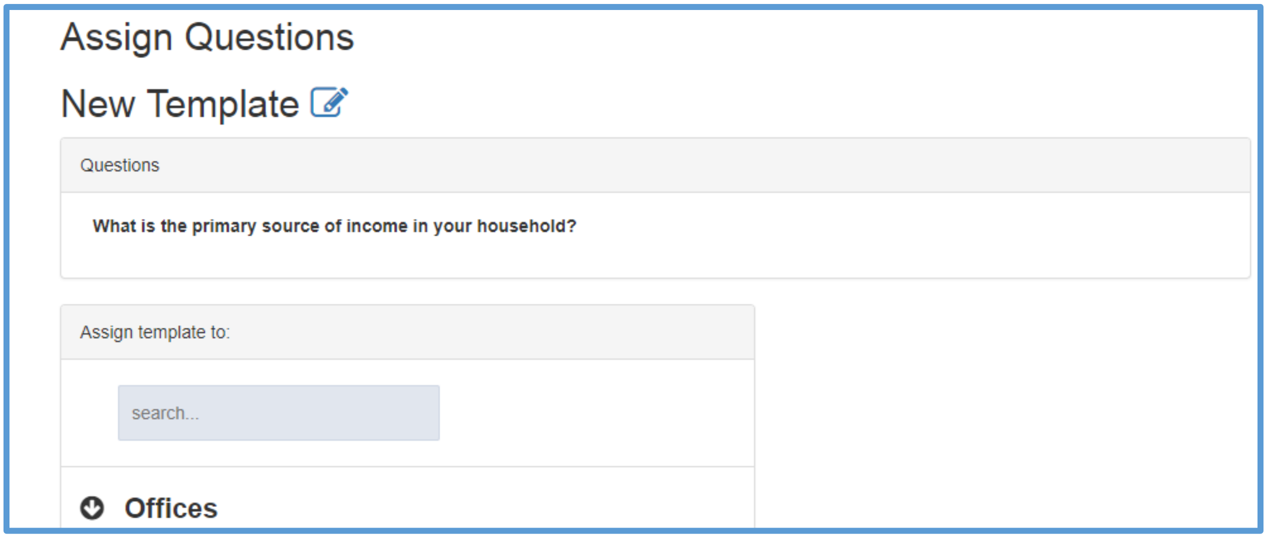
Assigning Settings to Offices

When you configure certain settings, you can assign those to offices. You can assign the following settings:

a) Security Roles
b) Question Templates/Custom Question
c) Taxpayer Profiles
d) Consent Forms
e) Print Sets
f) Return Tags
g) Custom credits

For this example, when you set up custom questions, you can assign the questions to offices, as shown below:

NOTE: This feature is available to **ALL** multi-site (MSA) group administrators.



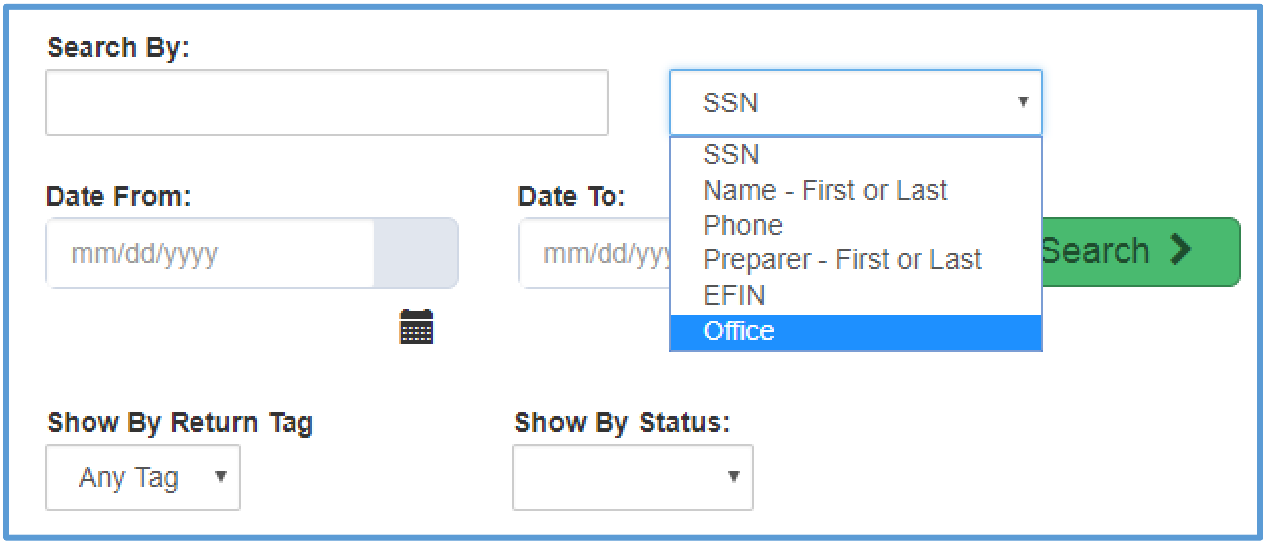
Note: The site cannot modify or delete items assigned by the group.

- TaxSlayer makes any modifications to an item immediately available at the assigned site.

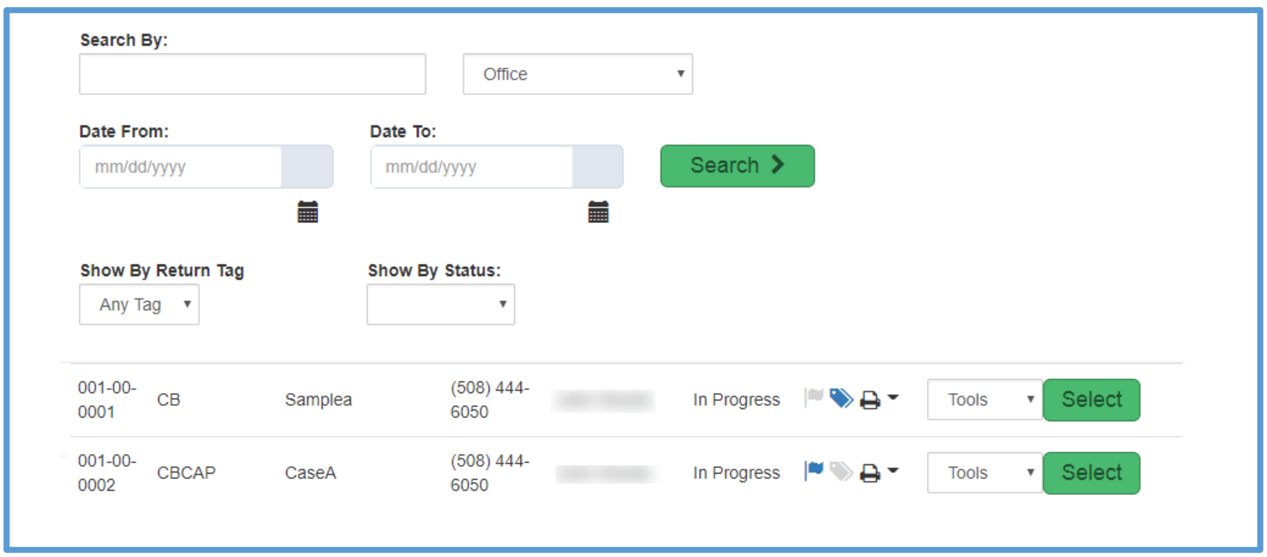
WARNING: You must **unassign** items from any applicable site before you delete it from the group level. Once you delete an item, you cannot remove it from a site.

Searching by Office (Relational EFIN required)

In many features, you can search by office if you are using a Relational EFIN and your user name is assigned a security template that allows access to this feature. This way, you can run reports or search for clients in one of the sites you manage. For example, on the **Client Search** page, you can search by office, as shown below:



When you search by an office, TaxSlayer Pro Online displays only returns created by that office:



Accessing Offices (Relational EFIN Required)

You can access each of your offices through the multiple-site administration if you are using a Relational EFIN and your user name is assigned a security template that allows access to this feature. To do so, use the following steps:

1. Click **Select** on the **Office Access** line.

TaxSlayer Pro Online displays the **Company's Office(s)** page:

2. Click **Access** for the office you want to access.

Note: Click **Edit** to display the **Office Setup** page for that site.

TaxSlayer Pro Online displays the **Welcome** page for that office:

3. You can use all of the features for this office just as discussed in the other topics.
4. If you need to select another office to access, click **Select** on the **Select Another Office** line.
5. When you finish working with this office, click **Return** to return to your multiple office **Welcome** page.

Summary

You should now be able to:

- Log in as the multi-site administrator.
- List management options.

To see a video of what you just learned, go to [Managing Multiple Sites]. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

TaxSlayer Pro Desktop Administration

Contingency Procedures

After completing this topic, you will be able to:

- Describe the TaxSlayer Pro Online contingency plan.
- Download TaxSlayer Pro's desktop application.

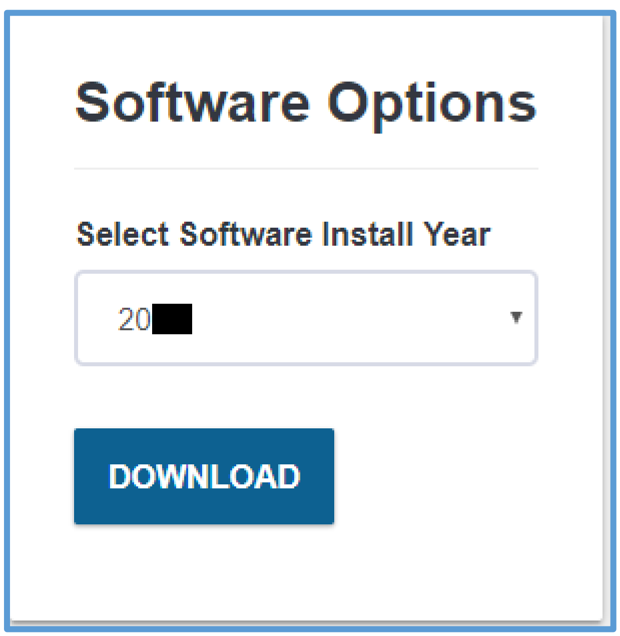
TaxSlayer Pro

TaxSlayer makes a contingency procedure available in the rare event that the web site or the site's Internet service becomes unavailable for an extended period. If that happens, you can use TaxSlayer Pro's desktop application to prepare and e-file returns.

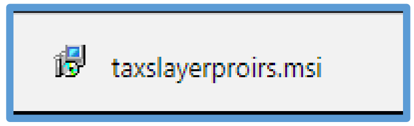
Download the desktop application in advance so that your site does not have any downtime. We recommend that you do not install TaxSlayer Pro on a network as a contingency plan. Instead, install on a standalone computer with an Internet connection.

Site Administrators can download the desktop application. To do so, use the following steps:

1. Log in to My Account/Account Hub from the VITA/TCE Springboard.
2. Select the appropriate year to download, located as shown below:

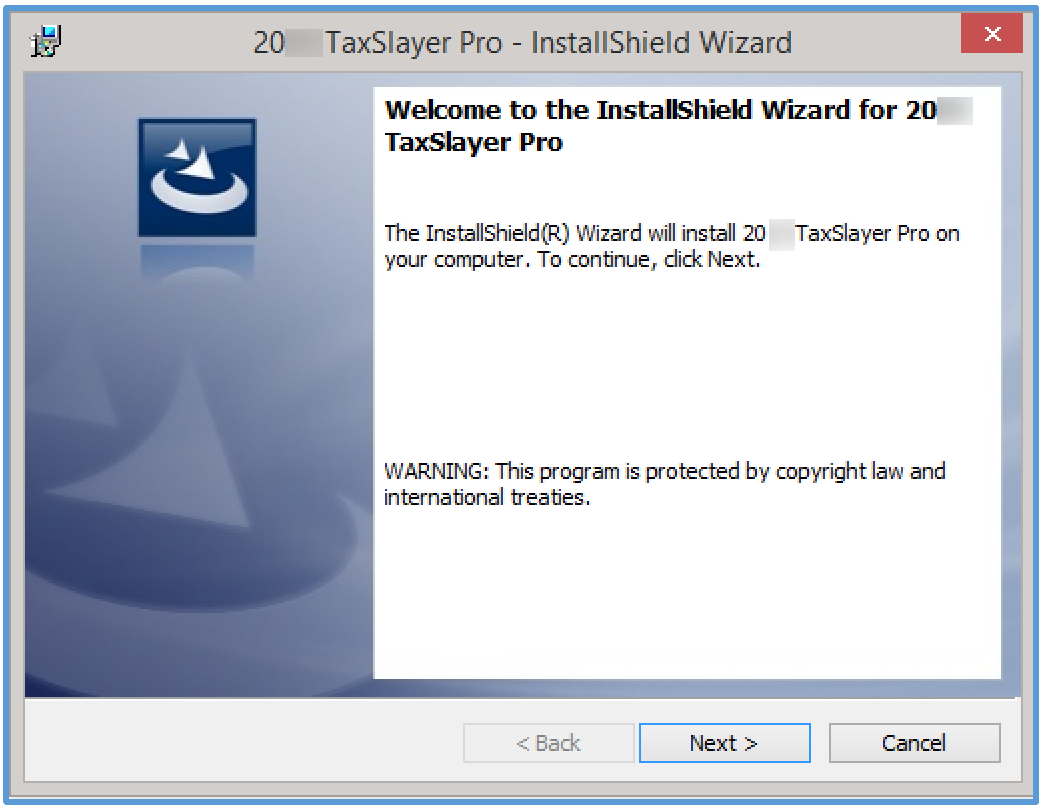


TaxSlayer Pro Online begins downloading the setup file:



3. When TaxSlayerPro.com completes the download, click the file.

Windows displays the InstallShield Wizard for TaxSlayer Pro:



4. Complete installation and setup as described in the *Installing TaxSlayer Pro Desktop* section.

Tip: For a complete listing of contingency options, refer to IRS Publication 4396-A, *Partner Resource Guide*. You can download this publication from the *Contingency Plan* lesson on the Practice Lab.

In order for the TaxSlayer Pro Desktop contingency plan to work successfully, it is important to keep the designated computers updated with the latest desktop software versions. TaxSlayer Pro Desktop automatically updates the first time you open it each day. We recommend that you do this daily or weekly.

If a software system outage or local Internet outage necessitates the use of a temporary contingency plan, you can use the installed and updated version of TaxSlayer Pro Desktop to complete any returns you need to prepare during the outage. Sites will be able to work the return completely from the desktop application, including e-filing and getting acknowledgments. The return will remain in the desktop application for the duration of the filing season.

Tip: Returns prepared using the desktop software during a contingency plan will be transmitted from the desktop software. You will also use the desktop software to retrieve any acknowledgement associated with the returns transmitted from the desktop software.

When TaxSlayer Pro Online is available again, use it to prepare new returns and complete any returns you started previously in TaxSlayer Pro Online.

Summary

You should now be able to:

- Describe the TaxSlayer Pro Online contingency plan.
- Download TaxSlayer Pro's desktop application.

To see a video of what you just learned, go to Contingency Procedures. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Installation and Network Configuration

After completing this topic, you will be able to:

- Install TaxSlayer Pro.
- Configure a network computer as the file server.
- Configure workstations.

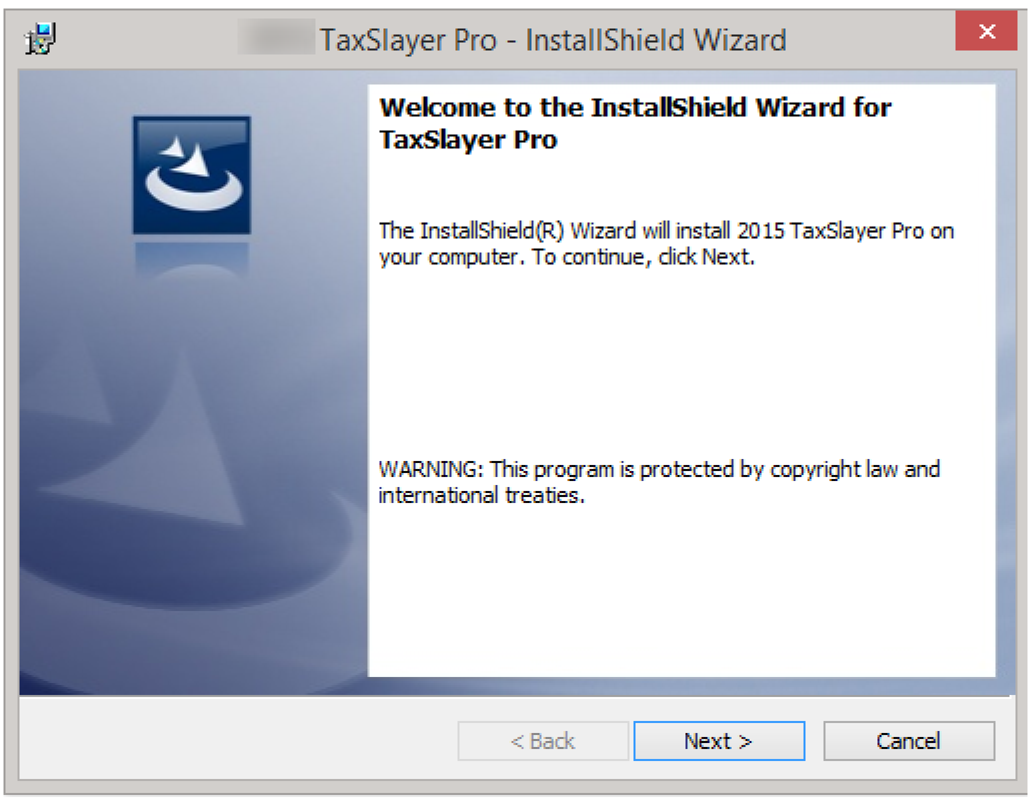
Installation

Note: If you intend to install TaxSlayer Pro on a network, designate one computer as your transmitting computer and install on that computer first.

To install TaxSlayer Pro, use the following steps:

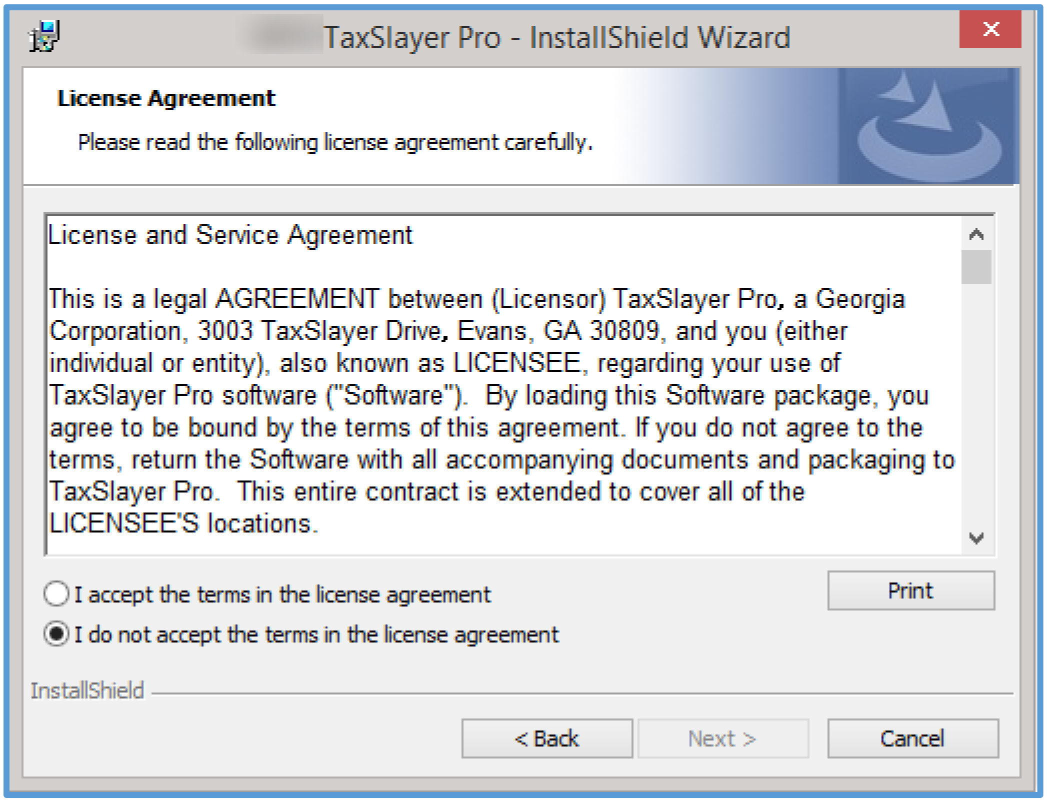
1. Download the TaxSlayer Pro application as described in the *Contingency Procedures* section.

Windows displays the InstallShield Wizard for TaxSlayer Pro:



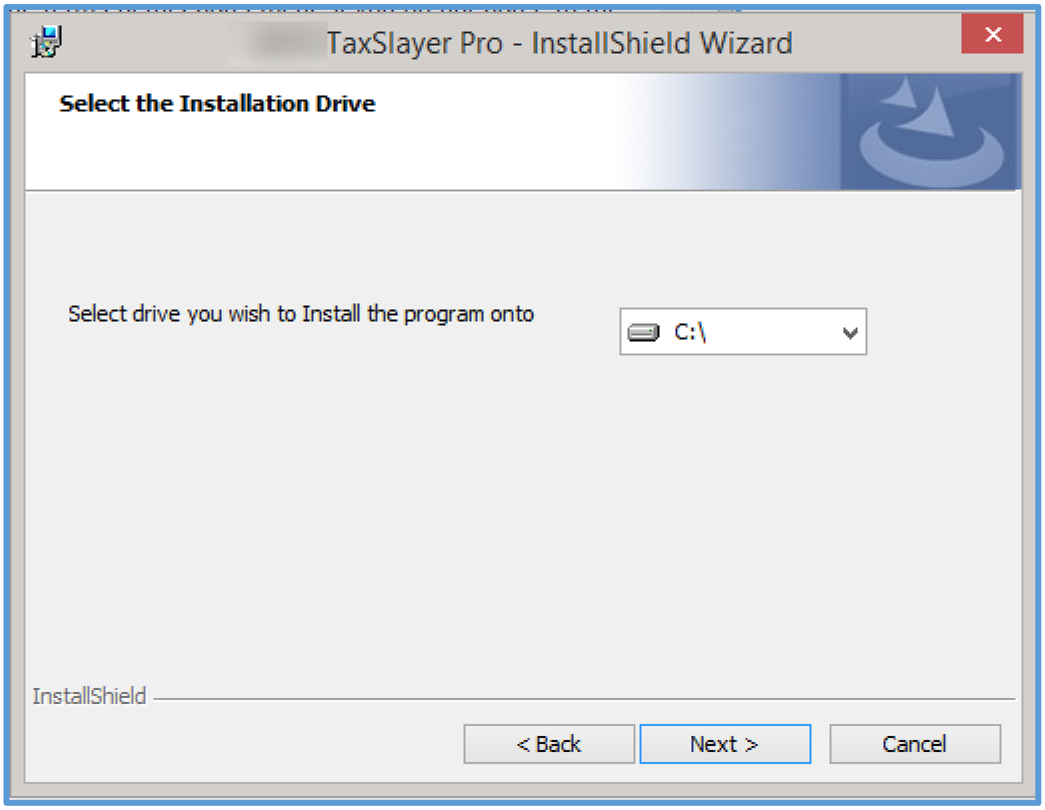
2. Click **Next**.

InstallShield Wizard displays the license agreement:



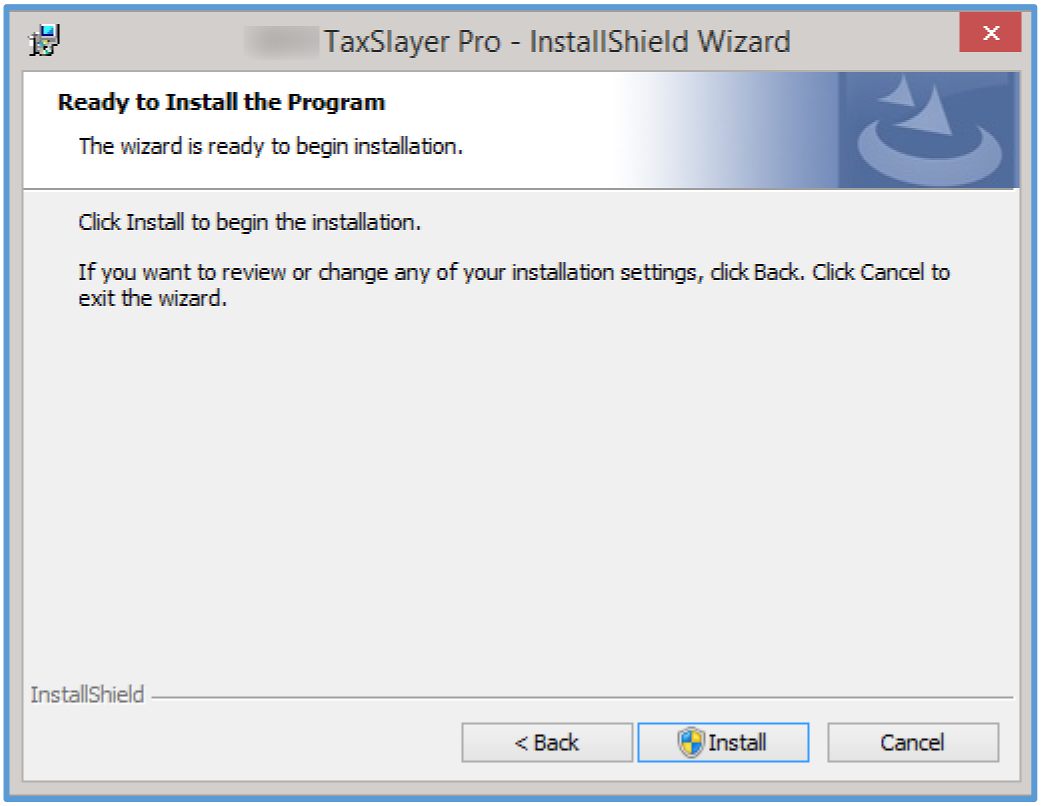
3. Read the license agreement and select **I accept the terms in the license agreement**.
4. Click **Next**.

InstallShield Wizard displays the **Select the Installation Drive** page, displaying all available drives:



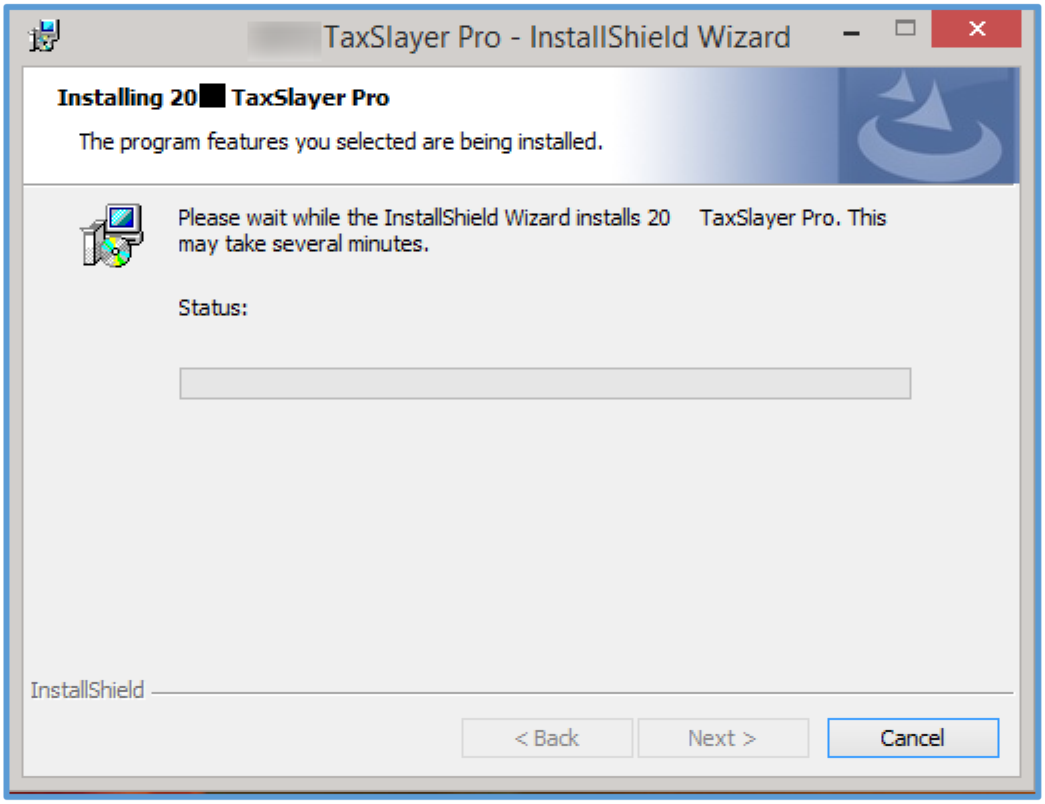
5. Leave the setting at default, which is your C drive, or change the drive using the drop-down list.
6. Click **Next**.

InstallShield Wizard displays the **Ready to Install the Program** page:



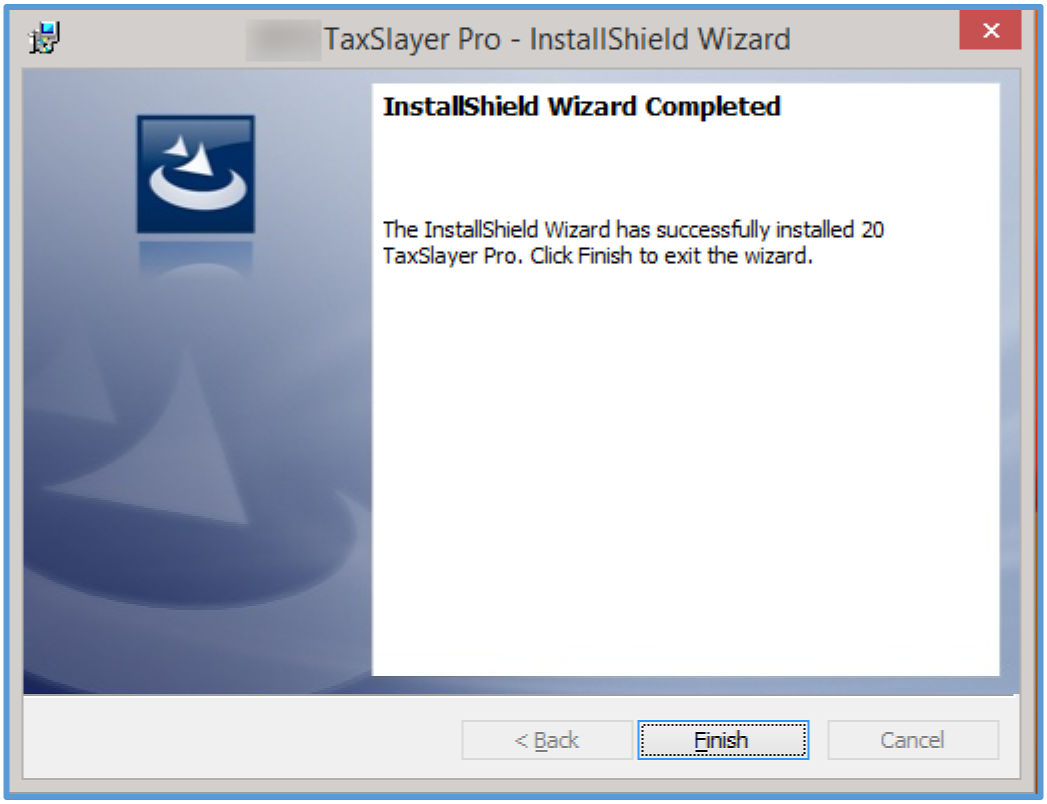
7. Click **Install** to begin installation.

InstallShield Wizard displays the **Installing TaxSlayer Pro** page with a progress bar showing your installation status:



InstallShield Wizard may take several minutes to install the program.

When finished, InstallShield Wizard displays a message to let you know installation is complete:



8. Click **Finish**.

Windows closes InstallShield Wizard and adds the TaxSlayer Pro icon to your desktop:

Network Configuration

The first time you open TaxSlayer Pro after your install, TaxSlayer prompts you to complete first-time configuration.

Transmitting Computer

Before you begin setting up TaxSlayer Pro on your network, do the following:

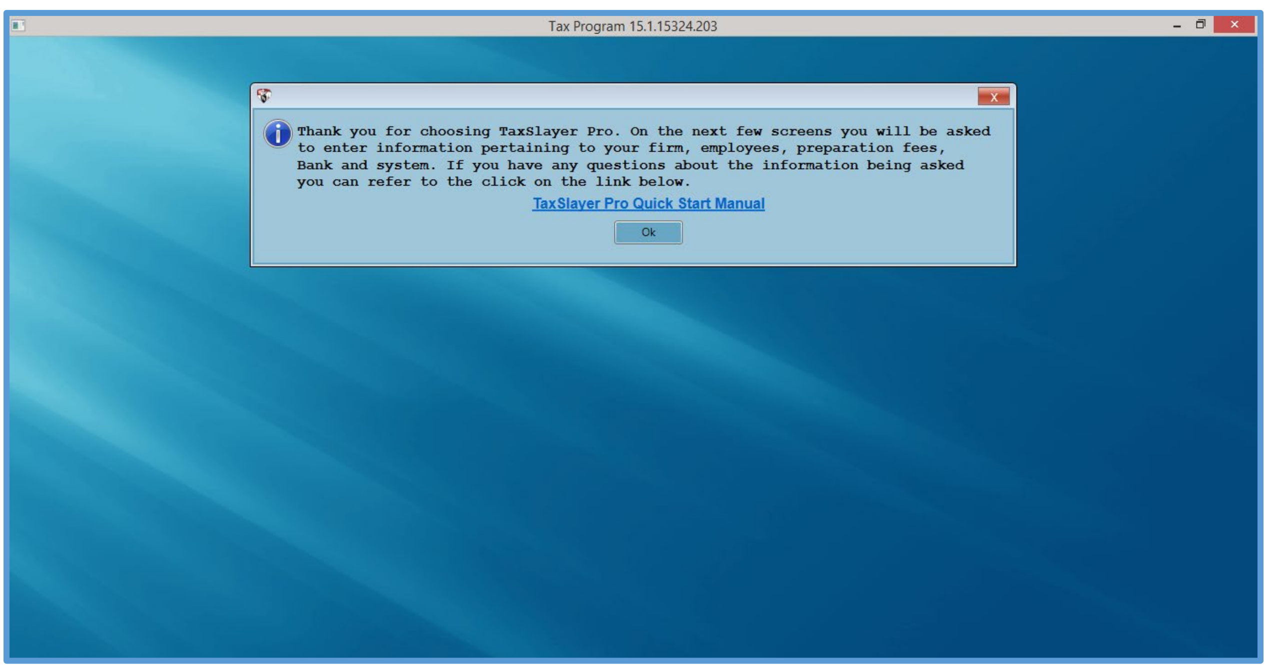
- Verify that your network is set up properly.
- Set the TaxSlayer Pro folder to allow everyone on the network at least **Modify** privileges.
- Enable file and printer sharing in your operating system and in your antivirus software.

If you need assistance with the settings above, contact your network/technology specialist.

To configure TaxSlayer Pro on a network, use the following steps:

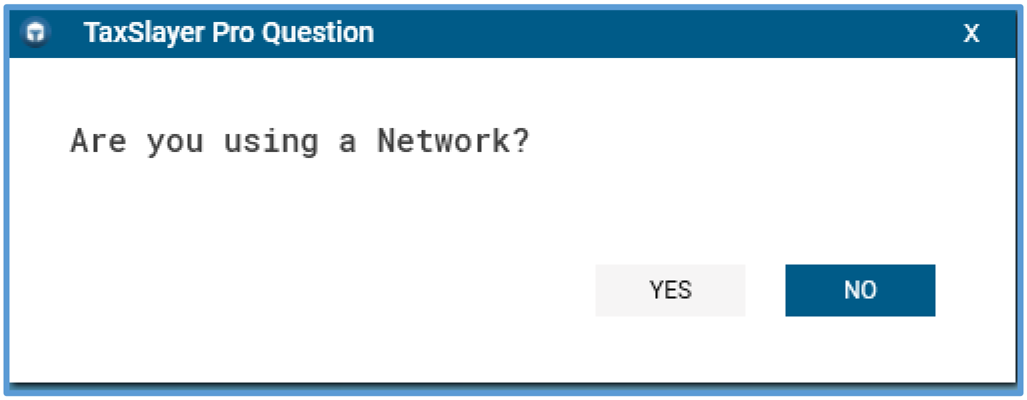
1. Double-click the TaxSlayer Pro icon on your desktop.

TaxSlayer Pro displays the **Thank you for choosing TaxSlayer Pro** window:



2. Click **Ok**.

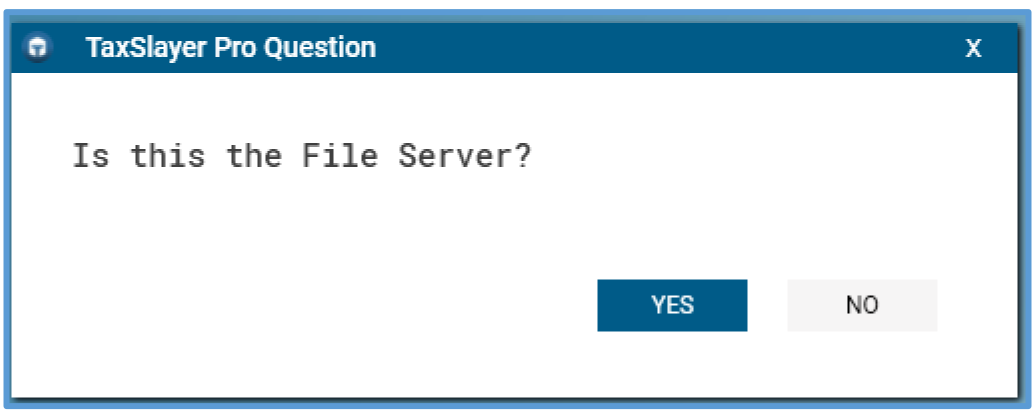
TaxSlayer Pro displays the **Network** question:



Do one of the following:

3. Click **Yes** if you intend to use TaxSlayer Pro on a network.

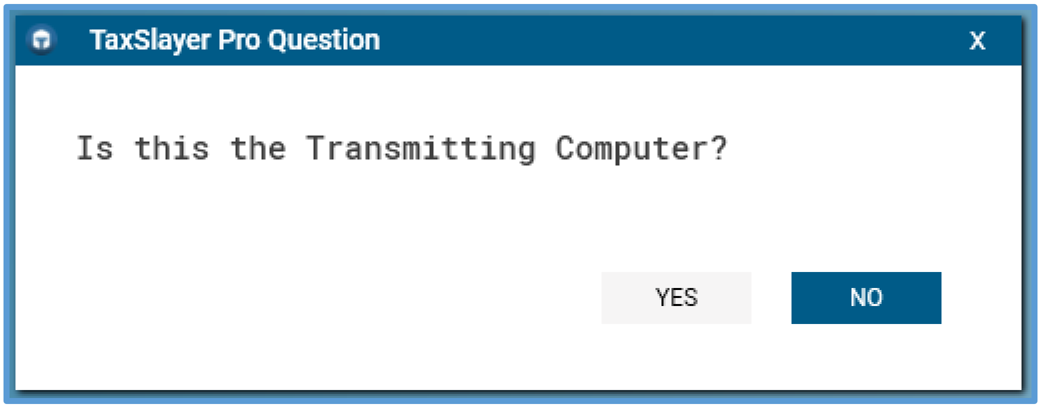
If yes, TaxSlayer Pro displays the next configuration question:



a. Click **Yes** to show that this computer is the file server.

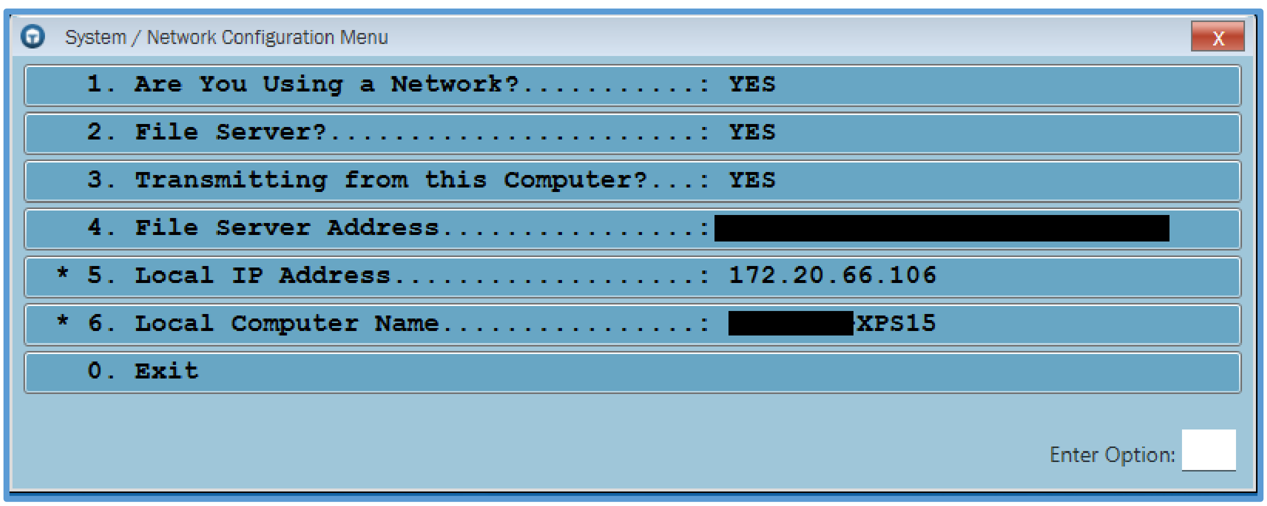
Note: Remember to install and set up the transmitting computer first. For instructions on setting up computers other than the file server, see the next section in this lesson.

TaxSlayer Pro displays a question to determine if this is the transmitting computer:



b. Click **Yes** to show that this is the transmitting computer.

TaxSlayer Pro displays the **System/Network Configuration Menu**:



Tip: TaxSlayer Pro uses these menus throughout the program after you answer questions to give you a chance to review your answers.

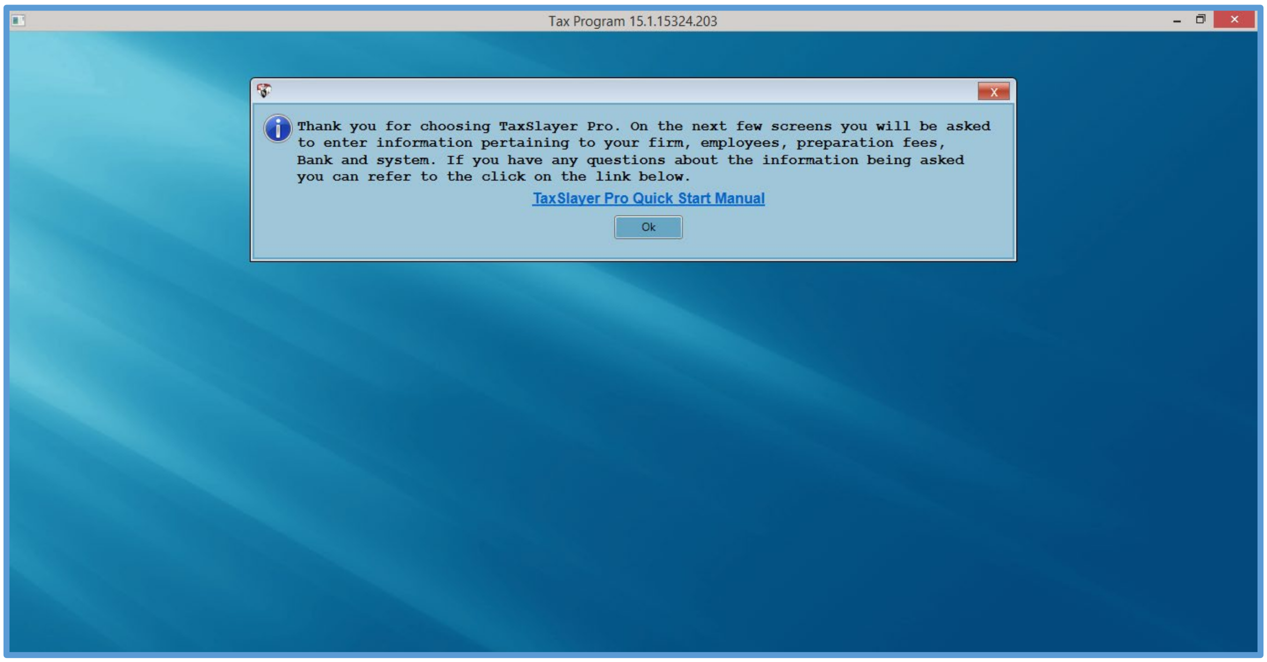
c. Review the answers to the questions. If you need to change an answer, click it to toggle the answer to **NO**.
d. Verify the name of the computer.
e. Click **Share TaxSlayer Pro to the Network** or type the corresponding number to share TaxSlayer Pro to the network.
f. Click **Exit** to exit the **Advanced Network** menu.
g. Click or type **0** to exit network setup.

Workstations

To configure TaxSlayer Pro on workstations, finish configuring the transmitting computer, and then use the following steps:

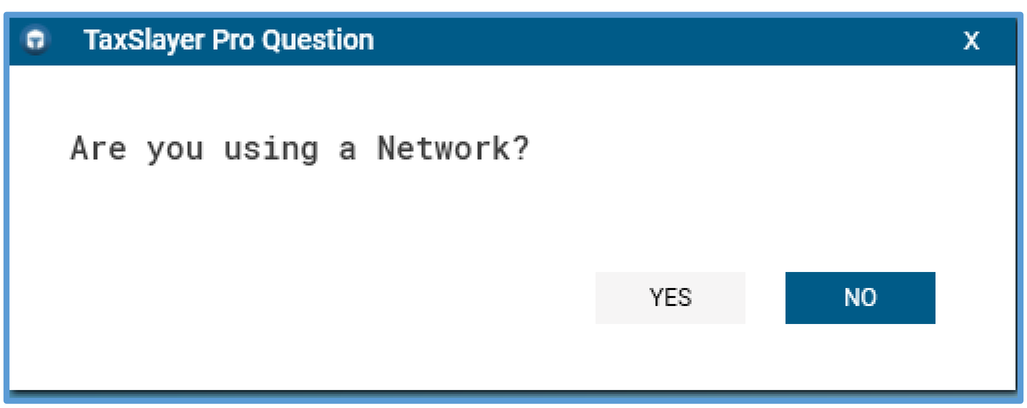
1. Install TaxSlayer Pro on the workstation using the steps discussed earlier in this lesson.
2. Double-click the TaxSlayer Pro icon on your desktop.

TaxSlayer Pro displays the **Thank you for choosing TaxSlayer Pro** window:



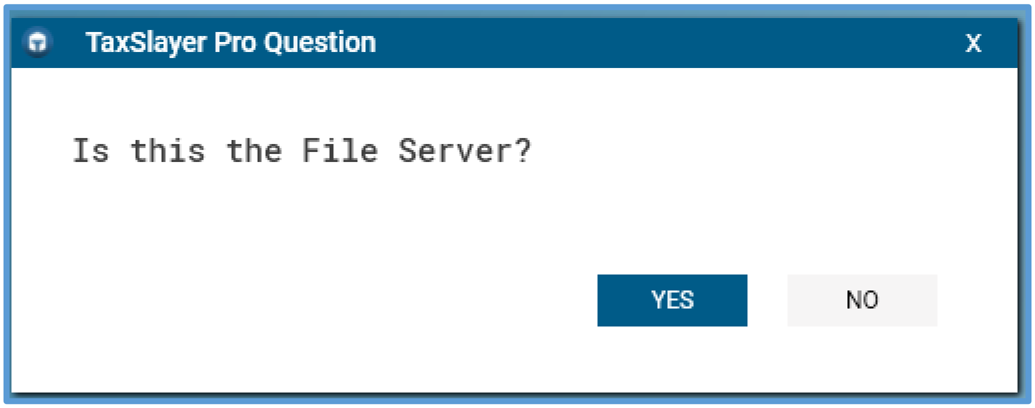
3. Click **Ok**.

TaxSlayer Pro displays the **Network** question:



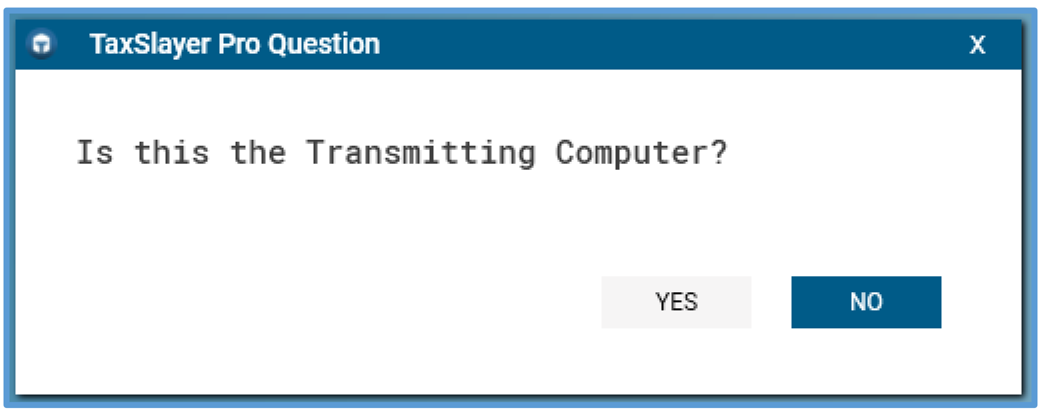
4. Click **Yes**.

TaxSlayer Pro displays the next question:



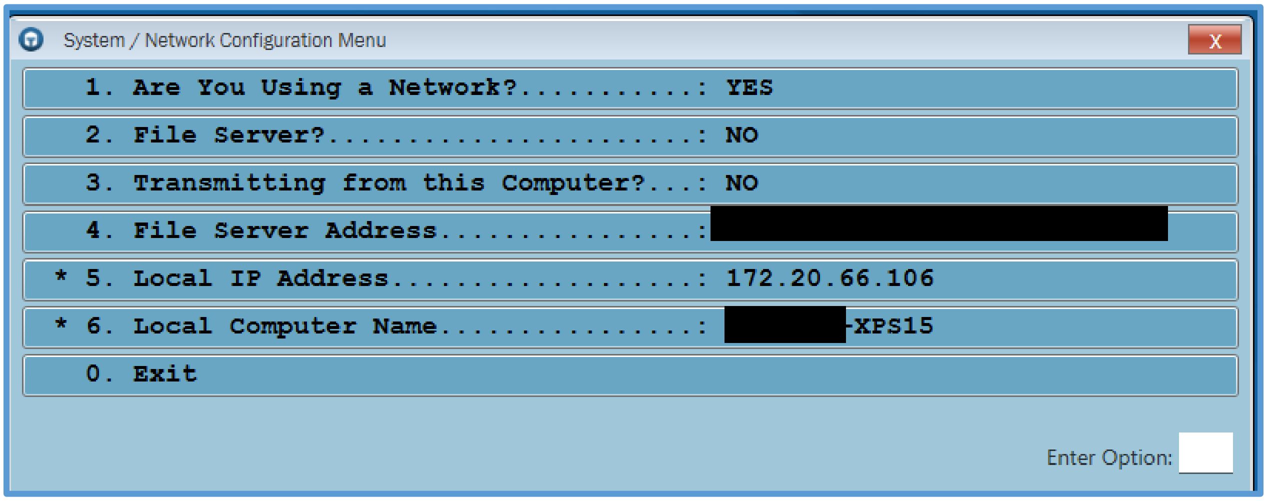
5. Click **No** to show that this computer is not the file server.

TaxSlayer Pro displays a question to determine if this is the transmitting computer:



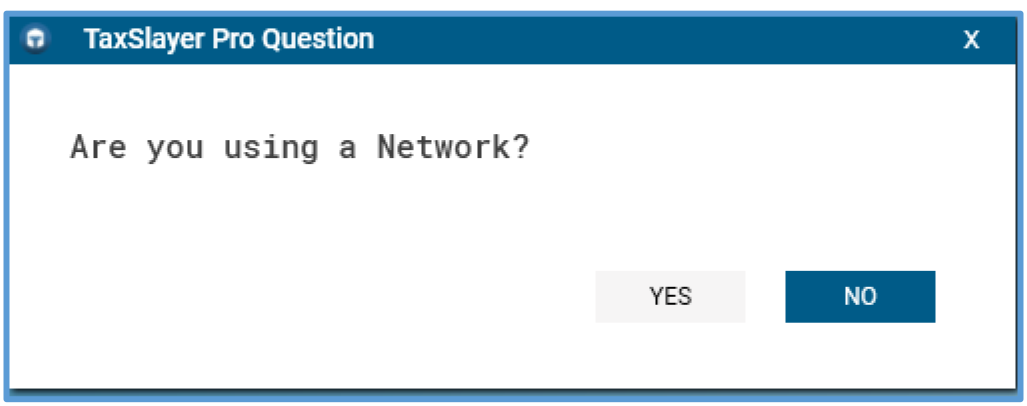
6. Click **No** to show that this is a non-transmitting workstation.

TaxSlayer Pro displays the **System/Network Configuration Menu**:



7. Review the answers to the questions and toggle answers if necessary.
8. Click **Exit** or type the corresponding number to exit network configuration.
9. Repeat these steps for each workstation.

If this is not a network configuration, click **No** on this question, as shown below:



4. Answering **No** indicates this will be a stand-alone computer setup for using TaxSlayer Pro.

See the next section, *Setting up Site Information*, for instructions on configuring TaxSlayer Pro.

Summary

You should now be able to:

- Install TaxSlayer Pro.
- Configure a network computer as the file server.
- Configure workstations.

To see a video of what you just learned, go to Installation and Network Configuration. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Setting up Site Information

After completing this topic, you will be able to:

- Configure your office/site in TaxSlayer Pro.
- Set up EROs in TaxSlayer Pro.

Office/Site Setup

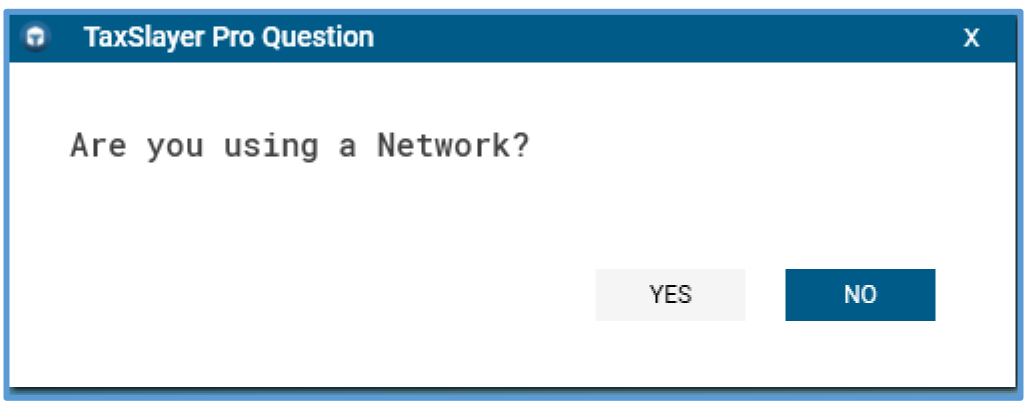
Before you begin using TaxSlayer Pro, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carryover to tax return so that you only have to type this information once. This includes items such as the firm/site name information.

To configure TaxSlayer Pro, use the following steps:

4. Double-click the TaxSlayer Pro icon on your desktop.

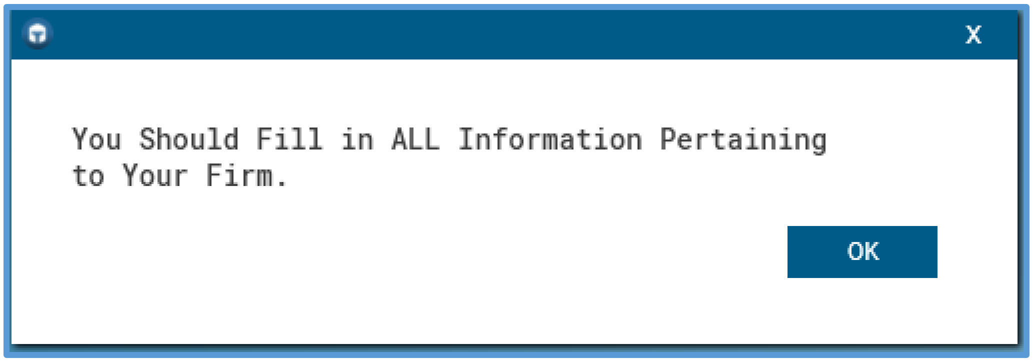
Networking

TaxSlayer Pro displays the **Network** question:



5. Click **Yes** or **No** to answer this question. If you need to set up TaxSlayer Pro on a network, see *Installation and Network Configuration*.

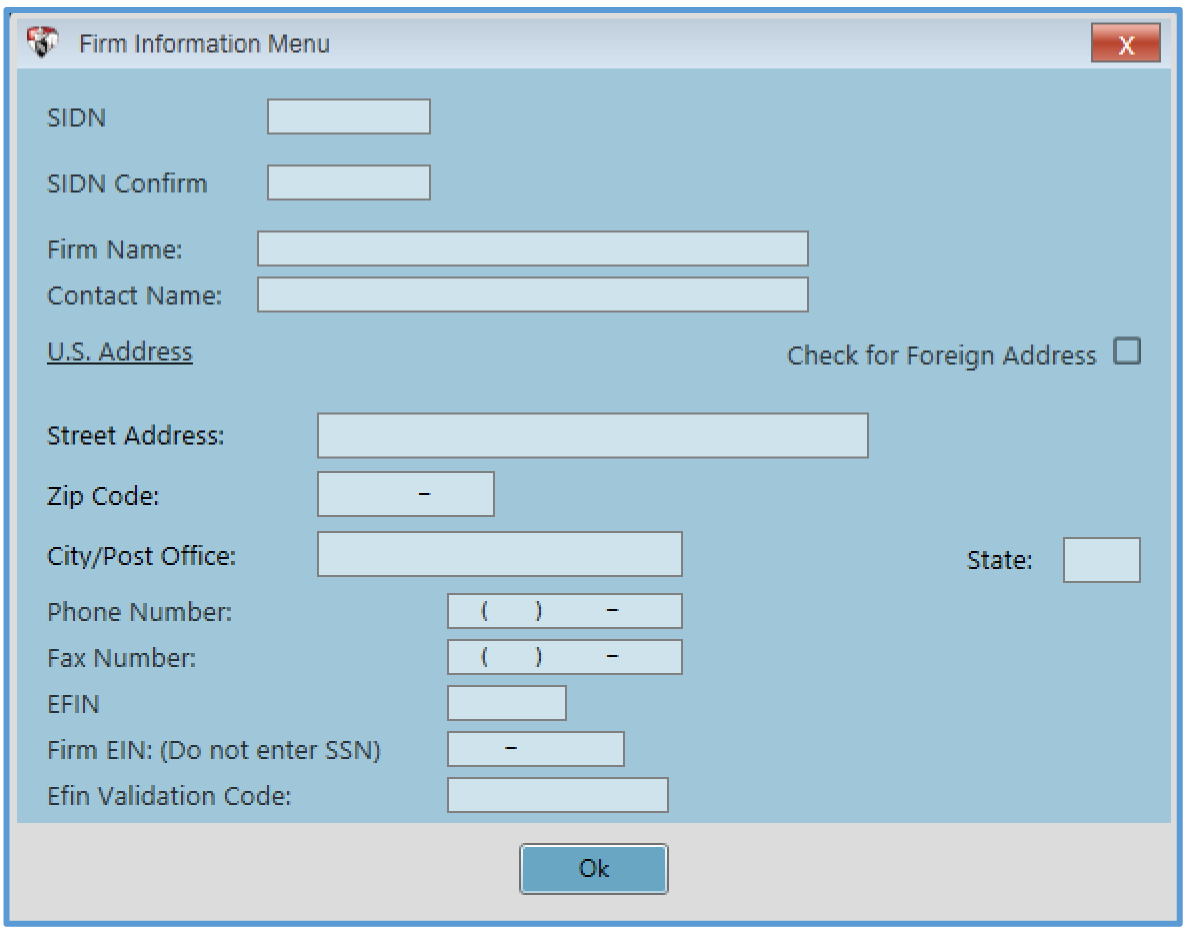
TaxSlayer Pro displays a reminder that you should fill in all information pertaining to your Firm/Site, as seen in the screenshot below.



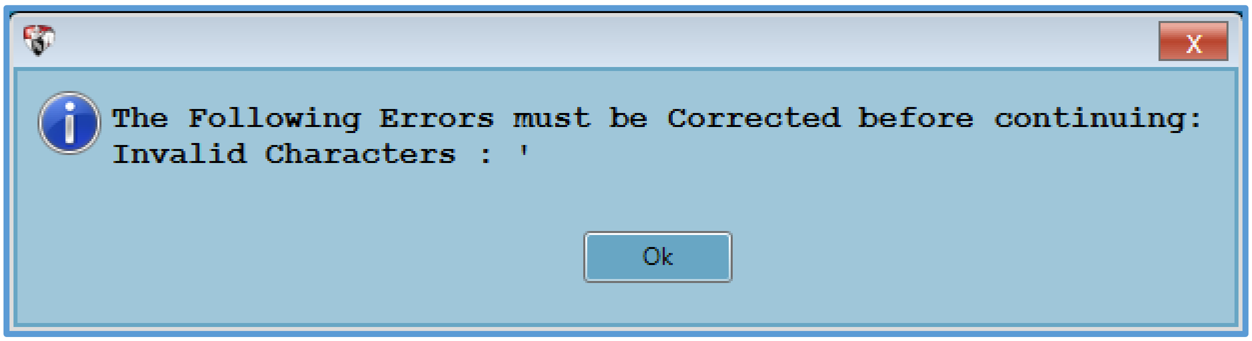
6. Click **Ok**.

Adding Firm Information

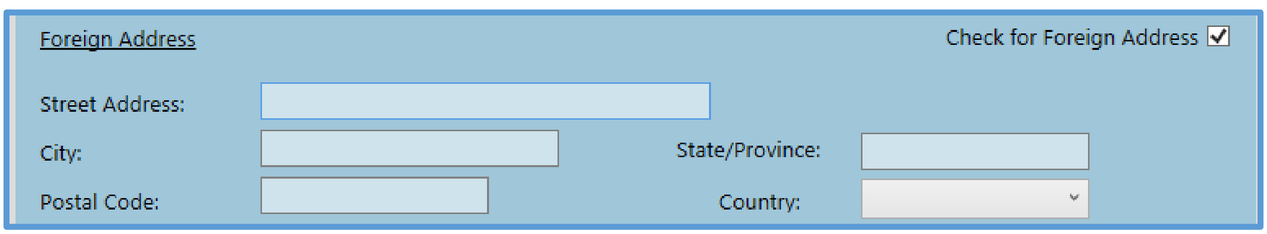
TaxSlayer Pro displays the **Firm Information Menu**:



7. Type your site’s information. Use the following tips for entering this information:
    a. Type your SIDN twice. If the SIDN does not match, TaxSlayer Pro prompts you to rekey the SIDN before you can continue.
    b. Do not type any special characters in the name or address boxes. When you click **Ok**, TaxSlayer Pro displays an error message with any characters the IRS does not allow:



    c. When you type your Zip Code, TaxSlayer Pro completes the city and state boxes.
    d. If your site is in another country, select the **Check for Foreign Address** check box to select the country.

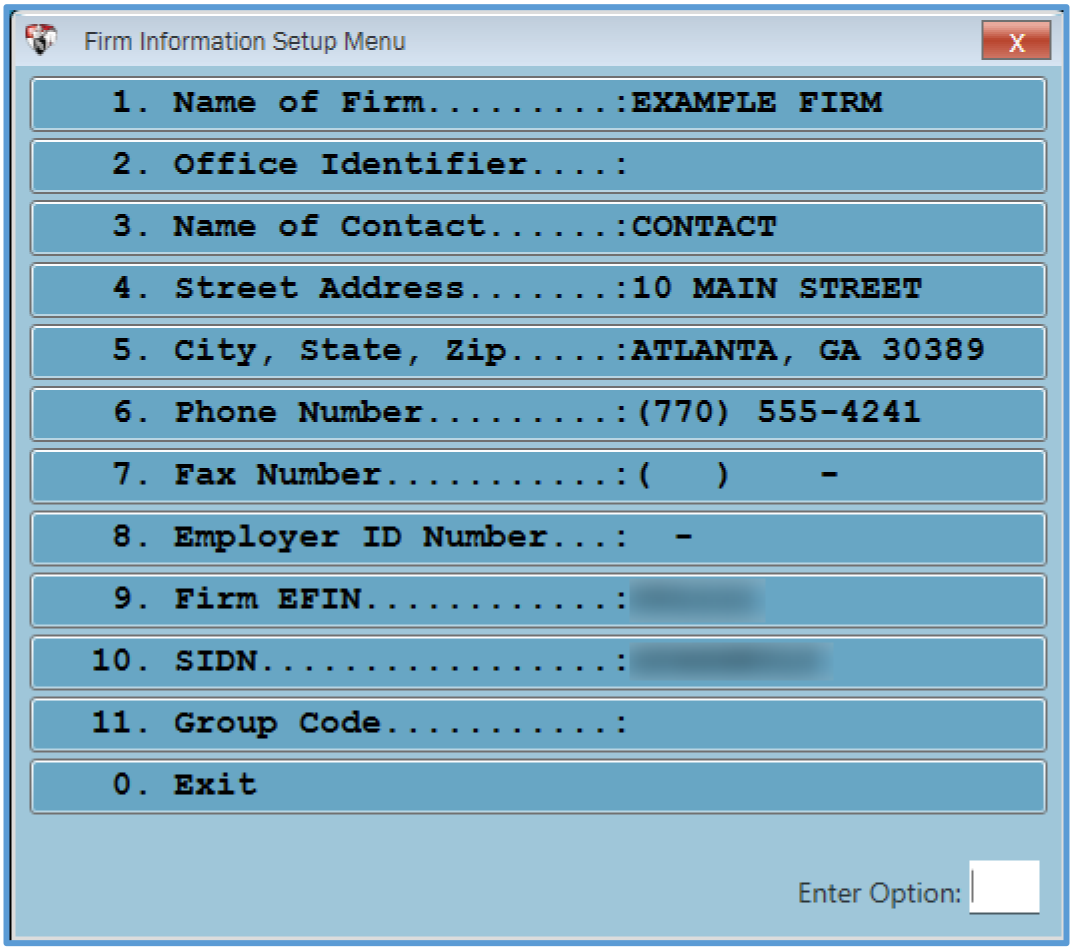


    e. Do **not** type your Social Security number in the **Firm EIN** box. This box pertains to paid preparers, leave this box blank.
    f. Type your EFIN validation code, or vendor control number, in the **Efin Validation Code** box.

TIP: Log in to your **My Account/Account Hu**b page and navigate to **Account History** to locate your EFIN Validation Code.

8. When you finish typing your site’s information, click **Ok**.

TaxSlayer Pro displays the **Firm Information Setup Menu**:

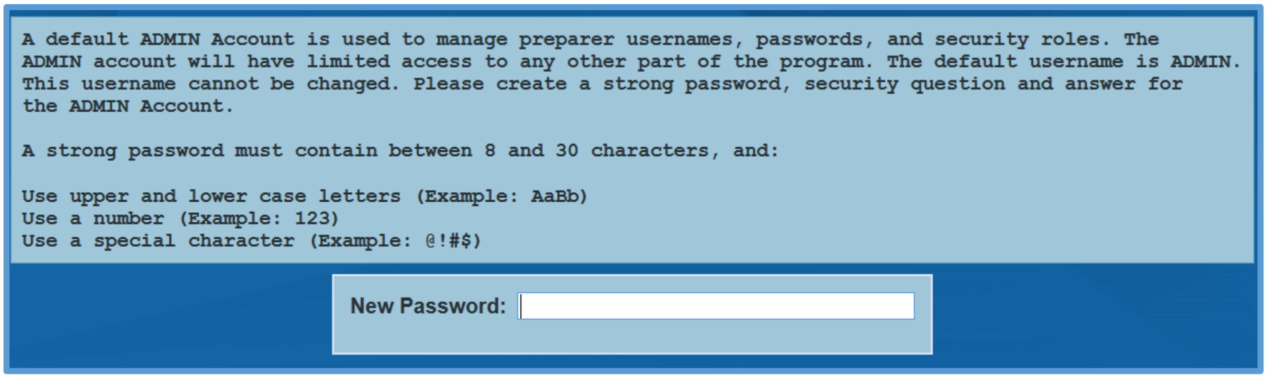


Note: TaxSlayer Pro uses these menus throughout the program after you answer questions to give you a chance to review your answers.

9. Review the answers to the questions. If you need to change an answer, click it to change the answer. Leave **Group Code** blank.
10. Click **Exit** or type the corresponding number.

Adding an Administrator Password

TaxSlayer Pro displays the **New Password** window:

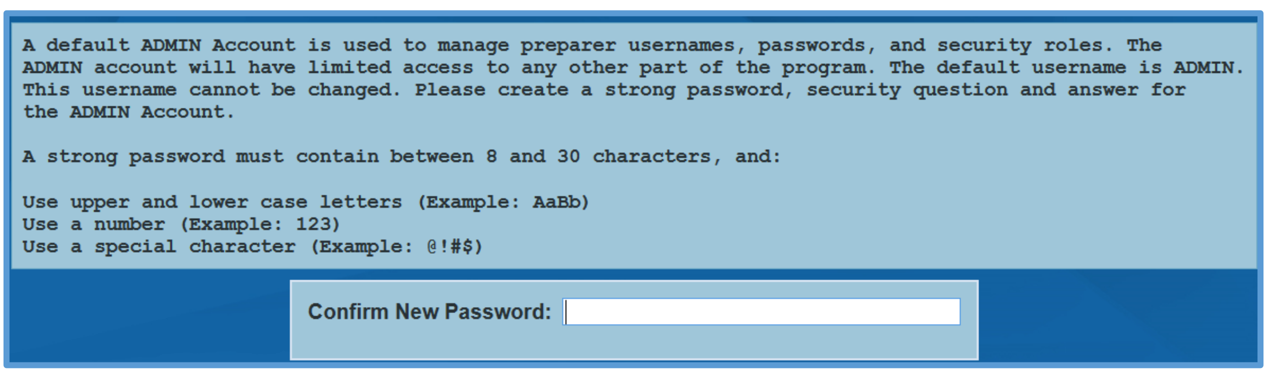


11. Read this page carefully. It contains information on setting your new password using Multi-Factor Authentication standards.
12. Type your new password.

TIP: The password must contain at least 8 characters, at least 1 upper case letter, at least 1 lower case letter, at least 1 number and at least 1 special character.

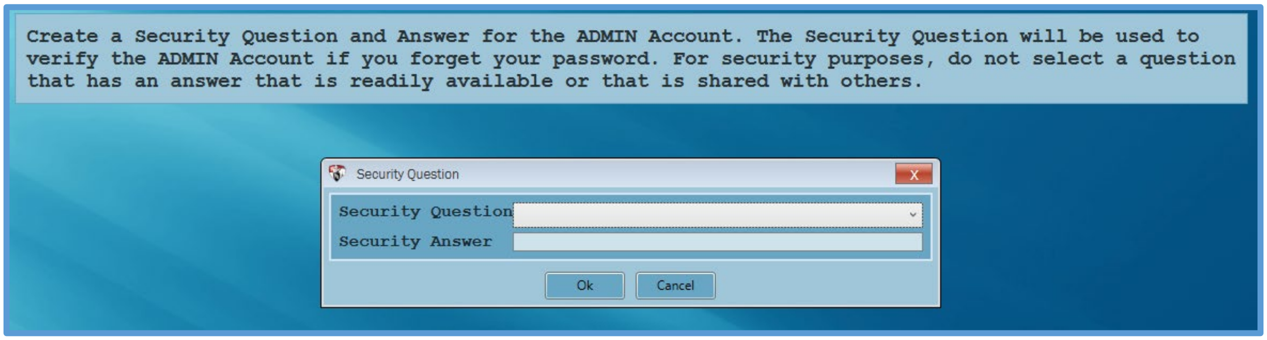
13. Press Enter.

TaxSlayer Pro displays the **Confirm New Password** window:



14. Type the new password again for verification.
15. Press Enter.

TaxSlayer Pro displays the **Security Question** window:

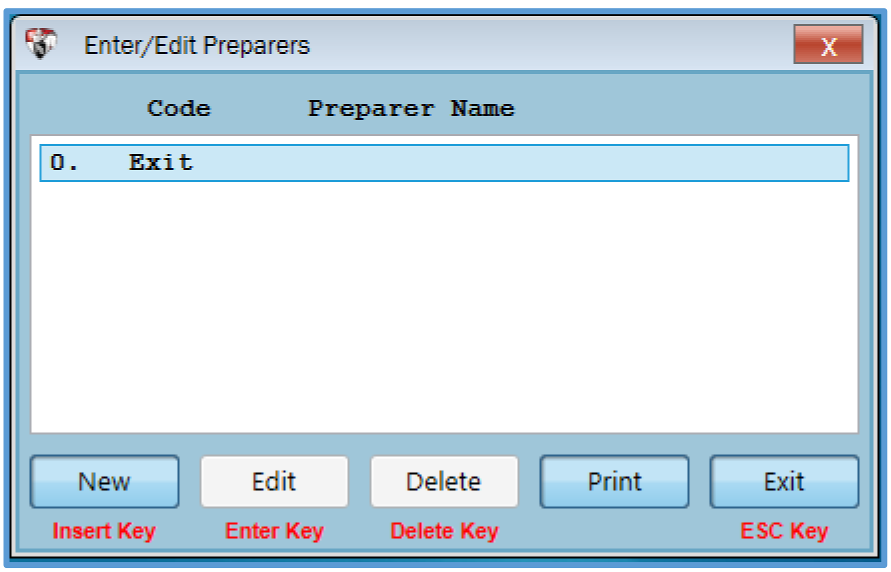


16. Select a security question from the list.
17. Type the answer to the security question.

TIP: Choose a security question for which you can easily remember the answer. If you forget your password, you will use this information to reset it.

18. Click **Ok**.

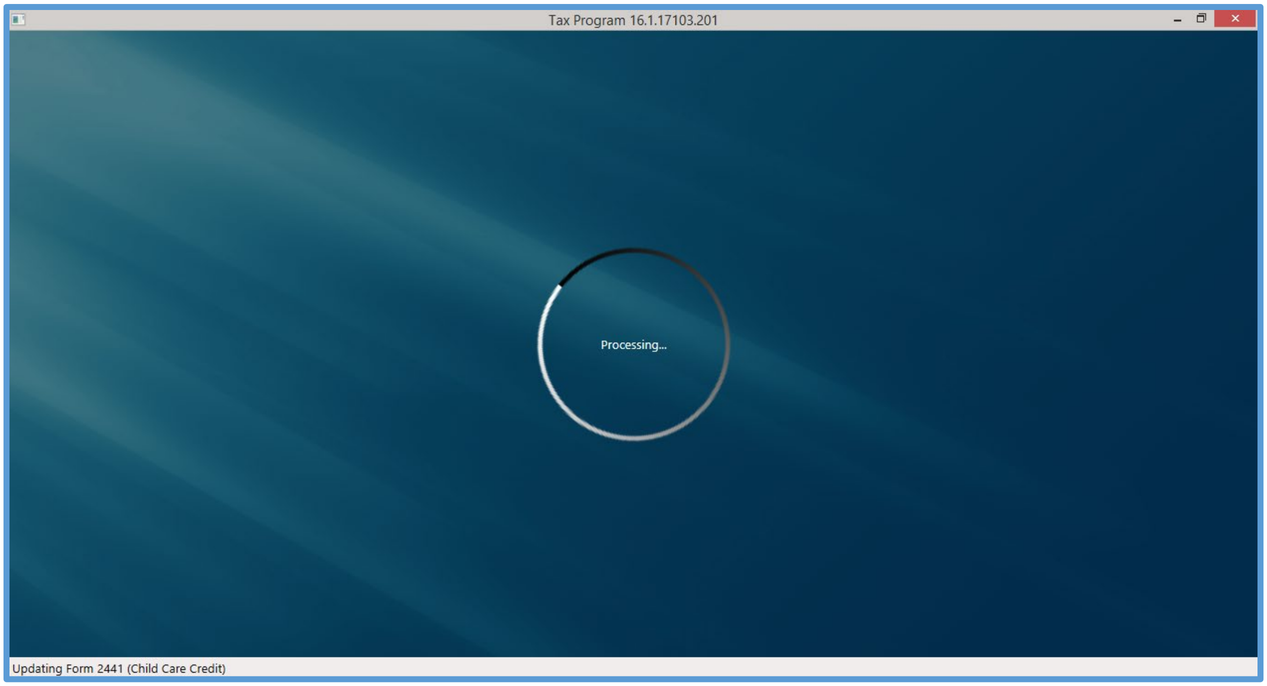
TaxSlayer Pro displays the **Enter/Edit Preparers** window:



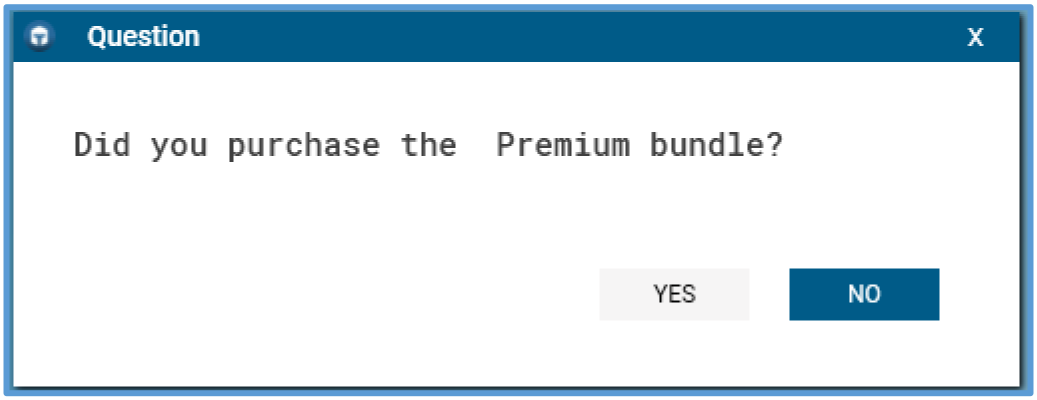
19. Click **Exit**.

Note: See the *Adding Preparers* section for information on adding preparers.

TaxSlayer Pro connects to the Internet to process any updates to the program. This may take a few minutes:

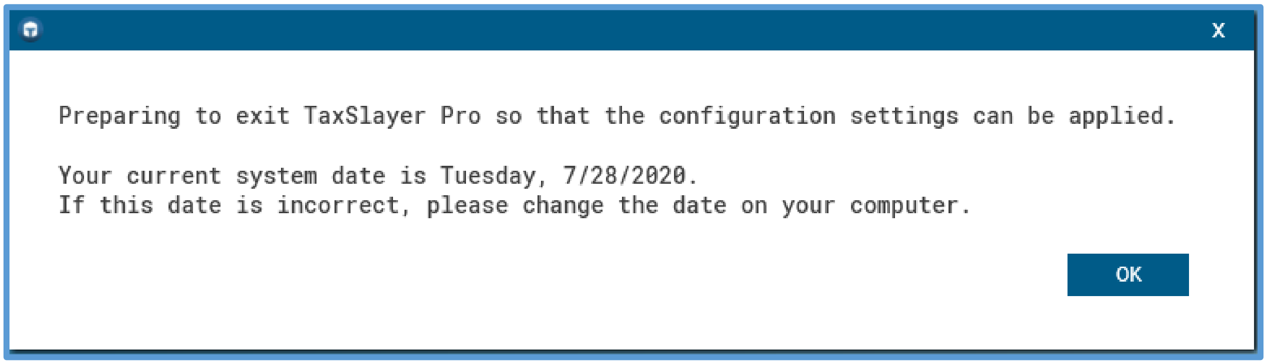


TaxSlayer Pro displays a question asking whether you purchased the premium bundle:



20. Click **NO**.

TaxSlayer Pro asks you to confirm the system date on your computer:



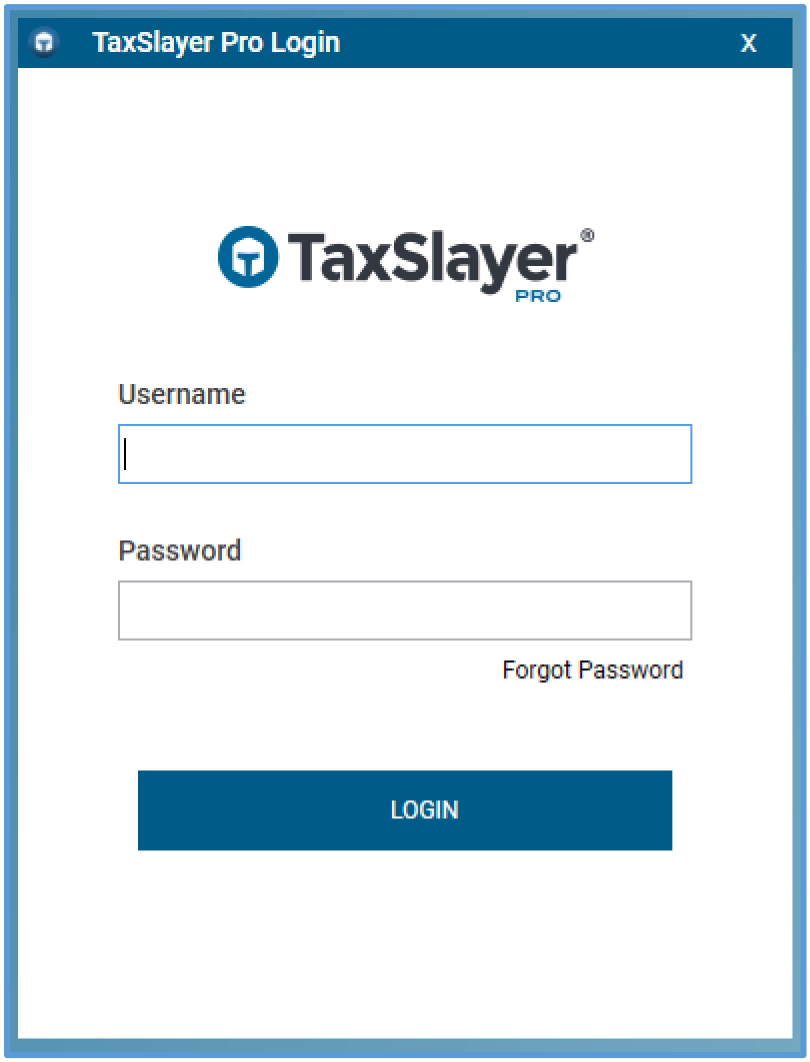
TaxSlayer Pro Online exits the program to apply the new settings.

Adding Backup Paths

After you complete the main configuration settings and set a password, you still need to set up paths and some other information. To do this, use the following steps:

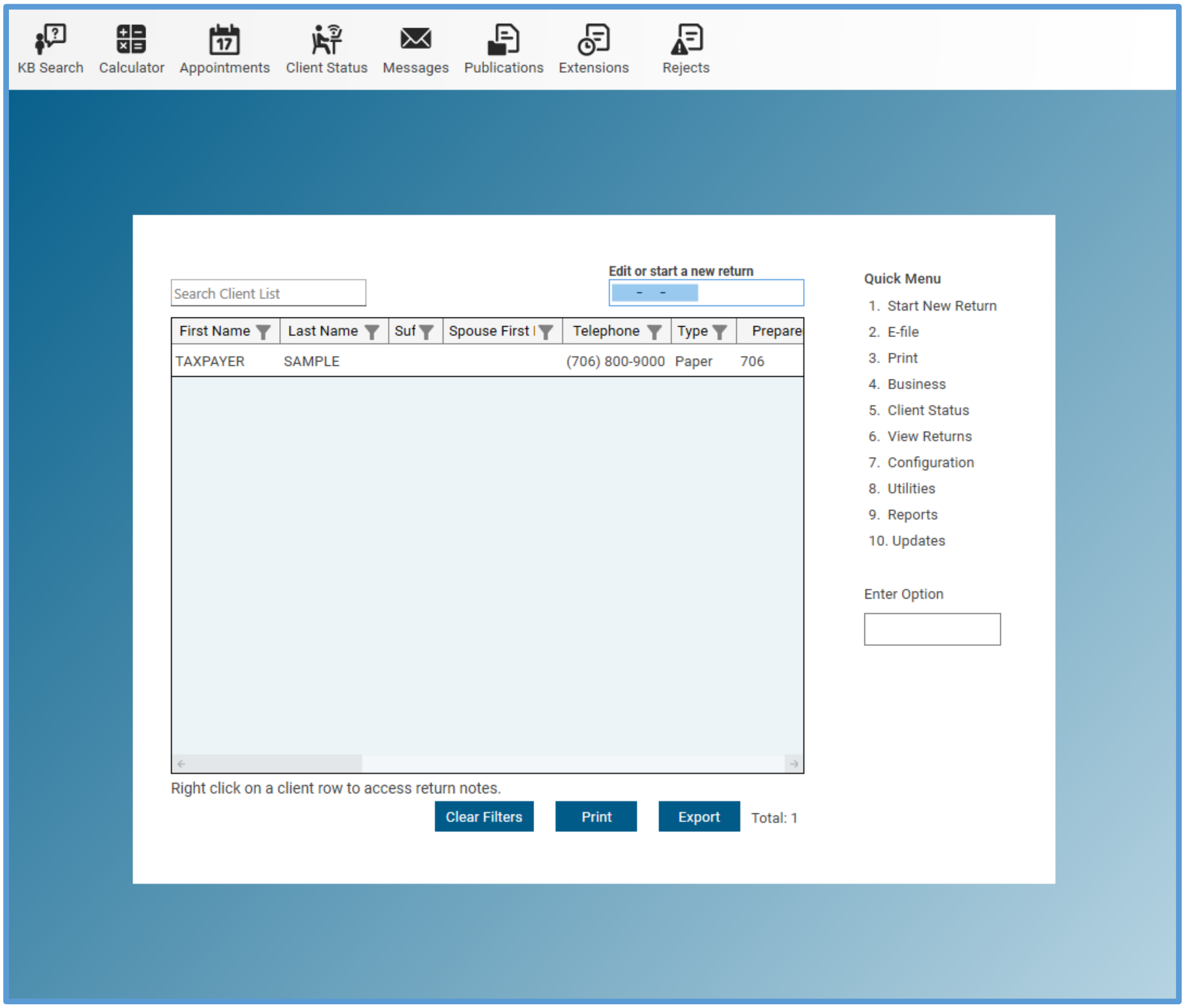
1. Double-click the TaxSlayer Pro icon on your desktop.

TaxSlayer Pro displays the **TaxSlayer Pro Login** window:



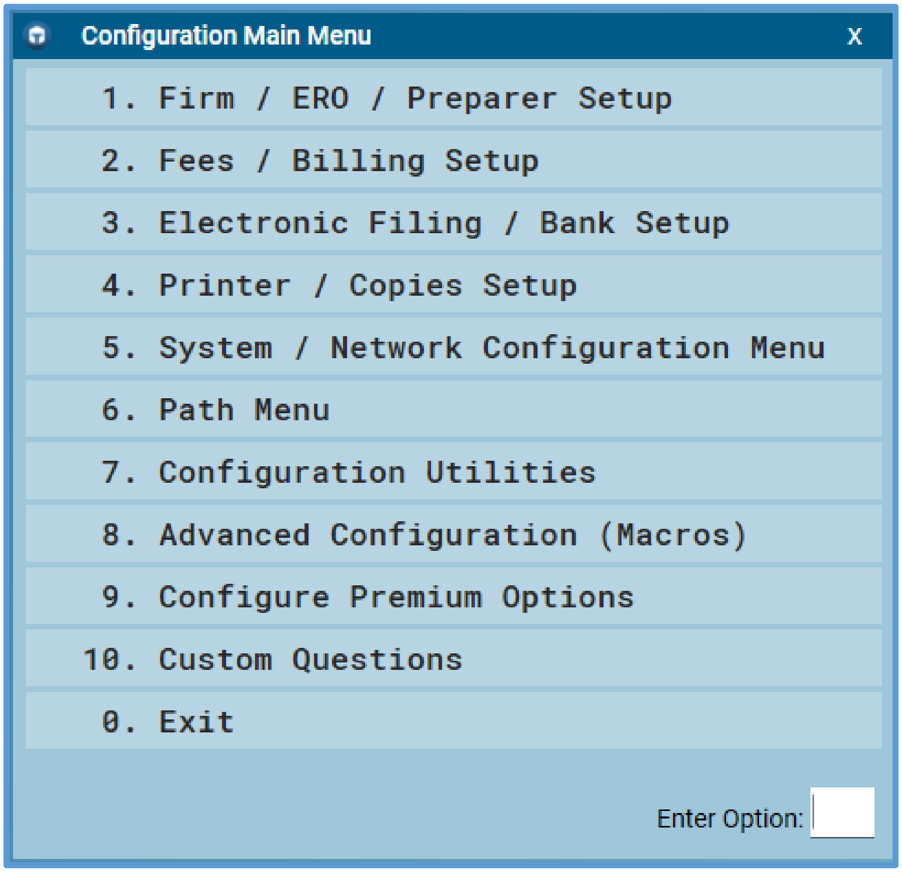
2. Type the user name and password you created in Configuration.
3. Click **Ok**.

TaxSlayer Pro displays the main window:



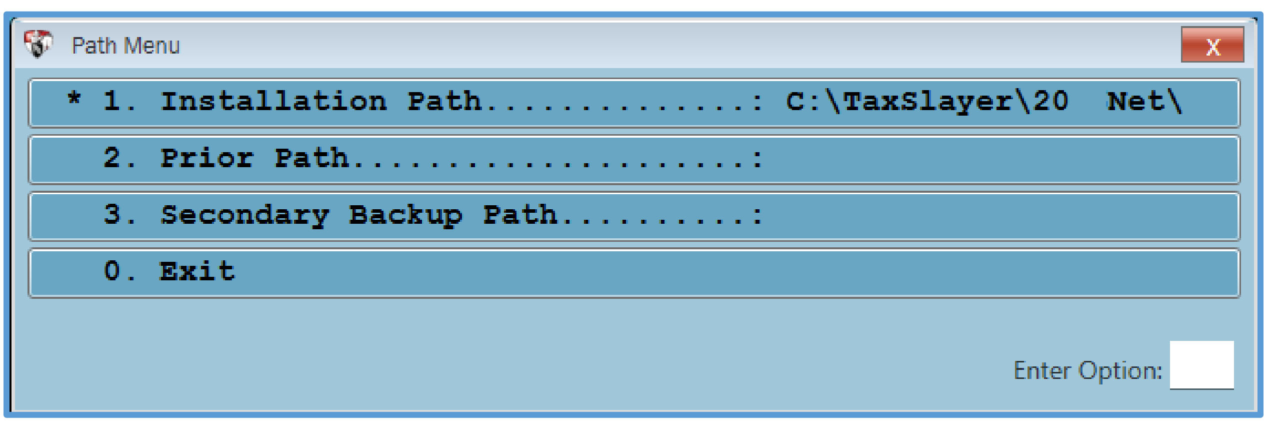
4. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



5. Click **Path Menu** or type the corresponding number.

TaxSlayer Pro displays the **Path Menu**:

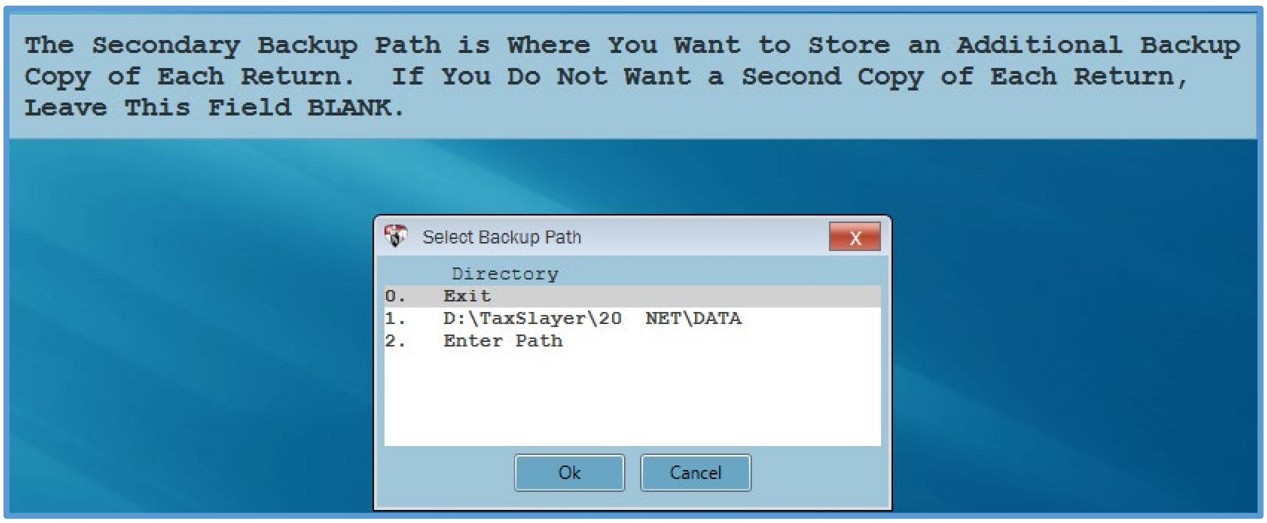


6. Leave the installation and prior path as displayed.

7. To back up returns to a second location, click **Secondary Backup Path** or click the corresponding number. This will allow returns to be backed up on one computer and installed on another computer for transmitting e-file returns.

Note: Connect your secondary backup media (USB drive, external hard drive, etc.) before beginning this step.

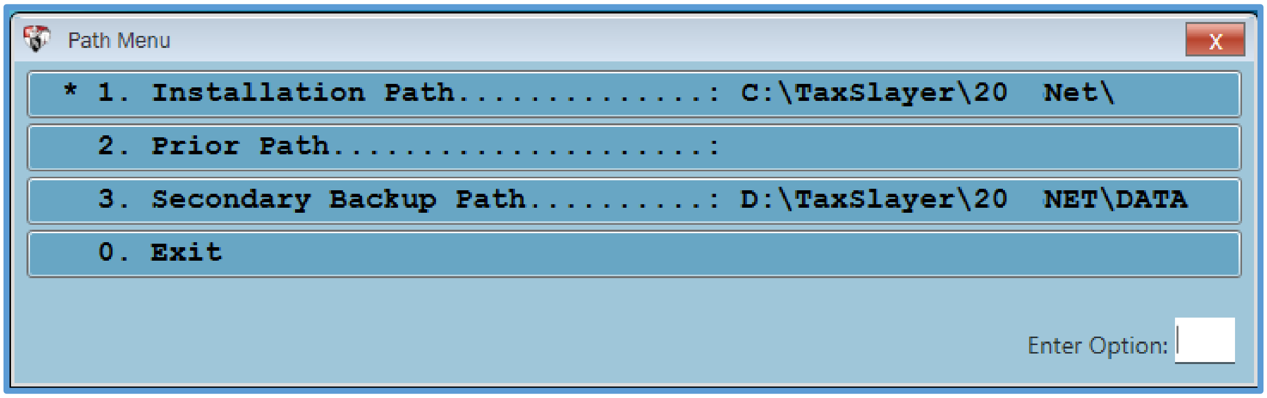
TaxSlayer Pro displays the **Select Backup Path** window with any external storage locations listed:



8. Click or type the number for the drive you want to use for the secondary backup. **You cannot use a CD/DVD drive for your secondary backup drive.**
9. Click **Ok**.

Note: If the backup folder does not already exist, TaxSlayer Pro prompts you to create it.

TaxSlayer Pro displays the **Path Menu**:



10. Review the information for accuracy.
11. Click **Exit** or type the corresponding number.

Setting up Macros

TaxSlayer Pro allows you to set up macros, or automatic entries, to reduce your time and keystrokes when entering data for employers, day care providers, etc., in your area. To set up macros, use the following steps from the **Configuration Main Menu**:

1. Click **Advanced Configuration (Macros)** or type the corresponding number.

TaxSlayer Pro displays the **Advanced Configuration Menu**:

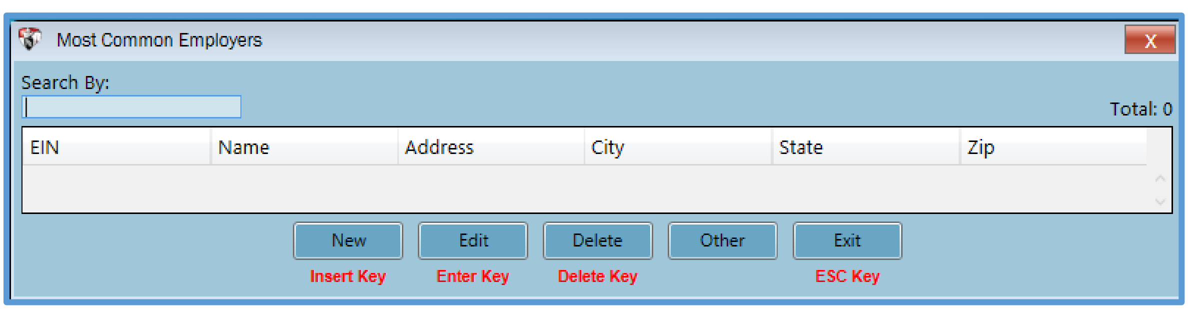
```
Advanced Configuration Menu                                        X
   1. MACRO (Most Common) Setup
   2. Special Attention Database
   3. Database Management
   4. Display Settings
   5. EIC Due Diligence Configuration
   6. Use Head of Household Worksheet?.................: NO
   7. Method Used to Call Adobe Acrobat................: Shell Method
   8. Type of Prior Taxable State Refund to Pull.......: Net
   9. Ask to unlock return awaiting acknowledgement....: NO
  10. Ask to unlock accepted return....................: NO
  11. Ask if 7216 Disclosure Authorization Signed......: NO
  12. Manage Custom 7216s
  13. Ask for Dependent Care Benefits on W-2 Add.......: NO
  14. Pull Prior Year Client Notes Forward.............: Ask to Pull
  15. Preparer Code is Required to Complete a Return...: NO
   0. Exit
                                                         Enter Option:
```

2. Click **MACRO (Most Common) Setup** or type the corresponding number.

TaxSlayer Pro displays the **Keystroke (Macro) Saver Setup Menu**:

3. Click **W2 Employers/1099R Payers** or type the corresponding number.

TaxSlayer Pro displays the **Most Common Employers** window:



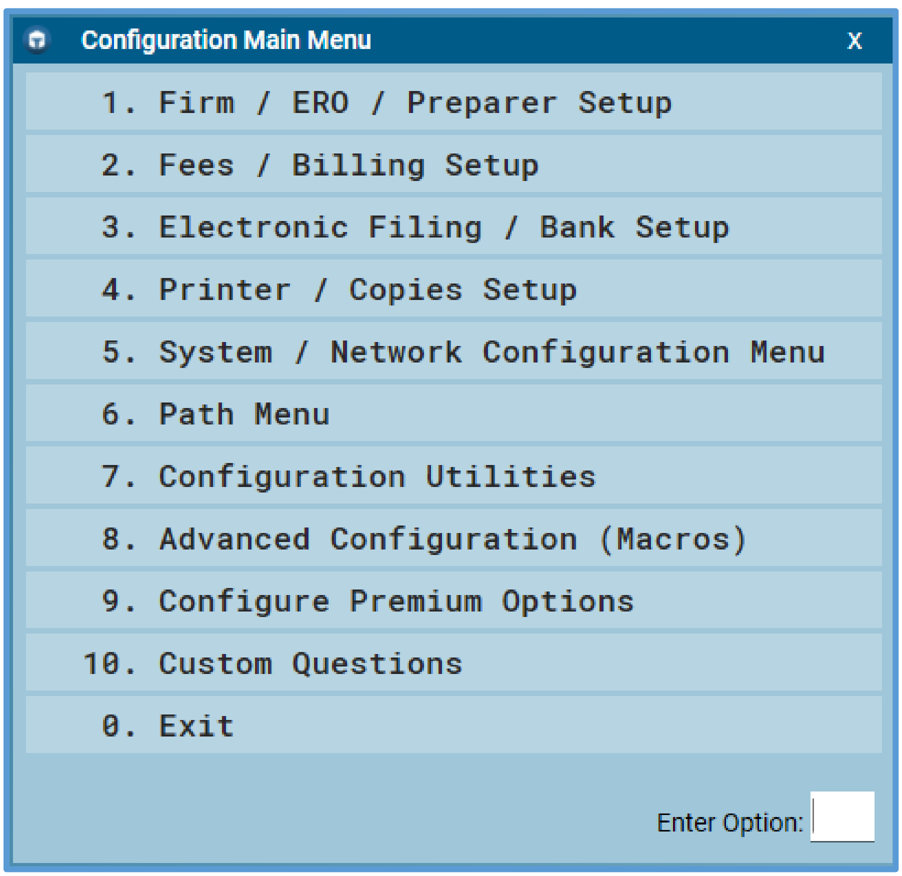
12. Click **New** and complete the information for each employer.
13. Click **Exit**.
14. Click any of the following to create applicable macros:
    a. Interest and dividend payers
    b. K-1 entities
    c. Child care providers
    d. Charitable organizations
    e. Banks
2. When you finish creating macros, click **Exit** until you reach the main window.

Changing Configuration Settings

If you need to change your site configuration later, you can do so from the main window. To change configuration, use the following steps from the TaxSlayer Pro main window:

1. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



2. Click or type the number for which you want to change settings.
3. Follow the screen prompts to type the corrected or updated information.
4. Press Enter to save the information.
5. Click **Exit** or type the corresponding number.

Summary

You should now be able to:

- Configure your office/site in TaxSlayer Pro.
- Set up EROs in TaxSlayer Pro.

To see a video of what you just learned, go to Setting up Site Information. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Setting up Security Templates

After completing this topic, you will be able to:

- List the security templates delivered with TaxSlayer Pro Desktop.
- Determine which security template to use based on the allowed actions.
- Create a new security template.
- Edit an existing security template.

In TaxSlayer Pro, use security templates to set the permissions for each preparer. You can use predefined security templates, create your own templates, or edit existing templates as needed.

Predefined Security Templates

In most cases, you need to use the security templates that TaxSlayer Pro predefines with your software.

When you set up users/preparers, you can select the security template during setup. See the next topic in this section, *Adding Preparers*, for information on selecting security templates for users.

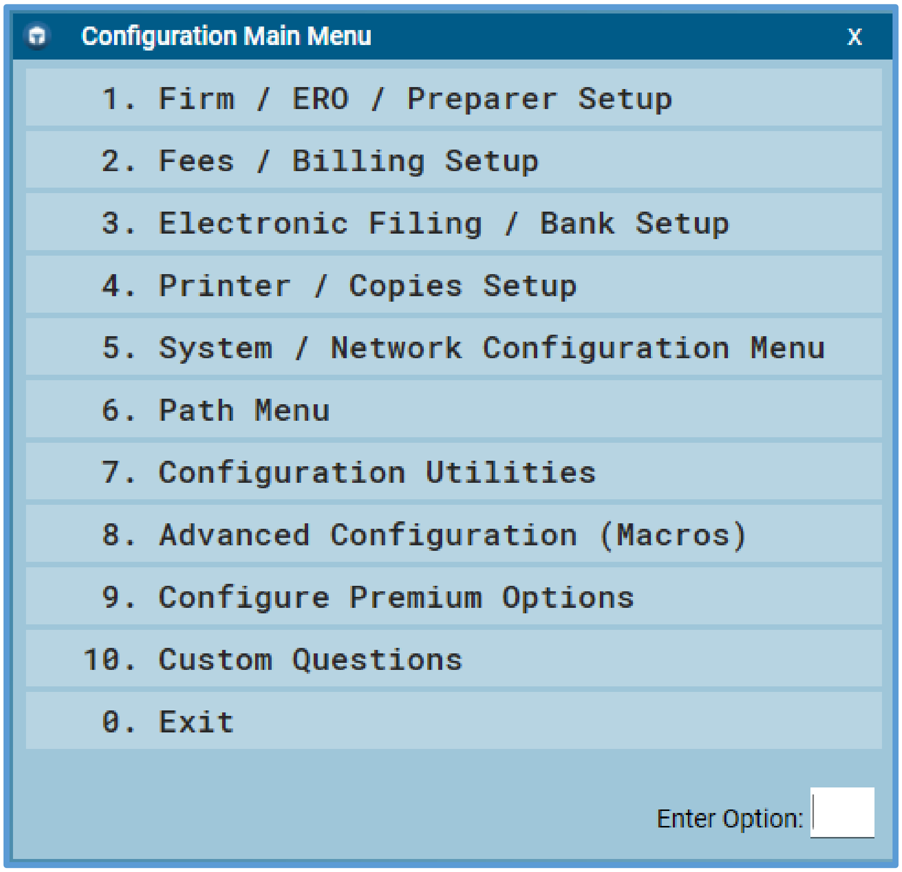
TaxSlayer Pro Tip: You cannot add the predefined Administrator role to users, and you cannot edit that role.

Creating Security Templates

You can create as many new security templates as you need at your site. To do this, use the following steps from the TaxSlayer Pro main window:

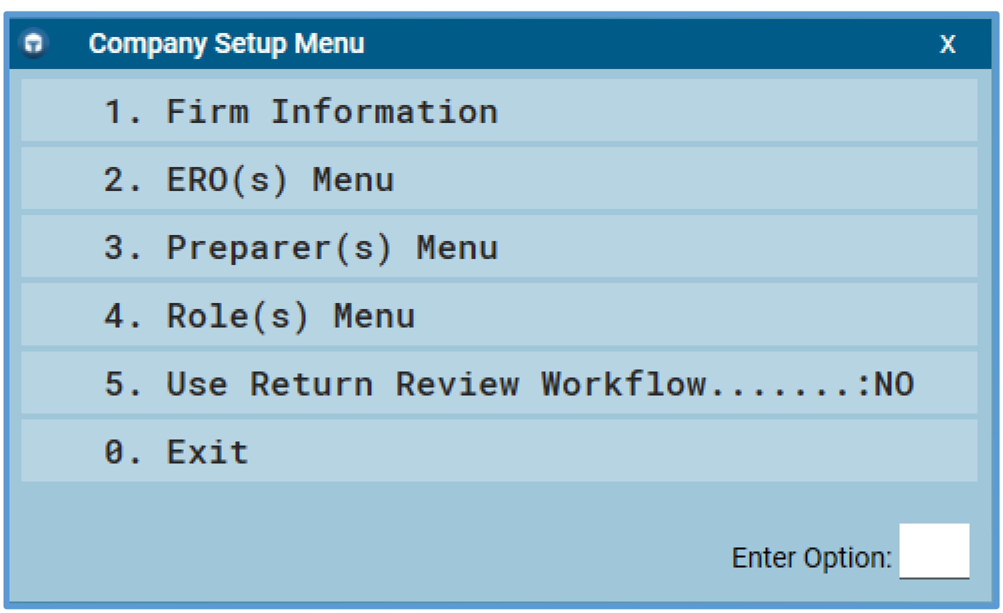
1. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



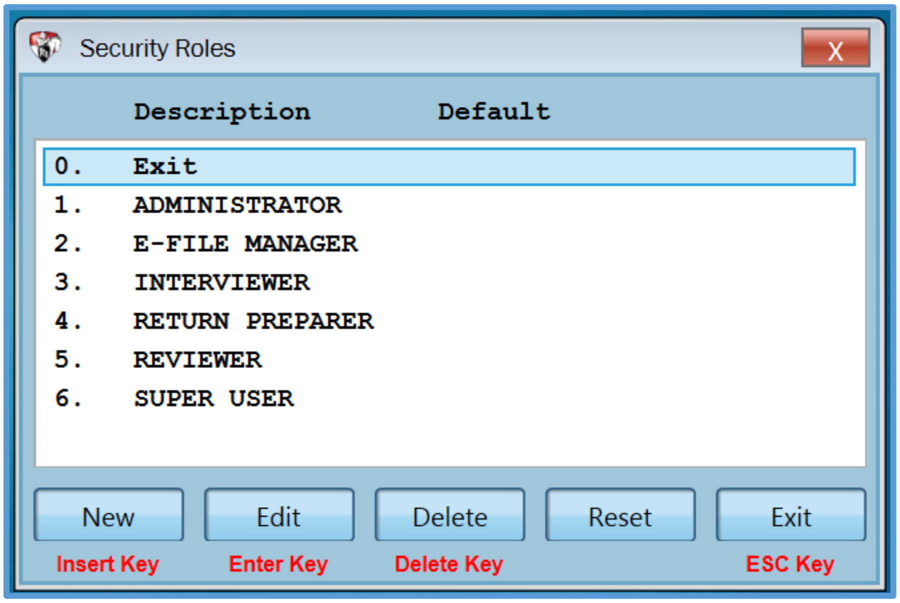
2. Click **Firm/ERO/Preparer Setup** or type the corresponding number.

TaxSlayer Pro displays the **Company Setup Menu**:



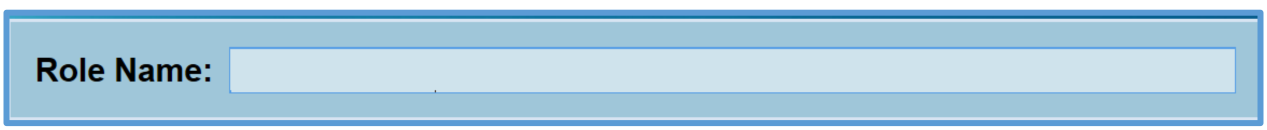
3. Click **Role(s) Menu** or type the corresponding number.

TaxSlayer Pro displays the **Security Roles** dialog box with the predefined roles discussed earlier in this topic:



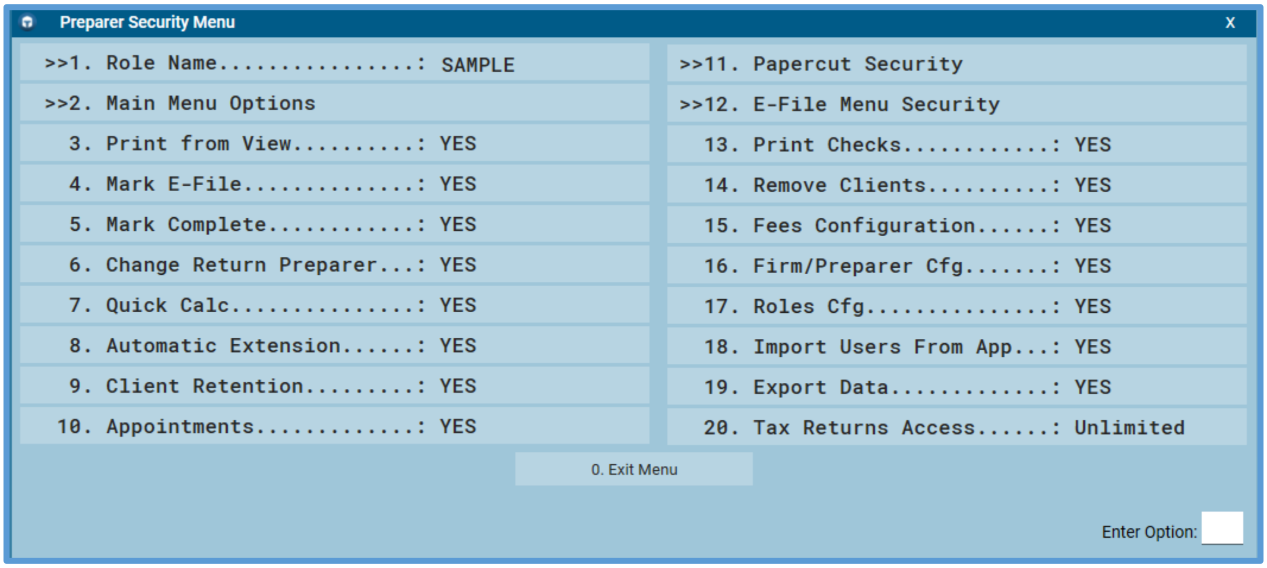
4. To add a new role, click **New**.

TaxSlayer Pro displays the **Role Name** dialog box:



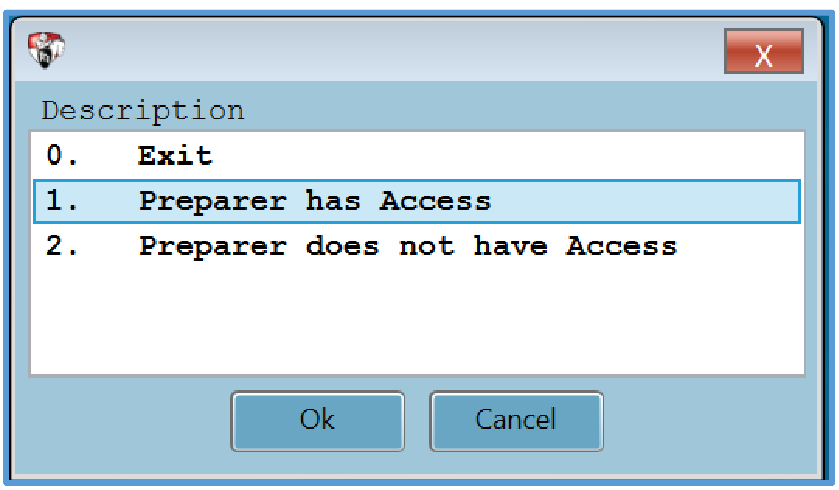
5. Type the name of the role you want to create.
6. Press Enter.

TaxSlayer Pro displays the **Preparer Security Menu**:



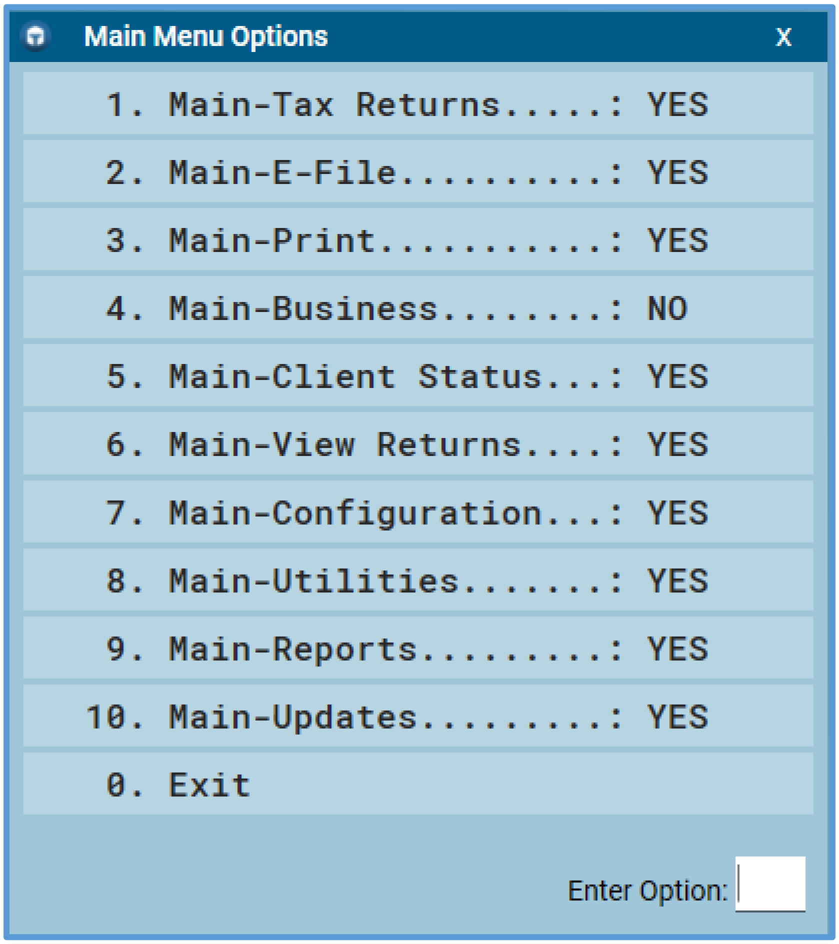
7. Click the permission or type the corresponding number to change that permission for this security template role.

When you click each option, TaxSlayer Pro displays a dialog box similar to the following:



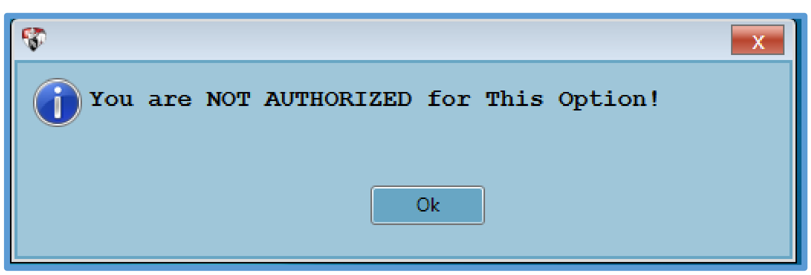
8. Click the correct number to adjust the access for the preparer.
9. Click **Ok** when finished.
10. If you want to change the options the user can access on the TaxSlayer Pro main window, click **Main Menu Options** or type the corresponding number.

TaxSlayer Pro displays the **Main Menu Options** menu:



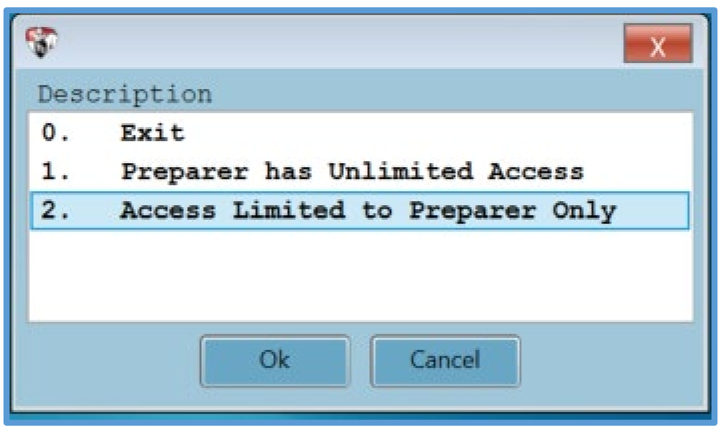
11. Click the options you want to toggle to **NO** so that users in this role cannot access the option on the TaxSlayer Pro main window.

TaxSlayer Pro Tip: When users click an option to which they do not have access, TaxSlayer Pro displays the following dialog box:



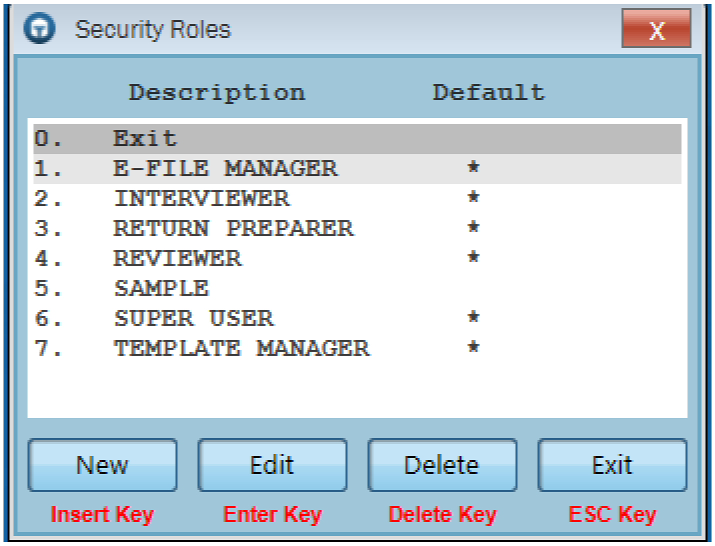
12. Click **Exit** or type the corresponding option.
13. Do **not** adjust the following permissions. VITA/TCE sites do not use these:
    a. Quick Calc
    b. Client Retention
    c. Default Retention Password
    d. Appointments
    e. Papercut Security
    f. Print Checks
    g. Fees Configuration (If your site does not track fees saved)
14. You can determine whether the user can access all tax returns or only returns he or she created. To do so, click **Tax Returns Access** or type the corresponding number.

TaxSlayer Pro displays the following menu:



15. Select the correct option.
16. Click **Ok**.
17. When you finish setting up permissions for the security template, click **Exit Menu**.

TaxSlayer Pro displays the **Security Roles** menu with the new role added:



18. Add new roles as needed.
19. Click **Exit** when you finish adding roles.

Editing Security Templates

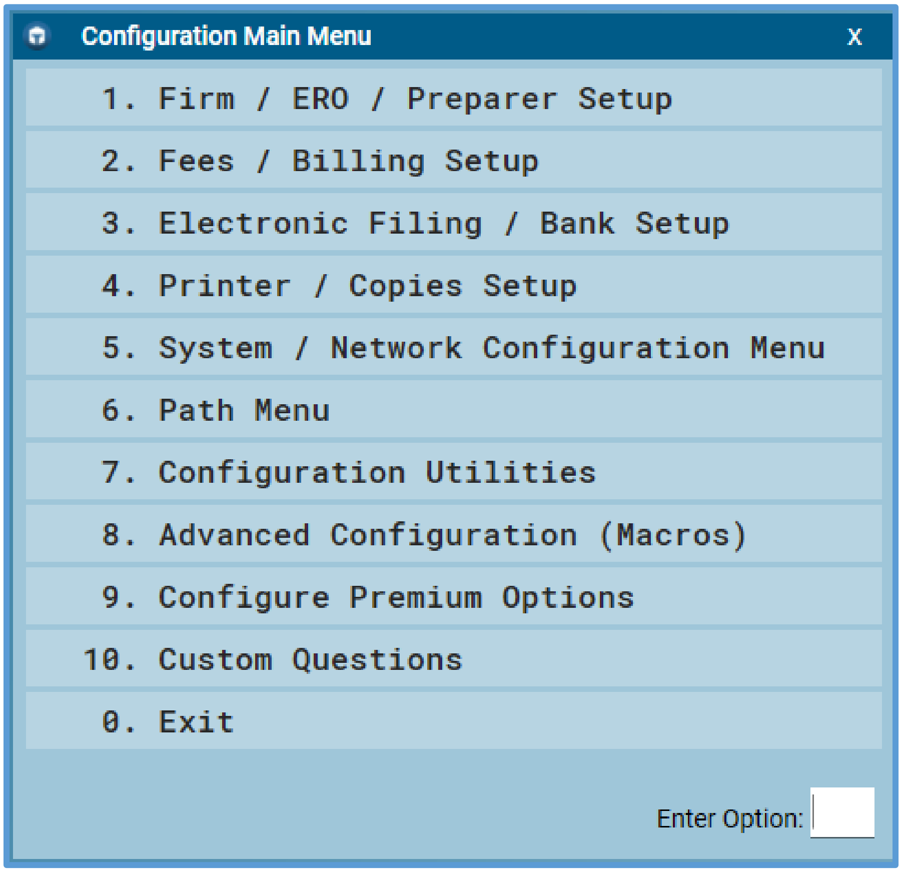
You can edit site-created security roles before or during tax season. If you want changed permissions to automatically update for the preparer, make sure that you select this correctly in preparer setup (see the *Adding Preparers* topic, next).

TaxSlayer Pro Tip: You cannot edit the predefined TaxSlayer roles.

To edit roles later, use the following steps from the TaxSlayer Pro main window:

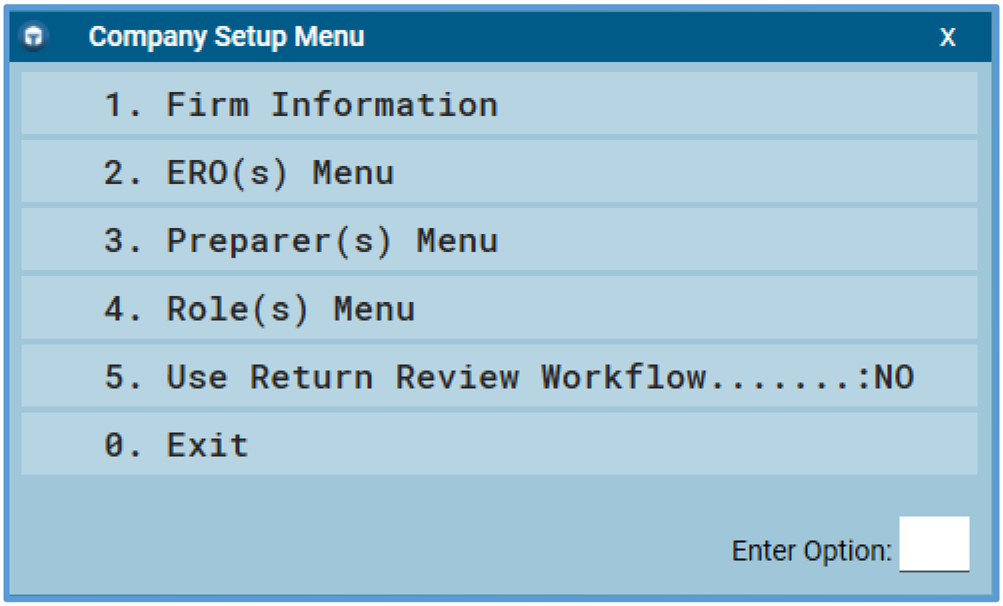
1. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



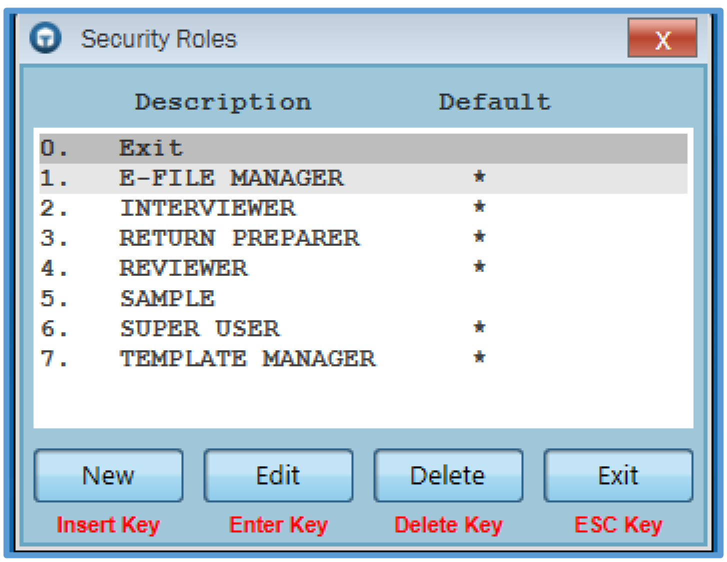
2. Click **Firm/ERO/Preparer Setup** or type the corresponding number.

TaxSlayer Pro displays the **Company Setup Menu**:



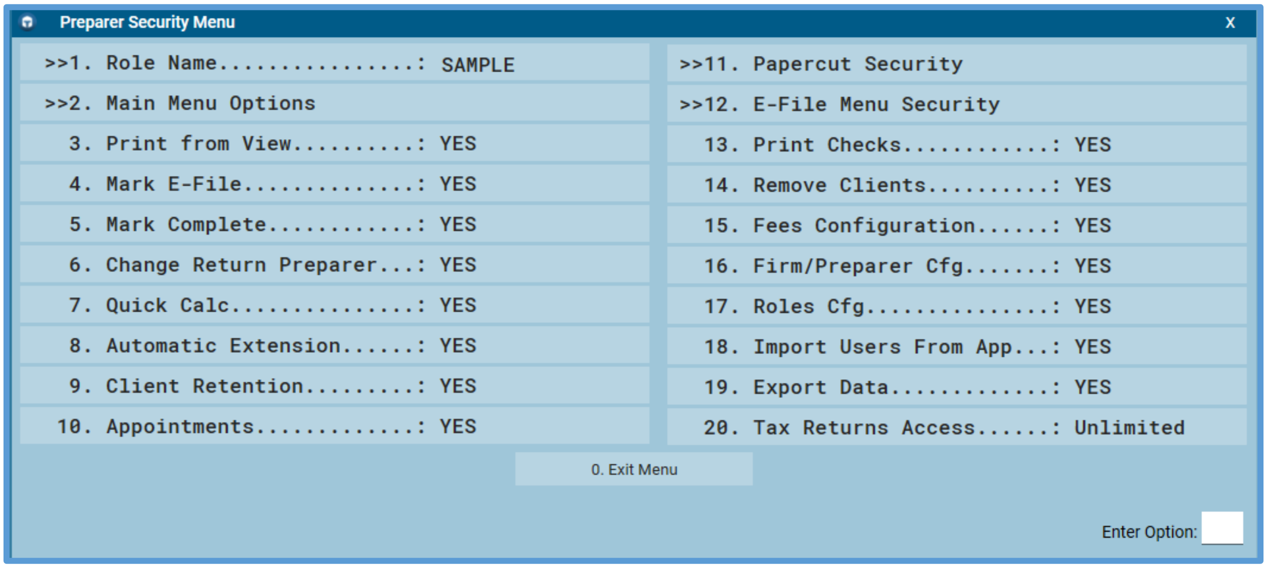
3. Click **Role(s) Menu** or type the corresponding number.

TaxSlayer Pro displays the **Security Roles** dialog box:



4. Click the name of the role you want to change.
5. Click **Edit**.

TaxSlayer Pro displays the **Preparer Security Menu**:



6. Use the same steps you used to set up security roles to change items.
7. When you finish changing permissions, click **Exit Menu**.

Summary

You should now be able to:

- List the security templates delivered with TaxSlayer Pro Desktop.
- Determine which security template to use based on the allowed actions.
- Create a new security template.
- Edit an existing security template.

To see a video of what you just learned, go to Setting up Security Templates. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Adding Preparers

After completing this topic, you will be able to:

- Add a preparer.
- Assign a security template for preparers.
- Control return access.

Adding Preparers

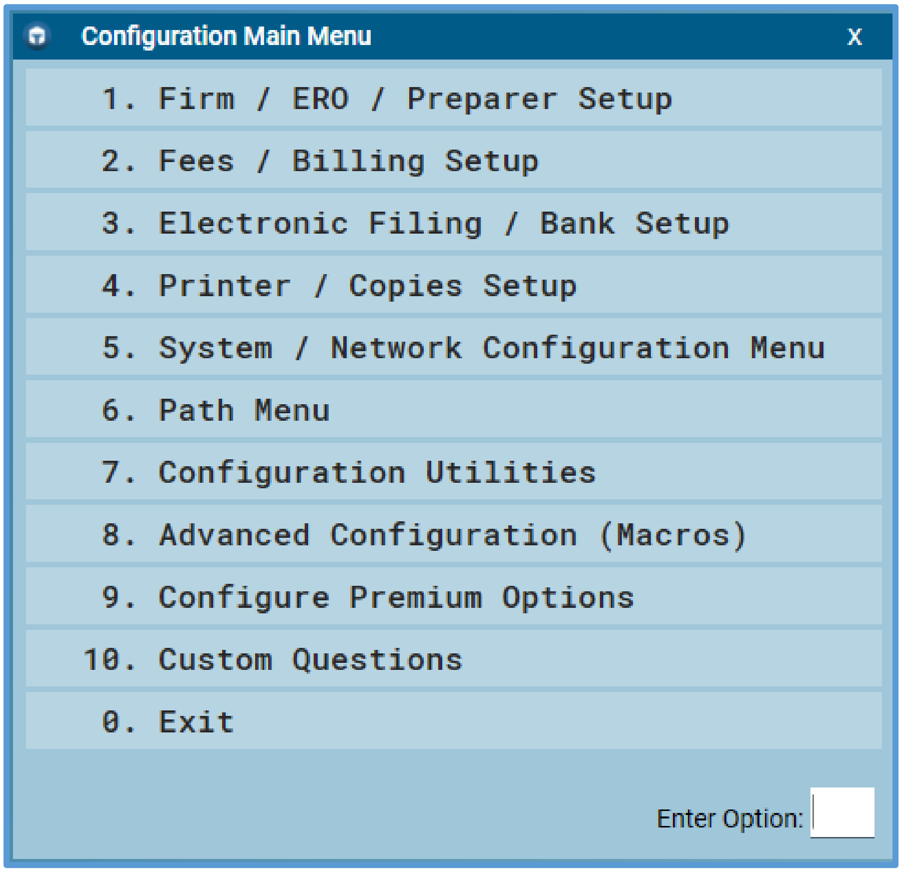
After you configure the information for the office and set up security templates, you need to add preparers. Add each preparer in your office.

TaxSlayer Pro Tip: The ADMIN user will be prompted to change the password during the setup process. This will be covered later.

To add a preparer, use the following steps:

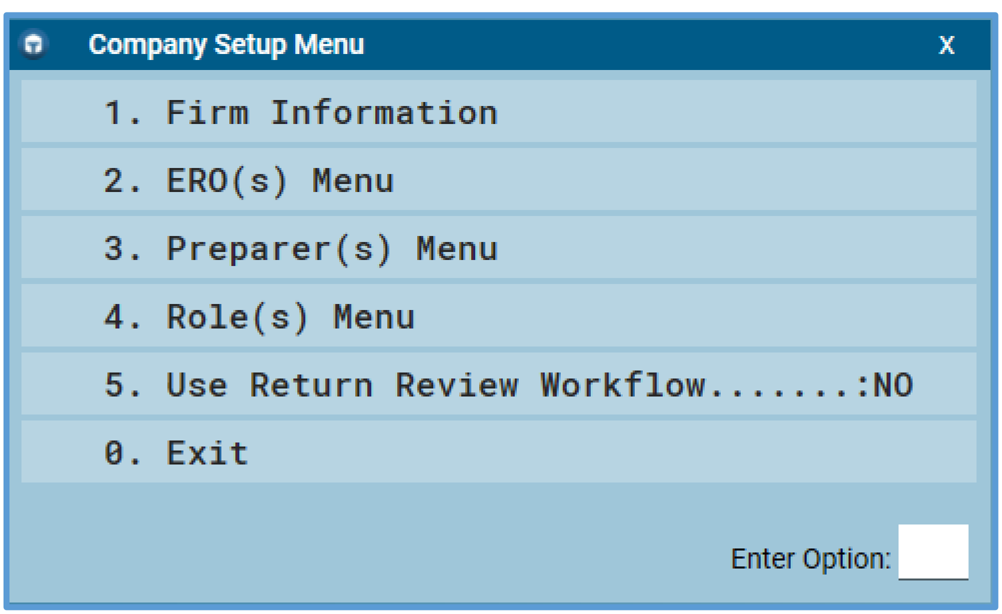
1. From the TaxSlayer Pro main window, click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



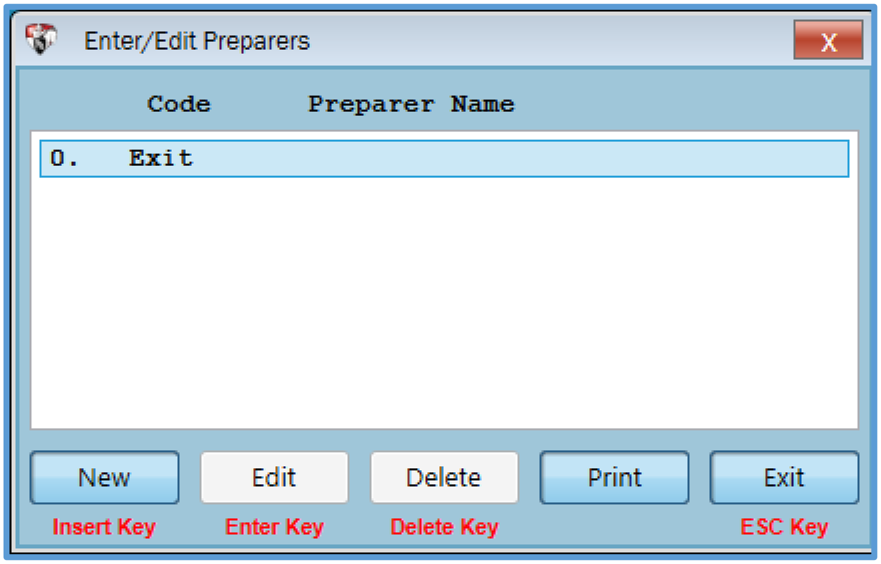
2. Click **Firm/ERO/Preparer Setup** or type the corresponding number.

TaxSlayer Pro displays the **Company Setup Menu**:



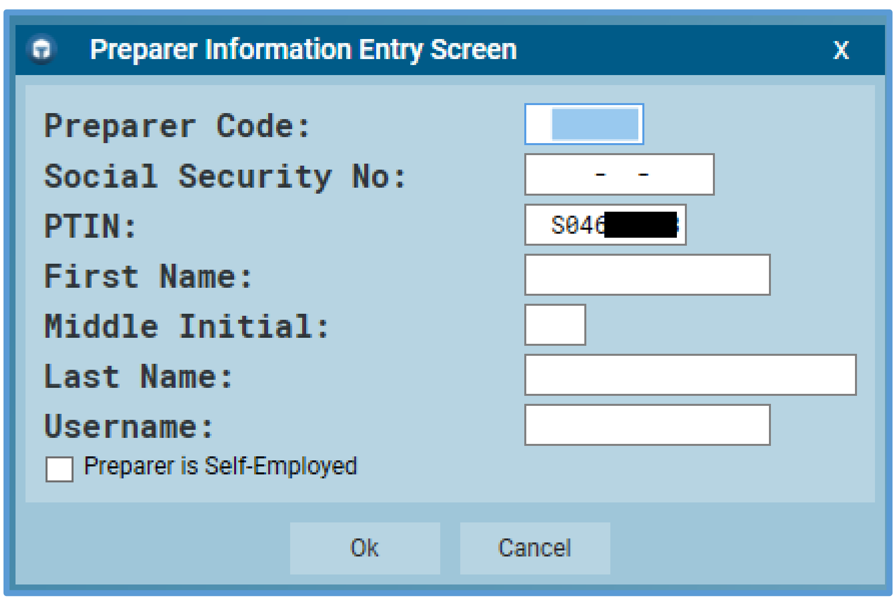
3. Click **Preparer(s) Menu** or type the corresponding number.

TaxSlayer Pro displays the **Enter/Edit Preparers** window:



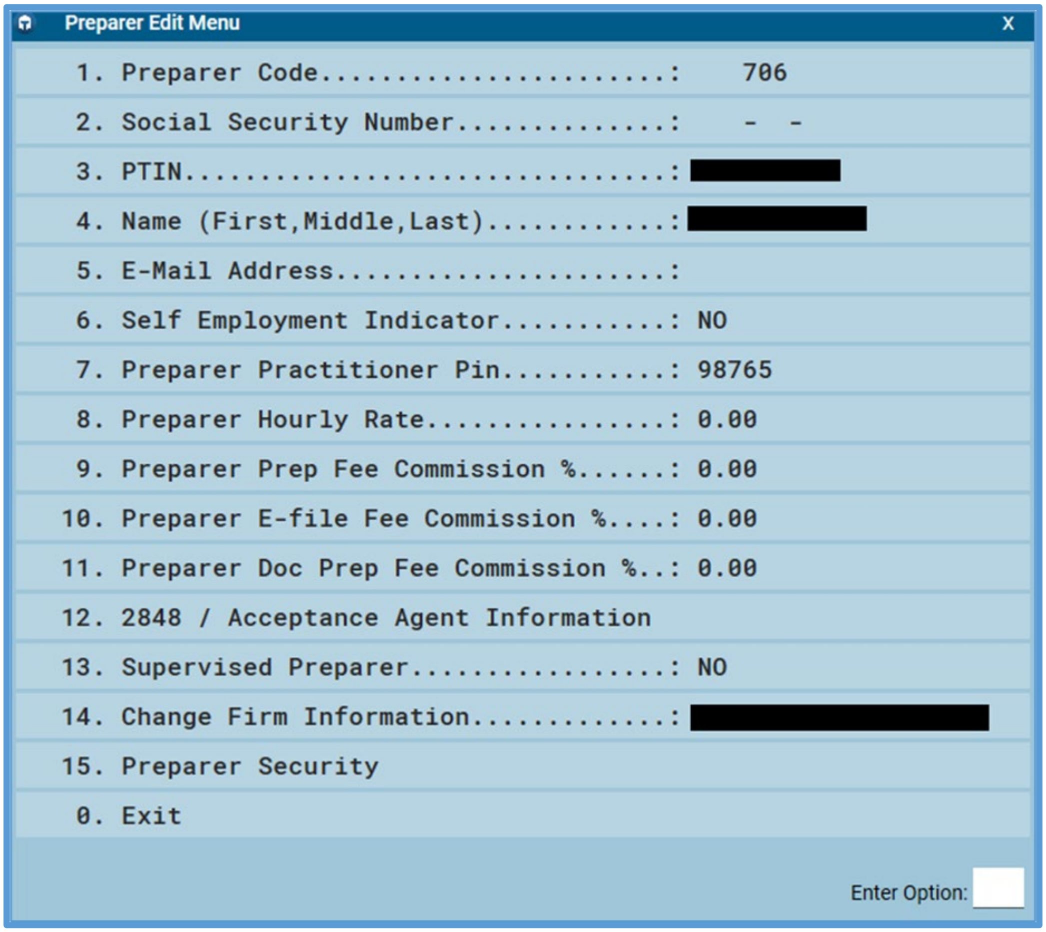
4. To add a new preparer, click **New**.

TaxSlayer Pro displays the **Preparer Information Entry Screen**:



5. Type a preparer code. You can use any number from 1-999. Use a unique code for each preparer.
6. **Do not** type a Social Security number.
7. TaxSlayer Pro carries the SIDN from the number you typed in site configuration.
8. Type the preparer's name in the appropriate boxes.
9. Type a user name for the preparer in the appropriate box.
10. Click **Ok**.

TaxSlayer Pro displays the **Preparer Edit Menu**:

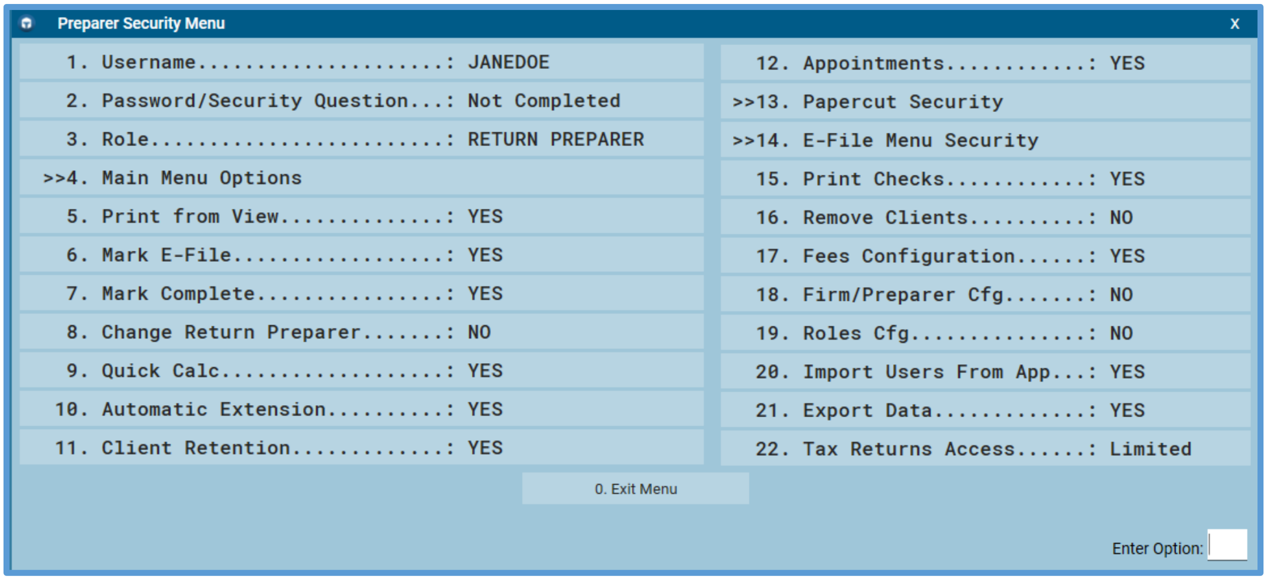


11. Verify the information for the preparer.

TaxSlayer Pro Tip: TaxSlayer Pro generates the practitioner PIN as 98765

12. Click **Preparer Security** or type the appropriate number**.**

TaxSlayer Pro displays the **Preparer Security Menu** with the new user name:



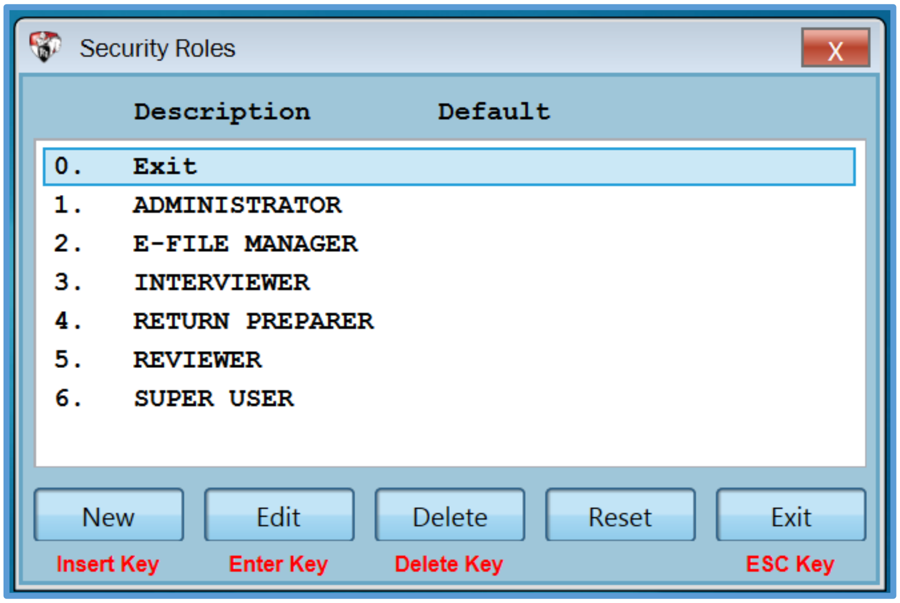
Assigning Security Templates

For each preparer, you should assign the correct security template. For information on the default security templates and creating new security templates, see [Setting up Security Templates].

To assign a security template for a preparer from the **Preparer Security Menu**, use the following steps:

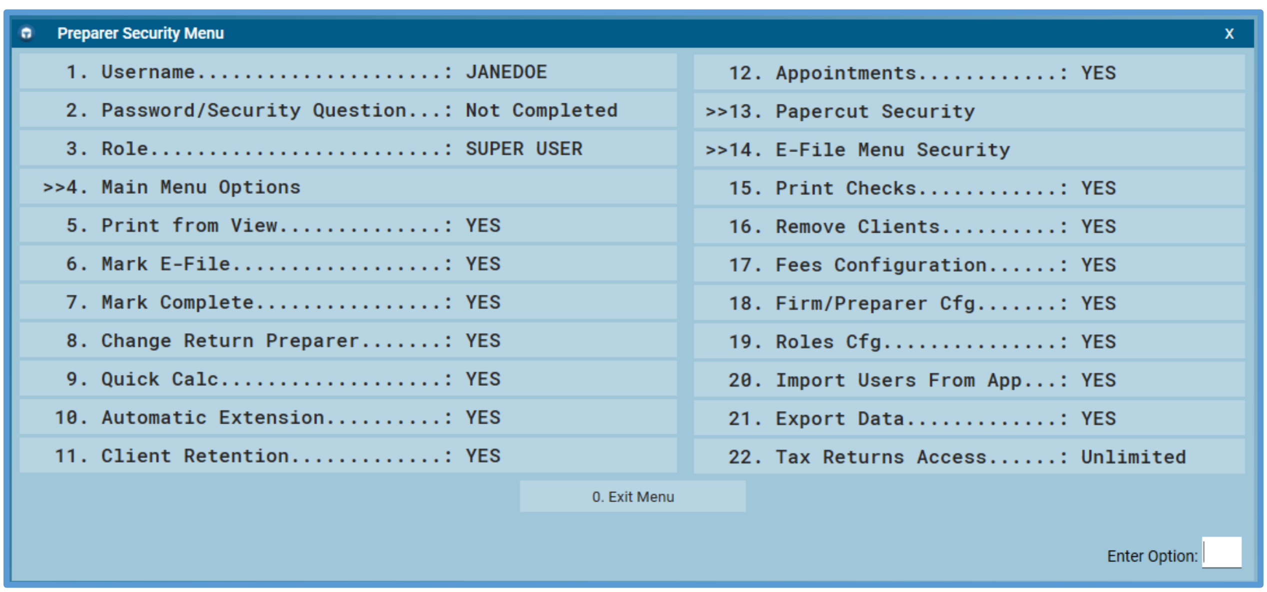
1. Click **Role** or type the corresponding number.

TaxSlayer Pro displays the **Security Roles** menu:



Click the security role you want to use for this preparer or type the corresponding number.

TaxSlayer Pro displays the **Preparer Security Menu** with the new role name listed:



TaxSlayer Pro Tip: If you need to make a security change specific to the user, you can do this by clicking the appropriate option.

Summary

You should now be able to:

- Add a preparer.
- Assign a security template for preparers.
- Control return access.

To see a video of what you just learned, go to Adding Preparers. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Custom Questions

After completing this topic, you will be able to:

- Configure questions and answers.
- List the number of possible answer choices you can add.

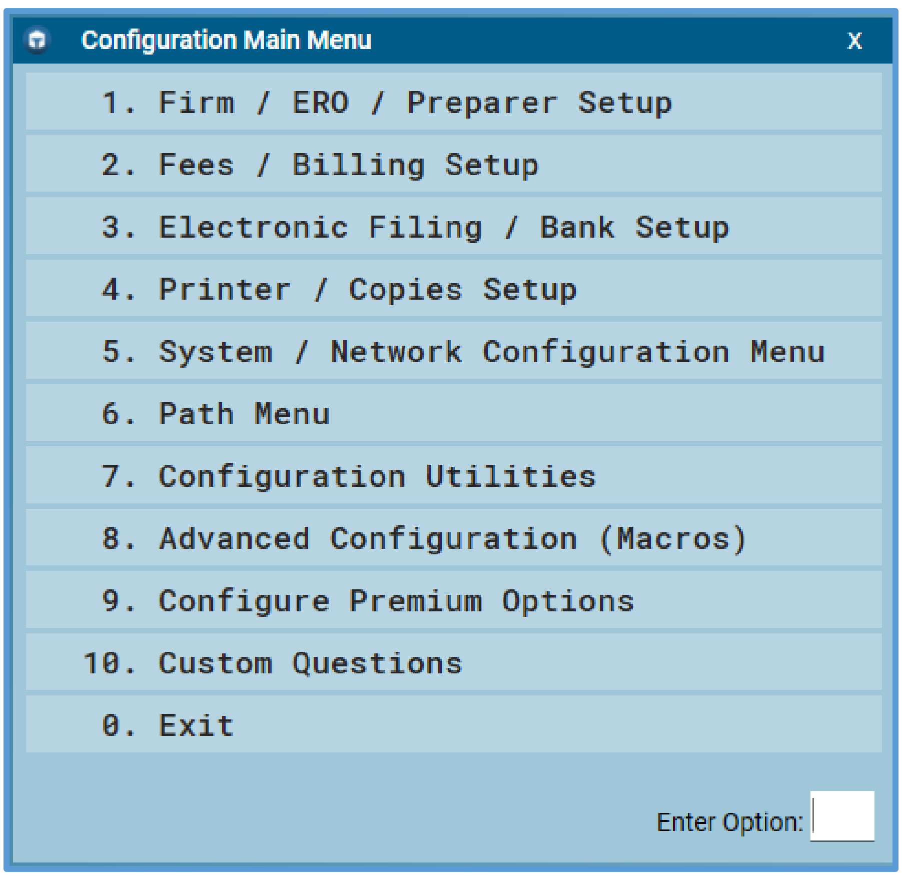
TaxSlayer Pro allows you to set up custom questions that preparers should answer while interviewing a taxpayer. You can use only the predefined questions or add more questions.

Adding Custom Questions

To access custom questions from the TaxSlayer Pro main window, use the following steps:

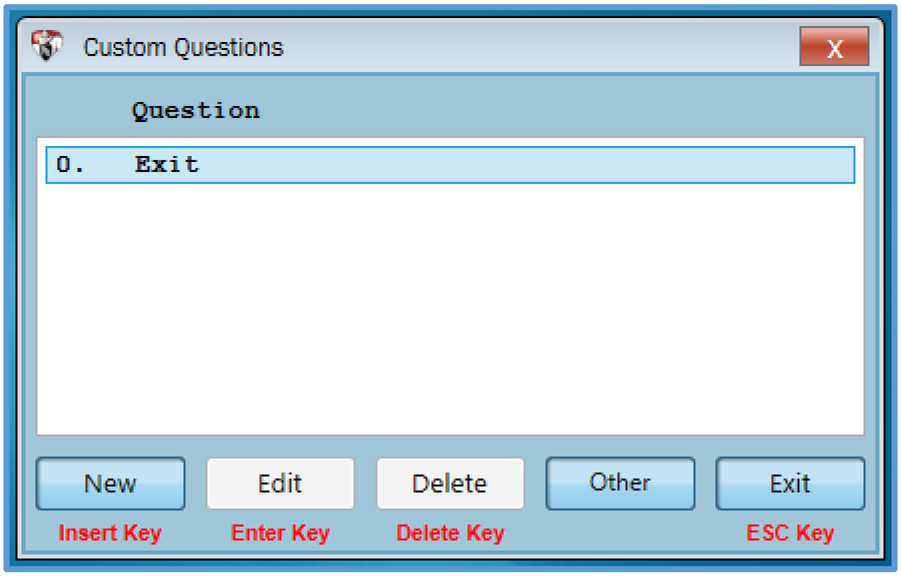
1. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:

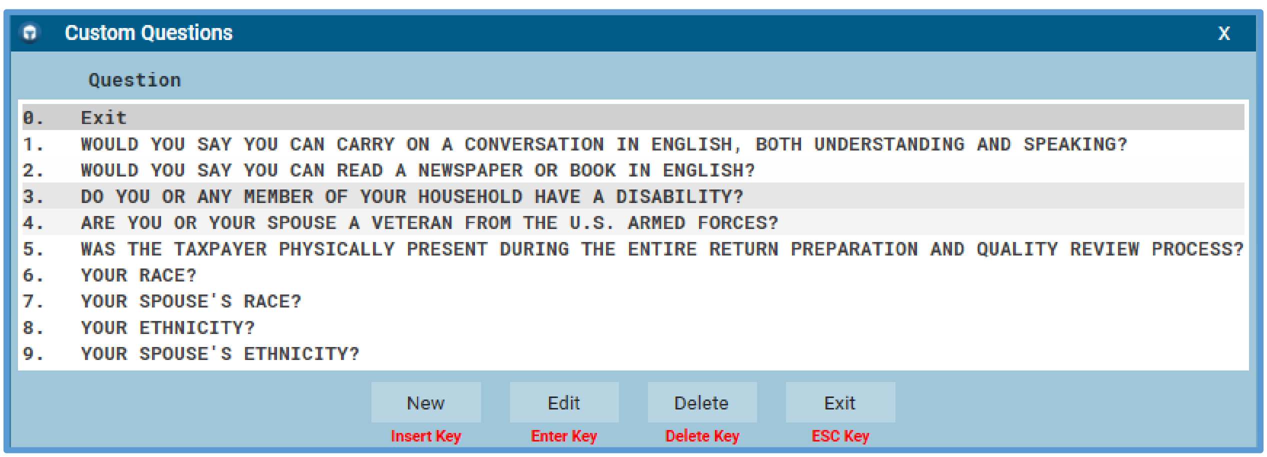


2. Click **Custom Questions** or type the corresponding number.

TaxSlayer Pro displays the **Custom Questions** menu:

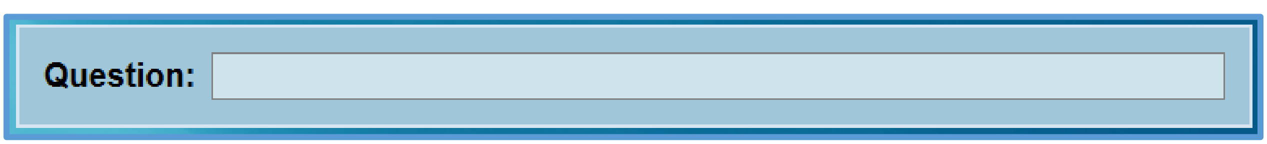


TaxSlayer Pro Tip: TaxSlayer Pro provides predefined questions in the tax returns. You cannot edit these questions from the **Custom Questions** configuration menus.



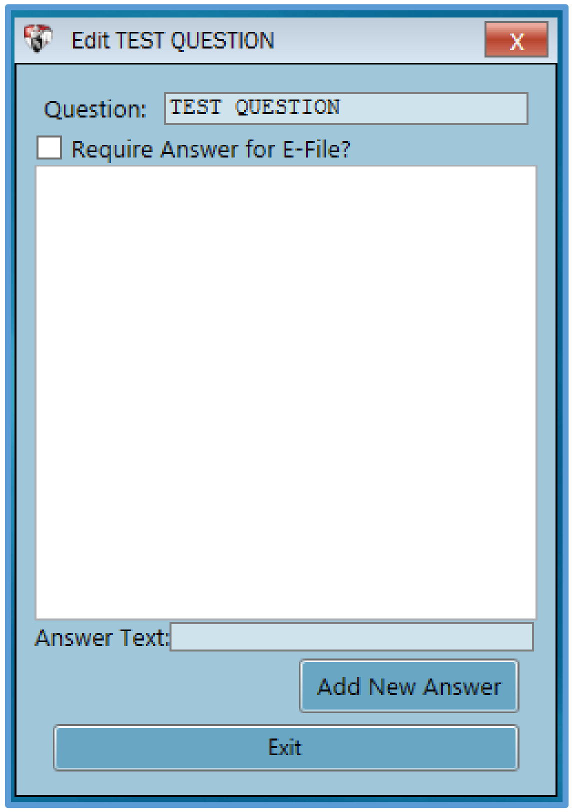
3. To add a new question, click **New**.

TaxSlayer Pro displays the **Question** box:



4. Type the question.
5. Press Enter.

TaxSlayer Pro displays the **Edit…** menu:

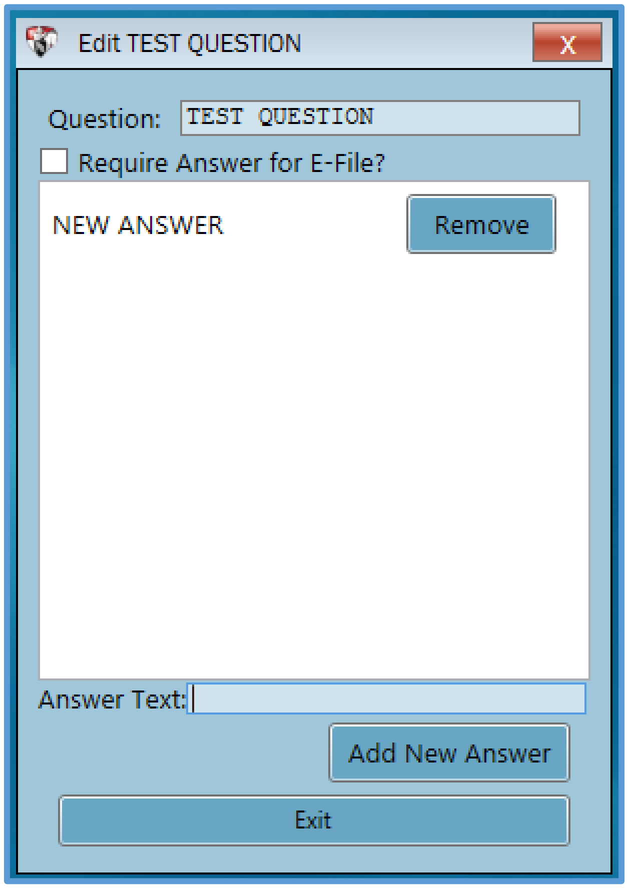


6. If you want to require preparers to answer this question, select the **Require Answer for E-File?** check box.

TaxSlayer Pro Tip: If you require the answer to a question, you **cannot** mark the return for e-file unless you answer the question.

7. Type the first answer choice in the **Answer Text** box.
8. Click **Add New Answer**.

TaxSlayer Pro displays the new answer choice:



9. Repeat the steps to add an unlimited number of answers.
10. If you want to delete an answer choice, click **Remove** for that answer.
11. When you finish adding answer choices, click **Exit**.

Summary

You should now be able to:

- Configure questions and answers.
- List the number of possible answer choices.

To see a video of what you just learned, go to Working with Custom Questions. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Configuring Printing

After completing this topic, you will be able to:

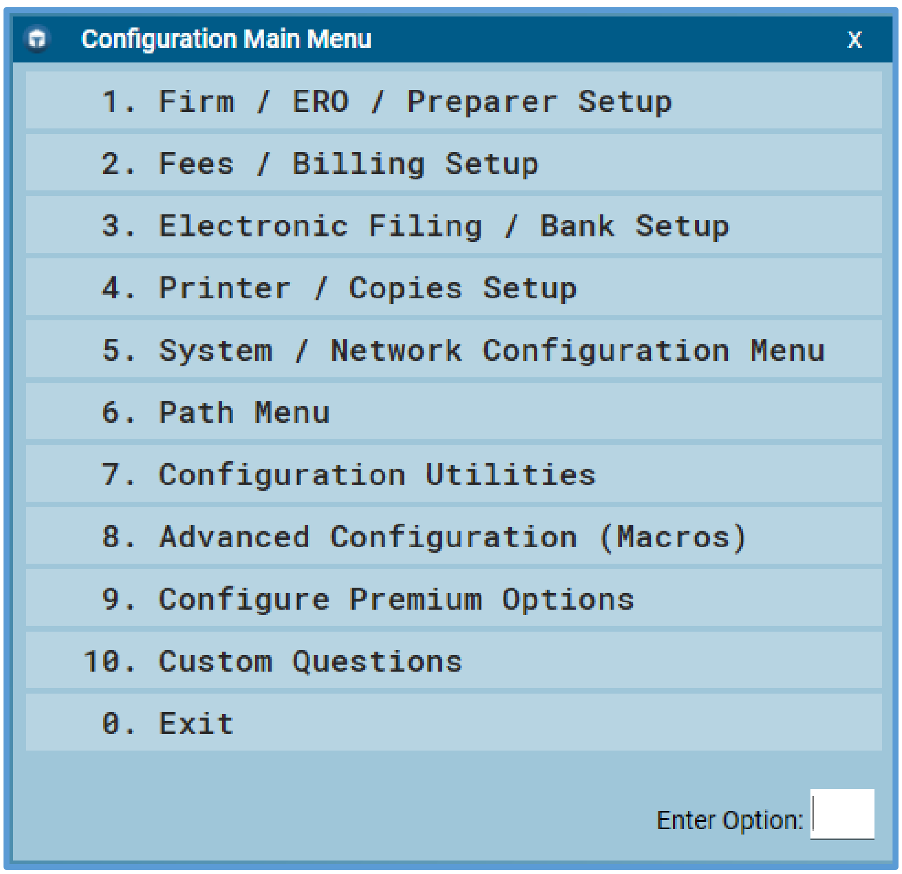
- List the predefined print sets.
- Determine which print set to use for the taxpayer.
- Change the number of copies to print.

Setting up the Printer

Next, you need to set up printing. To set up a default printer from the TaxSlayer Pro main window, use the following steps:

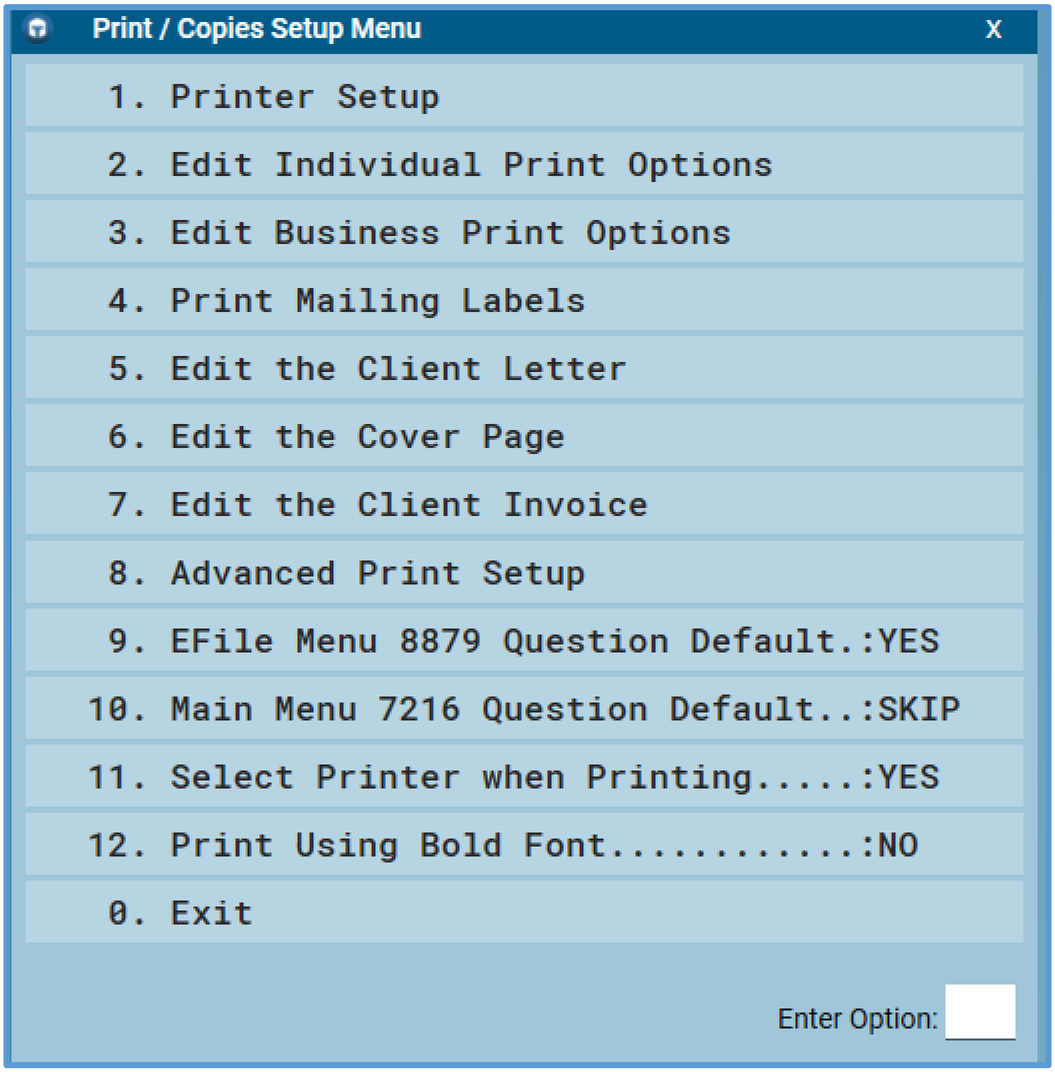
1. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



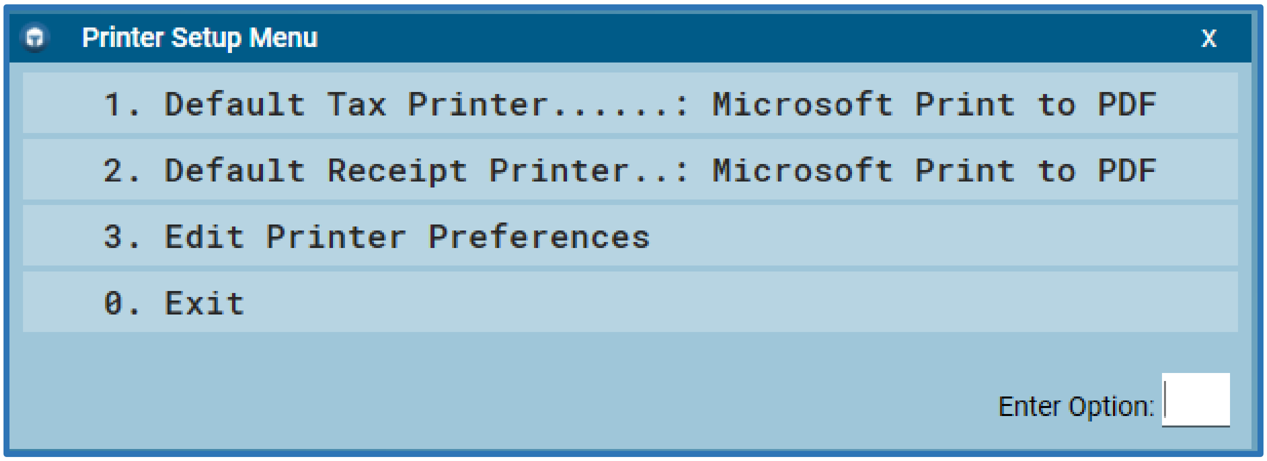
2. Click **Printer/Copies Setup** or type the corresponding number.

TaxSlayer Pro displays the **Print/Copies Setup Menu**:



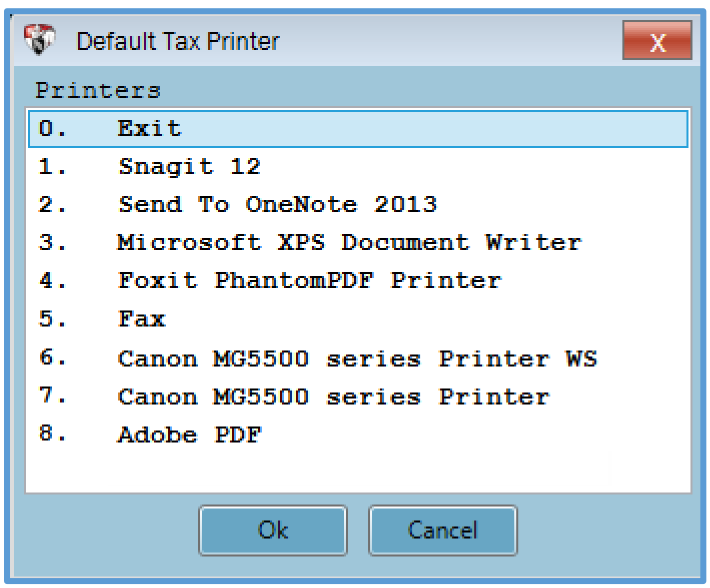
3. Click **Printer Setup** or type the corresponding number.

TaxSlayer Pro displays the **Printer Setup Menu**, listing the printer you have set up as your computer's default printer as the default TaxSlayer Pro printer:



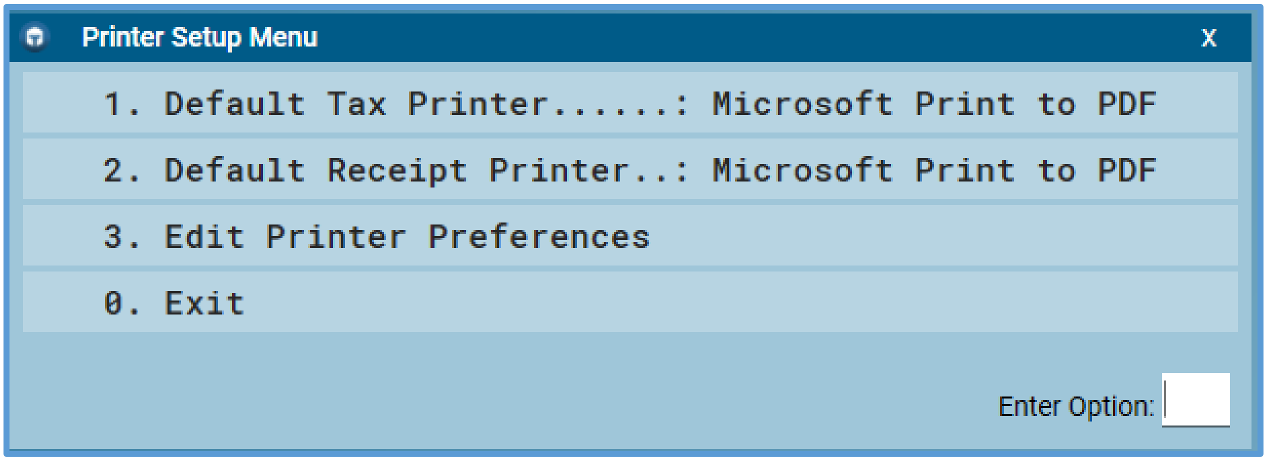
4. Verify that the listed printer is the one you want to use for TaxSlayer Pro. If you want to change the printer, click **Default Tax Printer**.

TaxSlayer Pro displays the **Default Tax Printer** menu:



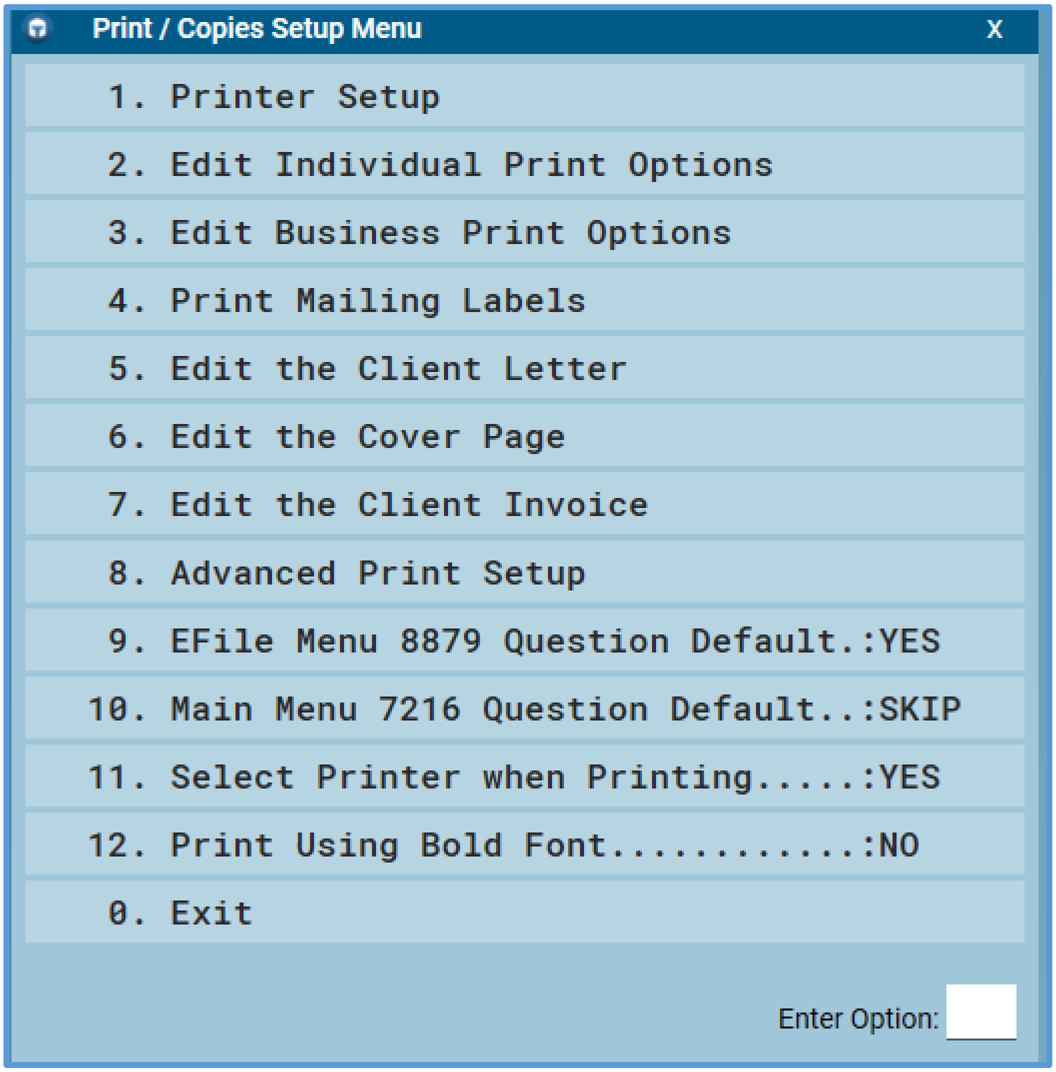
5. Click the printer you want to use as your TaxSlayer Pro default printer.
6. Click **Ok**.

TaxSlayer Pro displays the **Printer Setup Menu** with the printer you selected:



7. Click **Exit** or type the corresponding number.

TaxSlayer Pro displays the **Print/Copies Setup Menu**:

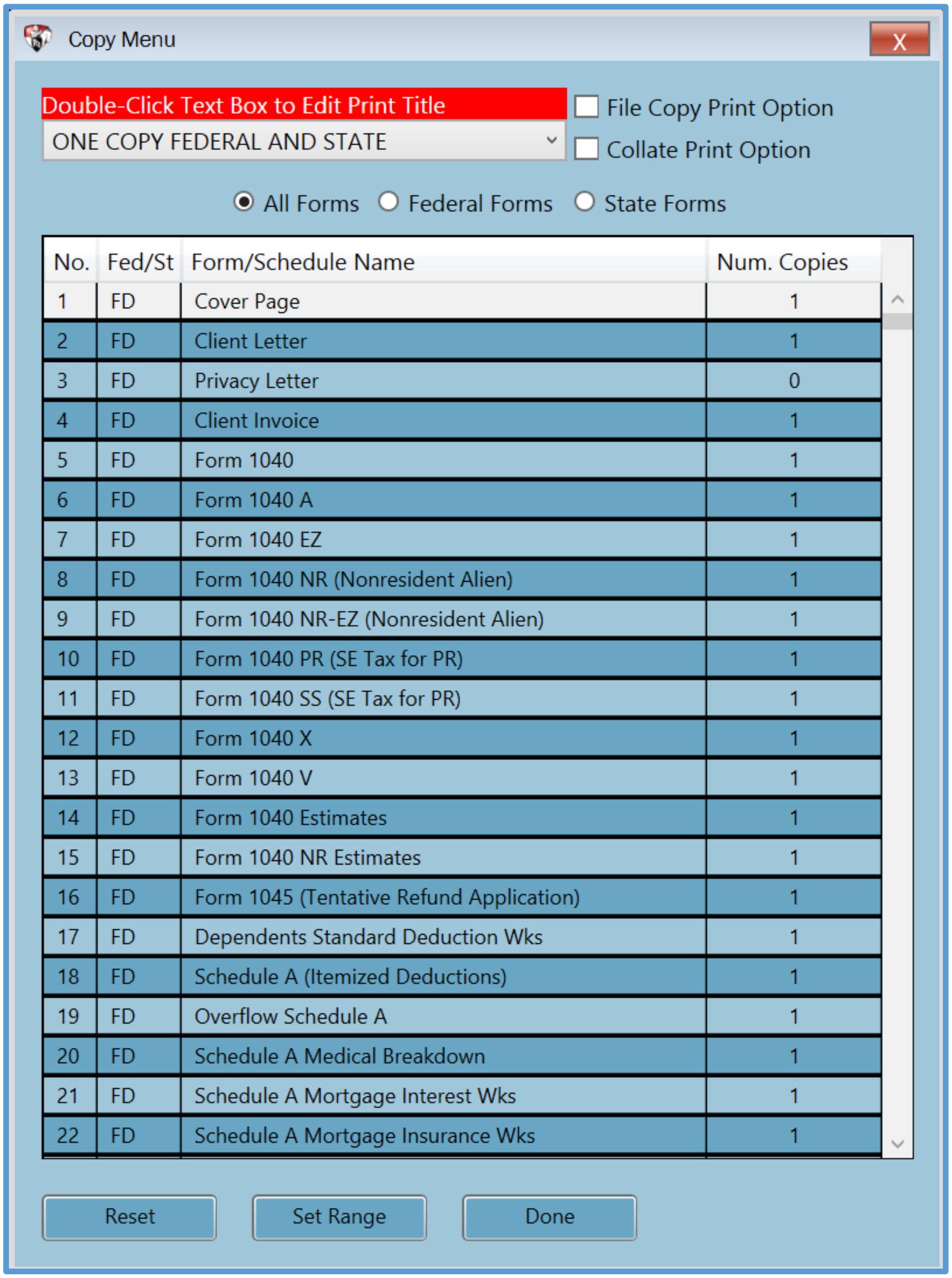


Print Sets

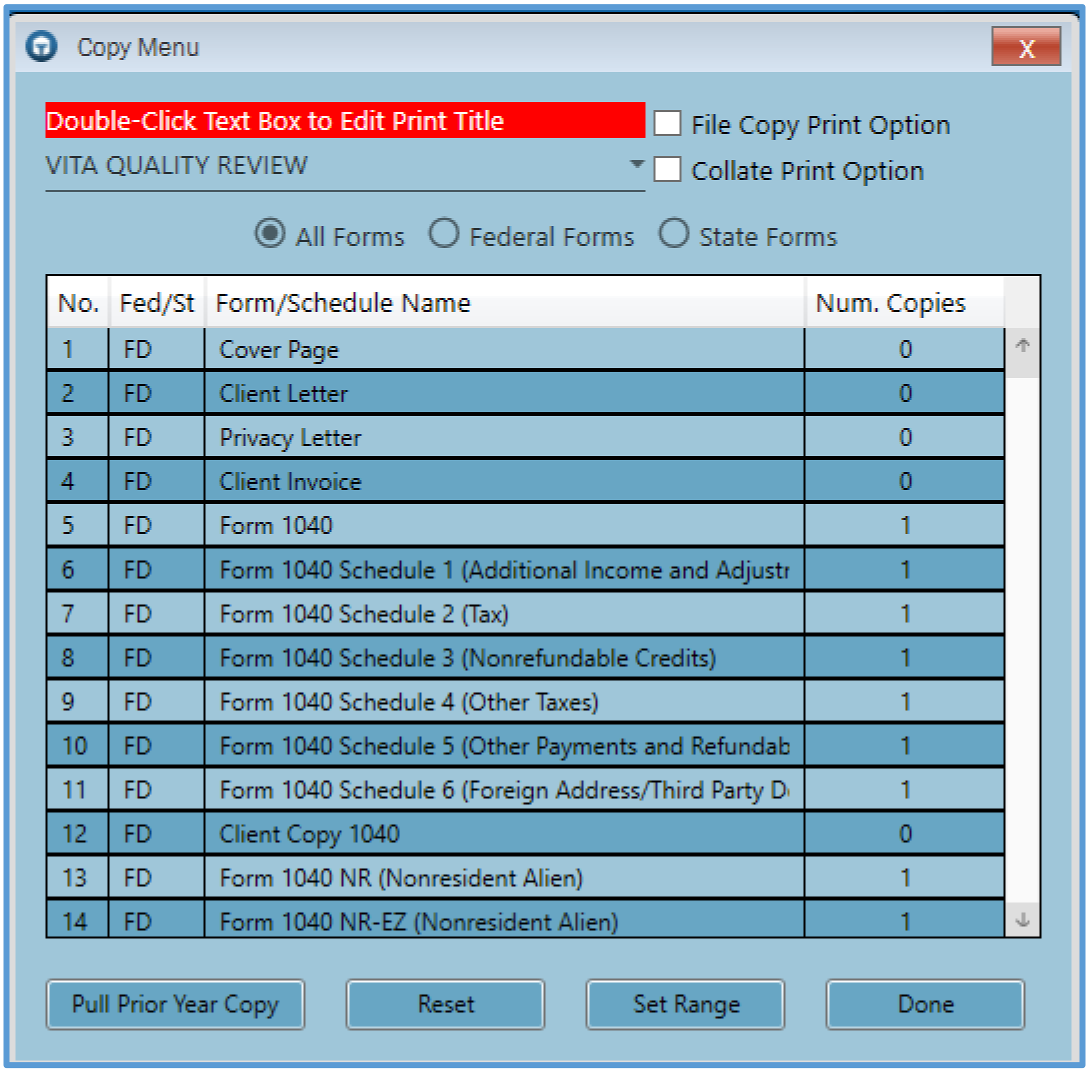
After you select the printer you want to use, you need to review the predefined print sets and make any necessary changes for your site's print sets. To do this from the **Print/Copies Setup Menu**, use the following steps:

1. Click **Edit Individual Print Options** or type the corresponding number.

TaxSlayer Pro displays the **Copy Menu**:



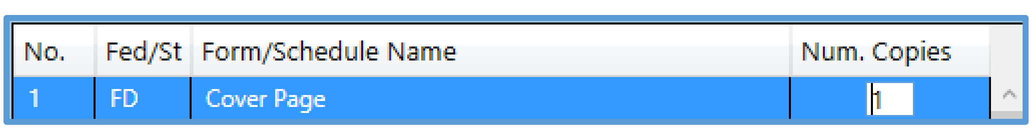
2. Review the predefined print sets so you know what forms and how many copies of each form are printed with each print set. In most cases, you should use one of the print sets designated as VITA. TaxSlayer Pro designed these print sets to follow the IRS guidelines.



Changing the Number of Copies

To change the number of copies for an individual form, use the following steps:

1. Click the **Num. Copies** column for the form.



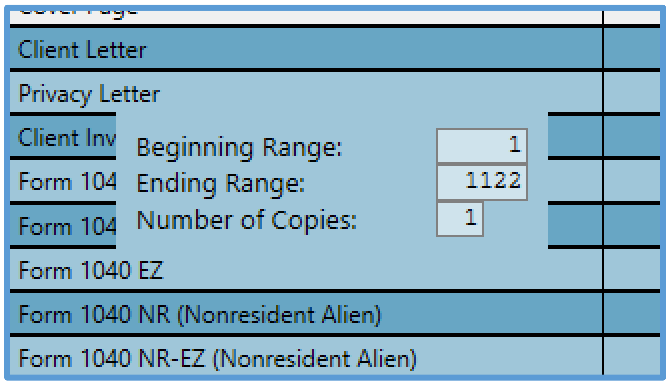
2. Type the number of copies you want to print.

3. Press Enter.

To change the number of copies for a range of forms in the print set, use the following steps:

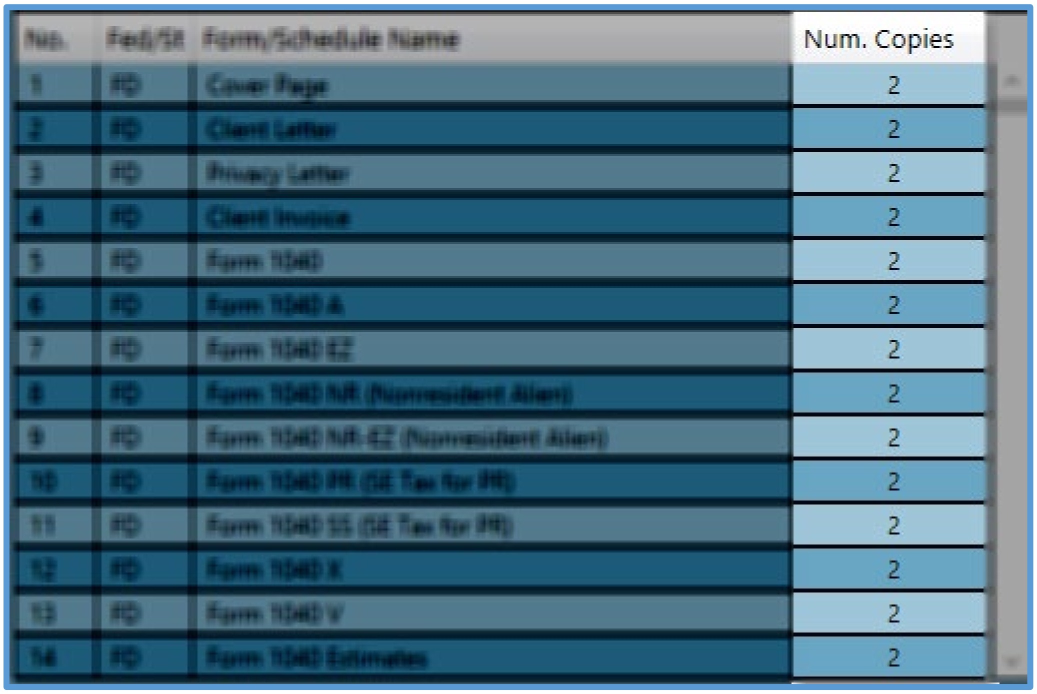
1. Click **Set Range**.

TaxSlayer Pro displays the range window:



2. Verify the **Beginning Range** and **Ending Range** boxes. The numbers here correspond to the number of the form, as listed in the print set. If you want to change the number of copies in all forms for this print set, leave the range as it is.
3. Type the correct number in the **Number of Copies** box.
4. Press Enter.

TaxSlayer Pro displays the new number of copies in the print set:



No.	Fed/St	Form/Schedule Name	Num. Copies
1	FD	Cover Page	2
2	FD	Client Letter	2
3	FD	Privacy Letter	2
4	FD	Client Invoice	2
5	FD	Form 1040	2
6	FD	Form 1040 A	2
7	FD	Form 1040 EZ	2
8	FD	Form 1040 NR (Nonresident Alien)	2
9	FD	Form 1040 NR-EZ (Nonresident Alien)	2
10	FD	Form 1040 PR (SE Tax for PR)	2
11	FD	Form 1040 SS (SE Tax for PR)	2
12	FD	Form 1040 X	2
13	FD	Form 1040 V	2
14	FD	Form 1040 Estimates	2

5. When you finish making changes to the print sets, click **Done**.

Summary

You should now be able to:

- List the predefined print sets.
- Determine which print set to use for the taxpayer.
- Change the number of copies to print.

To see a video of what you just learned, go to Configuring Printing. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Managing Returns

After completing this topic, you will be able to:

- Set up Return Tags.
- Filter returns by Return Tags.
- Delete returns.
- Recall returns.
- Back up returns from non-networked computers.
- Recall returns from non-networked computers.

Working with Return Tags

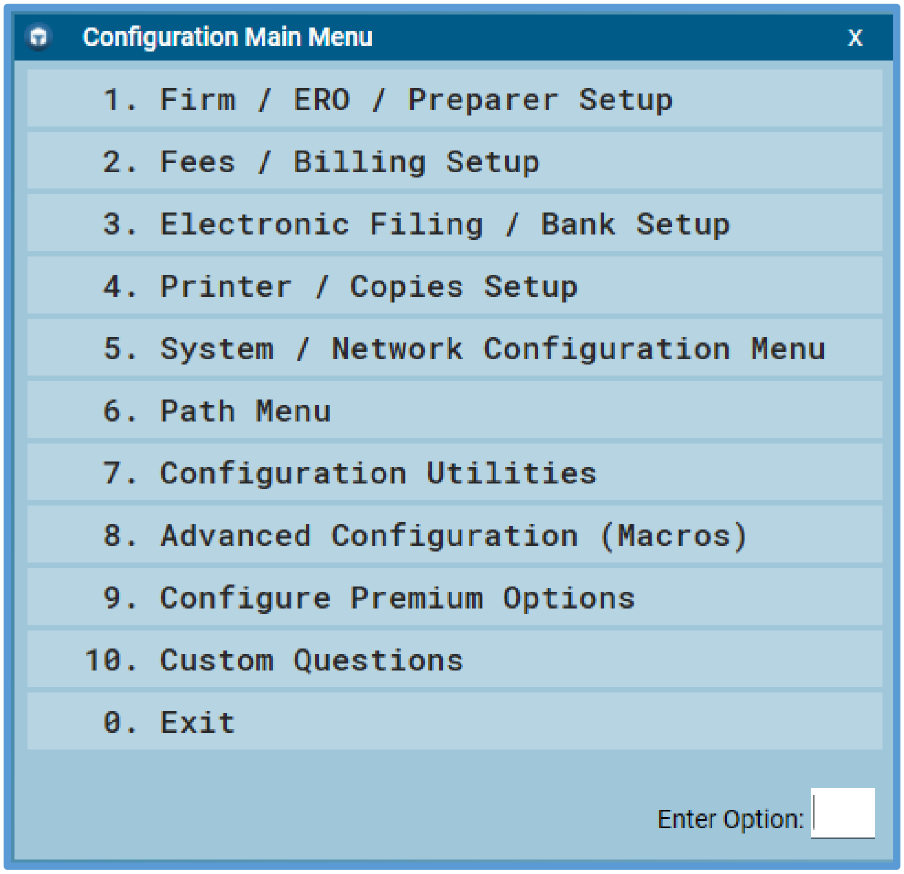
TaxSlayer Pro allows you to set up return tags to manage your returns. With return tags, you can designate a customized status.

Setting up Return Tags

TaxSlayer Pro does not have default return tags. You can create these while configuring macros. To add return tags in TaxSlayer Pro, use these steps from the TaxSlayer Pro main window:

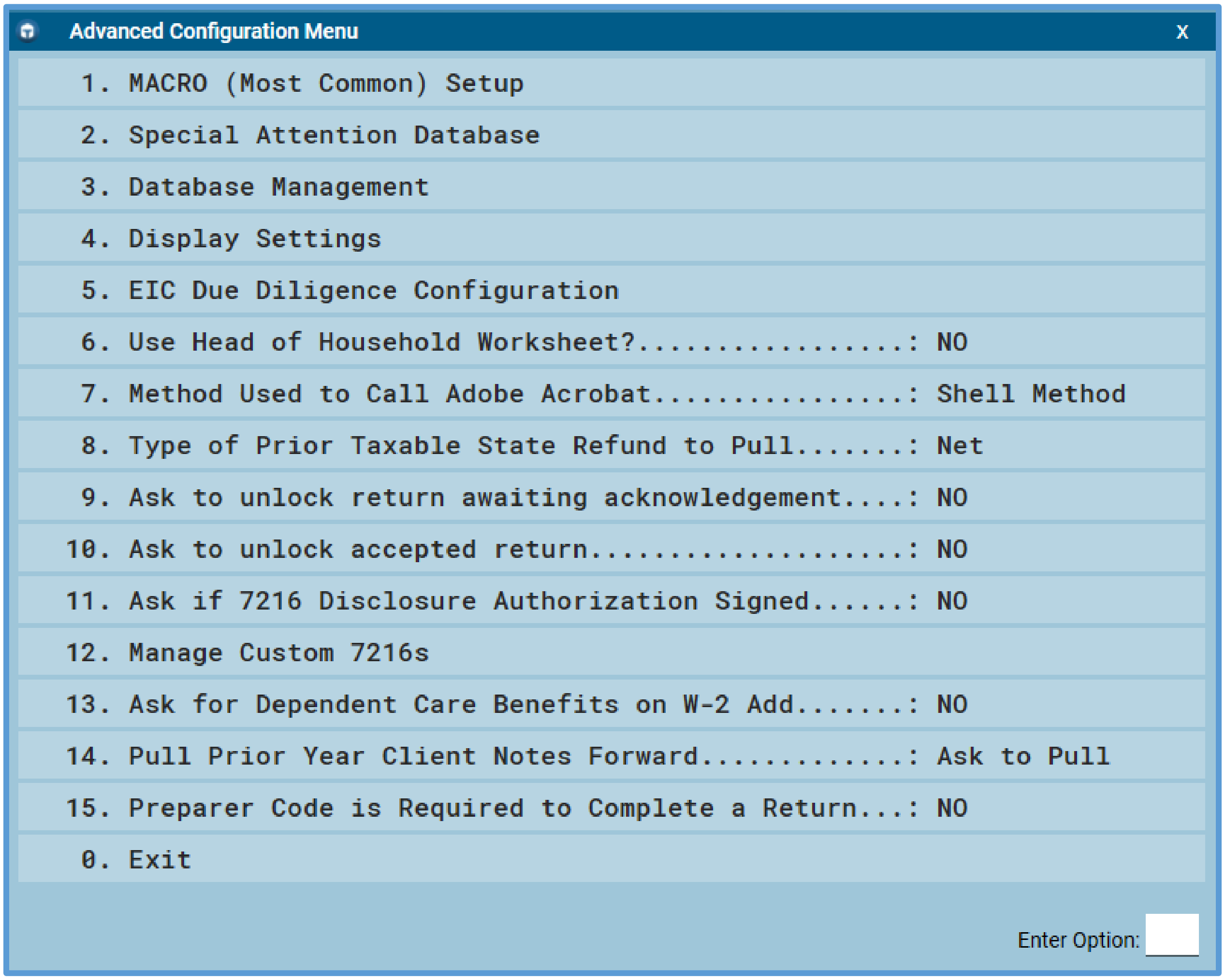
1. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



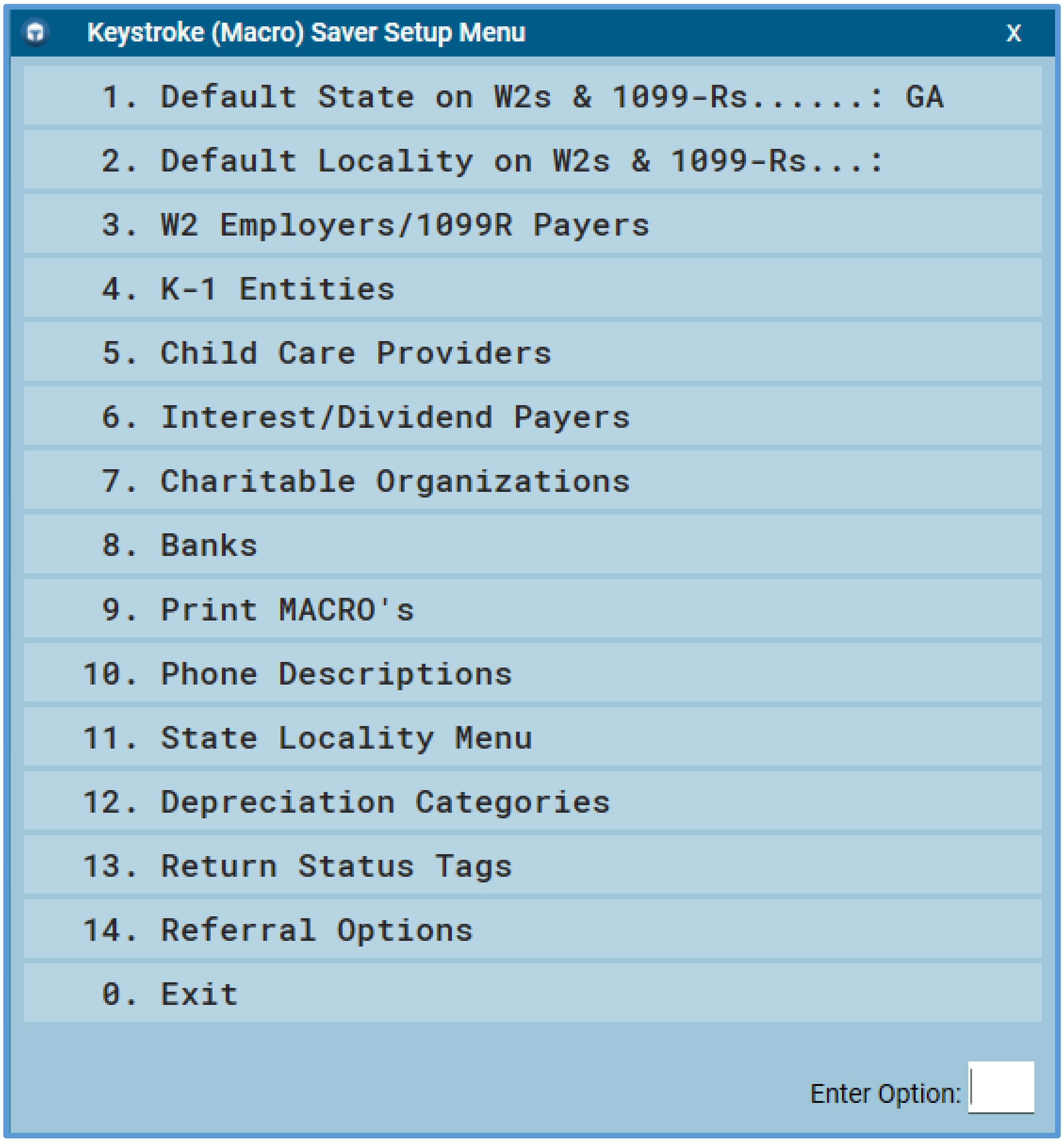
2. Click **Advanced Configuration (Macros)** or type the corresponding number.

TaxSlayer Pro displays the **Advanced Configuration Menu**:



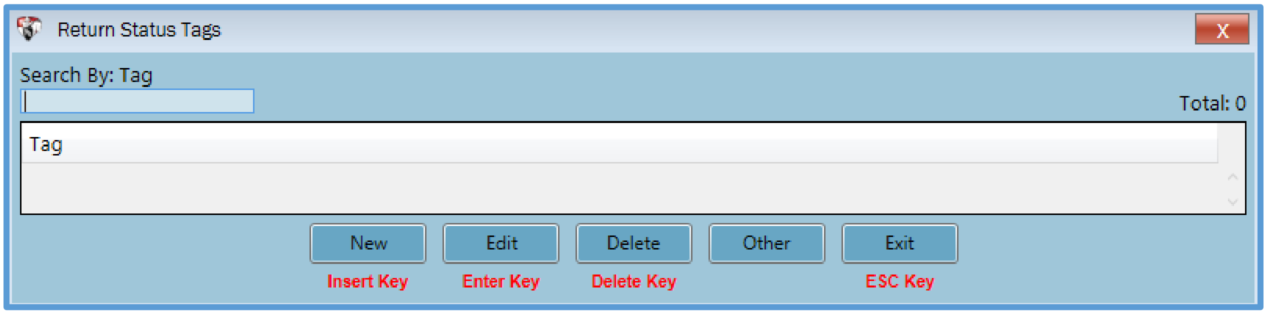
3. Click **MACRO (Most Common) Setup** or type the corresponding number.

TaxSlayer Pro displays the **Keystroke (Macro) Saver Setup Menu**:



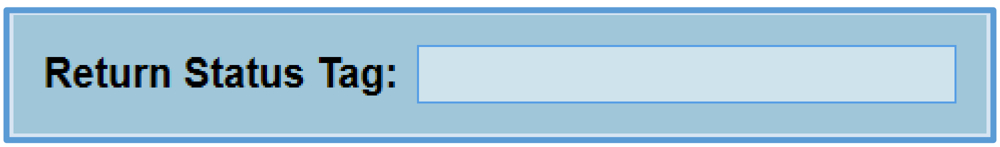
4. Click **Return Status Tags** or type the corresponding number.

TaxSlayer Pro displays the **Return Status Tags** menu:



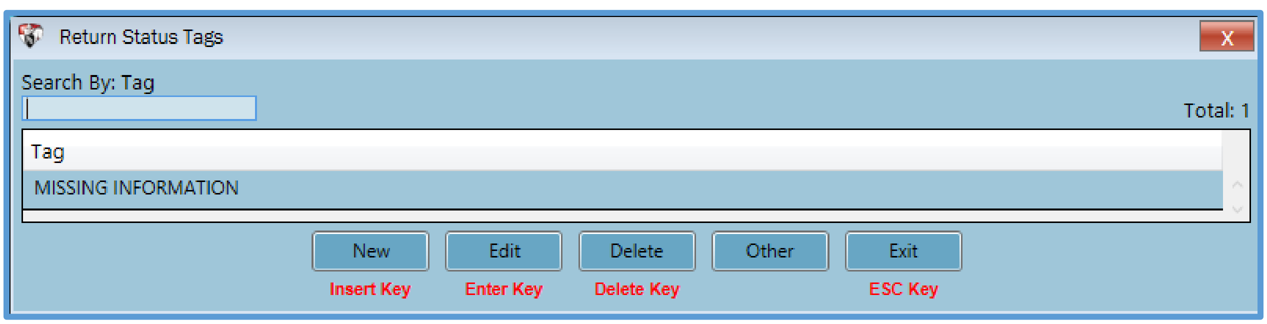
5. To add a new return tag, click **New**.

TaxSlayer Pro displays the **Return Status Tag** box:



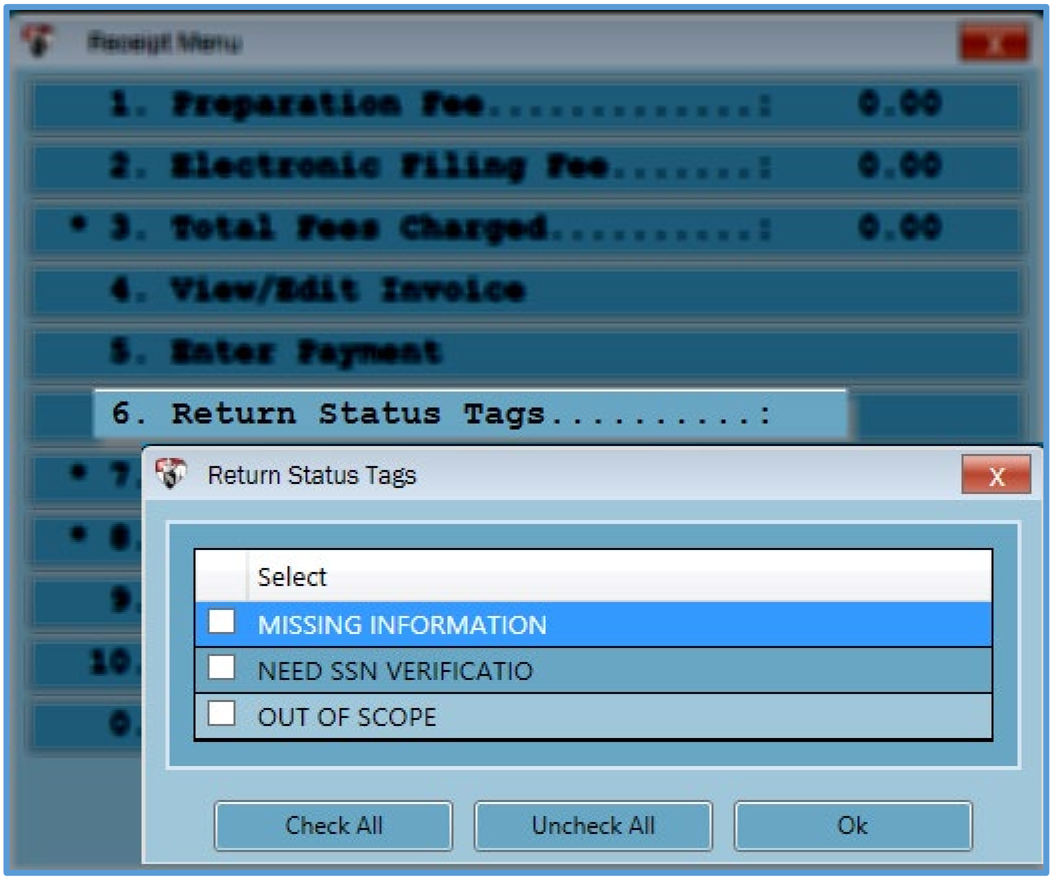
6. Type the name of the return tag you want to use.
7. Press Enter.

TaxSlayer Pro displays the **Return Status Tags** menu with the new return tag listed:



8. Repeat the steps until you add all the return tags you want.
9. Click **Exit**.

When a preparer exits a return, he or she can designate a return tag in the **Receipt Menu**:



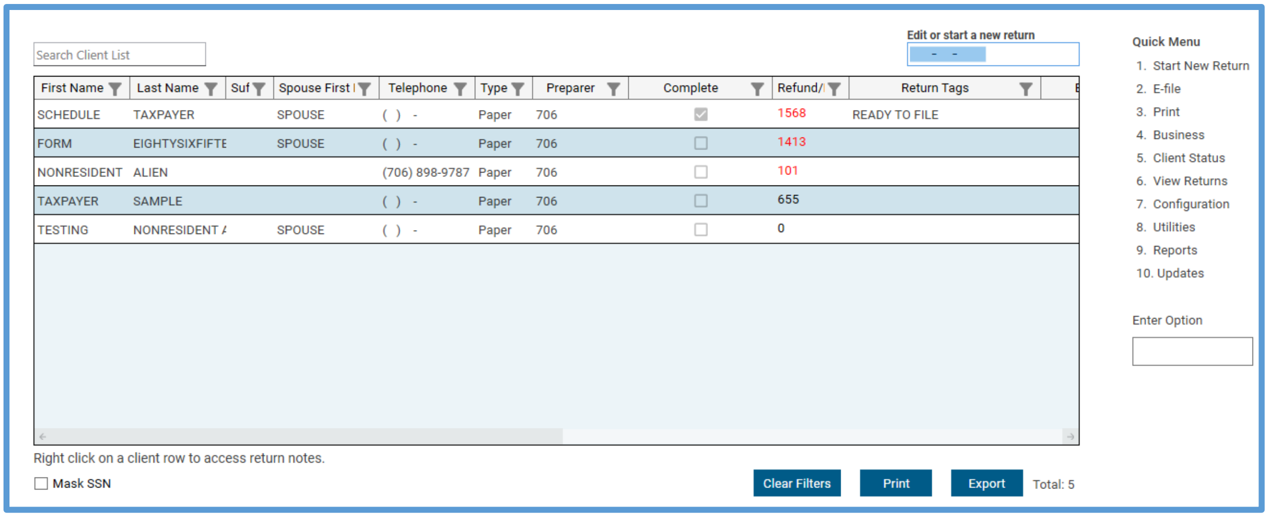
Filtering Returns by Return Tags

You can filter returns by return tags. When you do this, you can determine any actions that you need to take to complete returns. To filter returns, use the following steps from the TaxSlayer Pro main window:

1. Click **Tax Returns** or type the corresponding number.

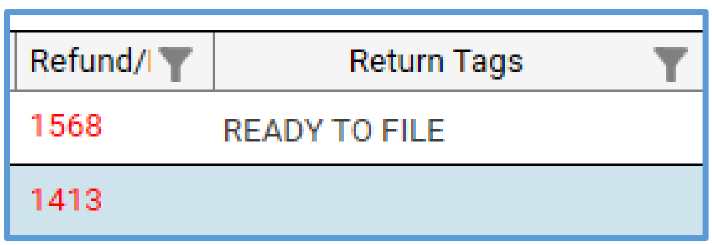
Note: The Client List also displays on the main application window.

TaxSlayer Pro displays the **Create a Return or Select a Client to Edit** window:



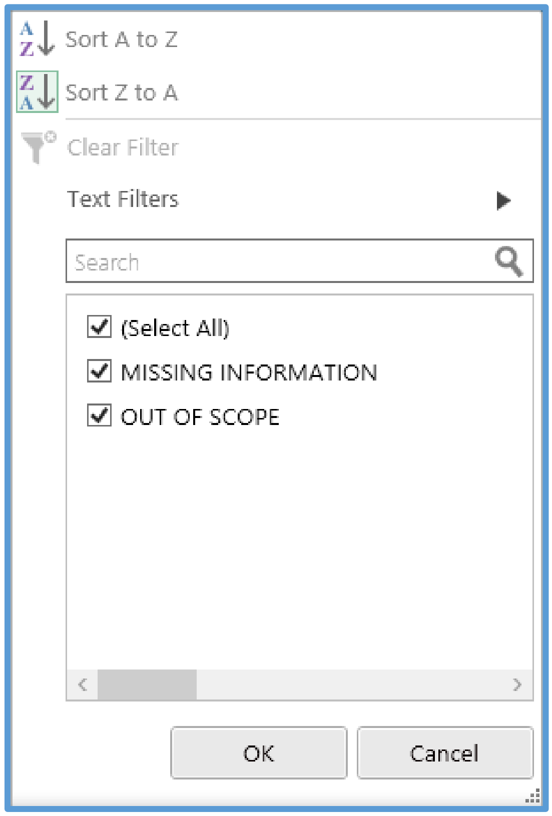
2. Scroll to the far right of the list.

TaxSlayer Pro displays the **Return Tags** column:



3. To sort the list by return tags, click the column heading.
4. To filter the list using return tags, click the **filter** icon in the column heading ( ).

TaxSlayer Pro displays the return tag filter:



5. Select the check boxes for any return tags you want to include in the list.
6. Clear the check boxes for any return tags you do **not** want to include in the list.
7. Click **OK**.

TaxSlayer Pro displays the list of returns, including only those with the selected return tags.

Deleting Returns

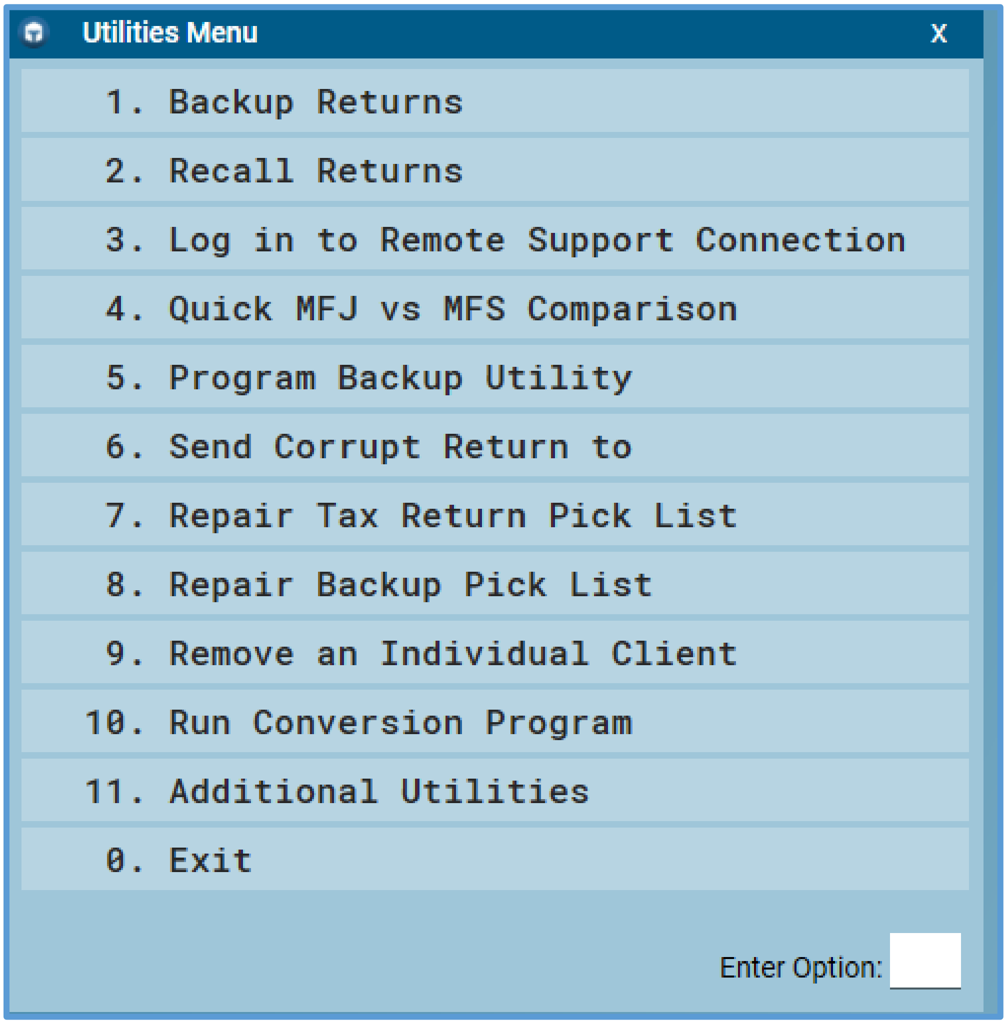
In rare events, you may need to delete a return. You can do this with the utilities in TaxSlayer Pro.

TaxSlayer Pro Tip: Use this feature with caution. Do not delete a return that you may need later.

To delete a tax return, use the following steps from the TaxSlayer Pro main window:

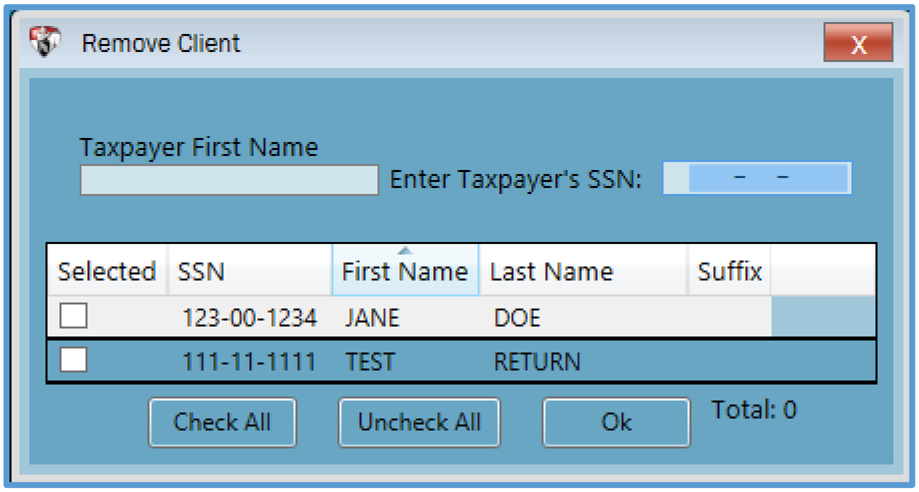
1. Click **Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Utilities Menu**:



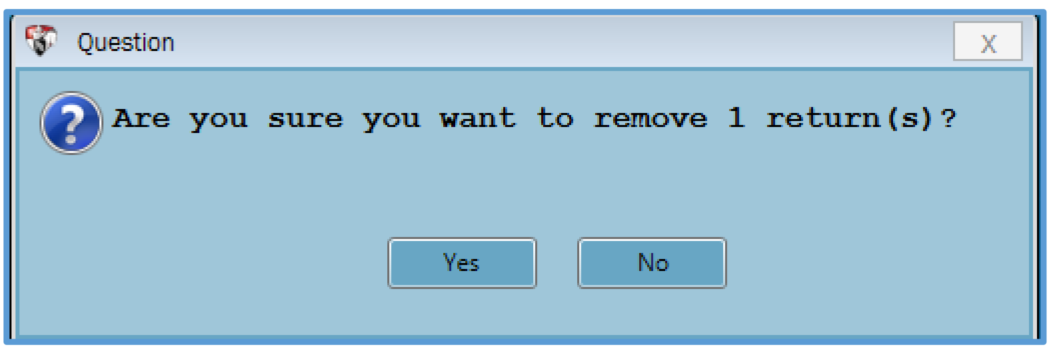
2. Click **Remove an Individual Client** or type the corresponding number.

TaxSlayer Pro displays the **Remove Client** menu:



3. Select the check box for the client(s) you want to delete.
4. Click **Ok**.

TaxSlayer Pro displays the **Question** confirmation box:



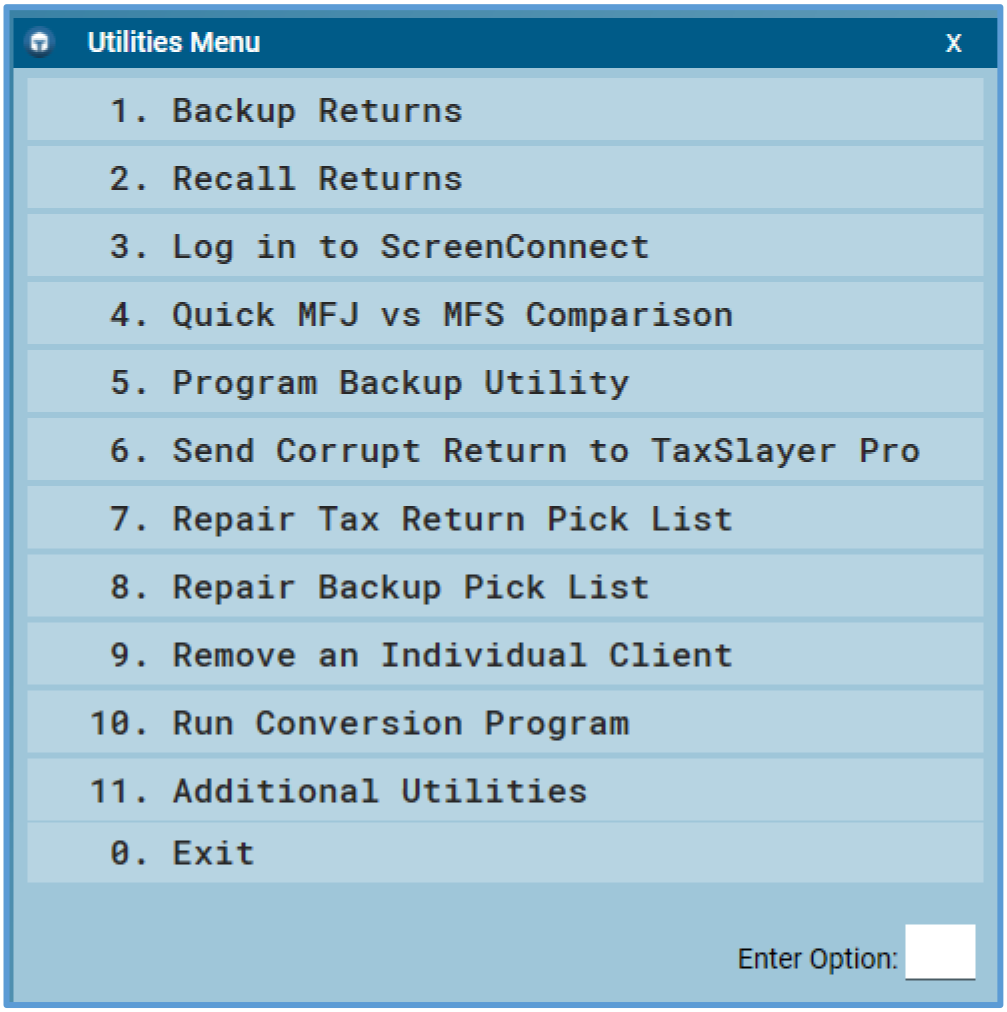
5. Click **Yes**.

Recalling Returns

During initial configuration, you selected a secondary backup drive to automatically back up your returns. You can use this backup drive to recall that version of a return later. To recall returns, use the following steps from the TaxSlayer Pro main window:

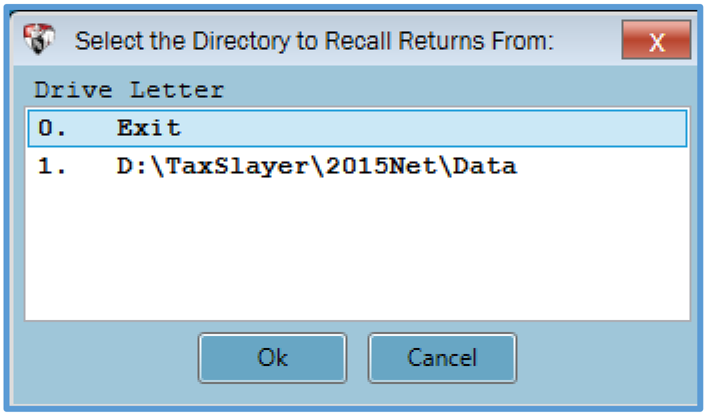
1. Click **Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Utilities Menu**:



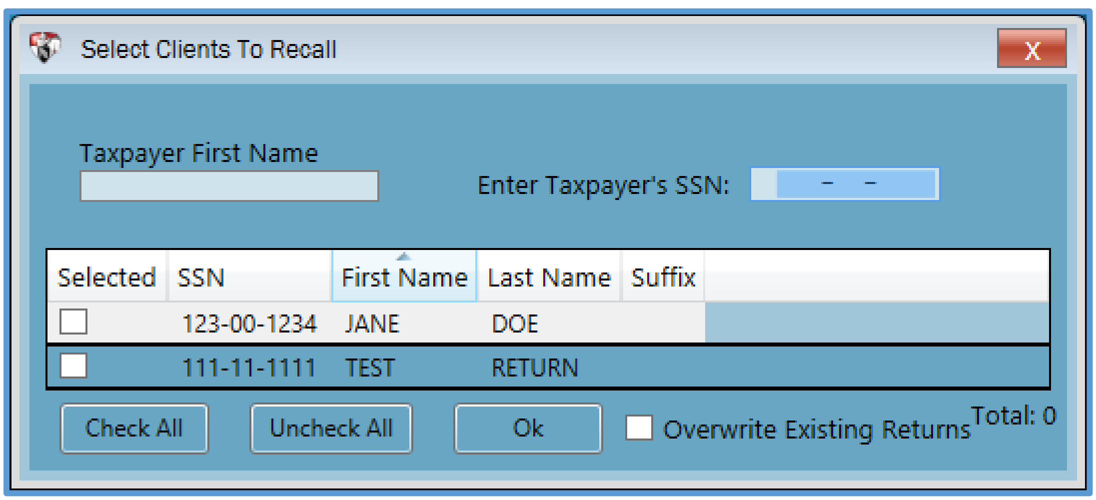
2. Click **Recall Returns** or type the corresponding number.

TaxSlayer Pro displays the **Select the Directory to Recall Returns From** window with all available backups listed:



3. Click the correct backup location.
4. Click **Ok**.

TaxSlayer Pro displays the **Select Clients To Recall** window:



5. Select the check boxes for the return(s) you want to recall. If you want to recall all returns, click **Check All**.
6. If you want TaxSlayer Pro to overwrite the return with the data from the backup, select the **Overwrite Existing Returns** check box.
7. Click **Ok**.

TaxSlayer Pro recalls the returns.

Backing up and Recalling Returns on Non-Networked Computers

If you have returns that are not networked, you still need to back them up. You may also need to transfer returns from a non-networked computer to the specified transmitting computer for e-filing.

Backing up Returns

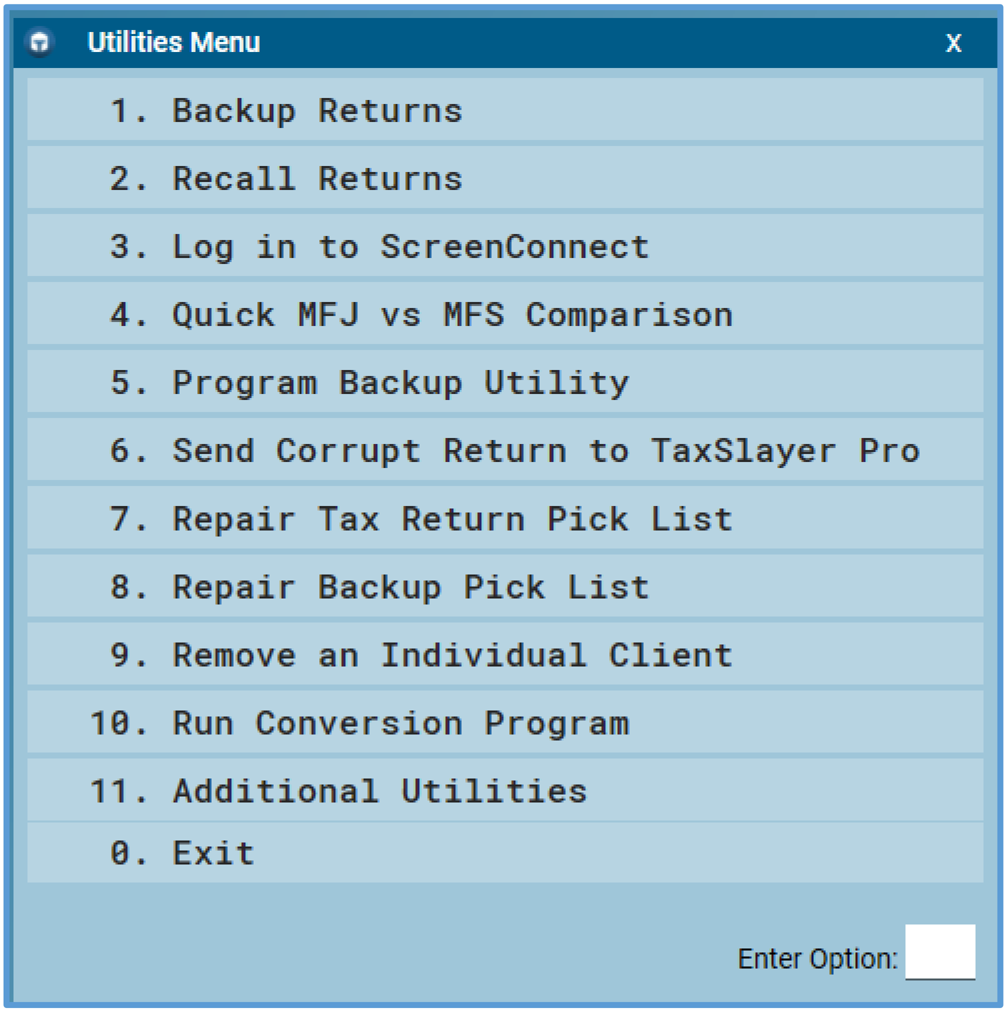
When you are ready to back up returns on a non-networked computer, first make sure that your USB drive or other external storage device is connected to the computer.

TaxSlayer Pro Tip: You can back up and recall returns for non-transmitting sites without needing to use a transmission code. Simply back up the returns at the non-transmitting site, recall the returns at a transmitting site, complete the applicable information in the return, and e-file as normal.

To back up the returns, use the following steps from the TaxSlayer Pro main window:

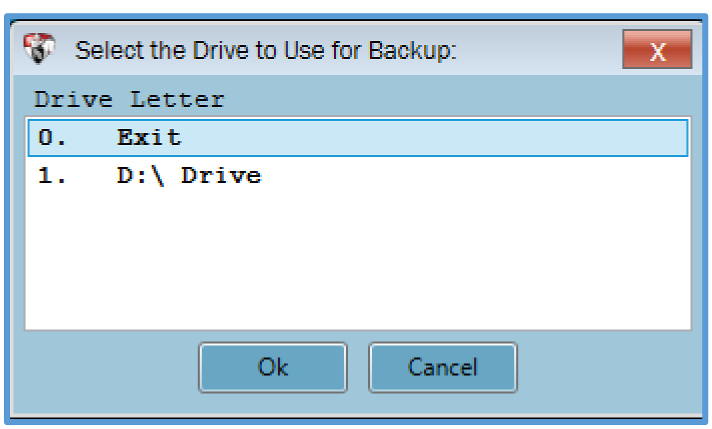
1. Click **Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Utilities Menu**:



2. Click **Backup Returns** or type the corresponding number.

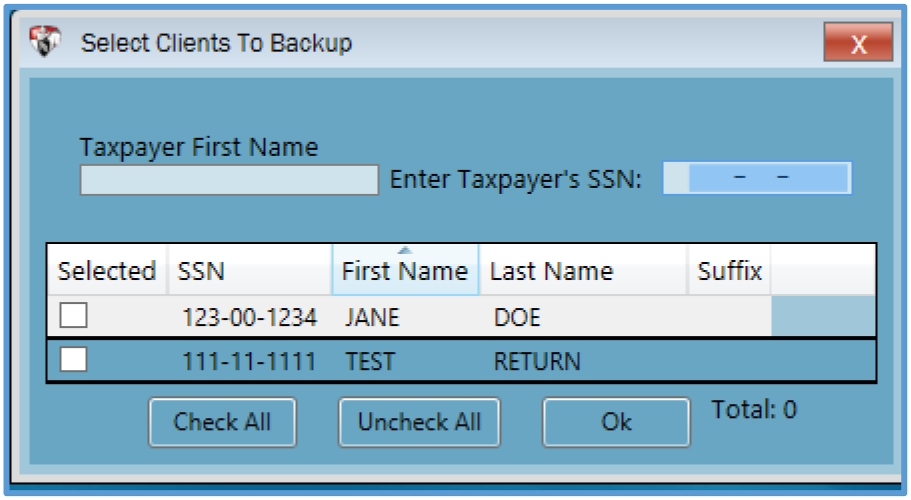
TaxSlayer Pro displays the **Select the Drive to Use for Backup** window:



3. Click the drive to which you want to back up returns.

4. Click **Ok**.

TaxSlayer Pro displays the **Select Clients to Backup** window:



5. Select the check box for the client(s) you want to back up. If you want to select all clients, click **Check All**.
6. Click **Ok**.

TaxSlayer Pro backs up the client files to the selected location.

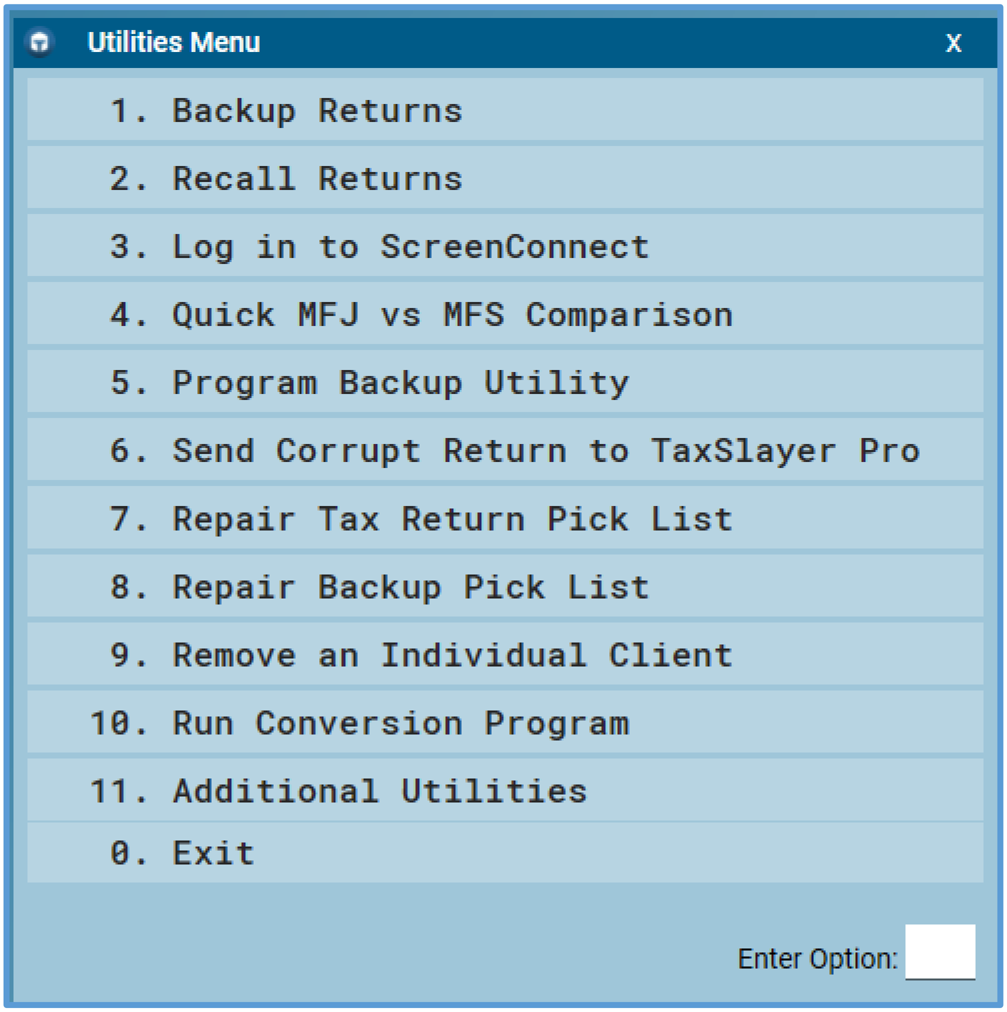
Recalling Returns

When you finish backing up the returns, you can move the external storage device to another computer to recall the returns.

To recall the returns on the transmitting computer, use the following steps from the TaxSlayer Pro main window:

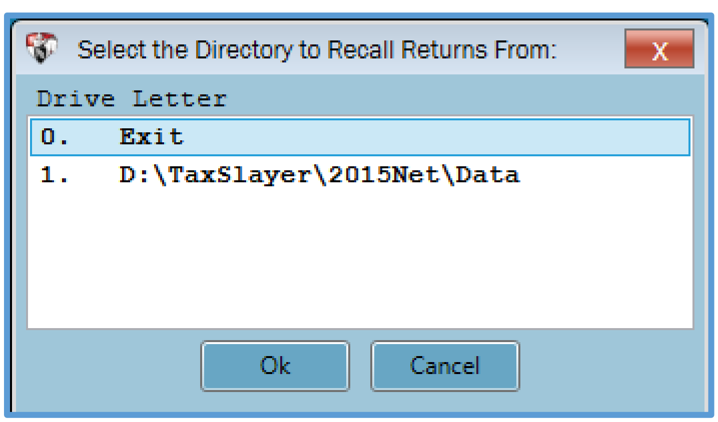
1. Click **Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Utilities Menu**:



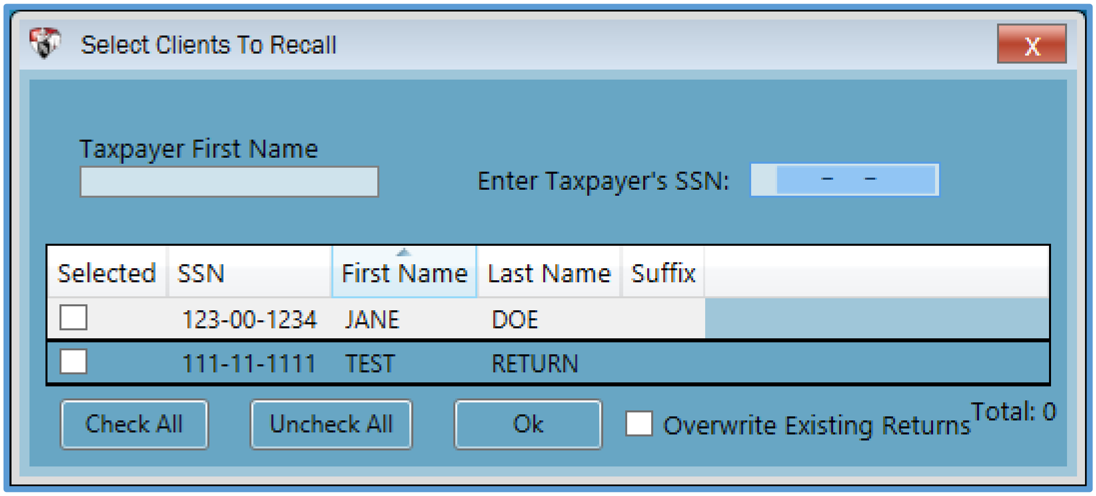
2. Click **Recall Returns** or type the corresponding number.

TaxSlayer Pro displays the **Select the Directory to Recall Returns From** window:



3. Click the name of the directory to which you backed up the returns. Remember that you may have multiple directories if you set up a secondary backup location. Choose the correct one.
4. Click **Ok**.

TaxSlayer Pro displays the **Select Clients To Recall** window:



5. Select the check boxes for the return(s) you want to recall. If you want to recall all returns, click **Check All**.
6. If you want TaxSlayer Pro to overwrite the return with the data from the backup, select the **Overwrite Existing Returns** check box.
7. Click **Ok**.

TaxSlayer Pro recalls the returns.

Summary

You should now be able to:

- Set up Return Tags.
- Filter returns by Return Tags.
- Delete returns.
- Recall returns.
- Back up returns from non-networked computers.
- Recall returns from non-networked computers.

To see a video of what you just learned, go to Managing Returns. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Updating and Transferring

After completing this topic, you will be able to:

- Configure automatic updates in TaxSlayer Pro.
- Manually update states in TaxSlayer Pro.
- Transfer updates to non-networked computers.
- Transfer configuration to non-networked computers.

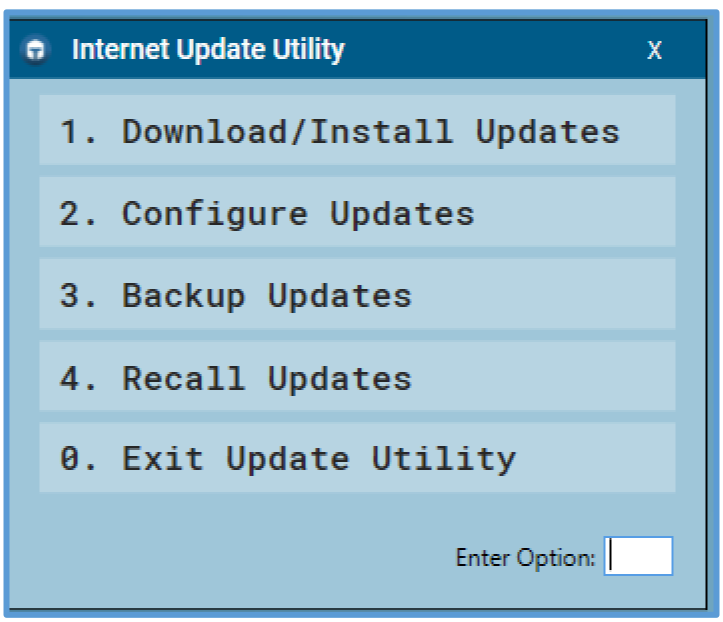
Managing Updates

Configuring Updates

TaxSlayer Pro automatically downloads and installs updates the first time you open the program each day. For states, you can configure which updates TaxSlayer Pro automatically downloads. To do this, use the following steps from the TaxSlayer Pro main window:

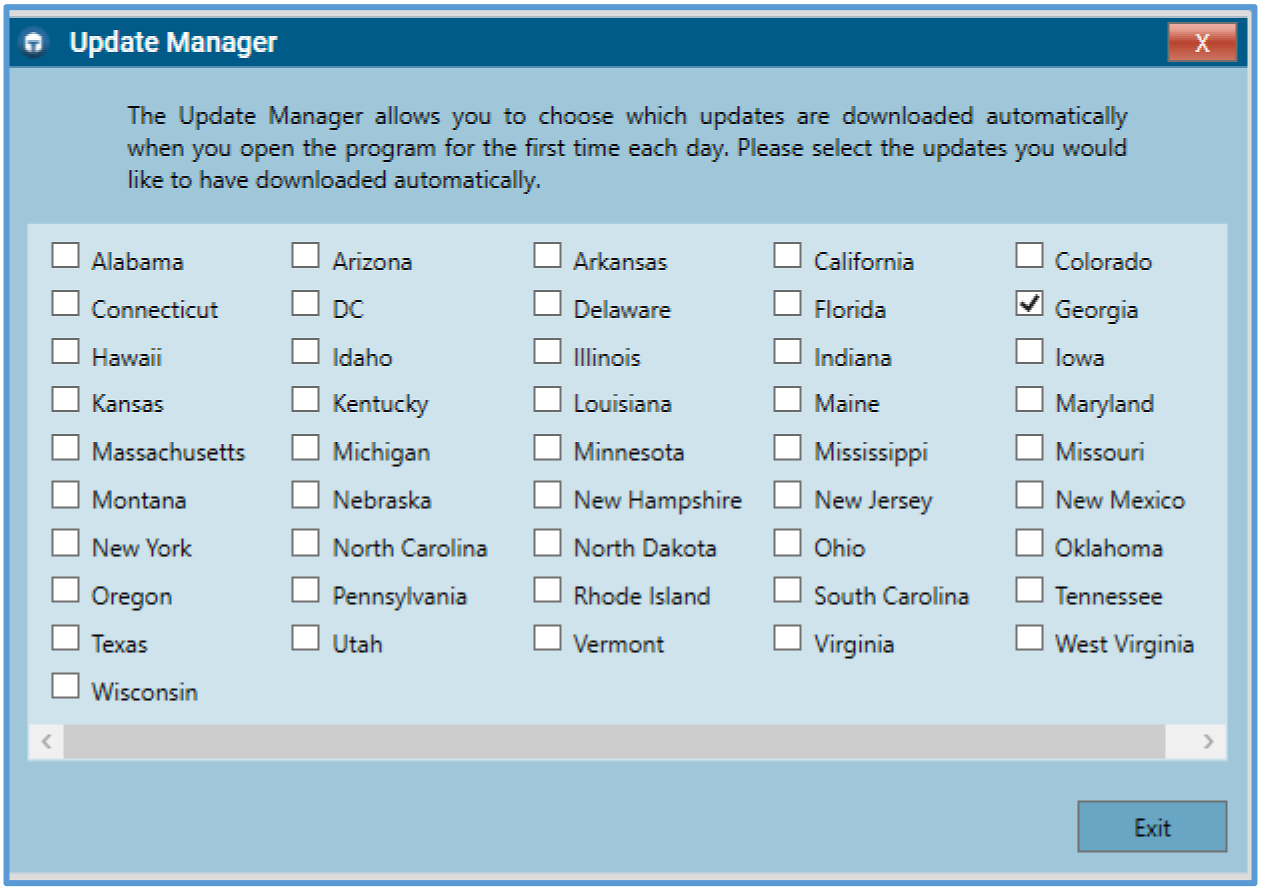
1. Click **Updates** or type the corresponding number.

TaxSlayer Pro displays the **Internet Update Utility Main Menu**:



2. Click **Configure Updates** or type the corresponding number.

TaxSlayer Pro displays the **Update Manager**:



3. Select the check boxes for the states you want TaxSlayer Pro to automatically download.

TaxSlayer Pro Tip: We recommend that you limit the number of states for automatic download to those you use most commonly at your office.

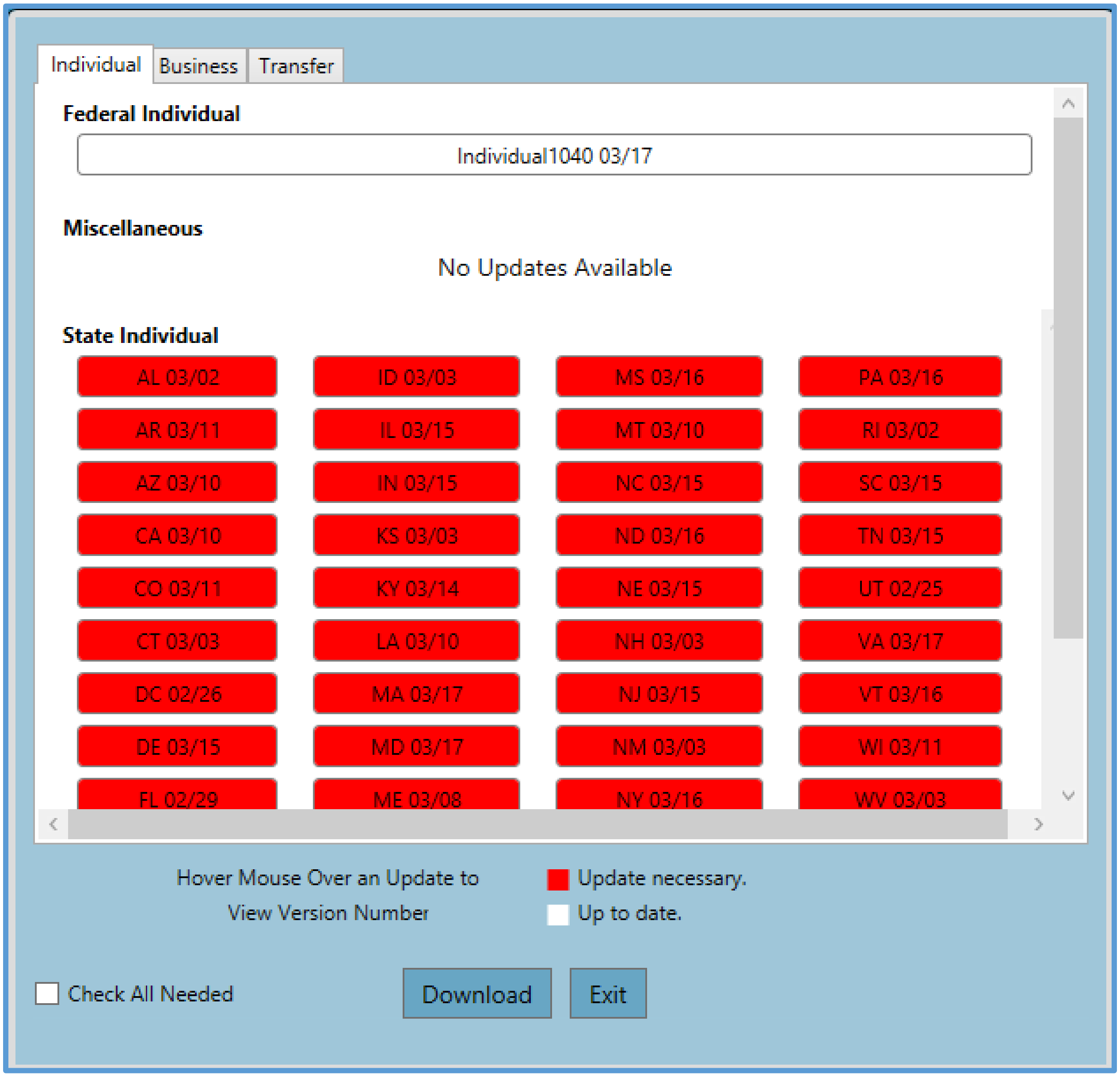
4. Click **Exit**.

Downloading Updates

If you need to prepare a state return other than those you selected for automatic download, you need to update the state. To do this, use the following steps from the **Internet Update Utility Main Menu**:

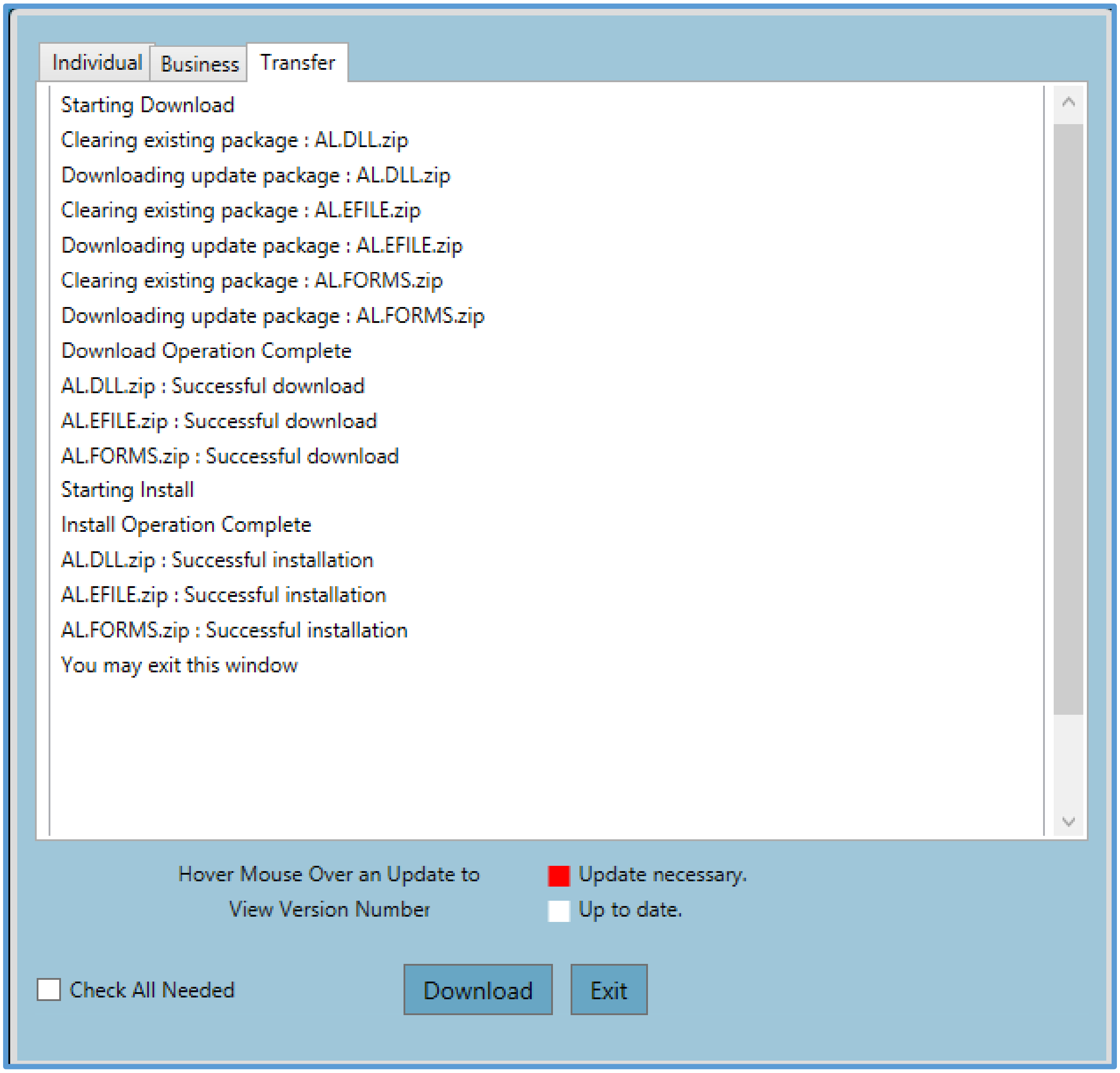
1. Click **Download/Install Updates** or type the corresponding number.

TaxSlayer Pro displays the **Update** window with all states that are not up to date in red:



2. Click the state(s) you need to update.
3. Click **Download**.

TaxSlayer Pro displays the **Transfer** tab with the progress of the download and installation:



4. Click **Exit**.

Transferring to Non-Networked Computers

Transferring Configuration to Non-Networked Computers

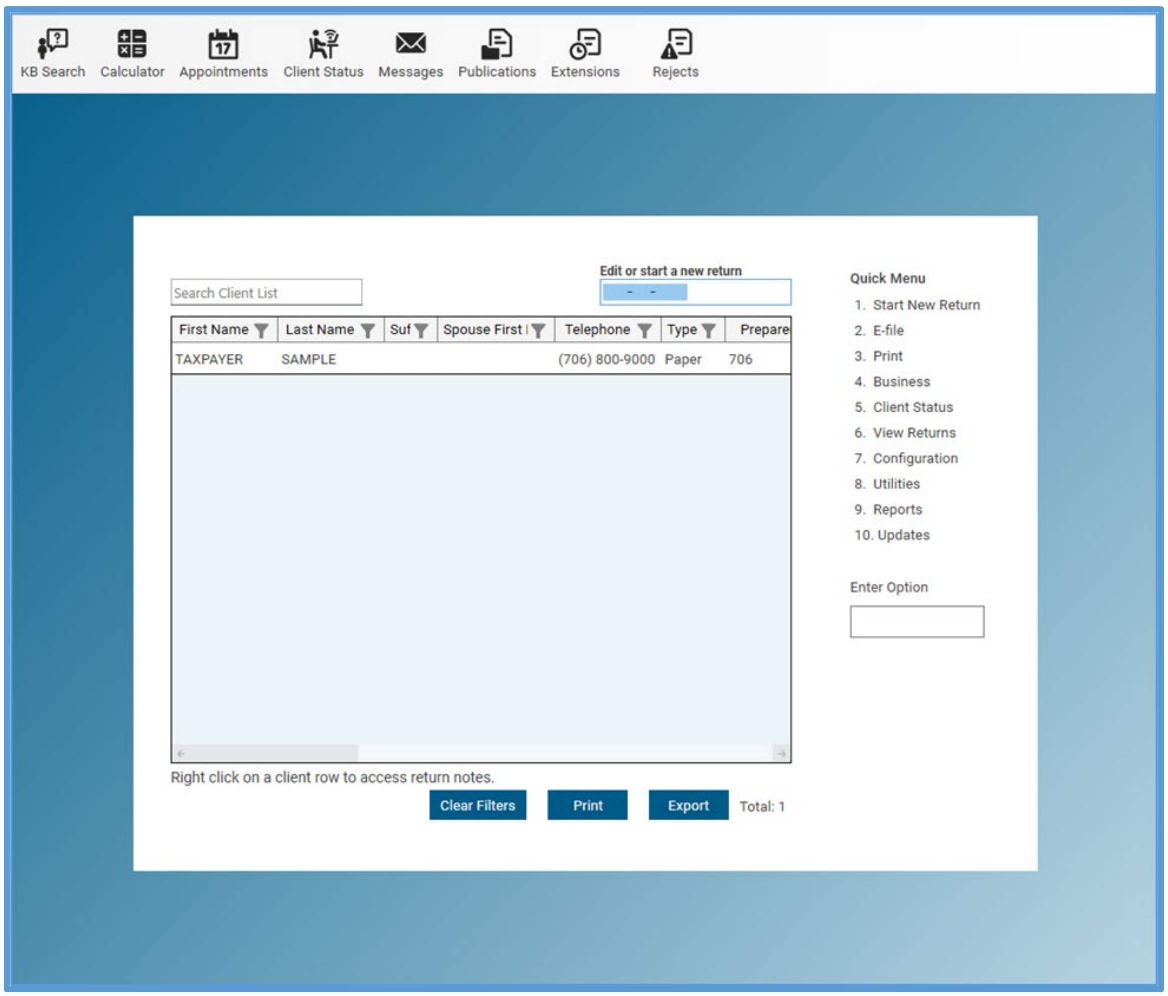
If you do not have a network for the computers at your site, you can transfer configuration to the non-networked computers. Use a USB flash drive or other external media.

Backing up Configuration

To back up configuration to external media, use the following steps:

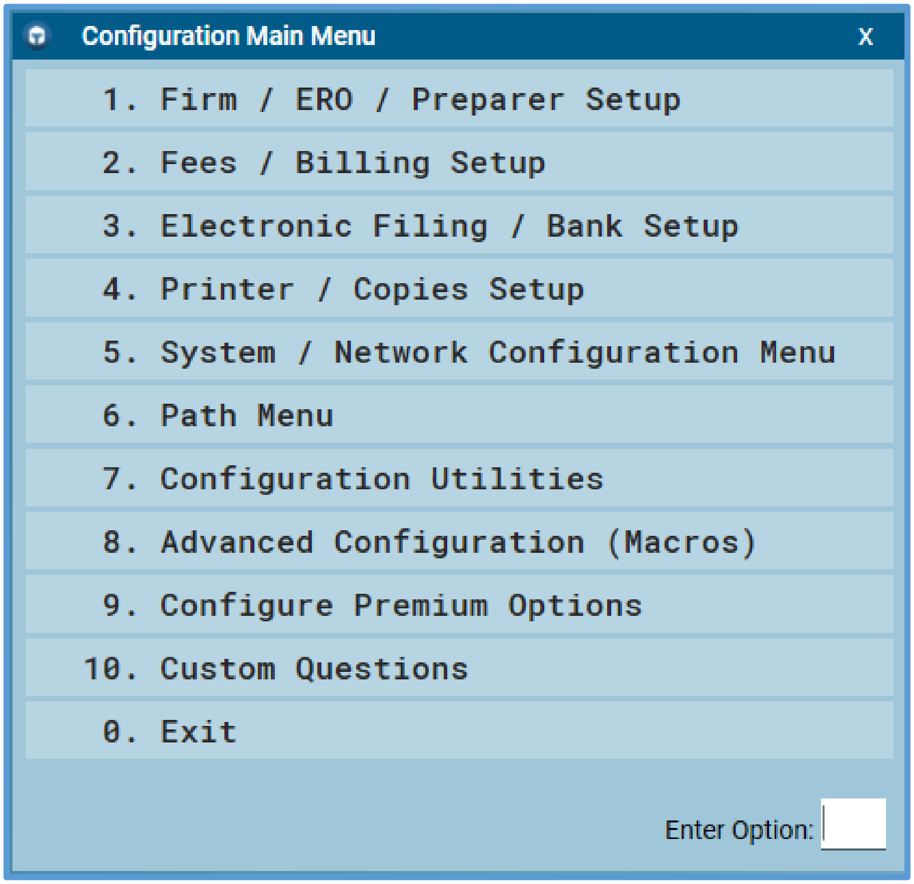
1. Open TaxSlayer Pro.

TaxSlayer Pro displays the main window:



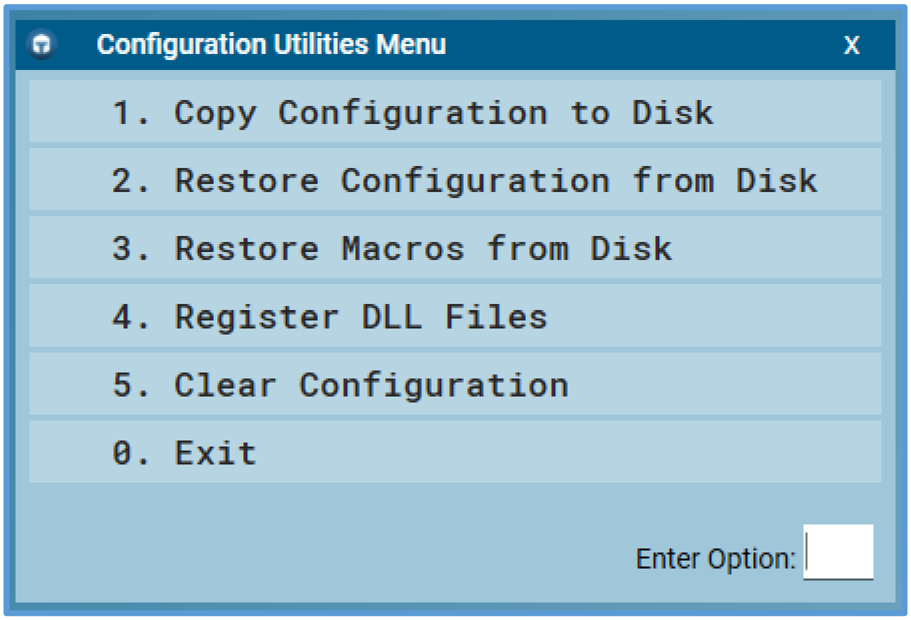
2. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



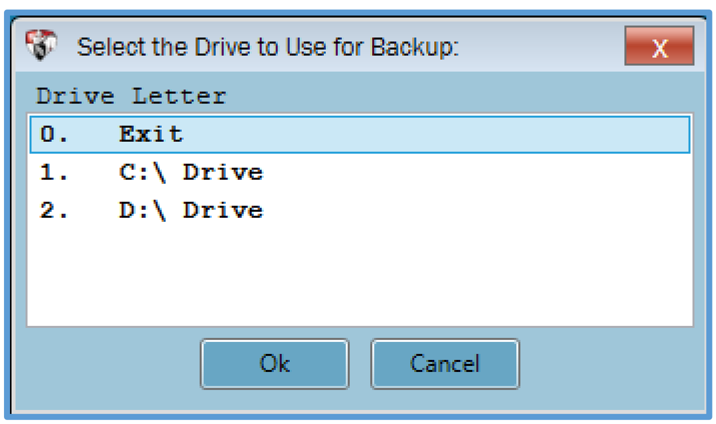
3. Click **Configuration Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Utilities Menu**:



4. Click **Copy Configuration to Disk** or type the corresponding number.

TaxSlayer Pro displays the **Select the Drive to Use for Backup** menu:



5. Click the drive to which you want to back up configuration.
6. Click **Ok**.

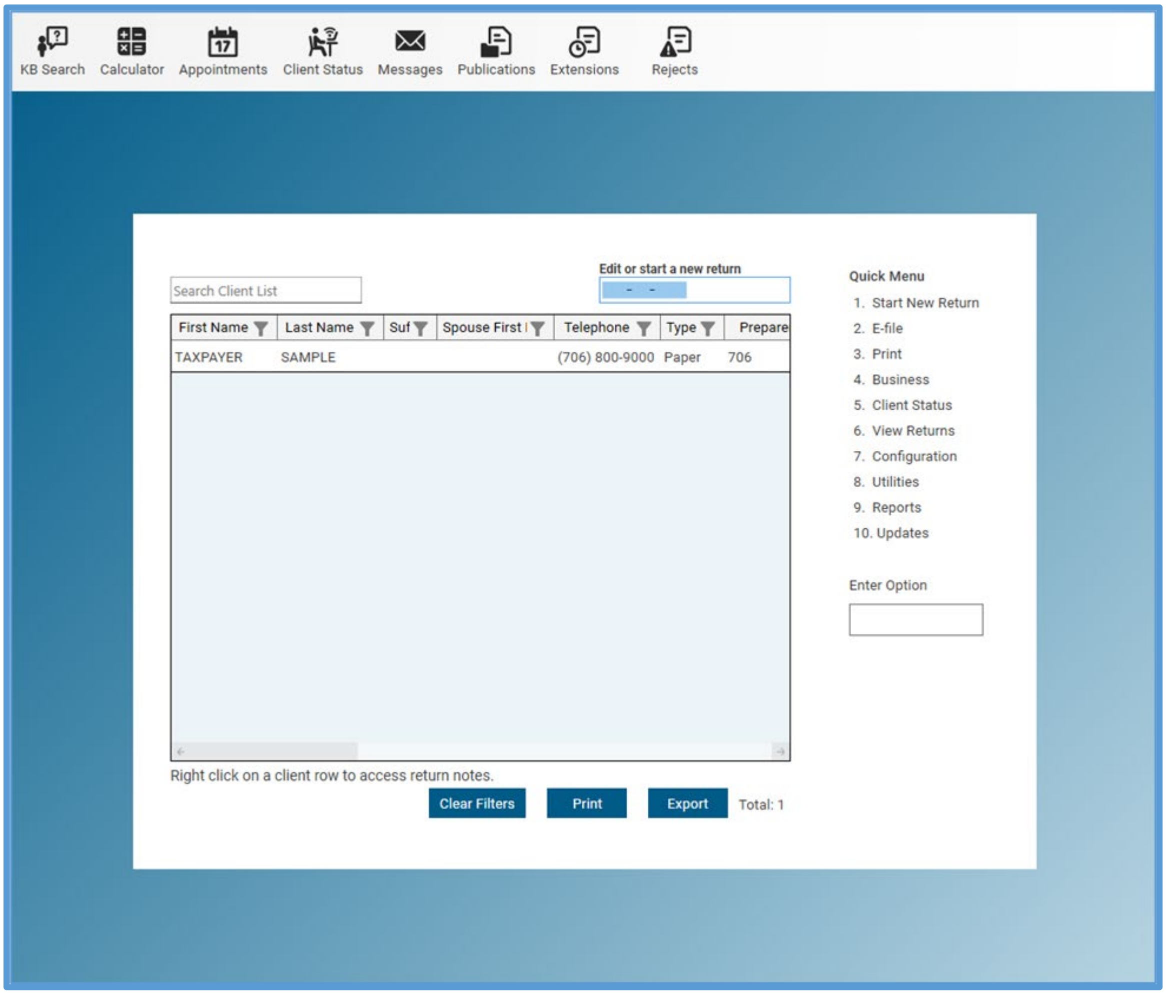
TaxSlayer Pro saves the configuration backup.

Configuring the Non-Networked Computer

After you save the configuration backup to the appropriate media, you need to move the file to the non-networked computer and restore it. To do this, use the following steps:

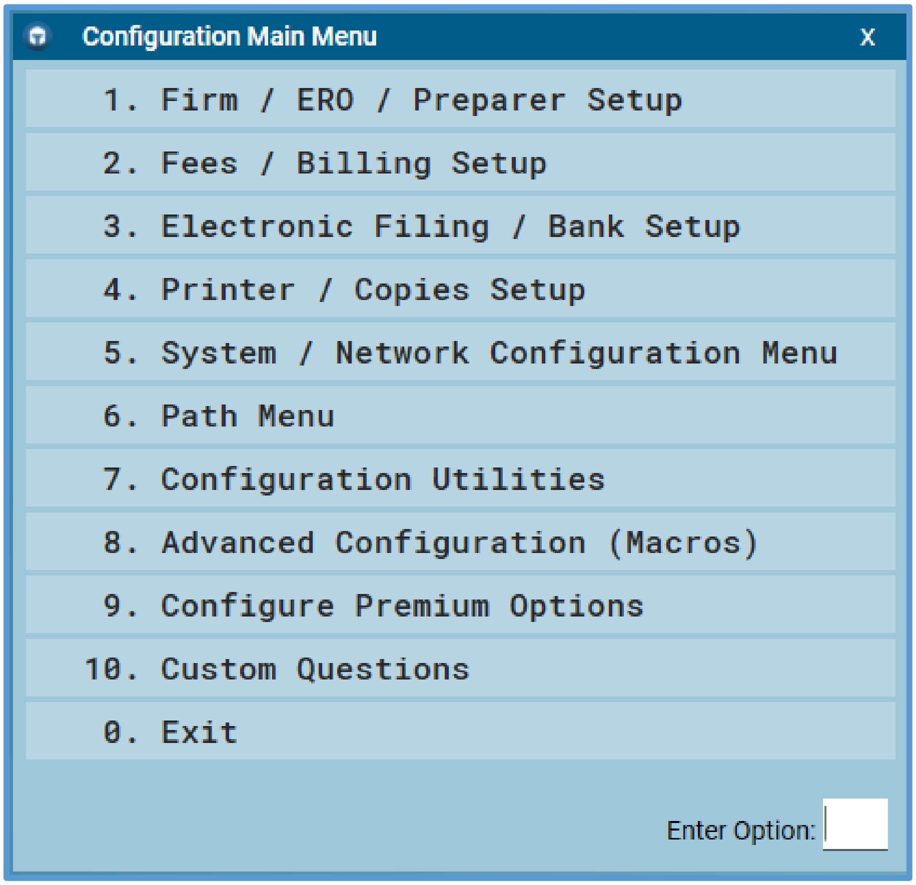
1. Attach the media device containing the update package to the non-networked computer.
2. Open TaxSlayer Pro.

TaxSlayer Pro displays the main window:



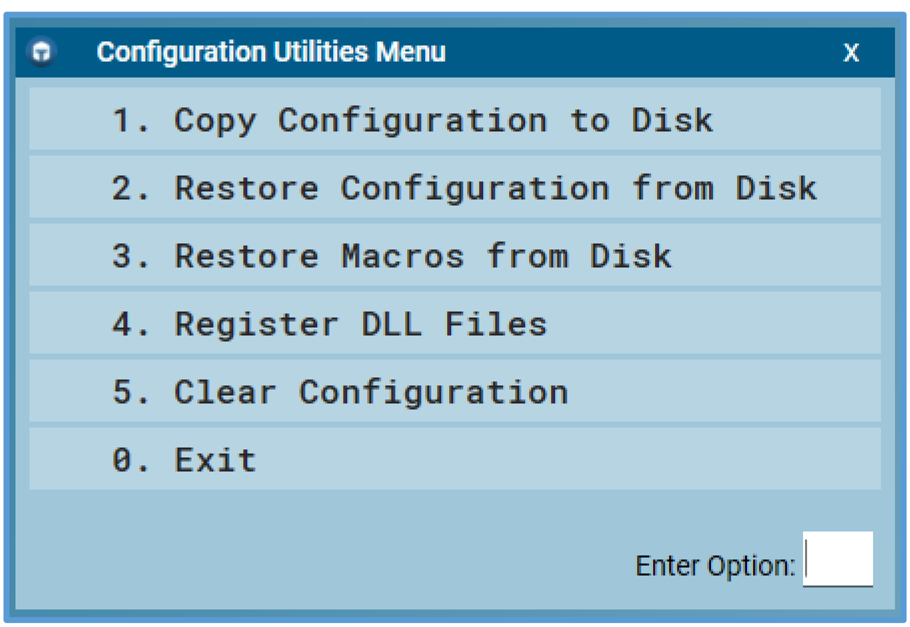
3. Click **Configuration** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Main Menu**:



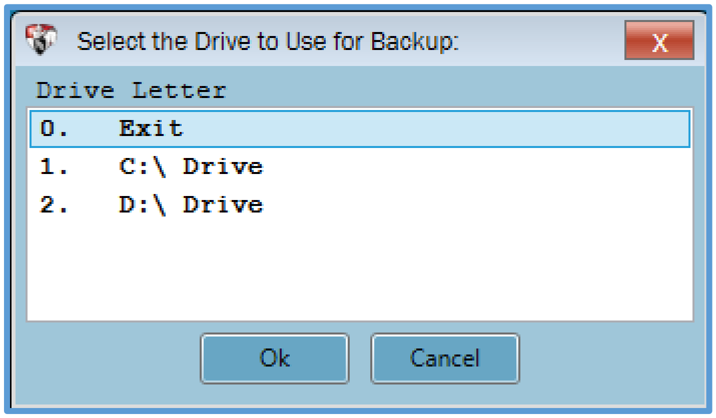
4. Click **Configuration Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Utilities Menu**:



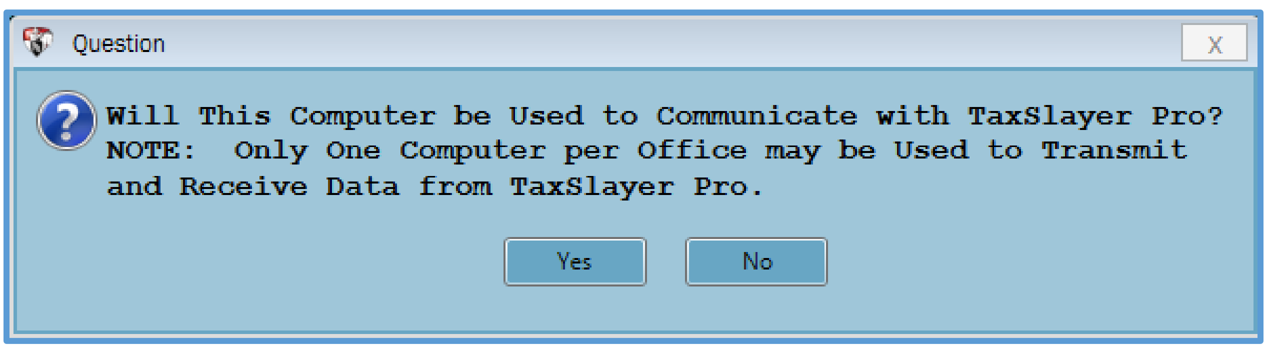
5. Click **Restore Configuration from Disk** or type the corresponding number.

TaxSlayer Pro displays the **Select the Drive to Use for Restore** menu:



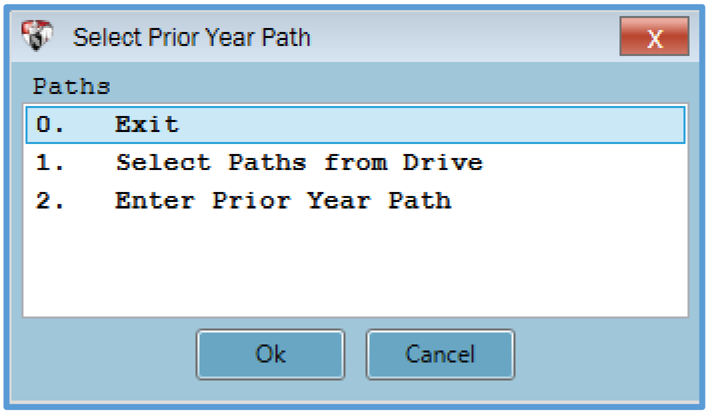
6. Click the drive to which you want to back up configuration.
7. Click **Ok**.

TaxSlayer Pro displays the **Question** box:



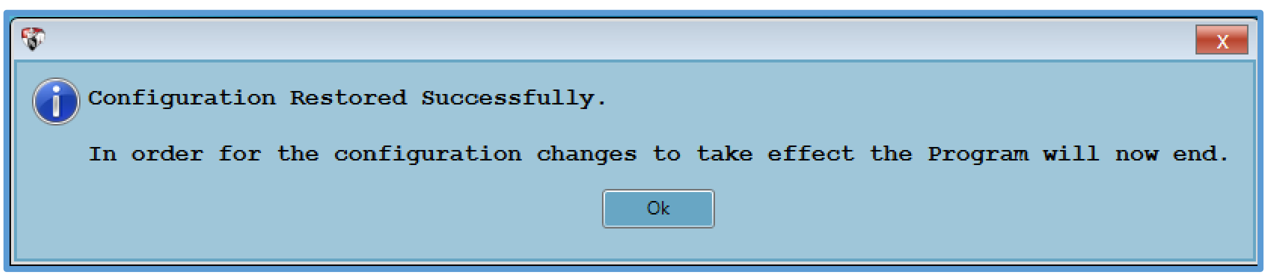
8. If you are restoring configuration to your transmitting computer, click **Yes**. Otherwise, click **No**.

TaxSlayer Pro displays the **Select Prior Year Path** menu:



9. Determine how you want to select the prior year path and click the appropriate option of the following:
    a. Click **Exit** if you do not have the prior year's software.
    b. **Select Paths from Drive**
    c. **Enter Prior Year Path**
10. Click **Ok**.

TaxSlayer Pro confirms restoration:



11. Click **Ok**.

TaxSlayer Pro closes the program to apply configuration changes.

Transferring Updates to Non-Networked Computers

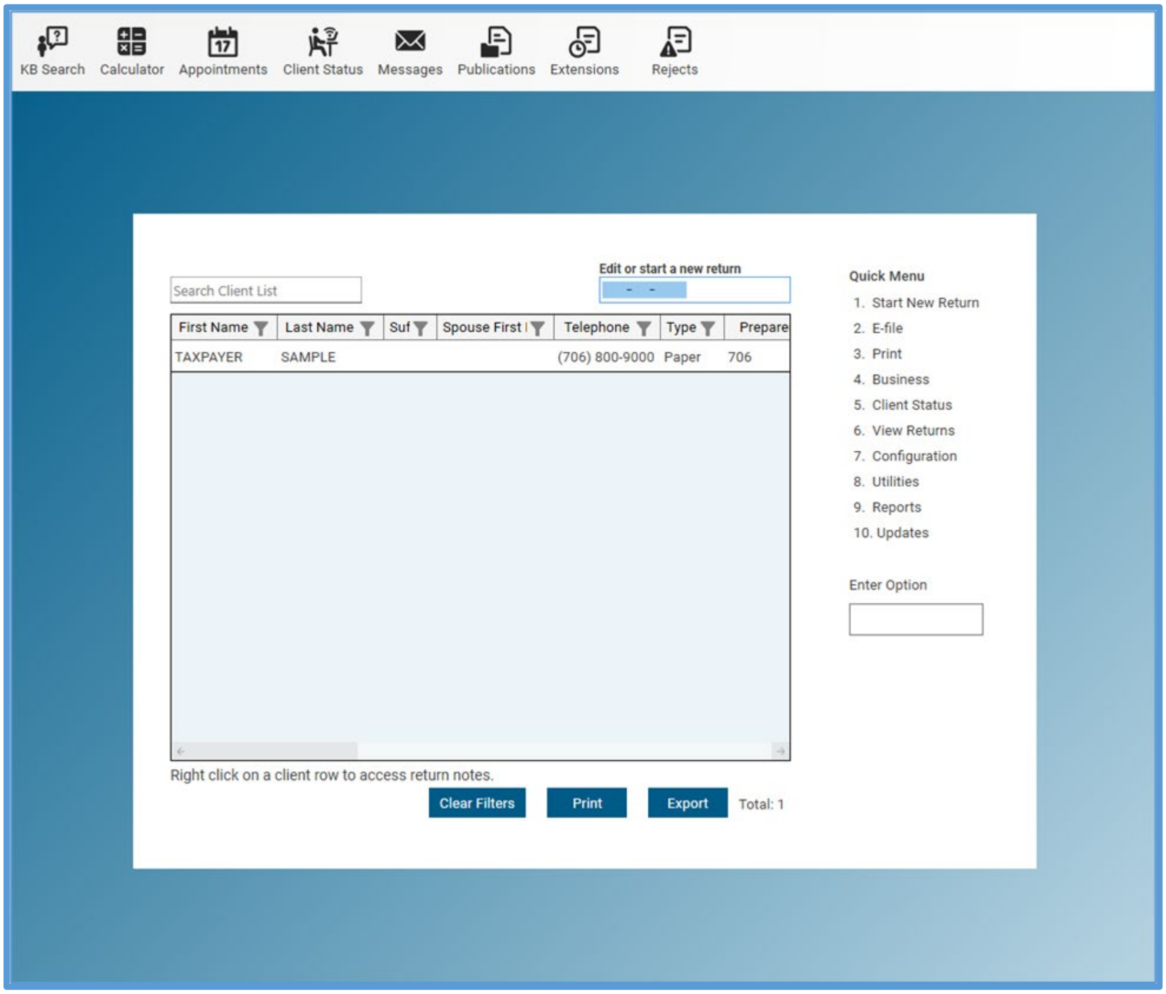
If you do not have a network for the computers at your site, you still need to update TaxSlayer Pro on each workstation. You can do this using a USB flash drive or other external media.

Save Updates

To save updates to external media, use the following steps:

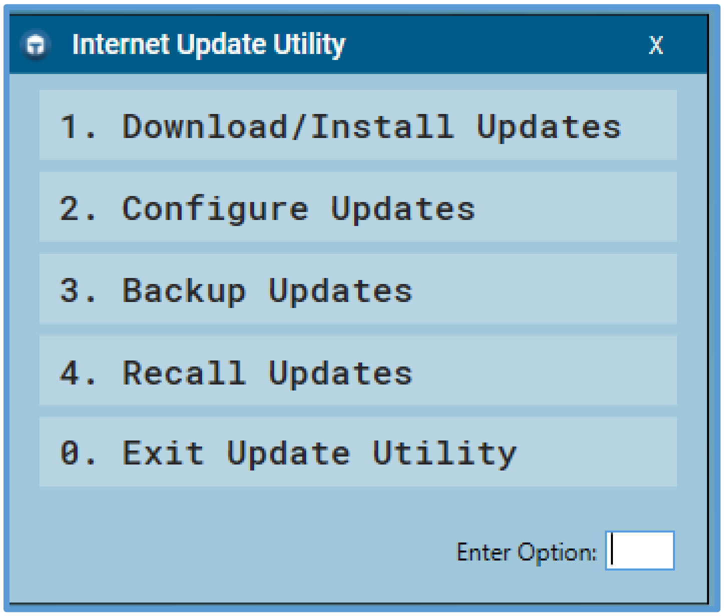
1. Open TaxSlayer Pro.

TaxSlayer Pro displays the main window:



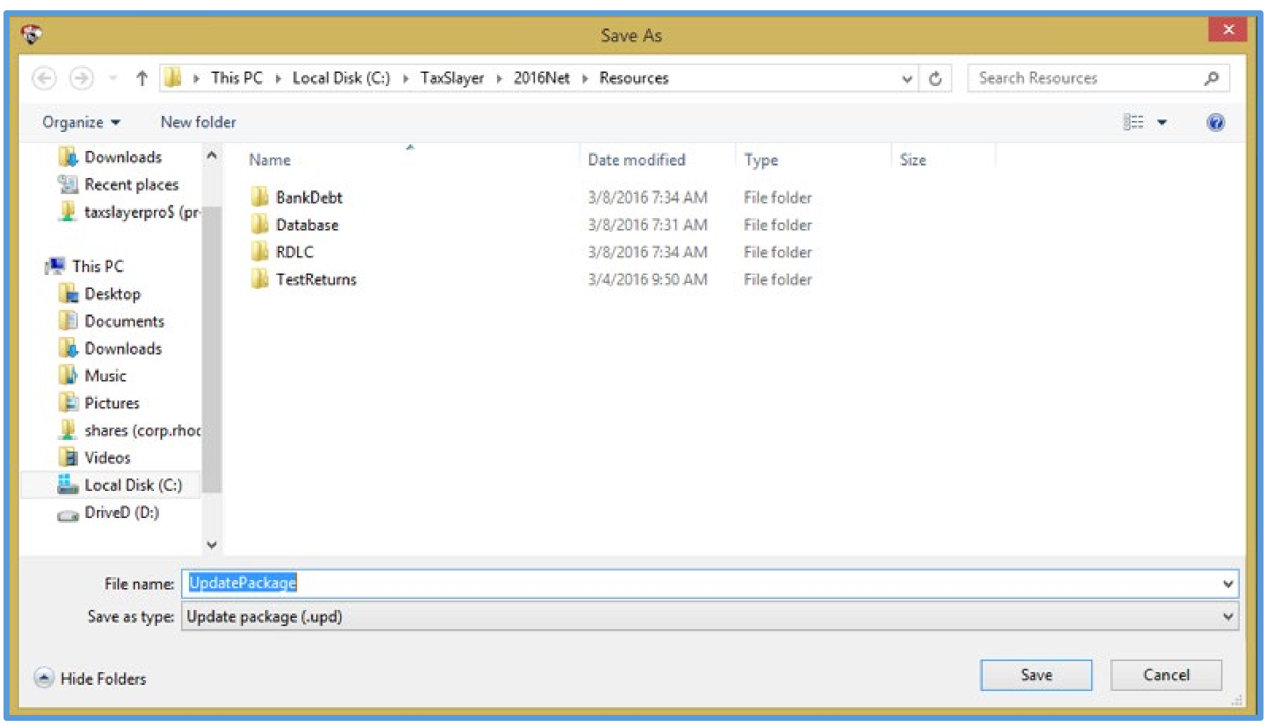
2. Click **Updates** or type the corresponding number.

TaxSlayer Pro displays the **Internet Update Utility Main Menu**:



3. Click **Backup Updates** or type the corresponding number.

TaxSlayer Pro displays the **Save As** window:



4. Navigate to the location to which you want to save the update package. If you are moving this to another computer, remember to save to the correct drive (USB flash drive or external hard drive).

5. Click **Save**.

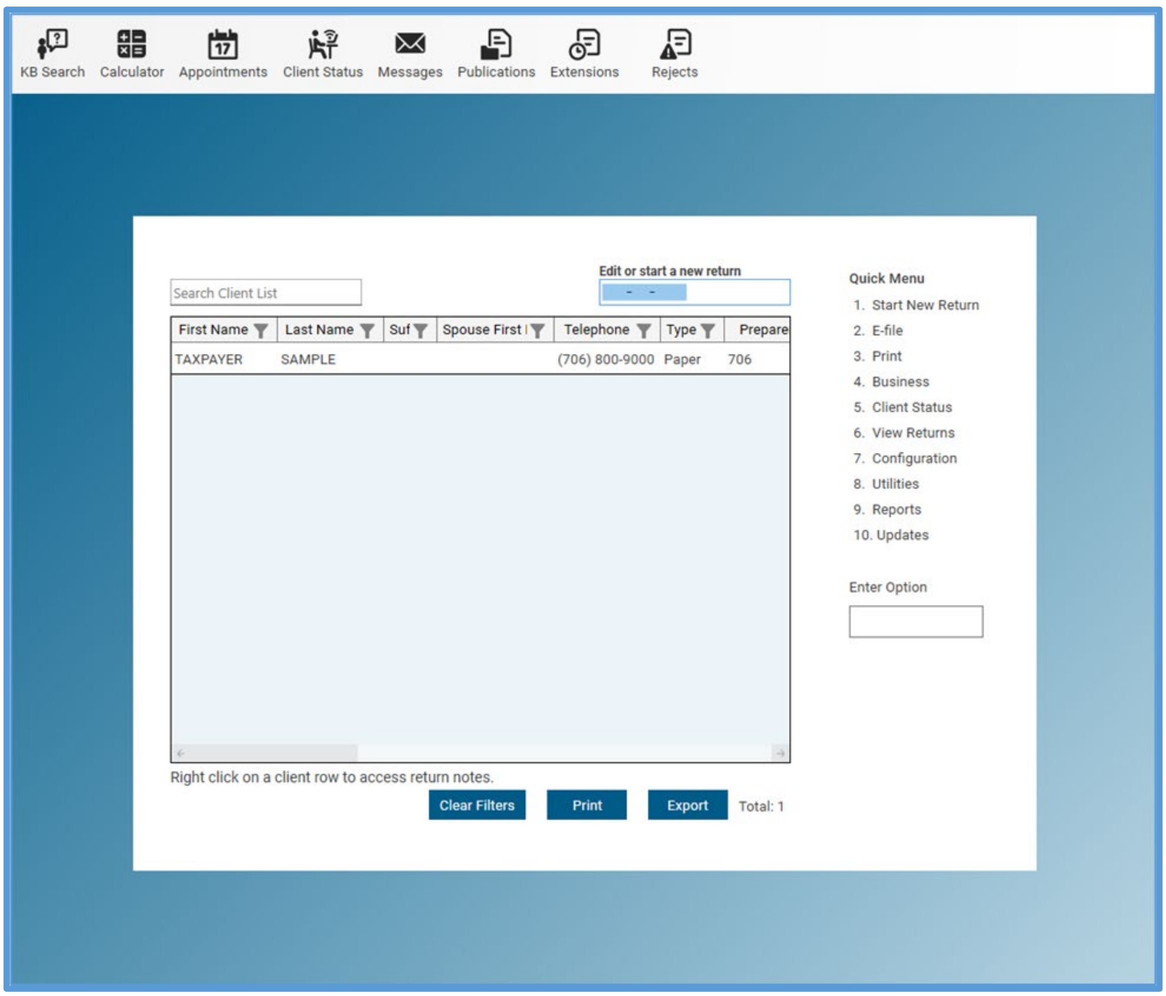
TaxSlayer Pro saves the update package with the file name **.upd**.

Updating the Non-Networked Computer

After you save the update package to the appropriate media, you need to move the file to the non-networked computer and install the updates. To do this, use the following steps:

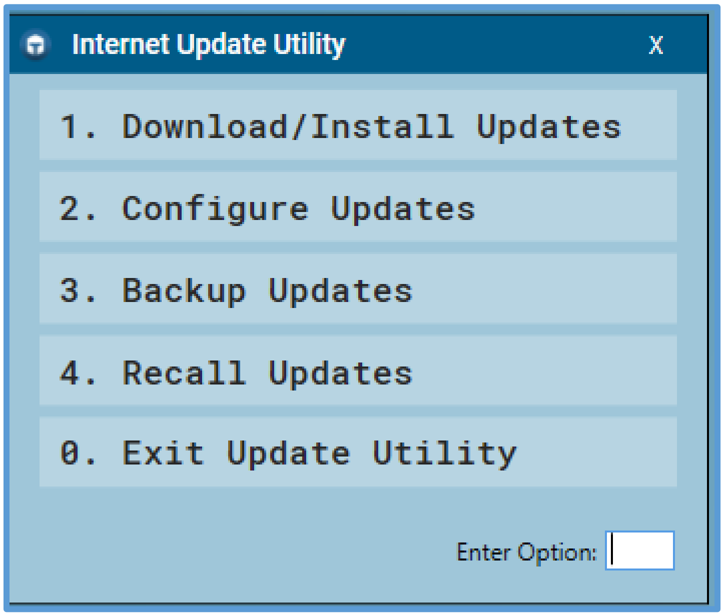
1. Attach the media device containing the update package to the non-networked computer.
2. Open TaxSlayer Pro.

TaxSlayer Pro displays the main window:



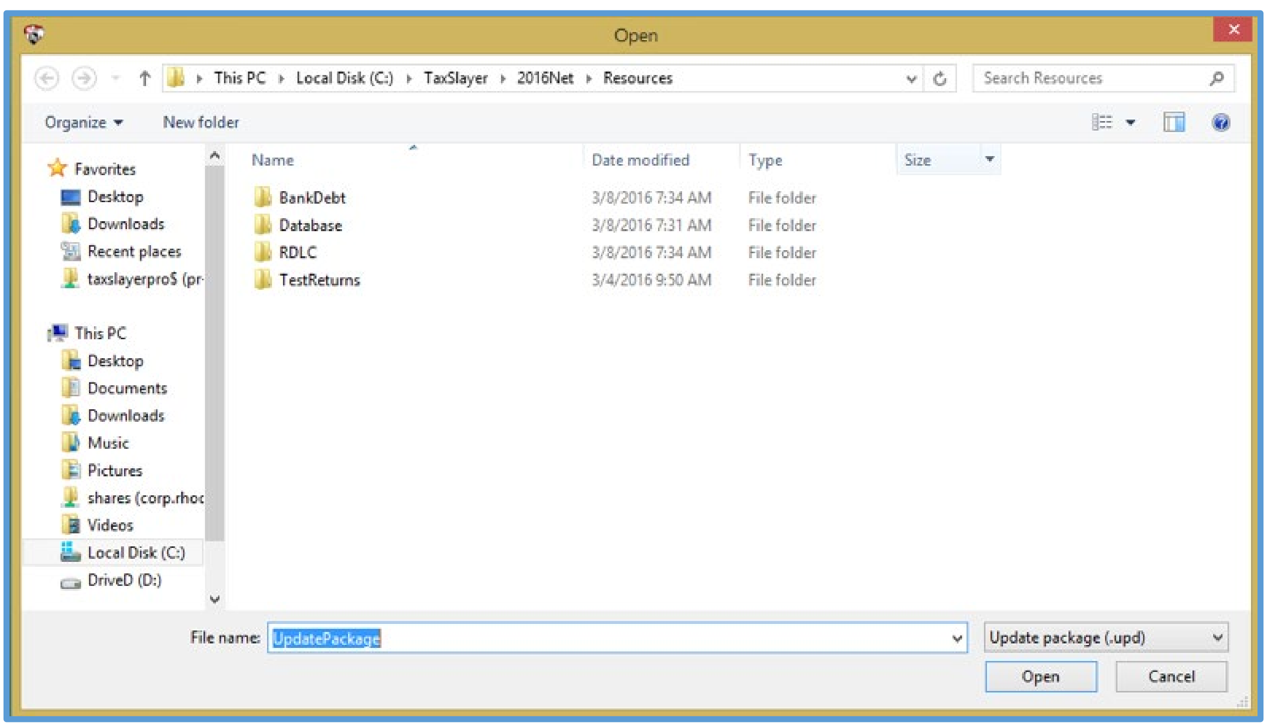
3. Click **Updates** or type the corresponding number.

TaxSlayer Pro displays the **Internet Update Utility Main Menu**:



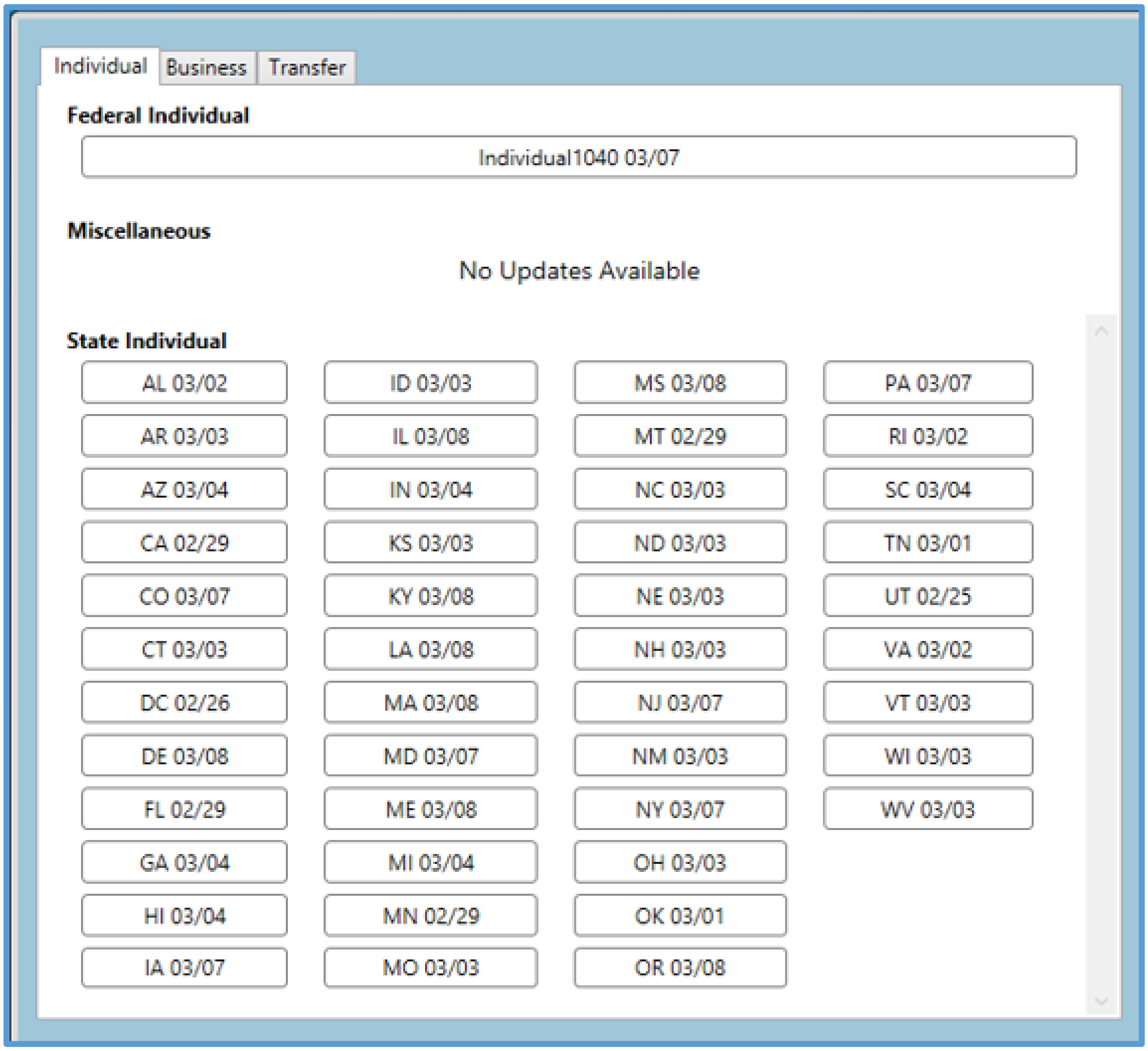
4. Click **Recall Updates** or type the corresponding number.

TaxSlayer Pro displays the **Open** window:



5. Navigate to the location to which you saved the update package.
6. Click **Open**.

TaxSlayer Pro displays the **Update** window:



7. Install the updates as normal.

Summary

You should now be able to:

- Configure automatic updates in TaxSlayer Pro.
- Manually update states in TaxSlayer Pro.
- Transfer updates to non-networked computers.
- Transfer configuration to non-networked computers.

To see a video of what you just learned, go to Updating and Transferring. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Reports

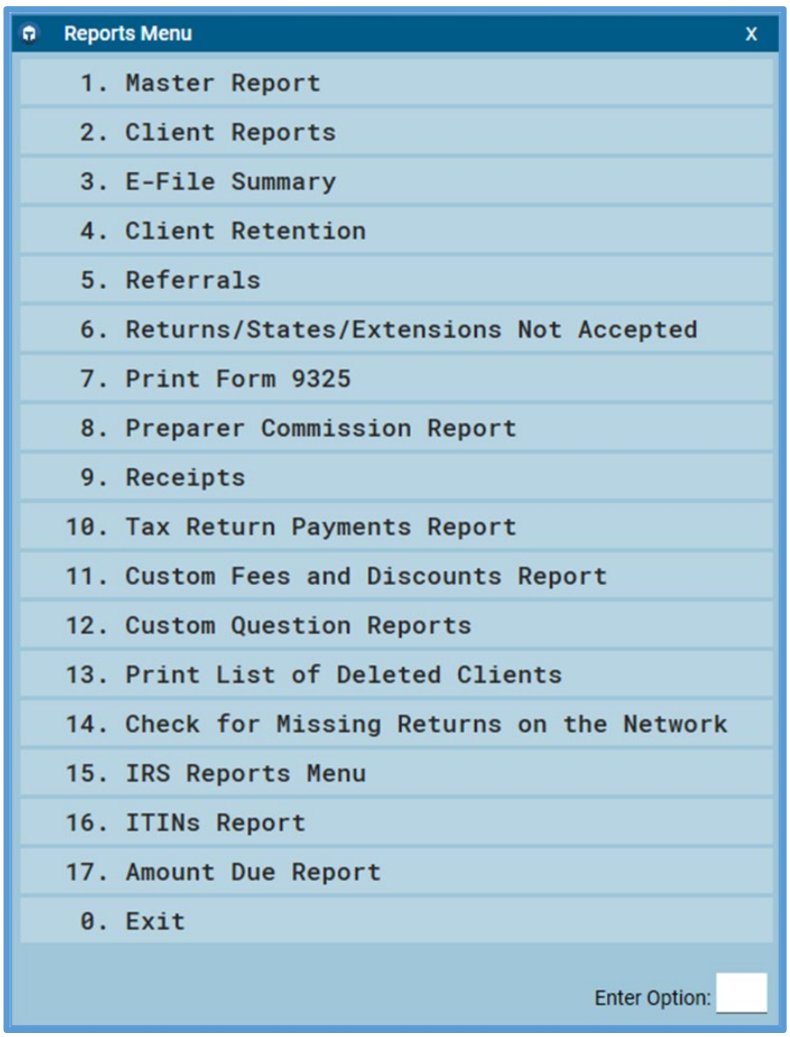
After completing this topic, you will be able to:

- Run reports.
- Filter reports.
- Export reports.

TaxSlayer Pro provides several reports that you can run to help manage returns. To run a report, use the following steps from the TaxSlayer Pro main window:

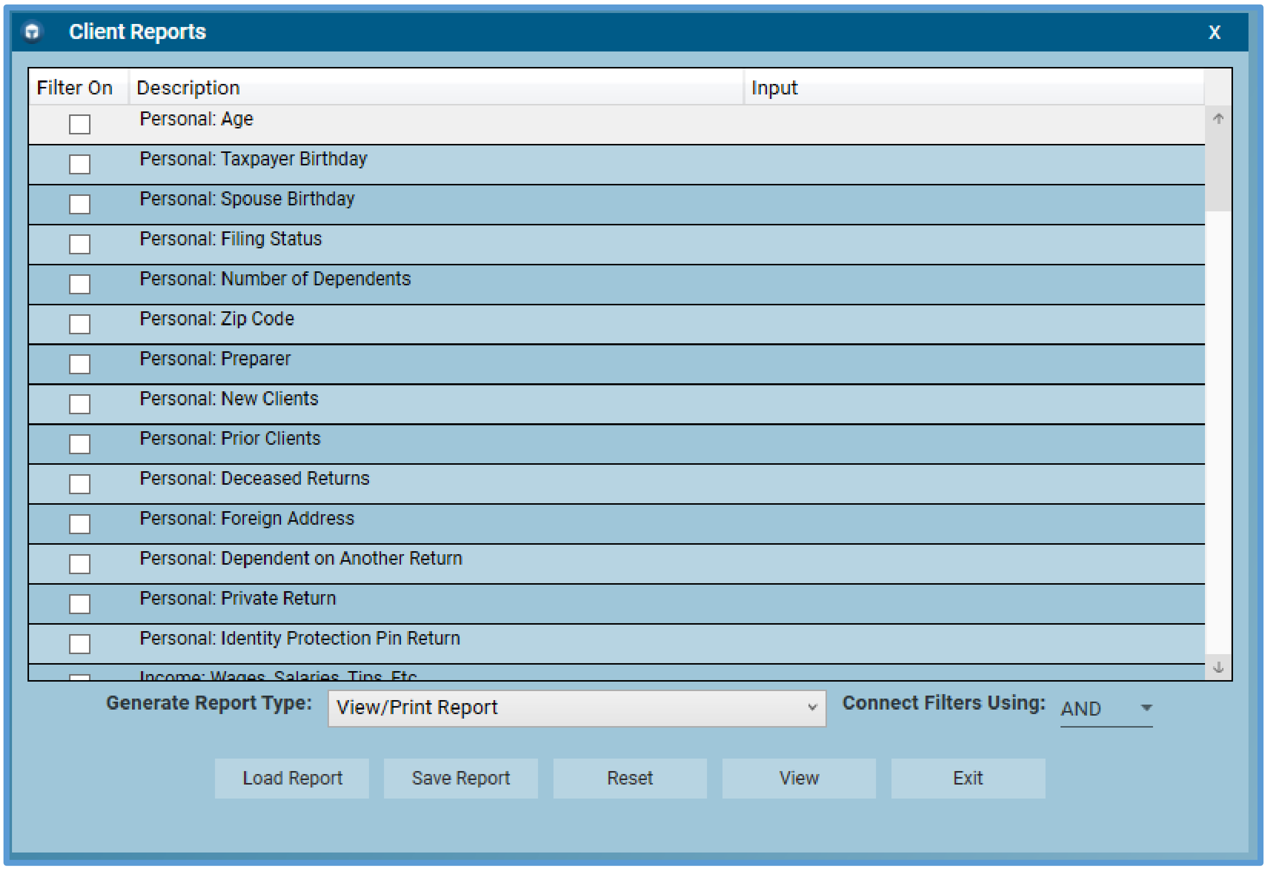
1. Click **Reports** or type the corresponding number.

TaxSlayer Pro displays the **Reports Menu**:



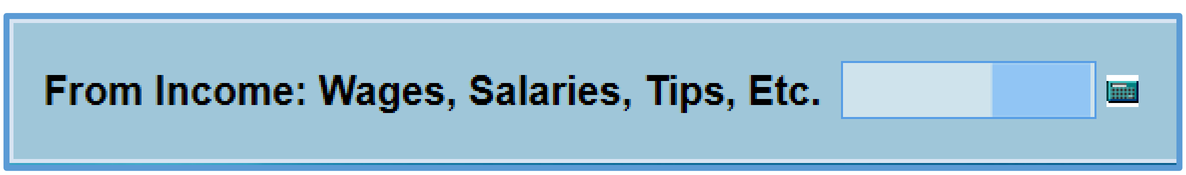
2. Review the available reports. Click the report type you want to run or type the corresponding number. For this topic, we will run **Client Reports**.

TaxSlayer Pro displays the **Client Reports** window:



3. Scroll through the list of available information and select the check box(es) for any data on which you want to run the report. For this example, we will use the **Income: Wages, Salaries, Tips, Etc.** data.

TaxSlayer Pro displays a box requesting the starting point for the data you want to report:



4. Type the starting data.
5. Press Enter.

TaxSlayer Pro displays a box requesting the ending point for the data you want to report:

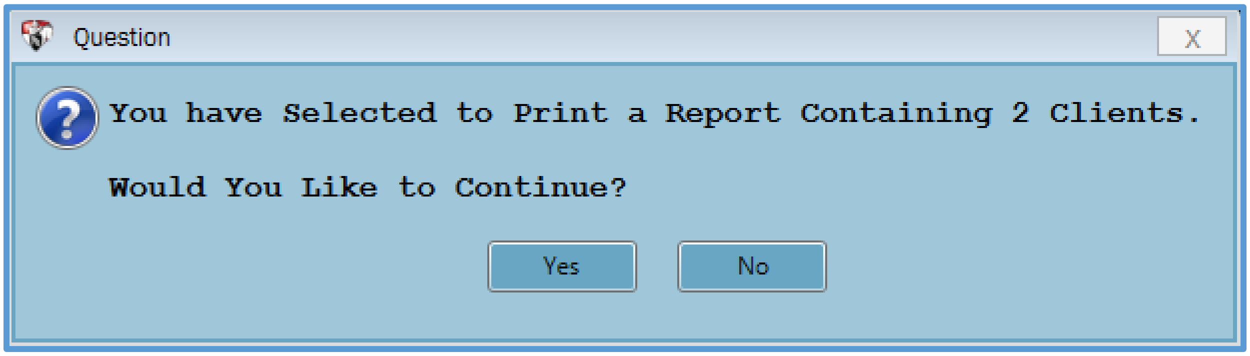
6. Type the ending data.
7. Press Enter.

TaxSlayer Pro displays the **Client Reports** window with the data you typed in the **Input** column:

TaxSlayer Pro Tip: If you want to save this information to run the same report later, click **Save Report**, type a name for your report, and press Enter.

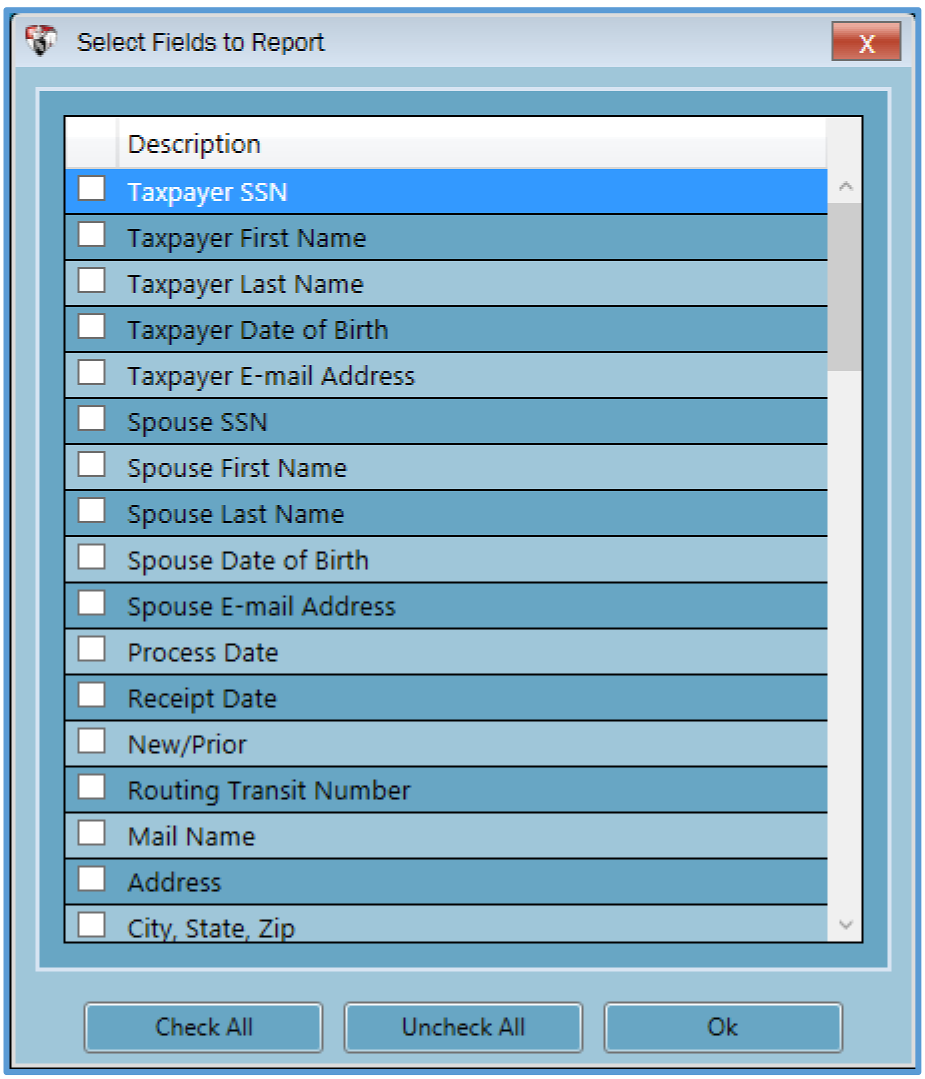
8. Click **View**.

TaxSlayer Pro displays a **Question** confirmation box:



9. Click **Yes**.

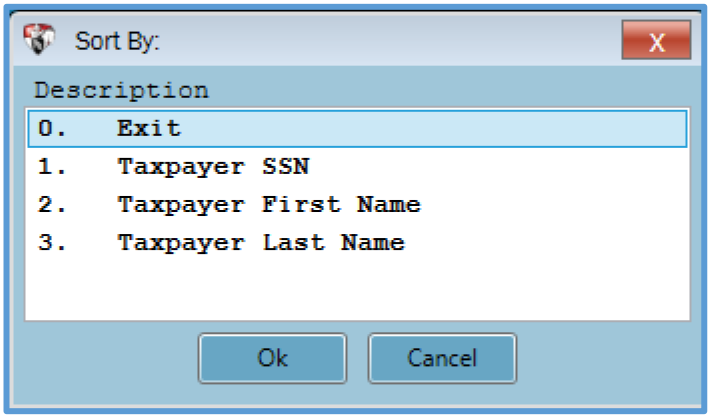
TaxSlayer Pro displays the **Select Fields to Report** window:



10. Select the check boxes for the data you want to include in the report.

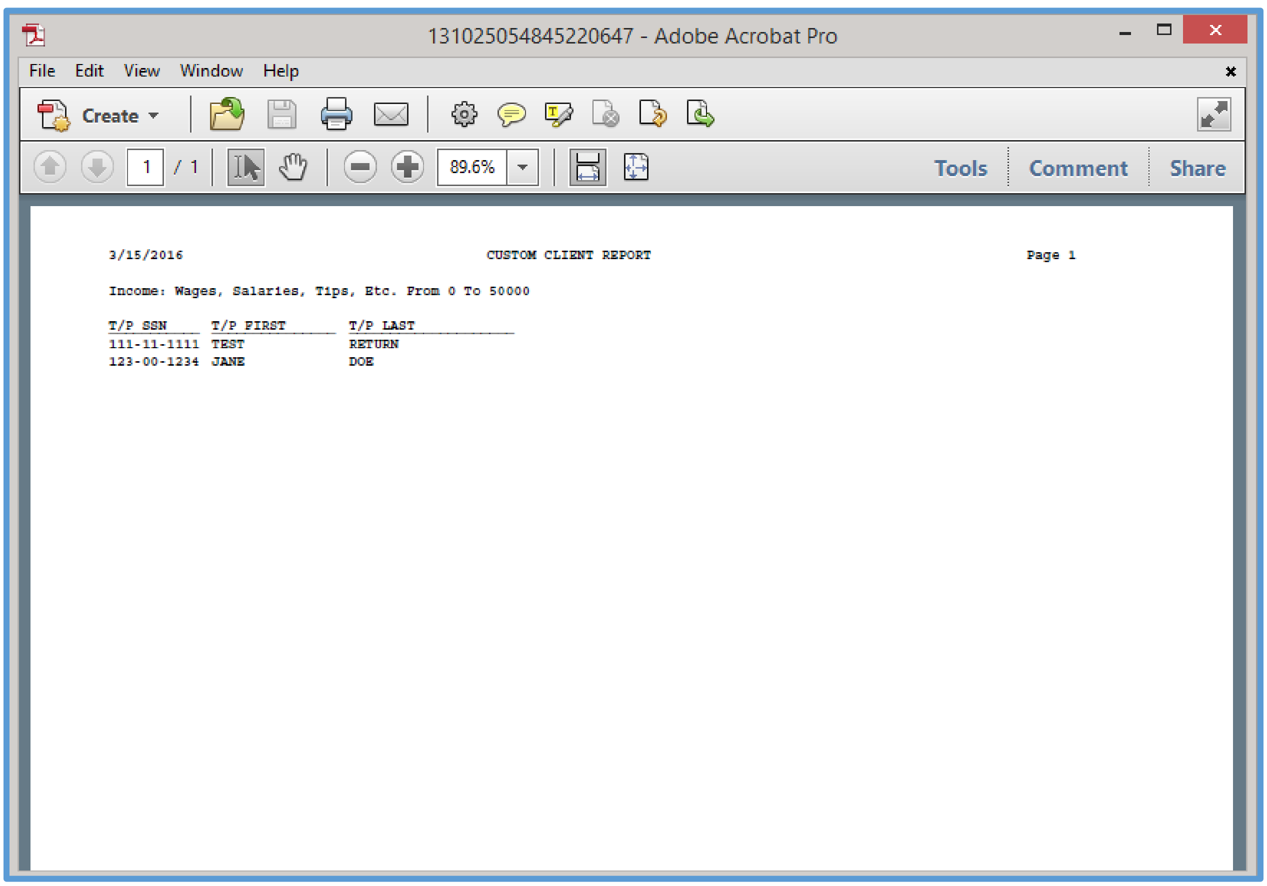
11. Click **Ok**.

TaxSlayer Pro displays the **Sort By** menu:



12. Click the column description by which you want to sort the report.
13. Click **Ok**.

TaxSlayer Pro displays the report as a PDF:

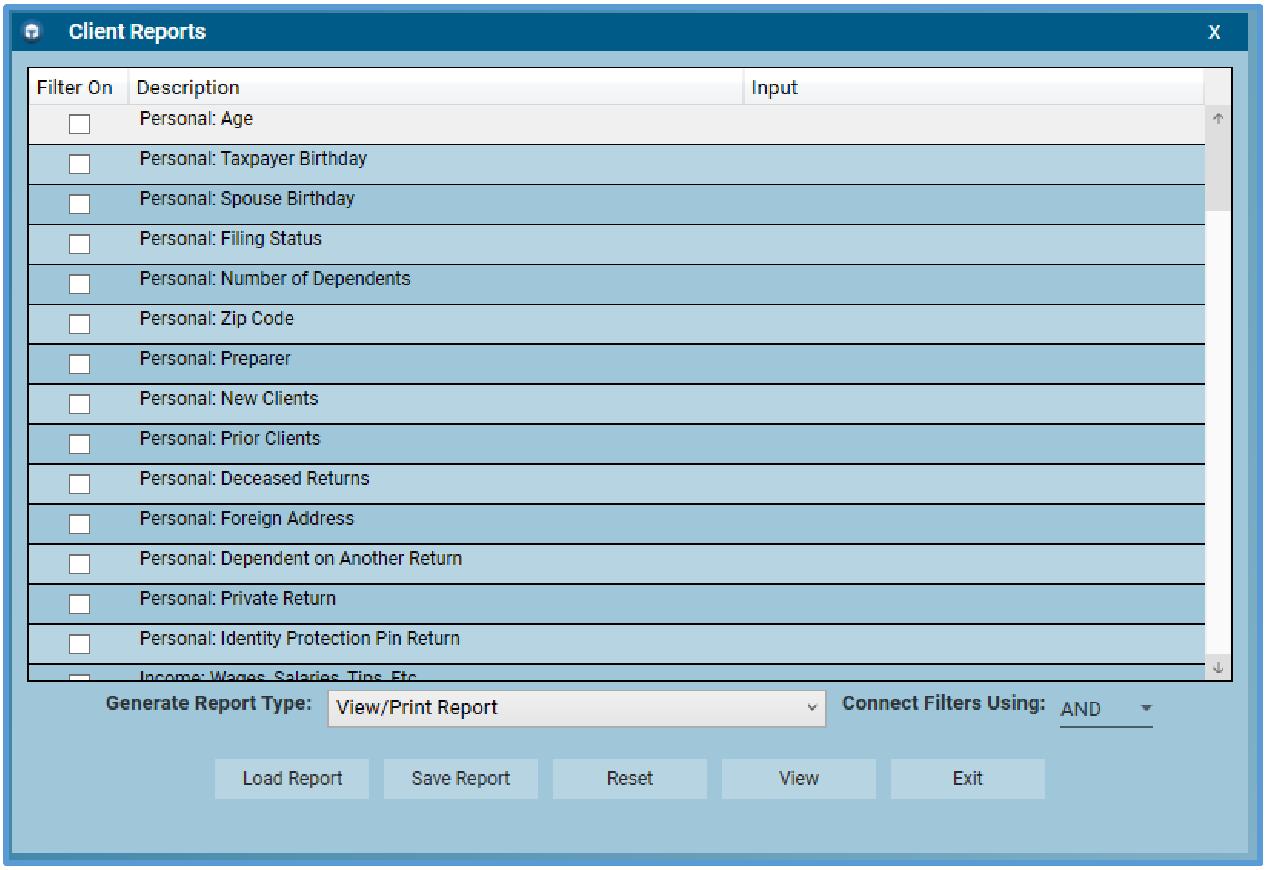


Exporting a Report

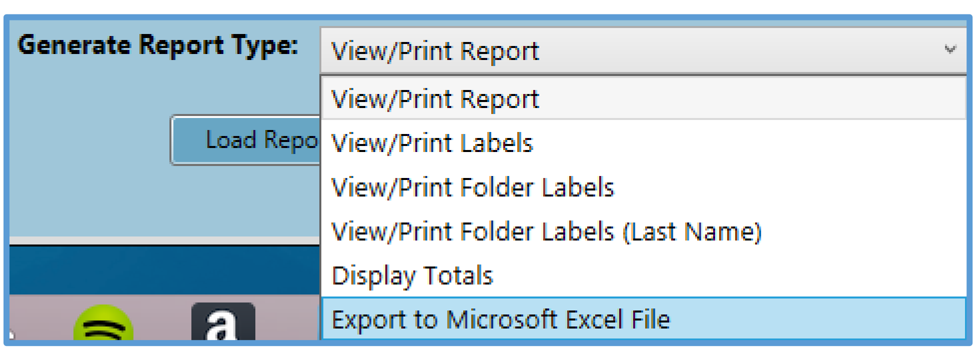
You can also export a report to Microsoft Excel instead of displaying it as a PDF. To export a report, use the following steps:

1. Navigate to reports and select the input data as discussed previously.

TaxSlayer Pro displays the **Client Reports** window:

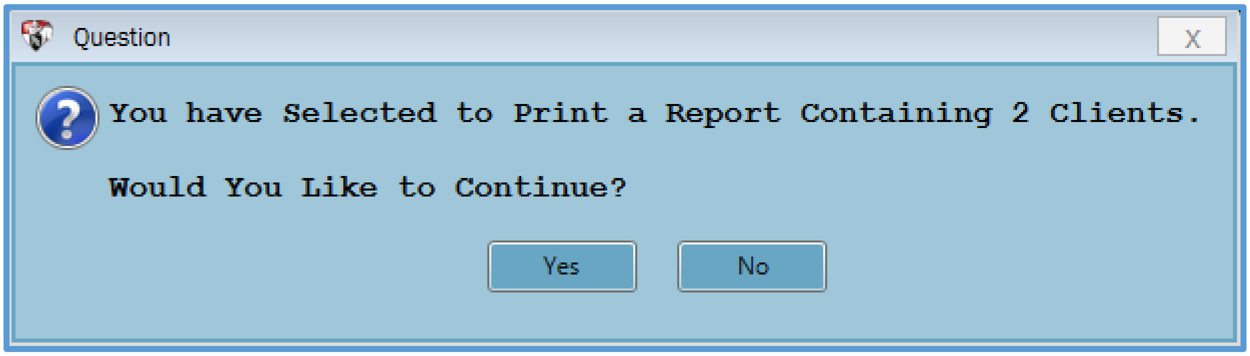


2. From the **Generate Report Type** drop-down list, select **Export to Microsoft Excel File**.



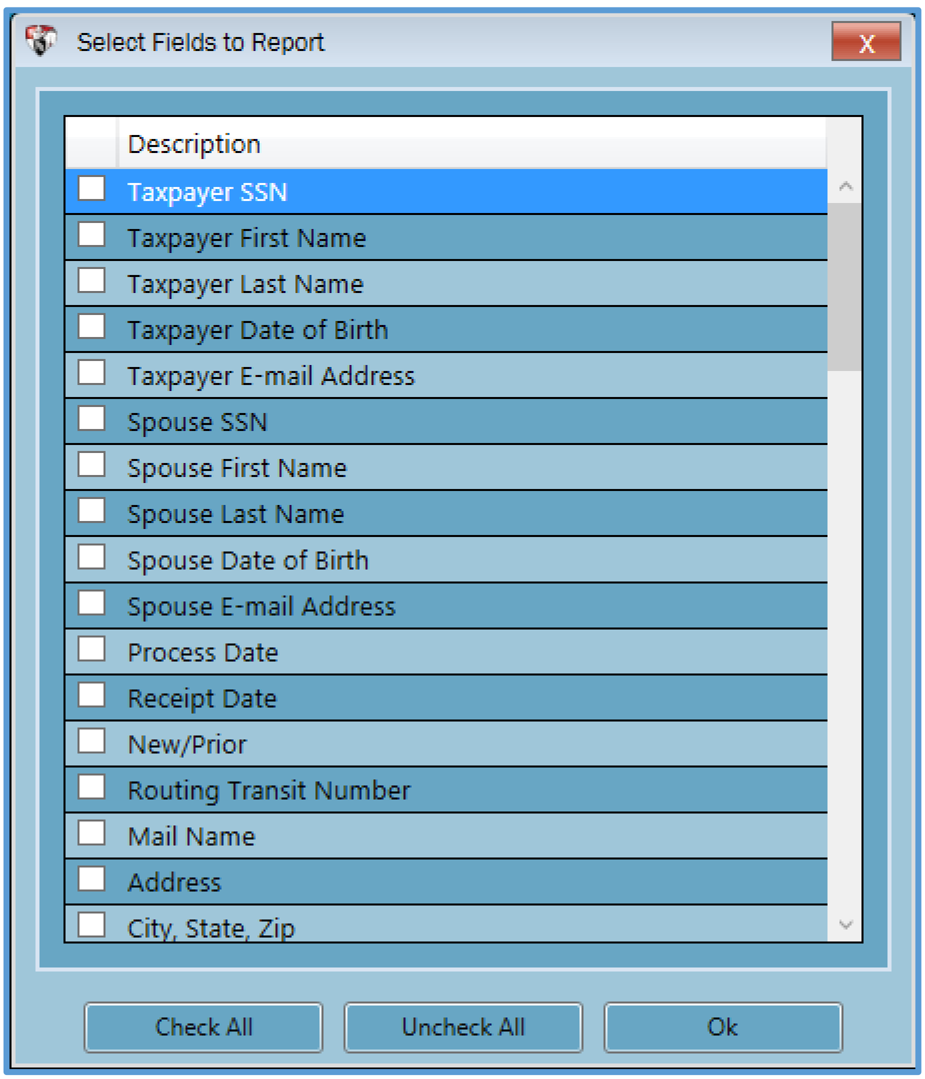
3. Click **View**.

TaxSlayer Pro displays a **Question** confirmation box:



4. Click **Yes**.

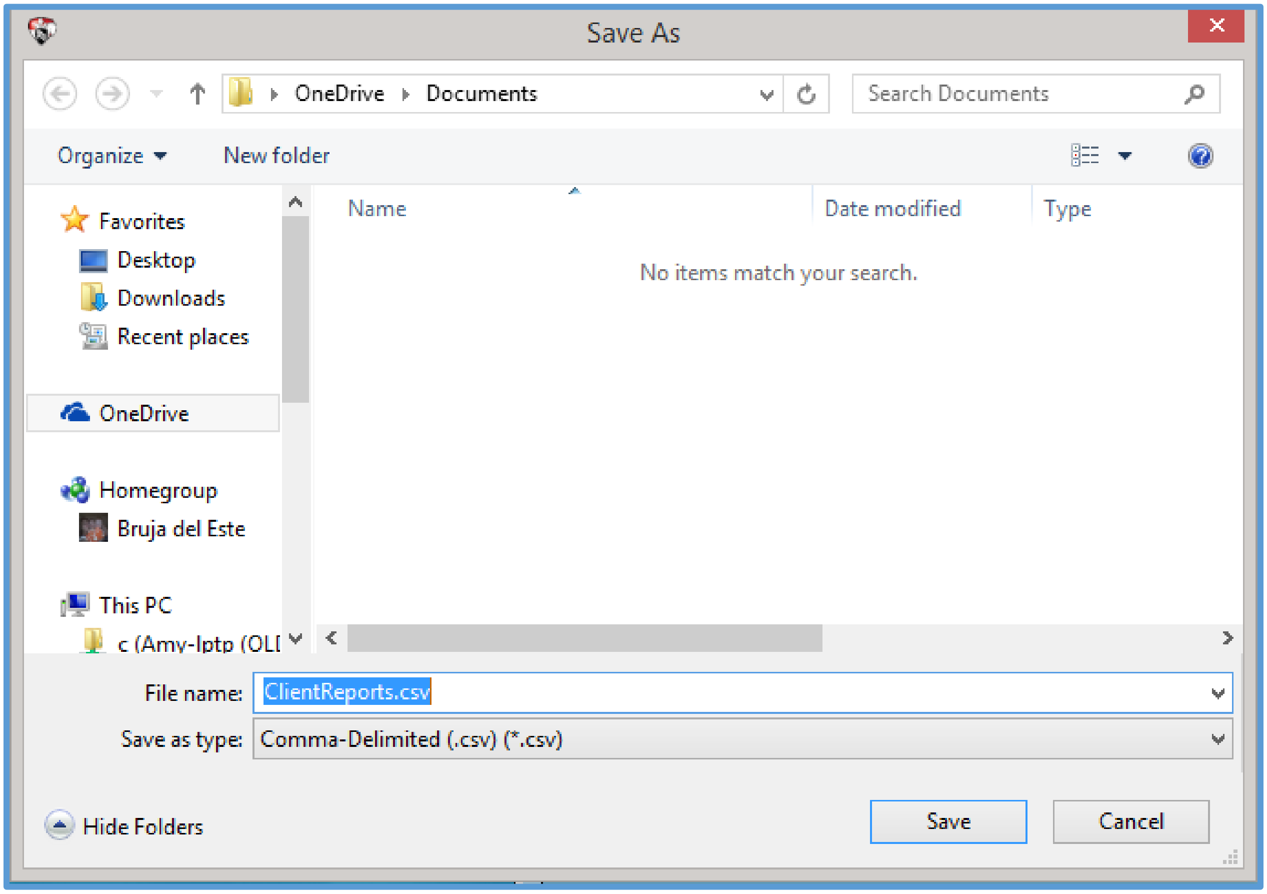
TaxSlayer Pro displays the **Select Fields to Report** window:



5. Select the check boxes for the data you want to include in the report.

6. Click **Ok**.

TaxSlayer Pro displays the **Save As** window:



7. Navigate to the location to which you want to save the report.
8. Click **Save**.

TaxSlayer Pro saves the report as a .csv in the location you chose:

Summary

You should now be able to:

- Run reports.
- Filter reports.
- Export reports.

To see a video of what you just learned, go to Working with Reports. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Preparing a Tax Return

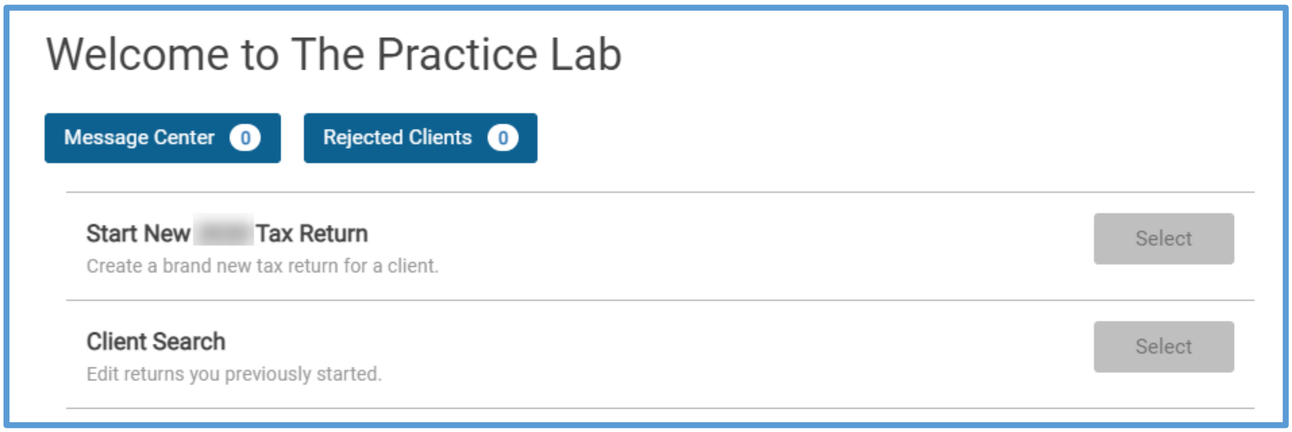
Starting a Tax Return

After completing this topic, you will be able to:

- Start a tax return in TaxSlayer Pro Online.
- Select a filing status.
- Enter personal information for the taxpayer and spouse.
- Enter dependent information.
- Add Form 8332 or a death certificate PDF for dependents.
- Add IRS Identity Protection PIN(s).

Starting a New Return

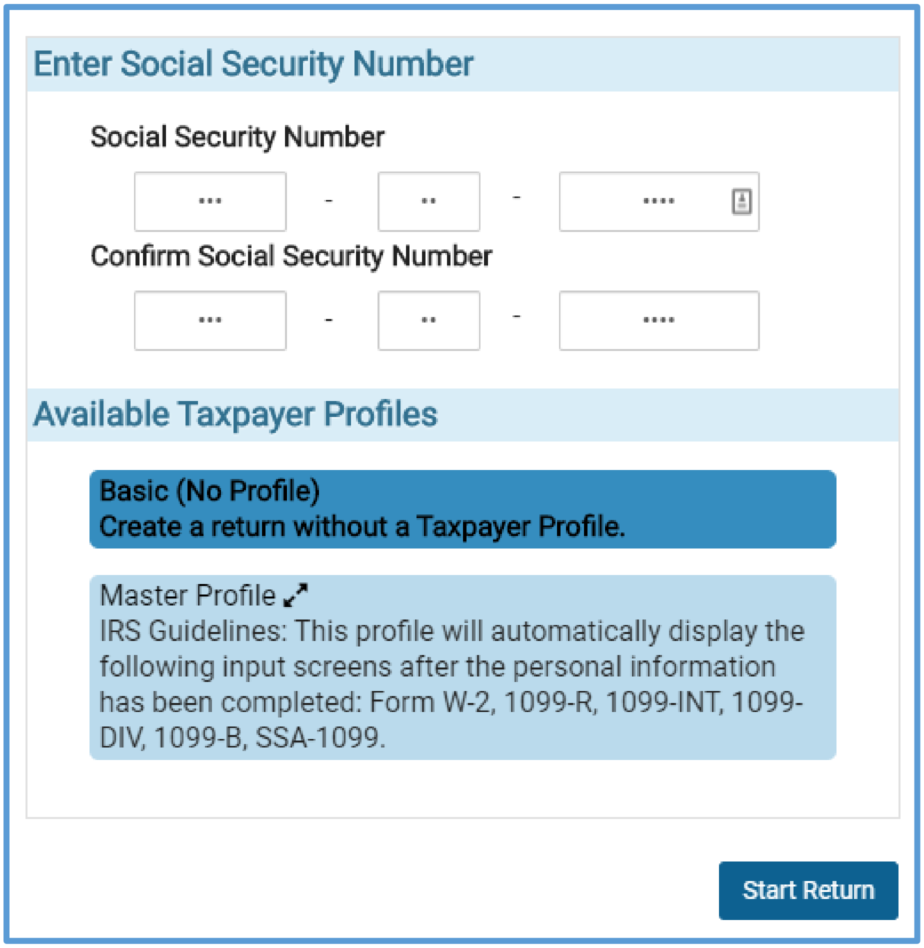
After you log in, TaxSlayer Pro Online displays the **Welcome to…** page:



To start a new return, use the following steps:

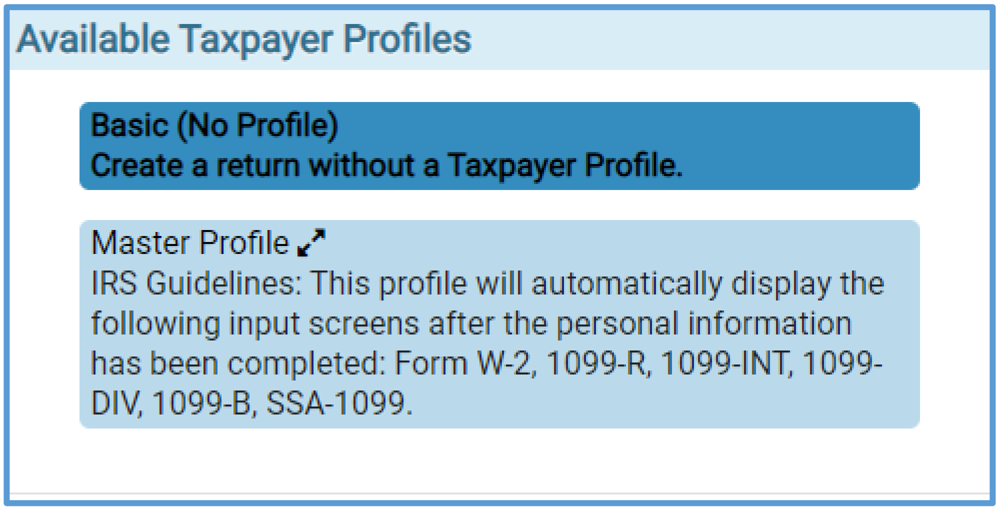
1. Click **Select** on the **Start New Tax Return** line.

TaxSlayer Pro Online displays the **Enter Social Security Number** page:



2. Type the taxpayer's Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN).
3. Type the taxpayer's Social Security number or ITIN again for verification. Use the taxpayer's documentation to type the number both times to avoid an incorrect entry.

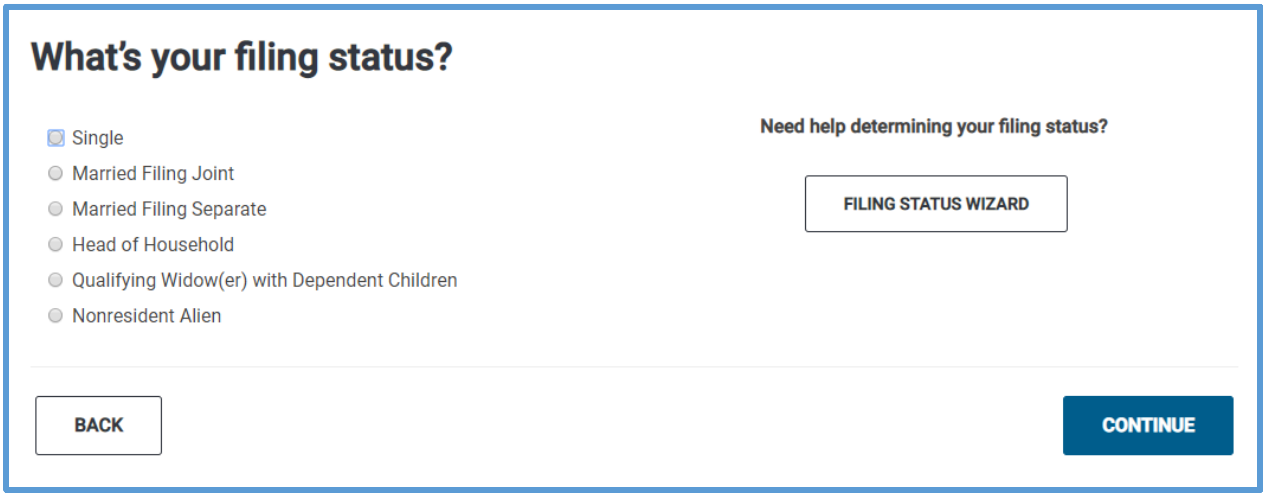
Taxslayer Pro Online displays the **Available Taxpayer Profiles** section:



4. Select a taxpayer profile. For this lesson, select **Basic**.
5. Click **Start Return**.

NOTE: You can choose a Taxpayer Profile to automatically display income and adjustment entry pages that most closely reflect information from the taxpayer. When you do this, you save time in the return. You can still add other information to the return after you complete any of the necessary forms displayed by the taxpayer profile. For more information on taxpayer profiles, see the *Entering Basic Income* lesson.

TaxSlayer Pro Online saves the new return and displays the **What's your filing status** page:



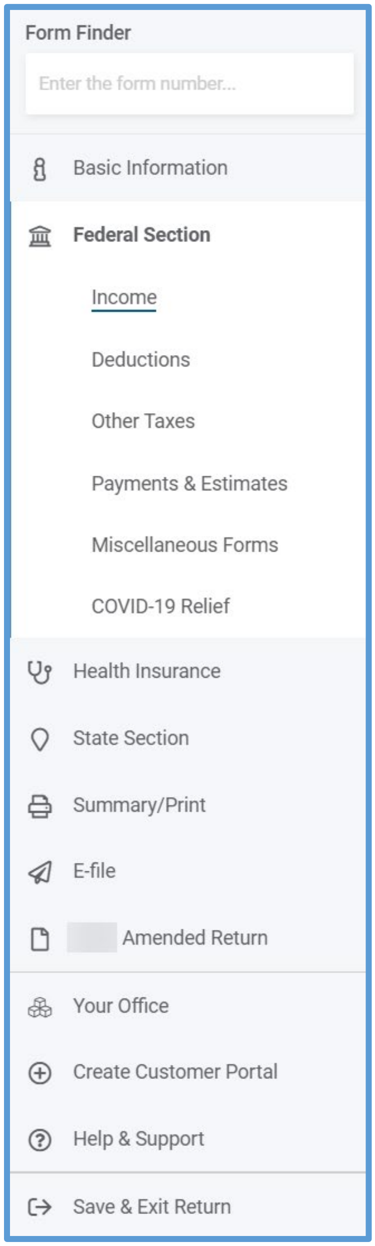
TIP: If you select the **Nonresident Alien** filing status, you cannot change back to a resident filing status (Single, etc.) on the tax return. In order to change to a resident filing status, you must deactivate the return and then reactivate the return using new return data. See the *Managing Returns* lesson for more detailed information on deactivating and reactivating returns.

Working in the Return

Layout and Links

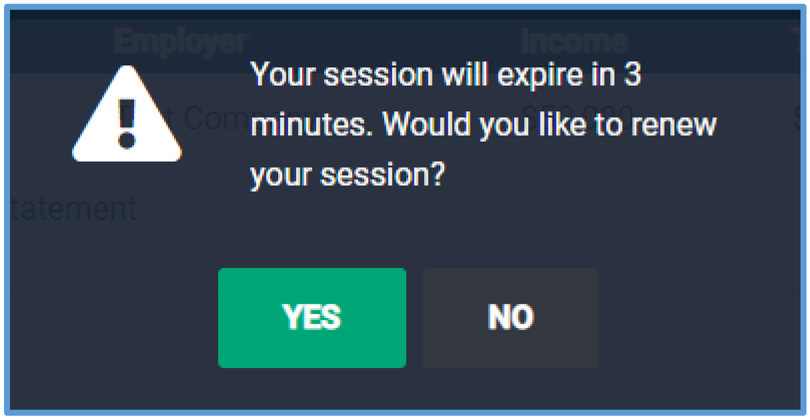
Use the left navigation panel to determine your current section of the tax return. The sub-menu links in the left navigation panel show you more detail on the section.

If you need to close the return, click **Save & Exit Return** at the left.



Session Expiration

If you are inactive for 17 minutes, TaxSlayer Pro Online displays a warning:

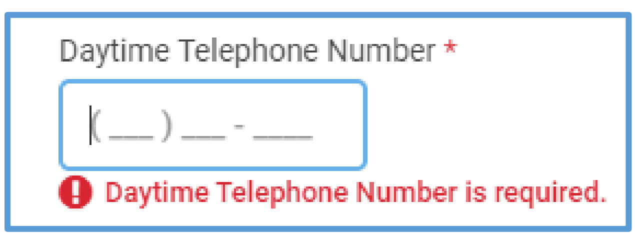


Click **Yes** to remain logged in. If you do not click **YES** within the three minutes, TaxSlayer Pro Online logs you out and displays the Office Client List. You will need to log in again.

TIP: TaxSlayer Pro Online saves the data you enter when you click **Continue** on each page. If your session times out before you click **Continue**, TaxSlayer Pro Online ***does not*** save the data.

Required Information

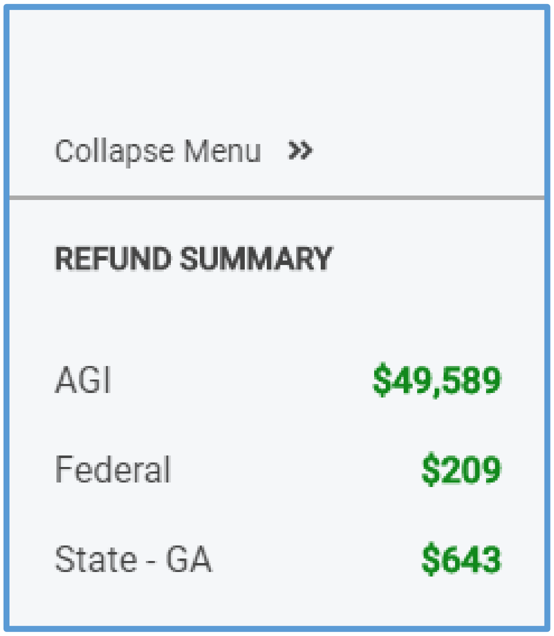
If you do not complete a required box on the page and attempt to continue to the next page, TaxSlayer Pro Online displays a warning in red either at the top of the page or on the box:



Click any warning to navigate to the error and correct it.

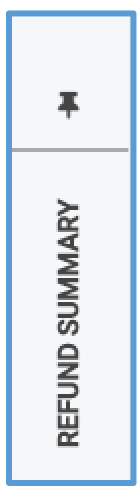
Federal AGI and Refund Amount

As you work through the return, TaxSlayer Pro displays the federal AGI, federal and state refund amount:



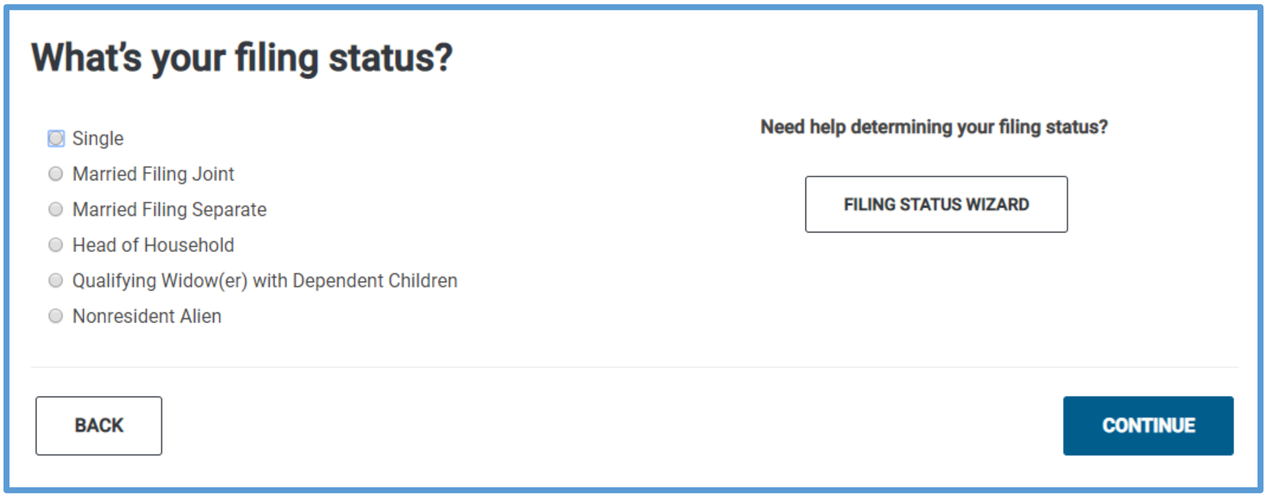
NOTE: If you add multiple states on the return, TaxSlayer Pro Online shows all states in one static view, displaying the appropriate refund/balance due information.

TIP: To hide the AGI and Refund monitor, click **Collapse Menu**. To expand the section, click the Refund Summary Pin icon.



Selecting a Filing Status

When you start a return, TaxSlayer Pro displays the **What's your filing status?** page, as discussed previously:



If you know the taxpayer's filing status based on the information he or she gives you, use the following steps:

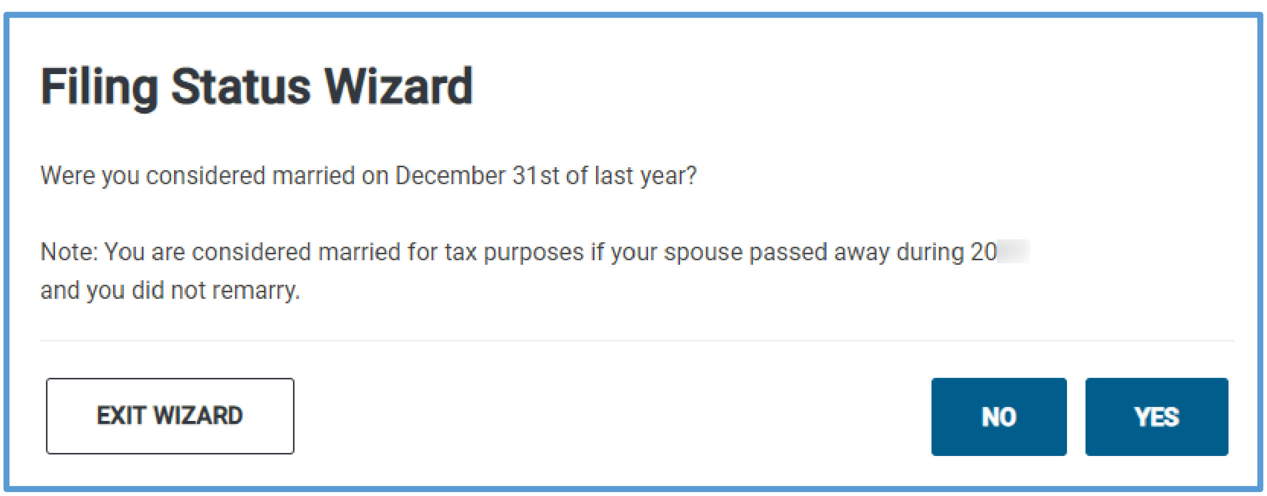
1. Select the appropriate filing status.
2. Click **Continue**.

Using the Filing Status Wizard

If you need help determining the filing status, use the following steps:

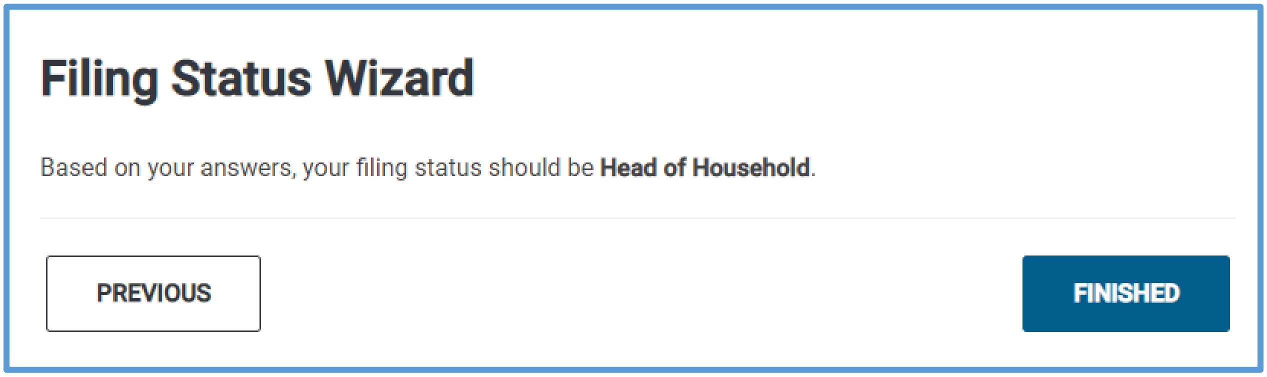
1. Click **Filing Status Wizard**.

TaxSlayer Pro Online displays the **Filing Status Wizard**:



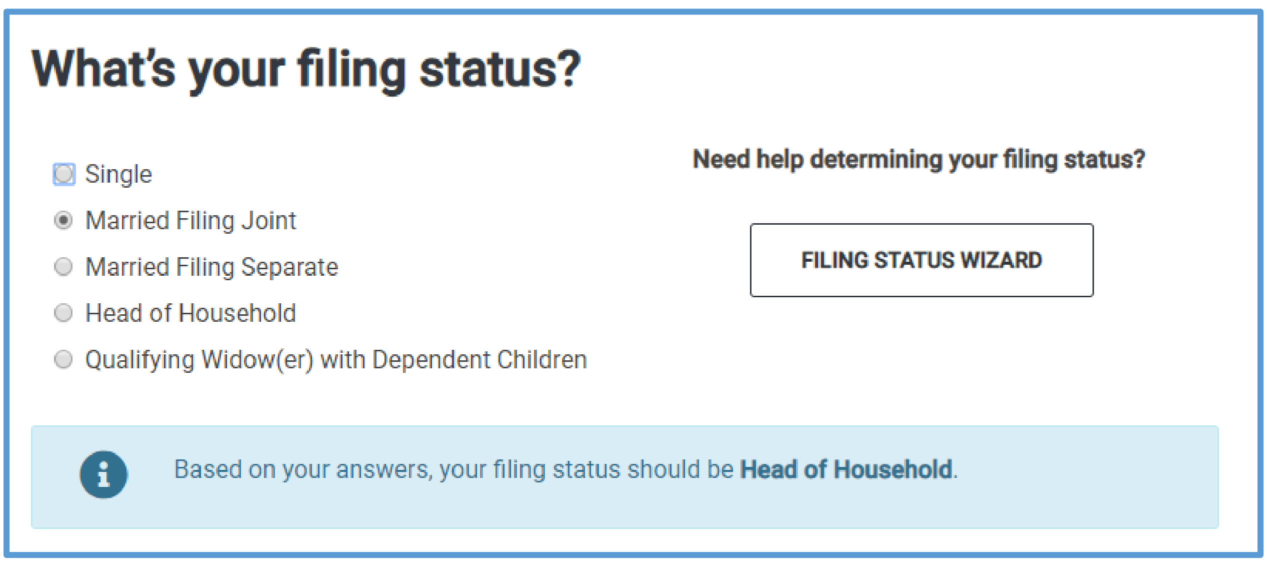
2. Read each question in the wizard to the taxpayer and click the appropriate answer.

When you finish answering all the questions, TaxSlayer Pro Online determines and displays the appropriate filing status based on your answers:



3. Click **Finished**.

TaxSlayer Pro displays the **What's your filing status?** page with the answer from the filing status wizard:



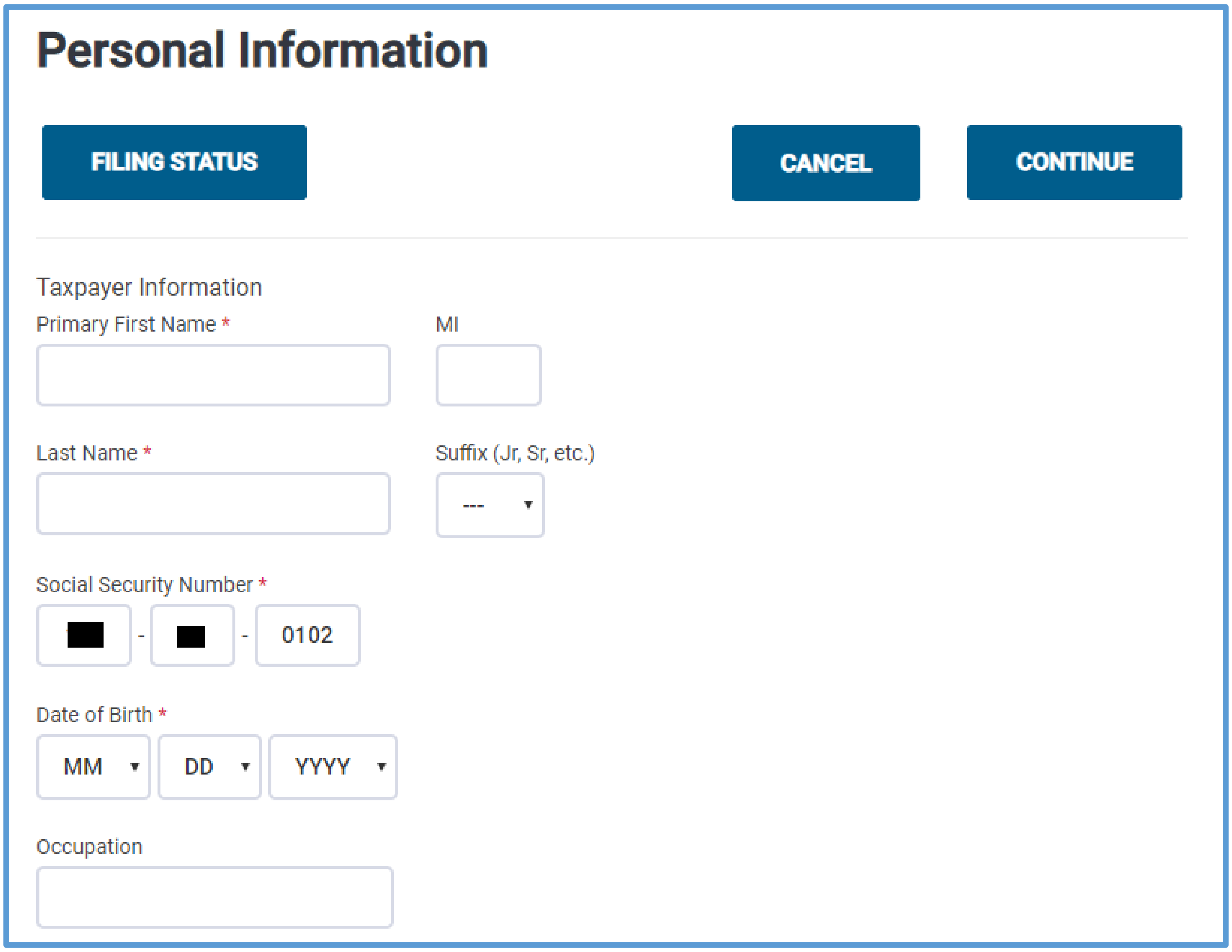
4. Select the appropriate filing status.

TIP: TaxSlayer Pro Online does not automatically select the filing status.

5. Click **Continue**.

Entering Personal Information

After you select the filing status, TaxSlayer Pro Online displays the **Personal Information** page:



Read each box and type or select the appropriate data.

Taxpayer Information

- TaxSlayer Pro Online automatically enters the primary Social Security Number/Individual Taxpayer Identification Number based on the information you typed while starting the return.

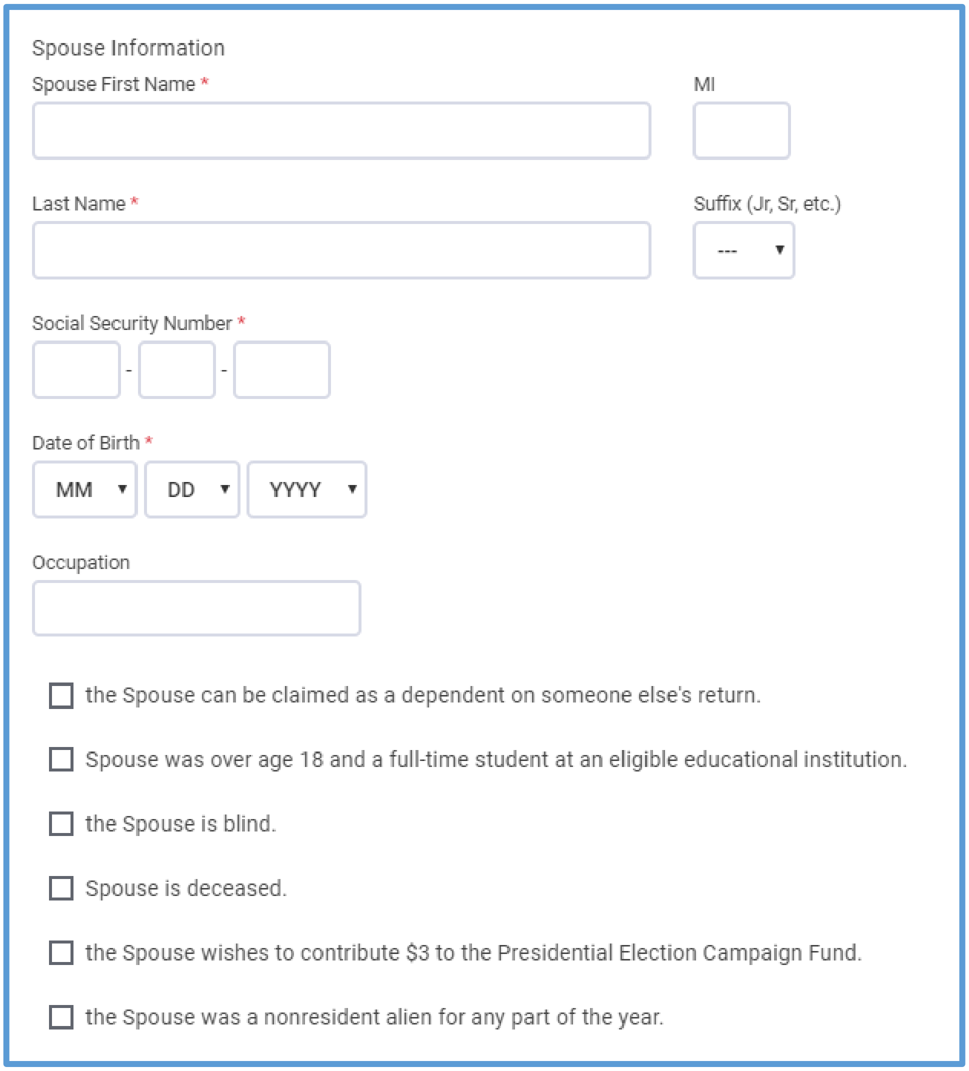
TIP: When entering the date of birth, enter the month and day without the leading zero. For example, if the taxpayer's birth date is May 4, 1986, type 5, Tab, 4, Tab, 1986, Tab.

- ☐ the Taxpayer can be claimed as a dependent on someone else's return.
- ☐ Taxpayer was over age 18 and a full-time student at an eligible educational institution.
- ☐ Taxpayer is blind.
- ☐ Taxpayer is deceased.
- ☐ the Taxpayer wishes to contribute $3 to the Presidential Election Campaign Fund.
- ☐ Taxpayer or Spouse served in a combat zone during the current tax year.
- ☐ Taxpayer was a nonresident alien for any part of the year.
- ☐ Taxpayer or Spouse was affected by a natural disaster during the current tax year.

- Select the check boxes to show whether the taxpayer can be claimed as a dependent on another return, is a student, blind, etc.

Note: TaxSlayer changes these selections each year depending on the current year tax law.

Spouse Information


Spouse Information

Spouse First Name *

MI

Last Name *

Suffix (Jr, Sr, etc.)

Social Security Number *

- -

Date of Birth *

MM DD YYYY

Occupation

☐ the Spouse can be claimed as a dependent on someone else's return.

☐ Spouse was over age 18 and a full-time student at an eligible educational institution.

☐ the Spouse is blind.

☐ Spouse is deceased.

☐ the Spouse wishes to contribute $3 to the Presidential Election Campaign Fund.

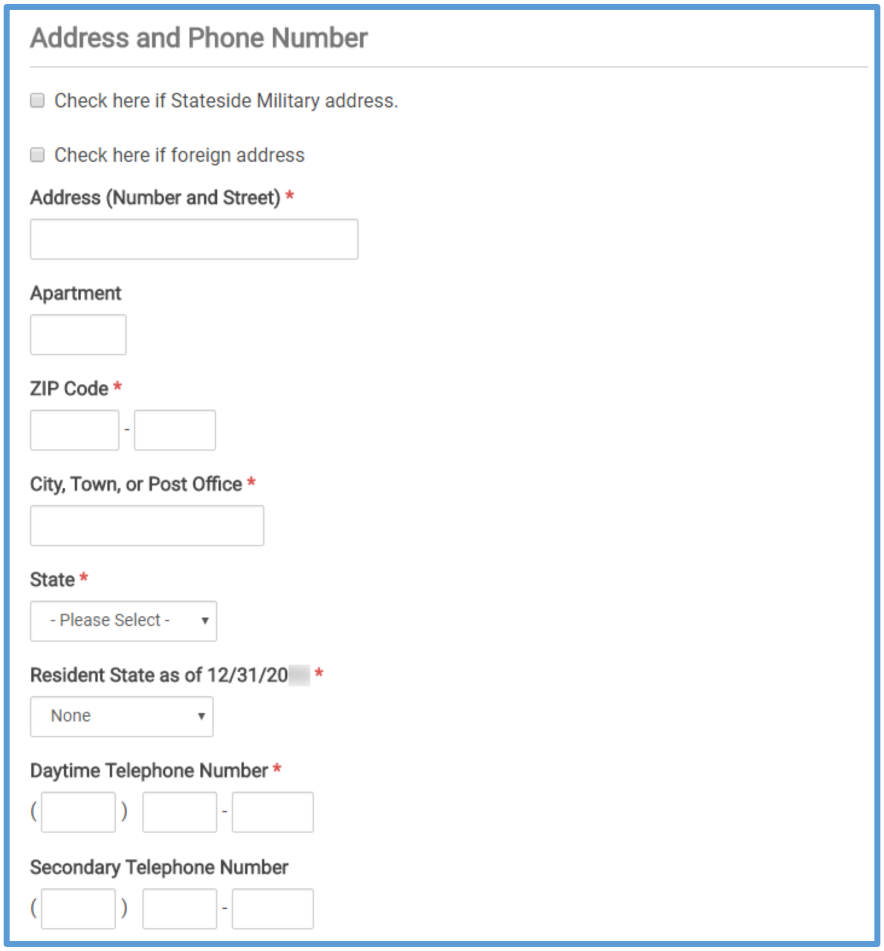
☐ the Spouse was a nonresident alien for any part of the year.

TaxSlayer Pro Online displays the **Spouse Information** section if you selected a Married filing status. Complete the information for the spouse and select any applicable check boxes.

TIP: TaxSlayer Pro Online automatically completes the spouse's last name based on the information you typed for the taxpayer's last name. You can change this box if the spouse has a different last name.

TIP: If you selected the Married Filing Separate filing status and the taxpayer does not know the spouse's Social Security number, type 111-00-1111 to continue to the next page. The taxpayer must paper file the return.

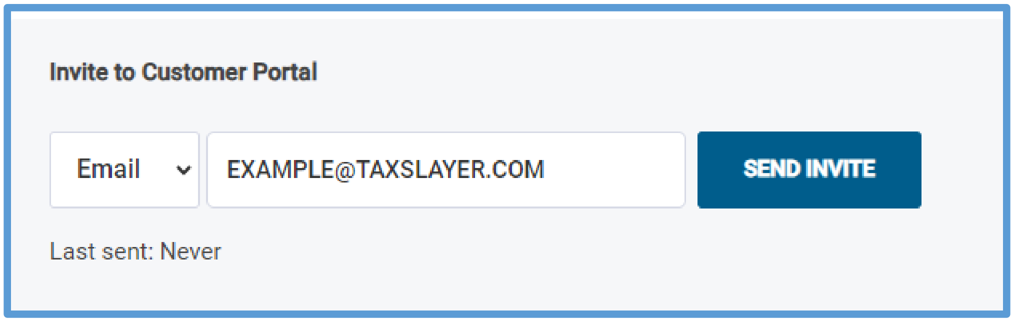
Contact Information



- Select the appropriate check box if the taxpayer has a stateside military address or a foreign address.
- When you type the Zip Code, TaxSlayer Pro Online automatically populates the city, state, and resident state.

TIP: If your resident state is different than the one selected based on your current address, you can change the state. TaxSlayer Pro Online loads the appropriate Resident State Information page based on this selection.

NOTE: If the security role assigned to the user has Customer Portal enabled, TaxSlayer Pro Online displays the **Invite to Customer Portal** dialog box at the bottom of the **Personal Information** page.

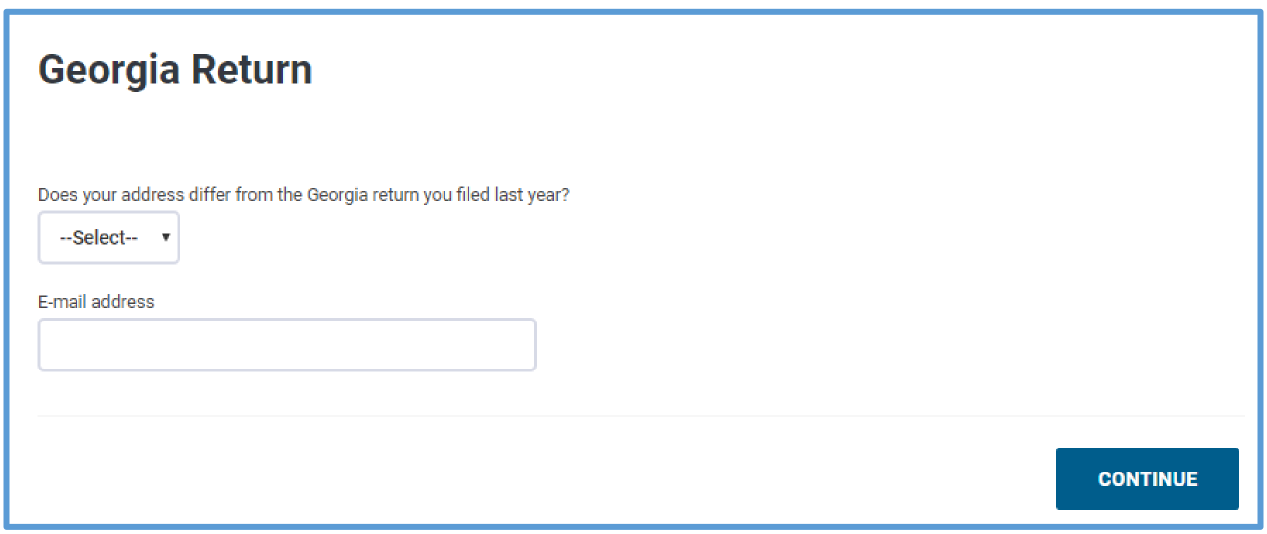


Finish Page

When you finish entering the personal information for the taxpayer and, if applicable, the spouse, click **Continue**.

Resident State Information

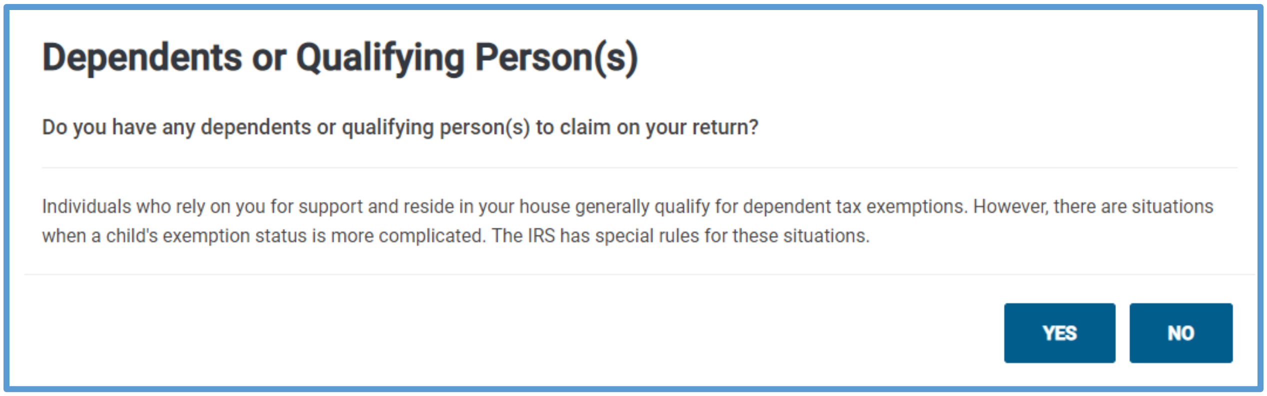
When you complete personal information with a Resident state, TaxSlayer Pro Online displays the **Just a few more questions** page with questions specific to the state you selected. The following screenshot shows Georgia as an example:



Support Tip: If you do not want the state-specific page to load in the **Basic Information** section, select **None** in the **Resident State** list on **Personal Information** page.

Entering Dependent Information

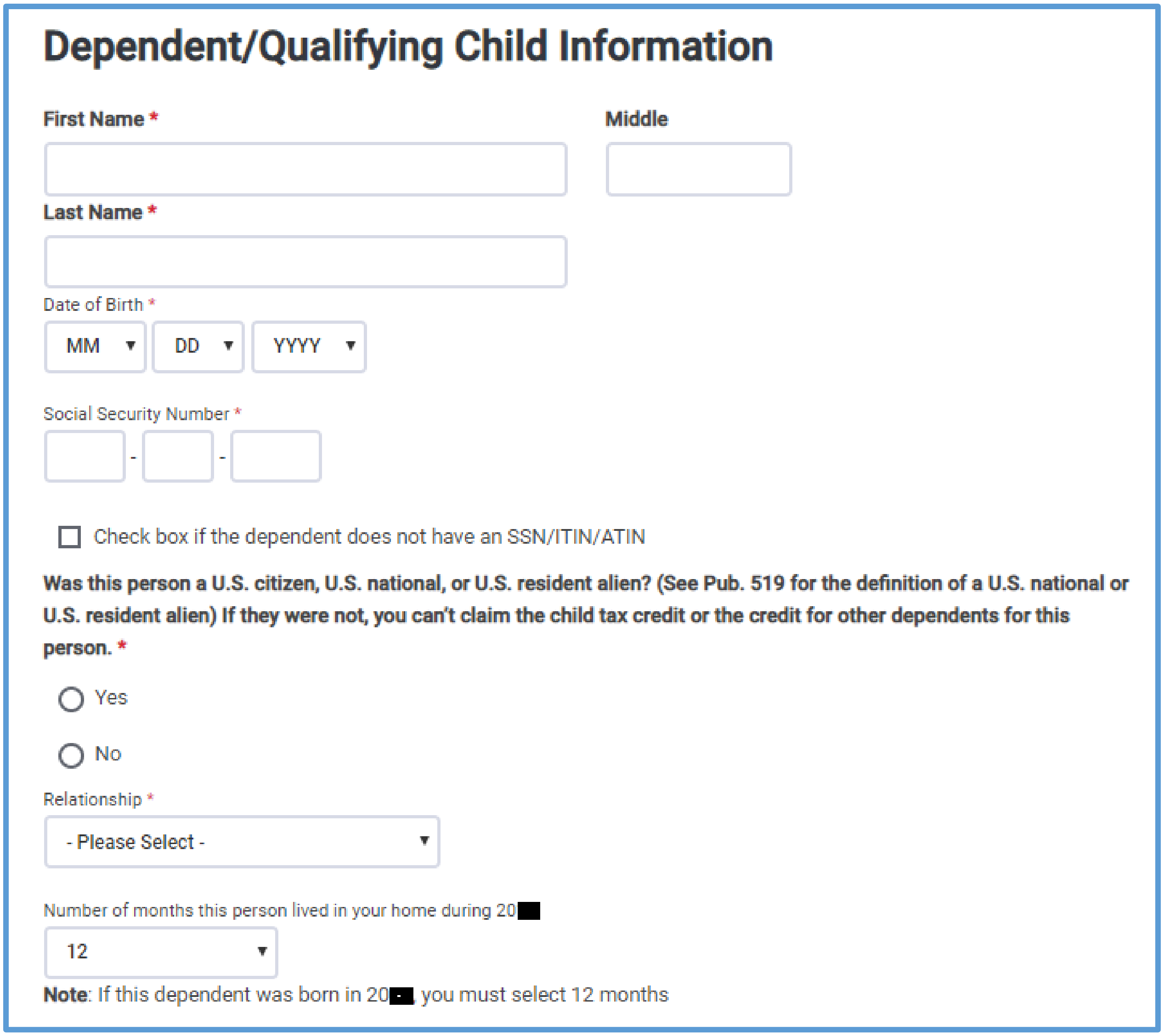
When you complete the personal information or state information, TaxSlayer Pro Online displays the **Dependents or Qualifying Person(s)** page:



To add dependents to the return, use the following steps:

1. Click **Yes** showing that the taxpayer does have a dependent or qualifying person.

TaxSlayer Pro Online displays the **Dependent/Qualifying Child Information** page:



2. Type the dependent or qualifying child's name.

TIP: TaxSlayer Pro Online completes the **Last Name** box based on the taxpayer's last name. You can change this information if the dependent has a different last name.

3. Select the date of birth from the lists.
4. If the dependent does not have a taxpayer identification number, select the **Check if the dependent does not have an SSN/ITIN/ATIN** check box.

TaxSlayer Pro Online displays a new question to determine whether Form W-7 is needed in the return:

☑ Check if the dependent does not have an SSN/ITIN/ATIN

This dependent will be completing a Form W-7, Application for ITIN

○ Yes

○ No

5. Select the answer to the question.
6. If the dependent does have a taxpayer identification number, type the dependent's Social Security number or other identifying number.
7. Select the answer to the question regarding U.S. citizen, U.S. national, or U.S. resident alien status.
8. Select the dependent's relationship from the list.
9. Select the number of months the dependent lived in the home during the year. If the dependent lived in Canada, Mexico, or was not in the home for other reasons, select the appropriate option from the list.
10. Select any appropriate check boxes. TaxSlayer Pro Online may display additional boxes for you to complete based on the check boxes you select.

Check All That Apply:

☐ This person was over age 18 and a full-time student at an eligible educational institution.

☐ Check if this person was DISABLED.

☐ Check if this qualifying child is NOT YOUR DEPENDENT.

☐ Check if you wish NOT to claim this dependent for Earned Income Credit purposes.

☑ Check if this dependent is married.

☐ Check if this dependent is filing their own tax return with the sole purpose of receiving a refund because of no tax liability.

☐ This dependent made over $4,150 of income

☐ This dependent qualifies for a Multiple Support Declaration.

11. When you finish typing the dependent's information, click **Continue**.

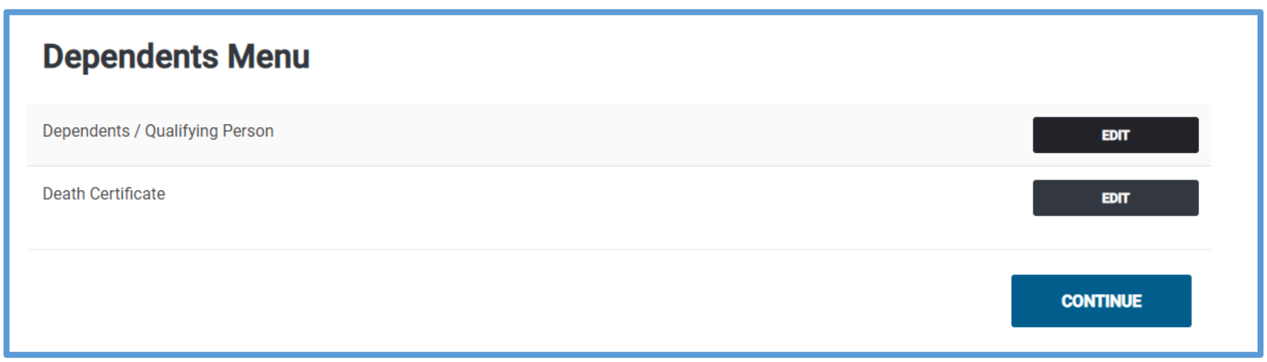
TaxSlayer Pro Online displays the **Dependent or Qualifying Child** page, listing the dependent you just entered:

12. If the taxpayer has more than one dependent or qualifying child, click **Add** to add each one.

TIP: You can add an unlimited number of qualifying dependents in the **Dependent or Qualifying Child** section.

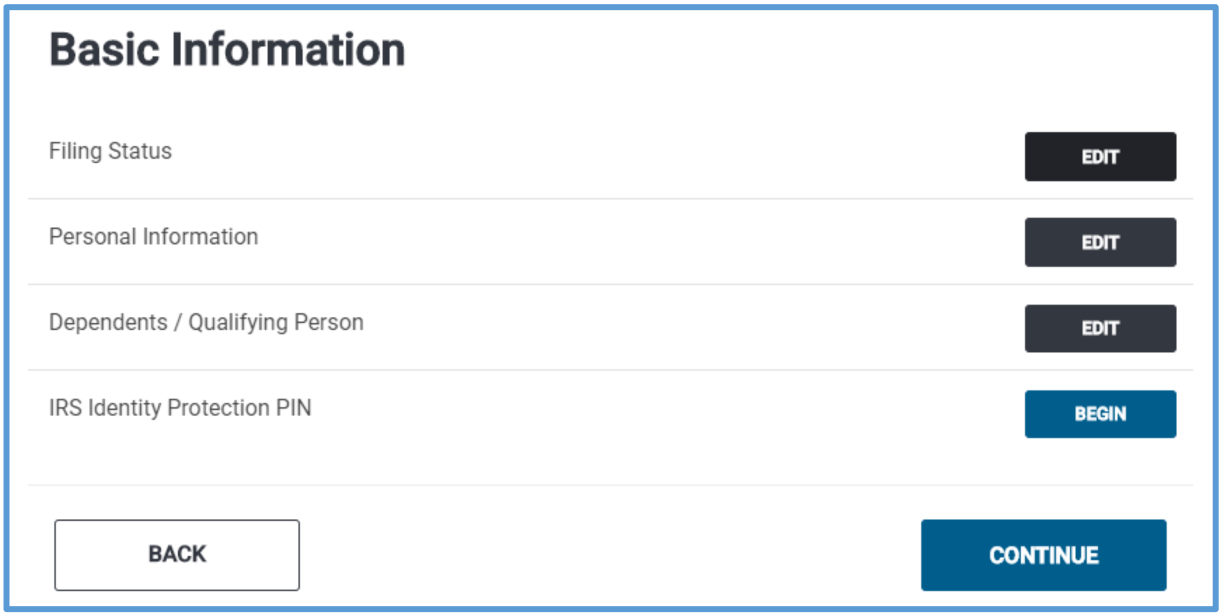
13. When you finish entering dependents, click **Continue**.

TaxSlayer Pro Online displays the **Dependents Menu**:



14. Click **Continue**.

TaxSlayer Pro Online displays the **Basic Information** page:

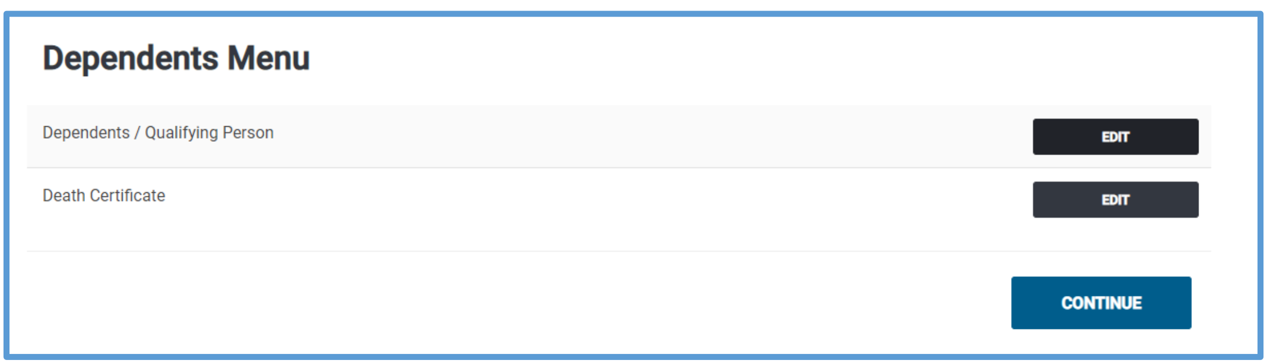


15. To review the filing status, personal information, or dependent information, click **Edit** for that row.
16. When you finish reviewing basic information and entering any applicable IRS Identity Protection PIN, click **Continue**.

Attaching Form 8332 or Dependent Death Certificate

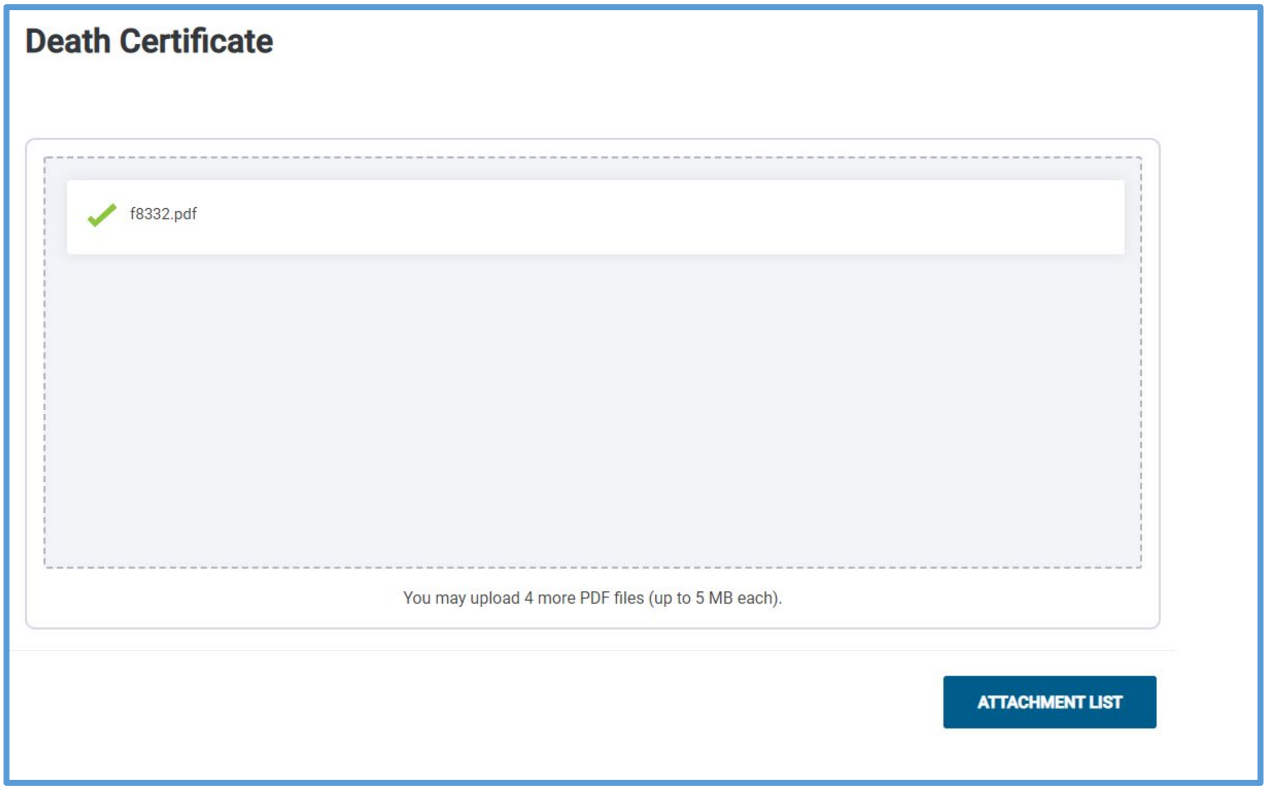
You can attach Form 8332 or a dependent's death certificate to the return. To do so, use the following steps from the **Dependents Menu** page:

1. Select **Dependents / Qualifying Person** from **Basic Information**.



2. Click **Begin** on the **Death Certificate** line.
3. Drag and drop a PDF of the Form 8332 or death certificate in the box.

TaxSlayer Pro Online displays the name of the PDF:



4. Click **Attachment List**.

TaxSlayer Pro Online displays the list of attachments:

5. If you need to add other attachments, click **Add PDF Attachment**.
6. When you finish, click **Continue**.
7. Click **Continue** to return to the **Basic Information** page.

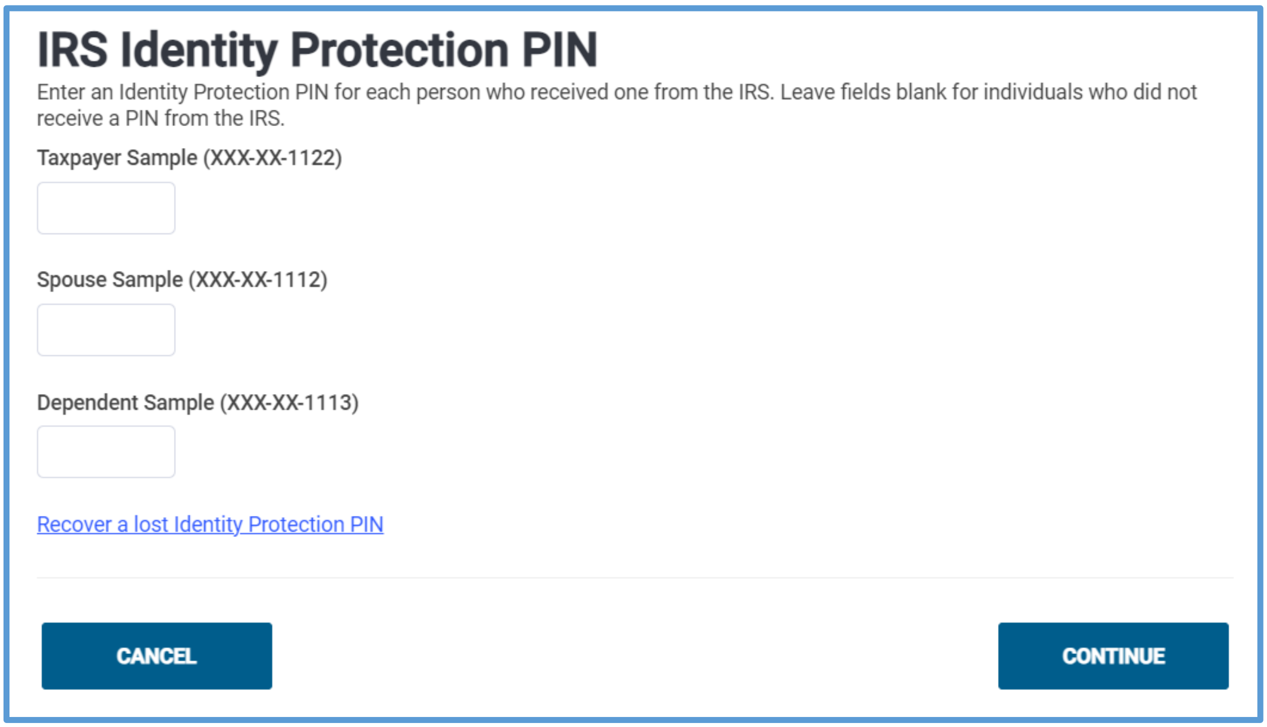
Entering IRS Identification PINs

If the IRS issued identity protection PINs to the taxpayer, spouse and/or dependents, you need to add them to the return. You can add IRS Identification PINs from either the **Basic Information** page or **Miscellaneous Forms**.

Entering IRS Identification PINs from Basic Information

Use the following steps to add the identity protection PINs from the **Basic Information** page:

1. Click the **BEGIN** button on the **IRS Identification PIN** line.
2. Type the appropriate PINs.



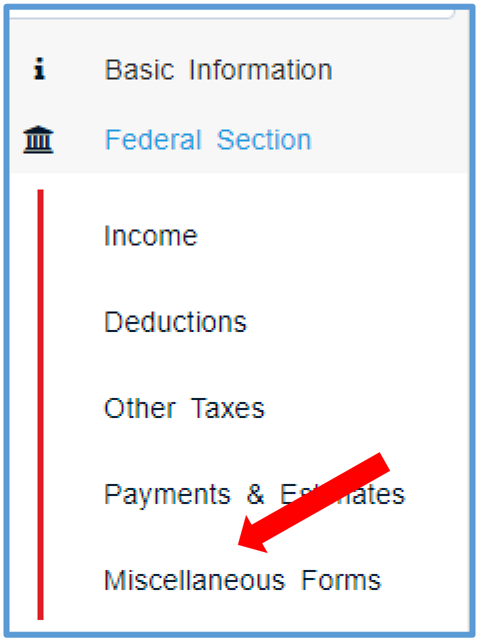
3. Click **CONTINUE**.
4. Click **CONTINUE** to move to the Federal Section.

When you finish the personal information, TaxSlayer Pro Online displays the **Federal Section.**

Entering IRS Identification PINs from Miscellaneous Forms

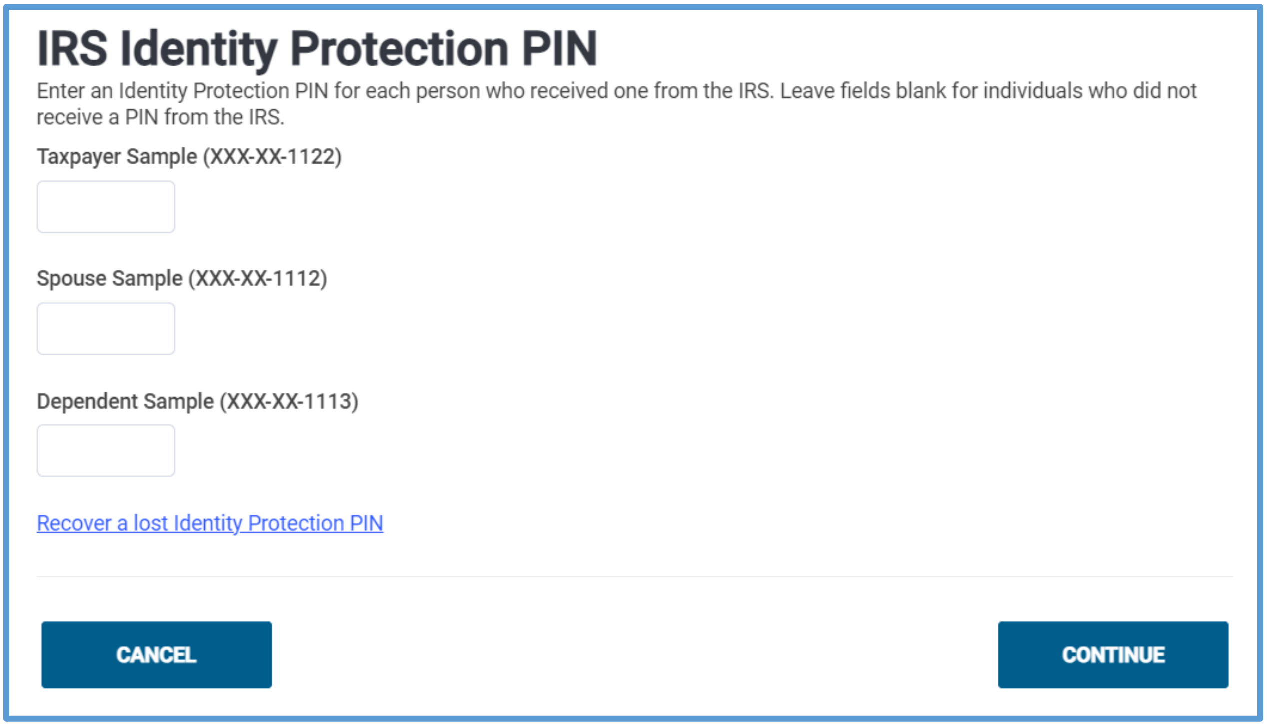
If you did not add identity protection PINs in **Basic Information**, use the following steps to add the identity protection PINs to the return:

1. Click **Miscellaneous Forms**, as shown below:



2. Click the **BEGIN** button on the **IRS Identification PIN** line.

TaxSlayer Pro Online displays the **IRS Identity Protection Pin** page:



3. Type the appropriate PINs.
4. Click **CONTINUE**.

Summary

You should now be able to:

- Start a tax return in TaxSlayer Pro Online.
- Select a filing status.
- Enter personal information for the taxpayer and spouse.
- Enter dependent information.
- Add Form 8332 or a death certificate PDF for dependents.
- Add IRS Identity Protection PIN(s).

To see a video of what you just learned, go to Starting a New Return. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Searching for Existing Taxpayers

After completing this topic, you will be able to:

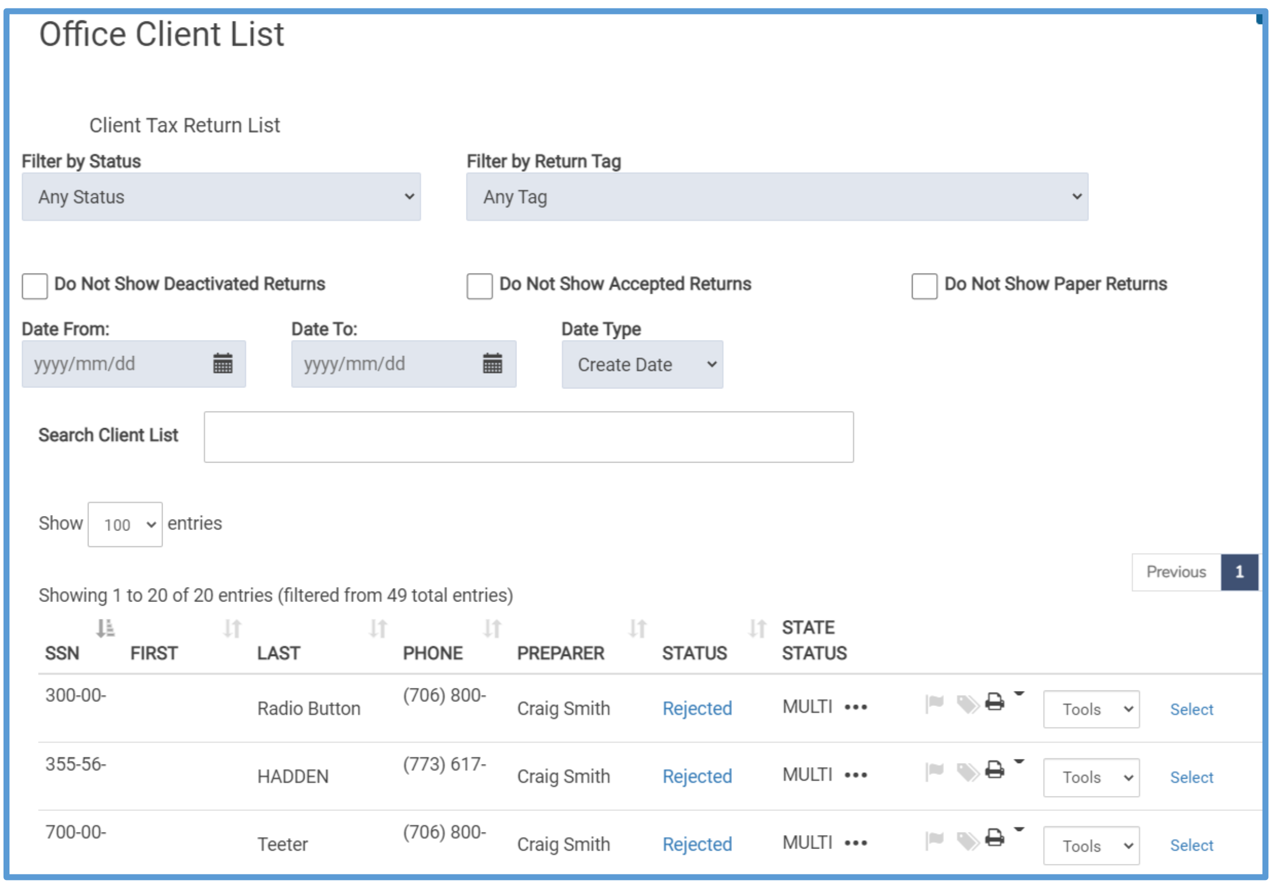
- Open an existing return.
- View the return history.
- Find a taxpayer's e-file status.
- Find explanations for any reject codes.

Opening an Existing Return

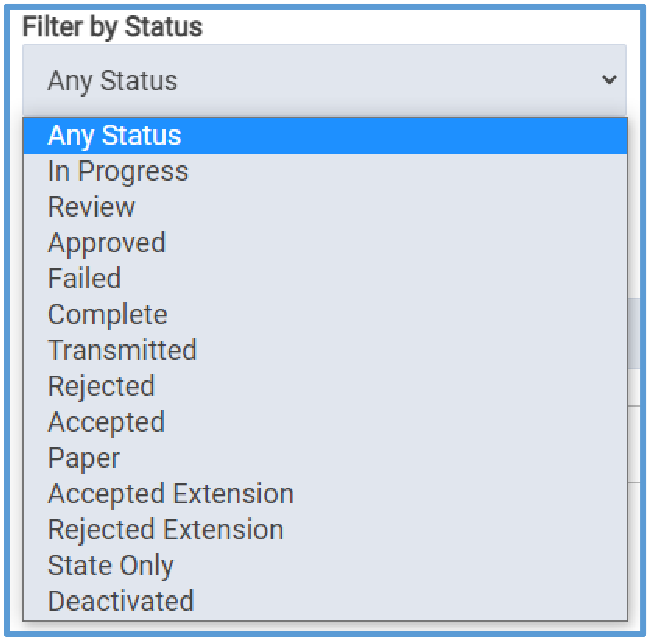
If you need to open a completed return, you can do that from the **Office Client List** page. To search for and open a return, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

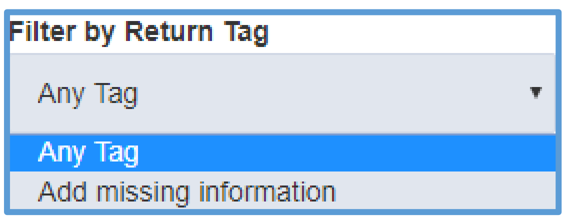
TaxSlayer Pro Online displays the **Office Client List** page:



2. To filter returns by status, select an option from the **Filter by Status** drop-down list, as shown below:



3. To filter by return tag, select an option from the **Filter by Return Tag** drop-down list, as shown below:



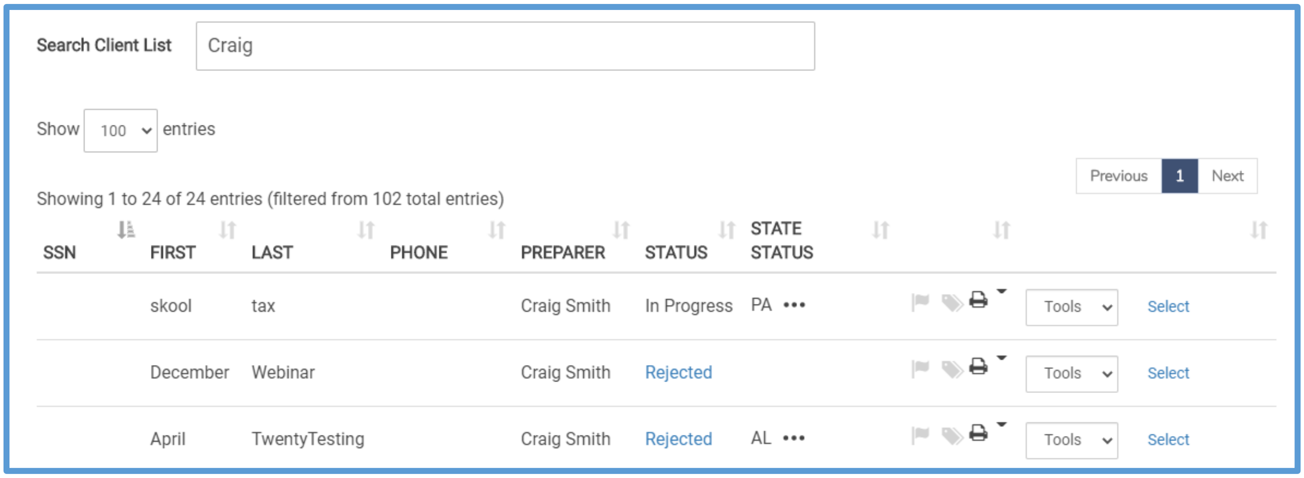
4. If you want to filter by dates, select the starting and ending dates from the appropriate boxes.
5. Type client information in the **Search Client list** box. You can search the client list using one of the following:
    a. Last 4 digits of Social Security number
    b. Full Social Security number
    c. First Name
    d. Last Name
    e. Phone number
    f. Preparer
    g. Status

Note: TaxSlayer Pro Online only enables the auto-find search feature when the site has either:

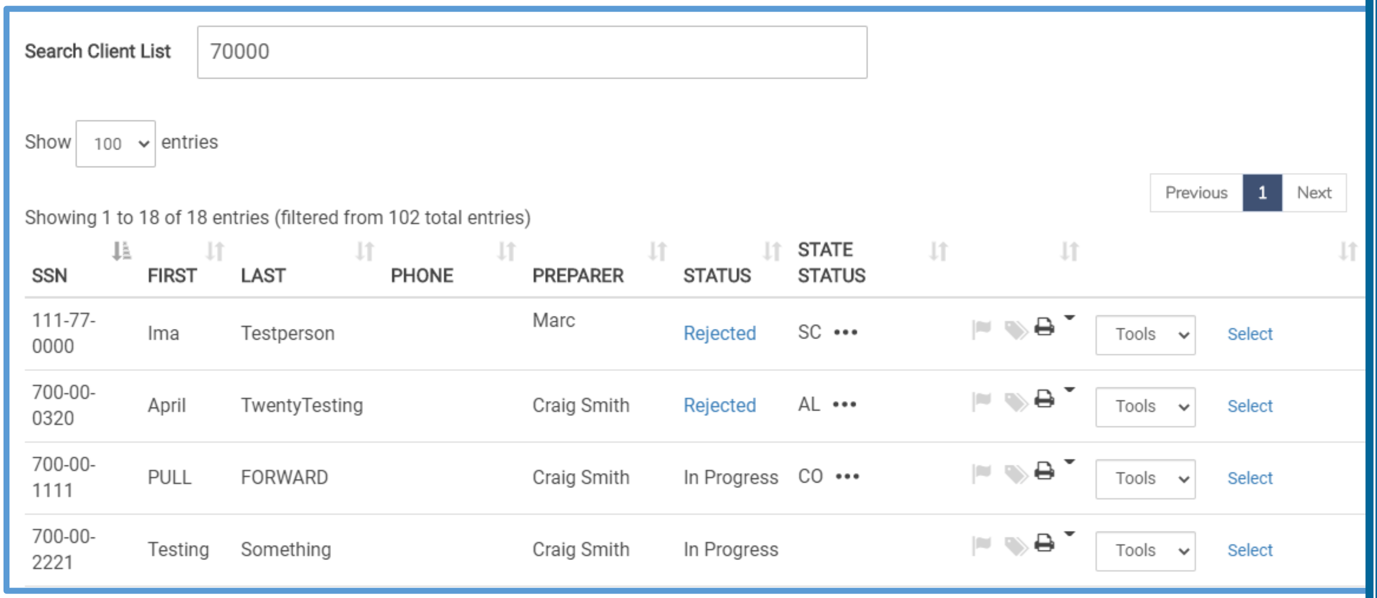
a. Fewer than 1,000 returns, or
b. Fewer returns than designated in Office Setup.

TIP: If you need to find a return that you previously deactivated, clear the **Do Not Show Deactivated Returns** check box.

For this example, search using the preparer name. TaxSlayer Pro Online displays all returns prepared by that preparer:

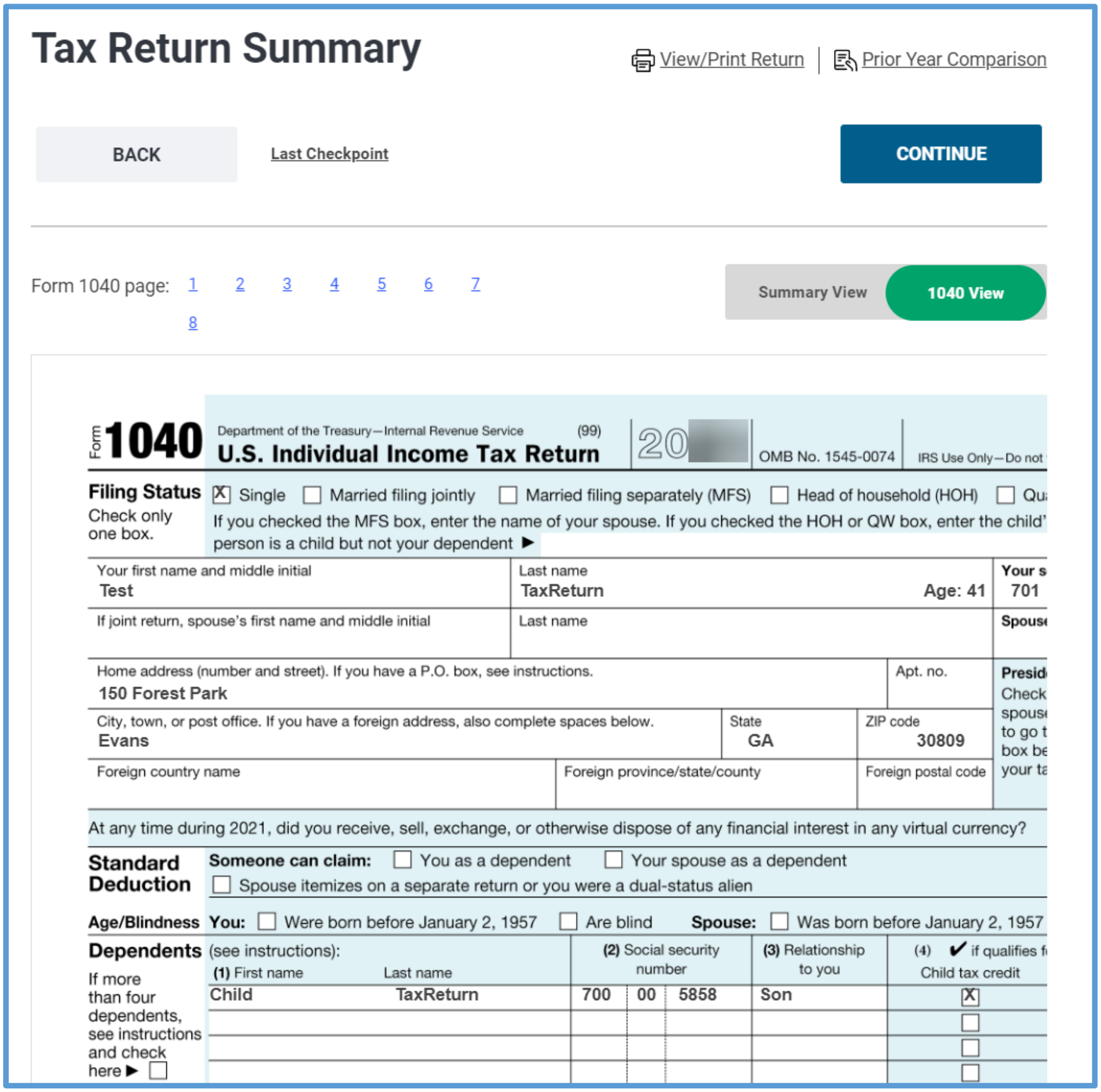


If you search by Social Security number, TaxSlayer Pro Online displays returns containing the Social Security number, or the portion of the Social Security number you typed:



6. Click **Select** on the line for the return you want to open.

TaxSlayer Pro Online displays the **Summary/Print** page for the return:



Tax Return Summary

View/Print Return | Prior Year Comparison

BACK   Last Checkpoint   CONTINUE

Form 1040 page: 1 2 3 4 5 6 7 8

Summary View | 1040 View

Form **1040** Department of the Treasury—Internal Revenue Service (99)
U.S. Individual Income Tax Return 20 OMB No. 1545-0074 IRS Use Only—Do not

Filing Status Check only one box. [X] Single [ ] Married filing jointly [ ] Married filing separately (MFS) [ ] Head of household (HOH) [ ] Qu
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child'
person is a child but not your dependent ▶

Your first name and middle initial	Last name		Your s
Test	TaxReturn	Age: 41	701
If joint return, spouse's first name and middle initial	Last name		Spous

Home address (number and street). If you have a P.O. box, see instructions.		Apt. no.	Presid Check spous to go t box be your ta
150 Forest Park			
City, town, or post office. If you have a foreign address, also complete spaces below.	State	ZIP code	
Evans	GA	30809	
Foreign country name	Foreign province/state/county	Foreign postal code	

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

Standard Deduction **Someone can claim:** [ ] You as a dependent [ ] Your spouse as a dependent
[ ] Spouse itemizes on a separate return or you were a dual-status alien

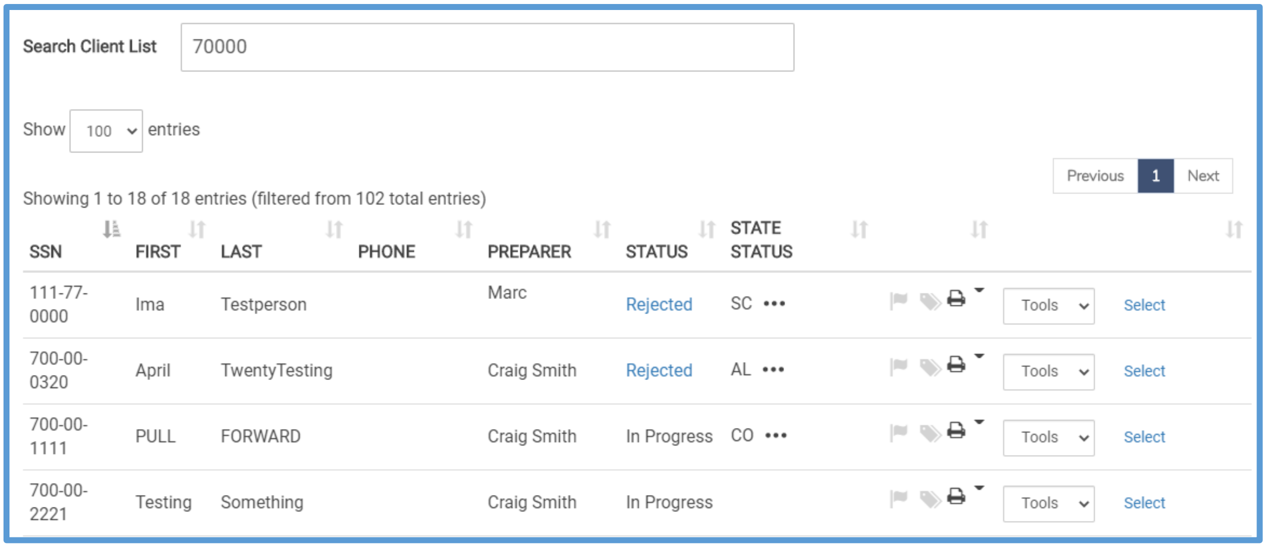
Age/Blindness **You:** [ ] Were born before January 2, 1957 [ ] Are blind **Spouse:** [ ] Was born before January 2, 1957

Dependents (see instructions): If more than four dependents, see instructions and check here ▶ [ ]

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✔ if qualifies f Child tax credit
Child	TaxReturn	700 00 5858	Son	[X]
				[ ]
				[ ]
				[ ]

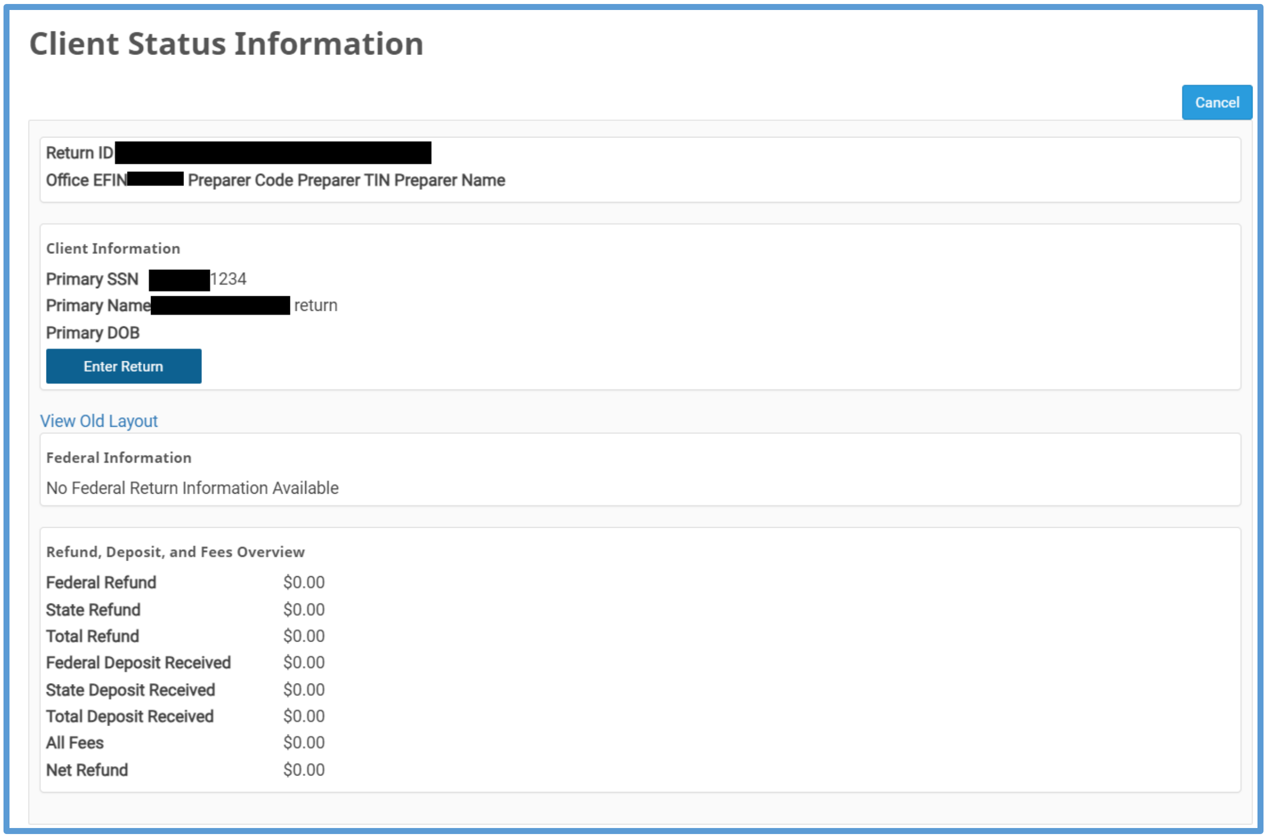
Viewing a Taxpayer’s Return History

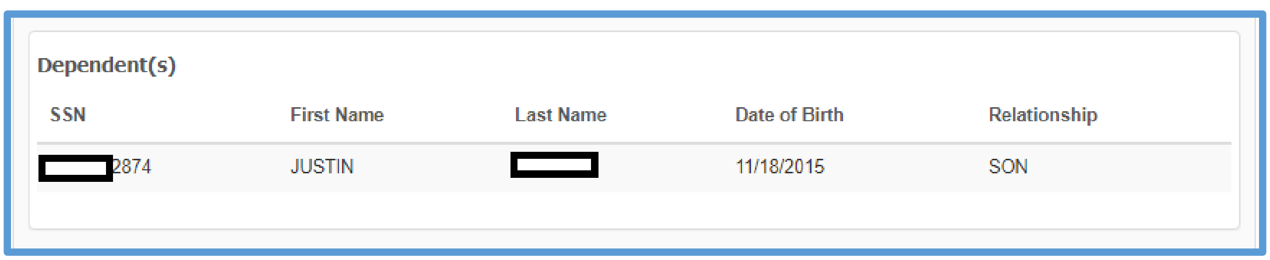
If you need to view the history of a return, you can do that from the **Office Client List** page. To find the return history, use the following steps from the **Office Client List** page:



1. From the **Tools** drop-down list, select **Client Status**.

TaxSlayer Pro Online displays the **Client Status** page with detailed client and dependent information:





2. Review the return history in the **MeF Status History** section.

Finding a Taxpayer's e-file Status

On the taxpayer's **Client Status** page, you can find e-file information at the bottom of the page. In the **Federal Information** section, you can find information on the type of return, date sent, and other information, as shown below:

Federal Transmissions

State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Return Type	...
FD	4/4/2018 6:19:51 PM	4/4/2018 6:30:18 PM	2640332	[redacted]	Accepted	$755.00	1040A	

State Transmissions

State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Form Type	...
CT	4/4/2018 6:32:58 PM	4/5/2018 3:15:32 AM	2640332	[redacted]	Accepted	$0.00	CT1040	

MeF Status History

State	Sent Date	Batch ID	Submission ID	Status	Type
CT	4/5/2018 3:15:32 AM	2640332	[redacted]	acknowledged	1040A
FD	4/4/2018 6:30:14 PM	2640332	[redacted]	acknowledged	1040A

TaxSlayer Pro Online shows whether the IRS or State accepted or rejected the return in the **Federal Transmissions** and **State Transmissions** sections. If the IRS rejected the return, you can also find explanations for the rejection in this section of the **Client Status** page.

Federal Transmissions

State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Return Type
FD	2/23/20 5:31:20 PM	2/23/2017 5:40:39 PM	1036951	[redacted]36951	Rejected	$2,337.00	1040A

Transmission Details

Collapse

Reject Code: IND-181-01 | Category: Database Validation Error | Severity: Reject and Stop

The Primary Taxpayer did not enter a valid Identity Protection Personal Identification Number (IP PIN). Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number.

*** Additional Information: xxx-xx7899 ***

Summary

You should now be able to:

- Open an existing return.
- View the return history.
- Find a taxpayer's e-file status.
- Find explanations for any reject codes.

To see a video of what you just learned, go to Searching for Existing Taxpayers. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Entering Basic Income

After completing this topic, you will be able to:

- List and define the methods for entering income.
- Complete Form W-2.
- Enter taxable refunds.
- Enter interest and dividends.
- Enter IRAs and pensions.
- Enter Social Security benefits.
- Enter Railroad Retirement benefits.
- Enter unemployment income.
- Add less common income, including the following:
    - Taxable scholarships.
    - Alaska Permanent fund dividends.
    - Gambling income.
    - Cancellations of debt.

Methods of Entering Income

TaxSlayer Pro Online provides multiple methods of entering income in the taxpayer's return. You can use any of the following:

- Taxpayer Profile
- 1040 View
- Guide Me
- Enter Myself
- Quick File

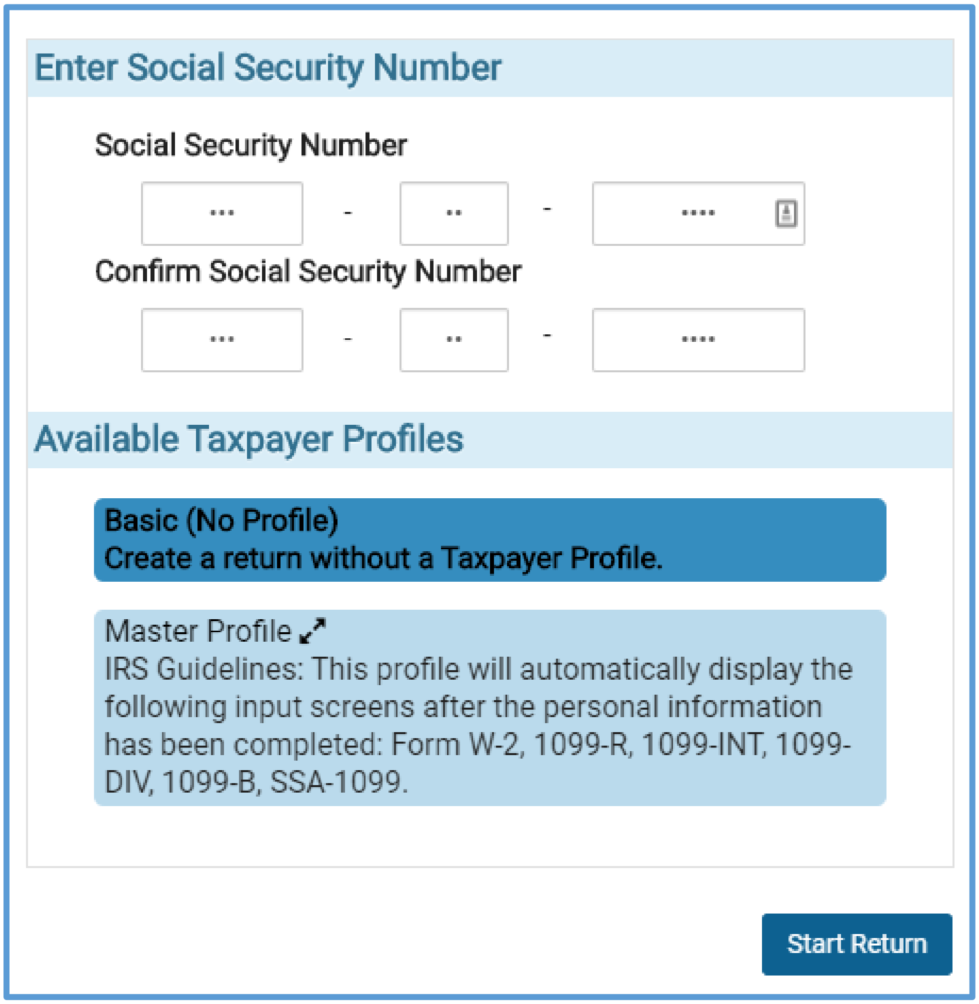
Taxpayer Profile

In TaxSlayer Pro Online, you can choose a taxpayer profile to automatically display income and adjustment entry pages that most closely reflect information from the taxpayers visiting your site. When you do this, you save time in the return. You can still add additional information to the return after you complete any of the necessary forms displayed by the taxpayer profile.

To apply a taxpayer profile to a return, do the following:

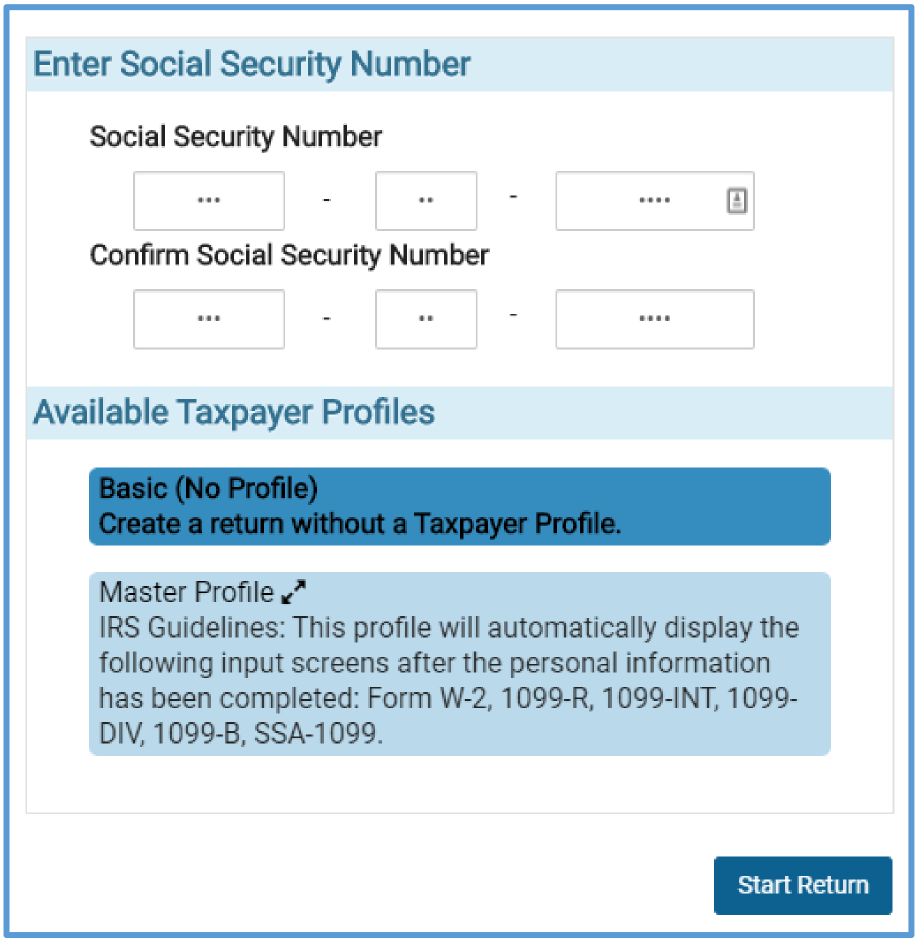
6. Click **Select** on the **Start New Tax Return** line.

TaxSlayer Pro Online displays the **Enter Social Security Number** section:



7. Type the taxpayer's Social Security number or ITIN.
8. Type the taxpayer's identifying number again for verification.

TaxSlayer Pro Online displays the **Available Taxpayer Profile** section:



9. Select a taxpayer profile.
10. Click **Start Return**.

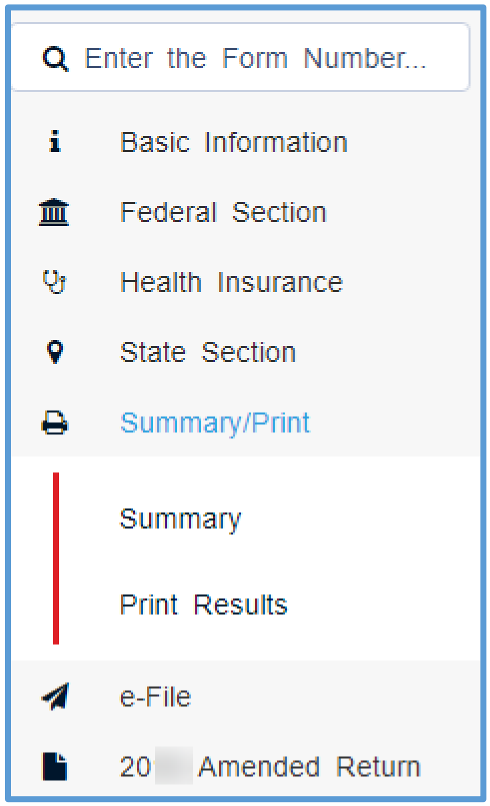
TIP: If you do not want to use a taxpayer profile for this return, you can choose **Basic (No Profile)** You can only select taxpayer profiles during **Start a New Return**.

After this point, you can enter the basic information.

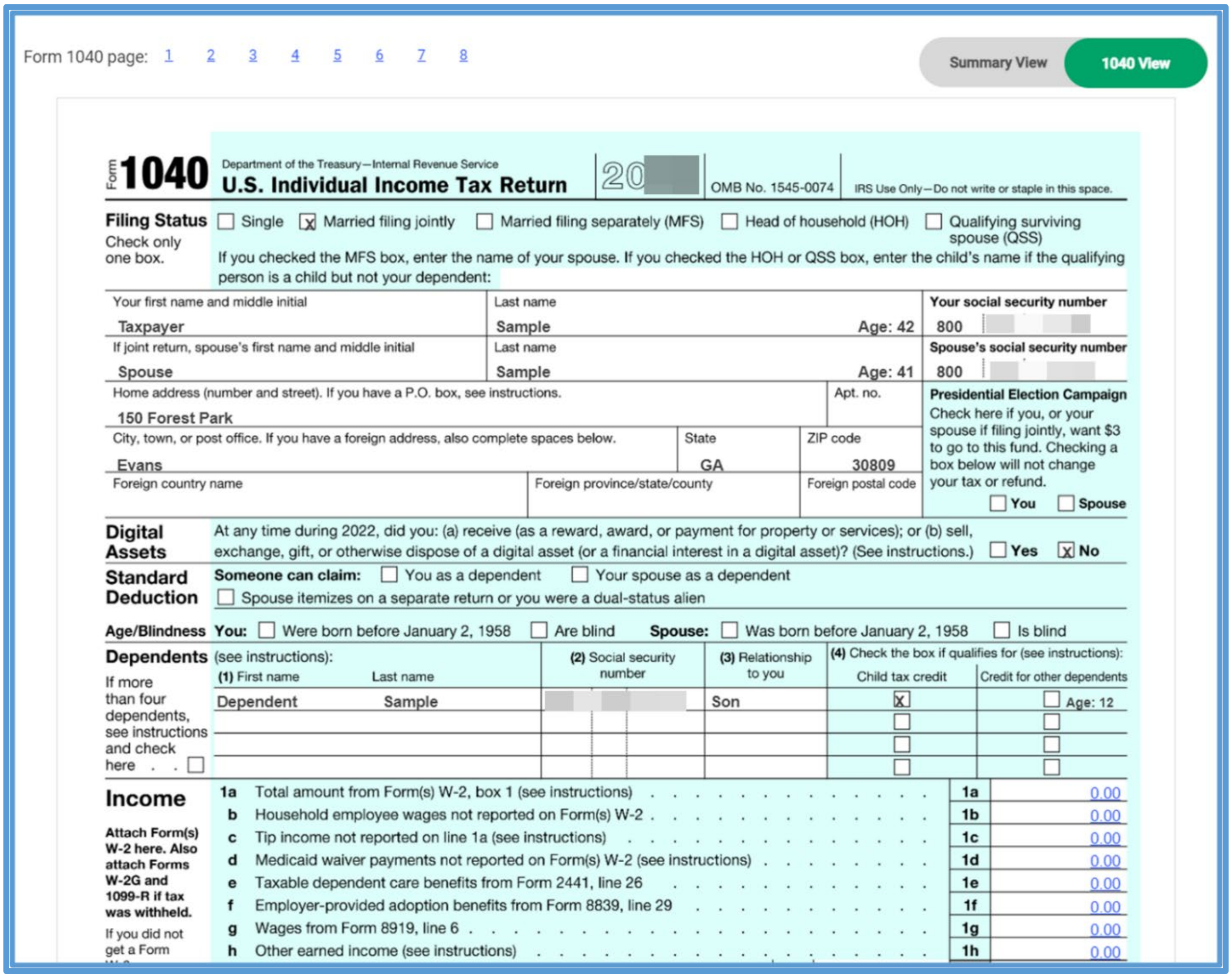
1040 View

You can add information to the return using the Form 1040 as a guide. To do this, use the following steps:

1. In an open return, click the **Summary/Print** link on the left navigation panel.



TaxSlayer Pro Online displays the **Calculation Summary** page:



Form 1040 page: 1 2 3 4 5 6 7 8

Summary View | 1040 View

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return 20 OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box. ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Your first name and middle initial	Last name		Your social security number
Taxpayer	Sample	Age: 42	800
If joint return, spouse's first name and middle initial	Last name		Spouse's social security number
Spouse	Sample	Age: 41	800

Home address (number and street). If you have a P.O. box, see instructions.			Apt. no.	Presidential Election Campaign
150 Forest Park				Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund.
City, town, or post office. If you have a foreign address, also complete spaces below.		State	ZIP code	
Evans		GA	30809	
Foreign country name	Foreign province/state/county		Foreign postal code	☐ You ☐ Spouse

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

Standard Deduction **Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness **You:** ☐ Were born before January 2, 1958 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions): If more than four dependents, see instructions and check here . . ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Child tax credit	Credit for other dependents
Dependent	Sample		Son	☒	☐ Age: 12
				☐	☐
				☐	☐
				☐	☐

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

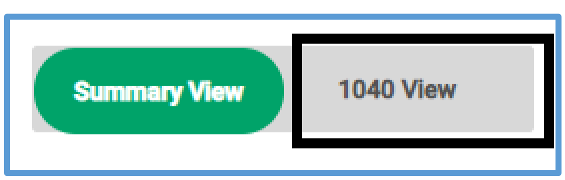
If you did not get a Form

1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	0.00
b	Household employee wages not reported on Form(s) W-2	1b	0.00
c	Tip income not reported on line 1a (see instructions)	1c	0.00
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	0.00
e	Taxable dependent care benefits from Form 2441, line 26	1e	0.00
f	Employer-provided adoption benefits from Form 8839, line 29	1f	0.00
g	Wages from Form 8919, line 6	1g	0.00
h	Other earned income (see instructions)	1h	0.00

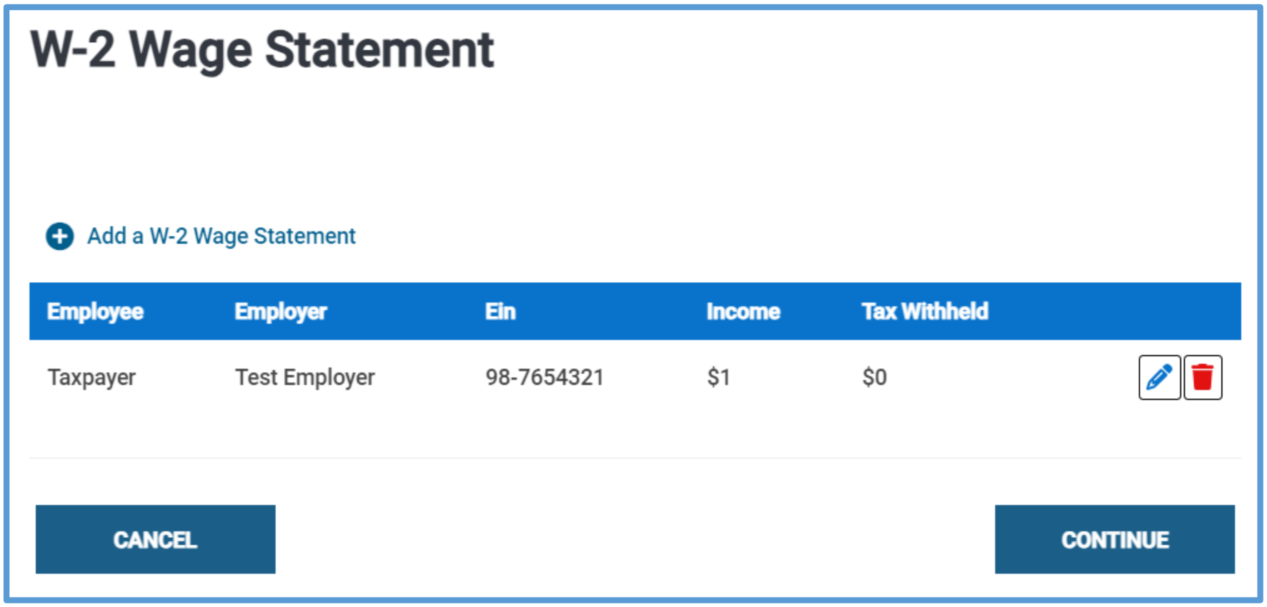
2. Click the line(s) on the return to link to the entry menu for that information. For example, click **Line 1**.

TIP: If you do not see the 1040 view, ask your site administrator to navigate Office Setup in Configuration. There, select the **Display Summary using 1040 View** check box.

Note: If your site is not set up to automatically display 1040 view, click the **1040 View** button to display that view.



TaxSlayer Pro displays the **W-2 Entry** or **W-2 Wage Statement** page:



From this page, you can enter multiple Forms W-2 or edit a previously entered Form W-2.

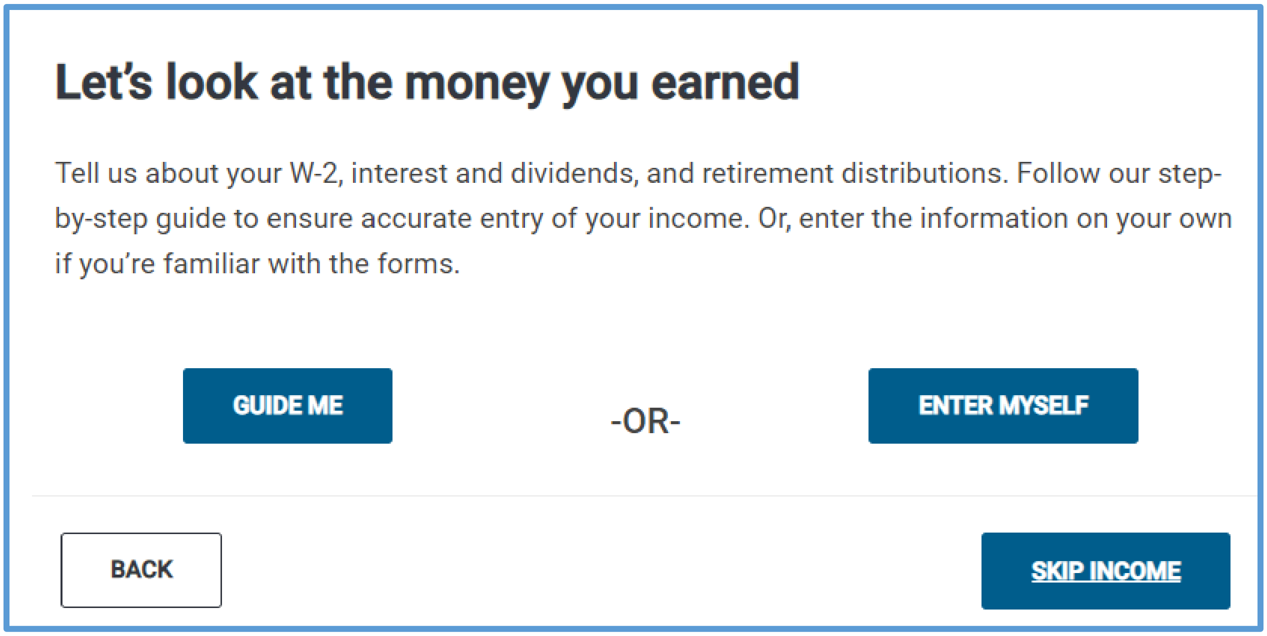
3. Click **Continue** to return to 1040 view. From there, work your way down the 1040 view to complete the tax return.

Guide Me

You can have the program guide you through the return preparation process if the administrator marks your preparer as **Required to Use Guide** in Preparer Setup. To have TaxSlayer Pro Online guide you through preparing the return, use the following steps:

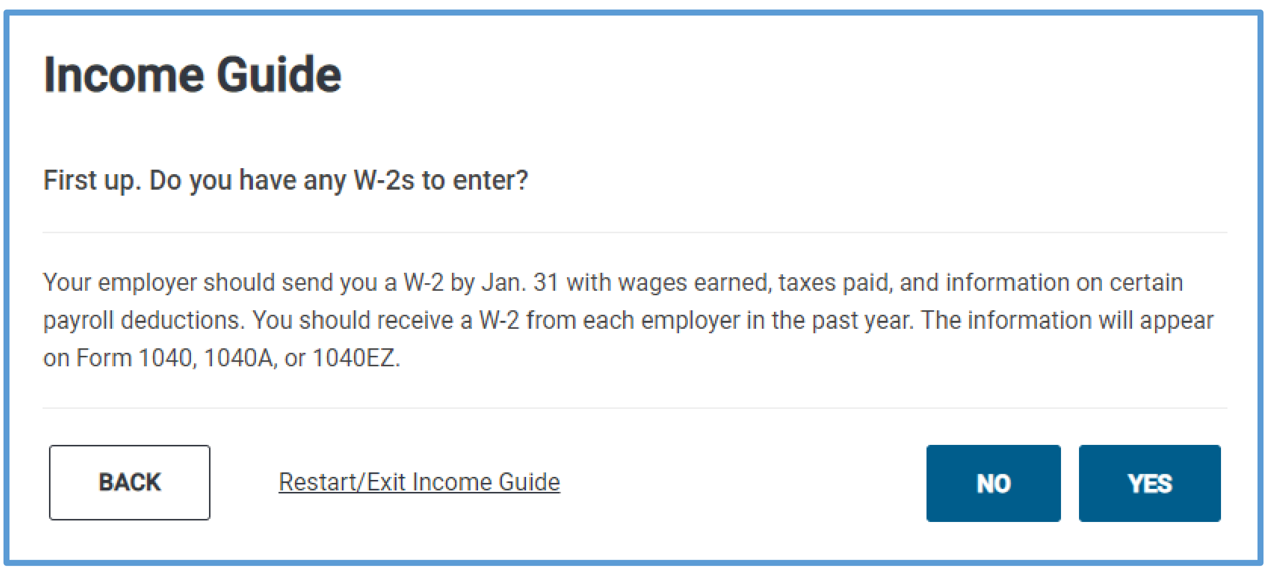
1. Start a new return.
2. Apply a taxpayer profile, if desired.
3. Add the taxpayer's filing status.
4. Add the taxpayer and spouse's personal information, including name, address, and other information.
5. Complete entry pages loaded from a selected taxpayer profile, if applicable.

TaxSlayer Pro Online displays the **Let's look at the money you earned** page:



6. Click **Guide Me**.

TaxSlayer Pro Online displays the **Income Guide** page:

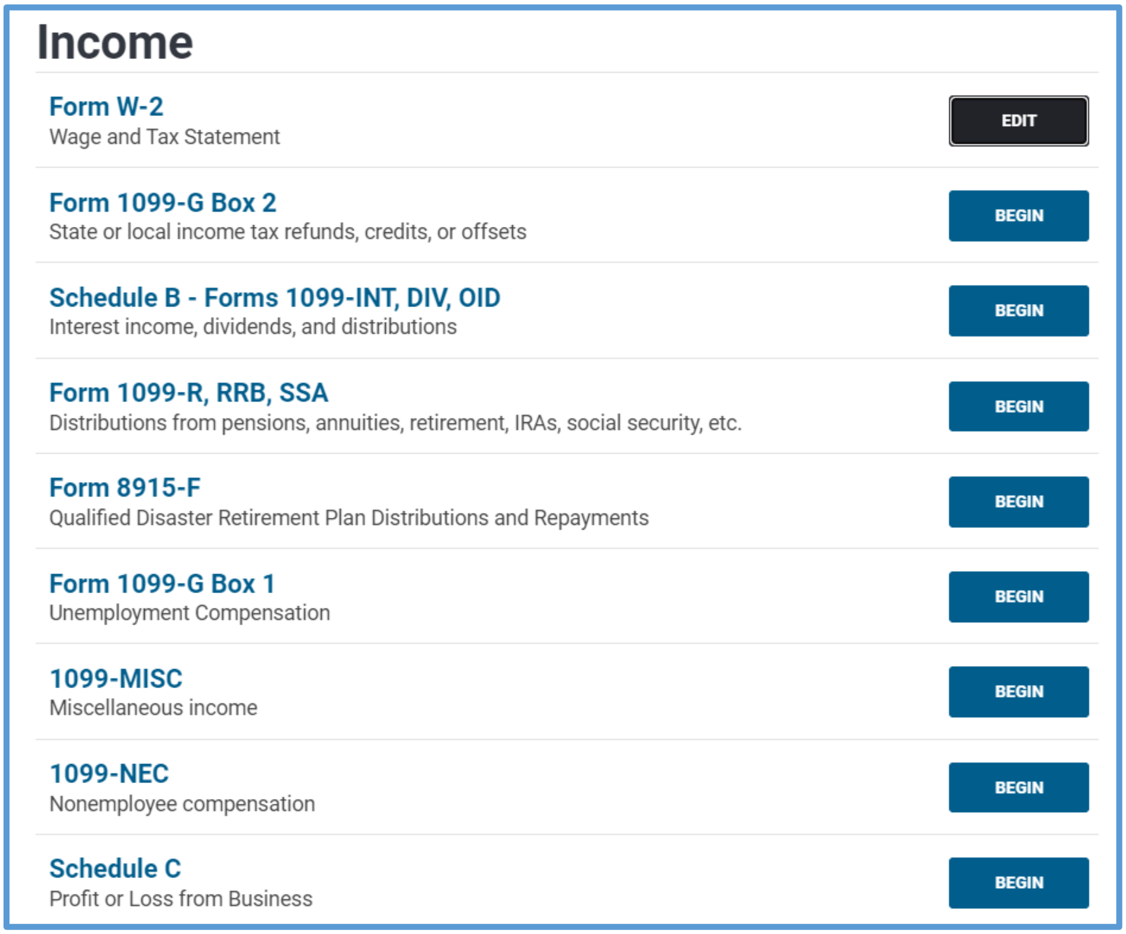


7. Read the information on the page and answer each question based on the information the taxpayer gives you. These pages are designed as questions that you can read to the taxpayer.

Enter Myself

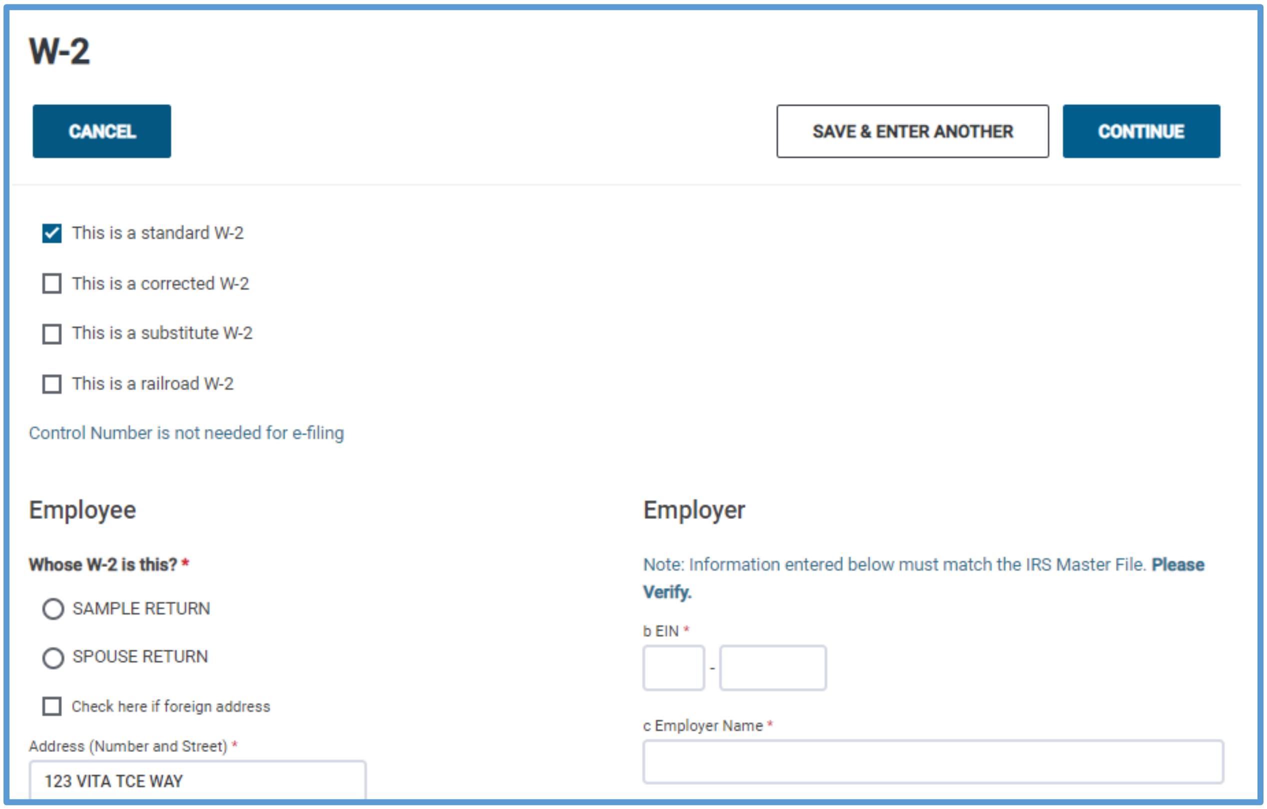
1. **Enter Myself** is the default method for entering data. With it, you enter the information yourself rather than having TaxSlayer Pro Online guide you through entering the information. If you are using this method, use the following steps: Start the return and complete **Basic Information**.

After you complete the **Basic Information** section, TaxSlayer Pro Online displays the **Income** page:



1. Click the line for the type of income you need to add to the return. For this example, click **Form W-2**.

TaxSlayer Pro Online displays the **W-2** page:



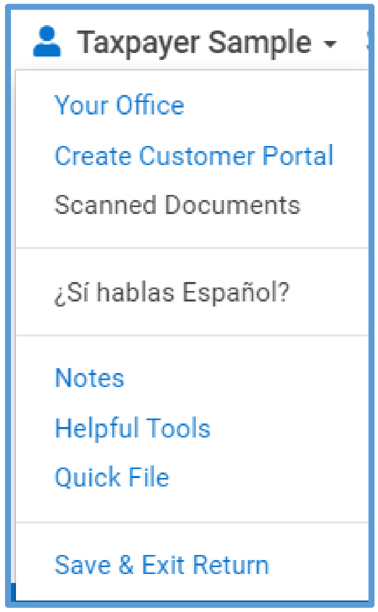
2. Type the information from the taxpayer's Form W-2 on the TaxSlayer Pro Online form.

Quick File

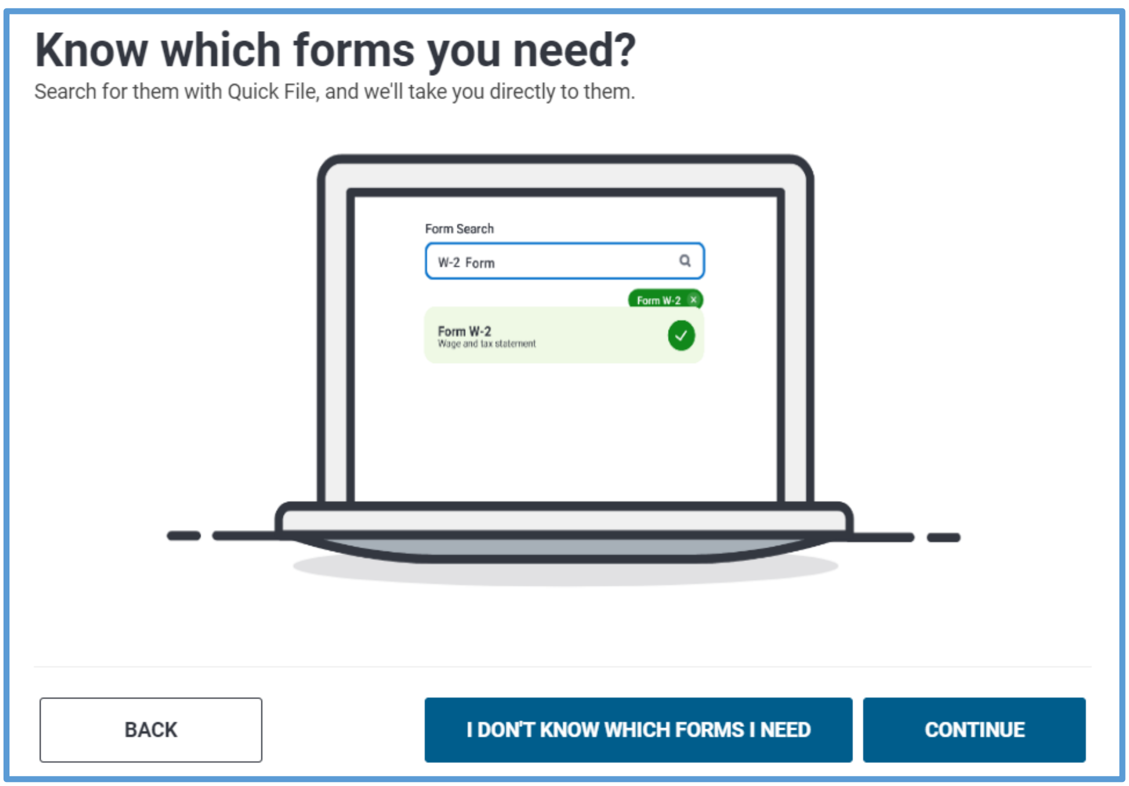
In TaxSlayer Pro Online, you can create a Quick File list to automatically display income and adjustment entry pages based on the information given to you by the taxpayer after completing the Basic Information section. When you do this, you save time in the return. You can still add additional information to the return after you complete any of the necessary forms displayed by the taxpayer profile.

To create a Quick File list from an open return, use the following steps:

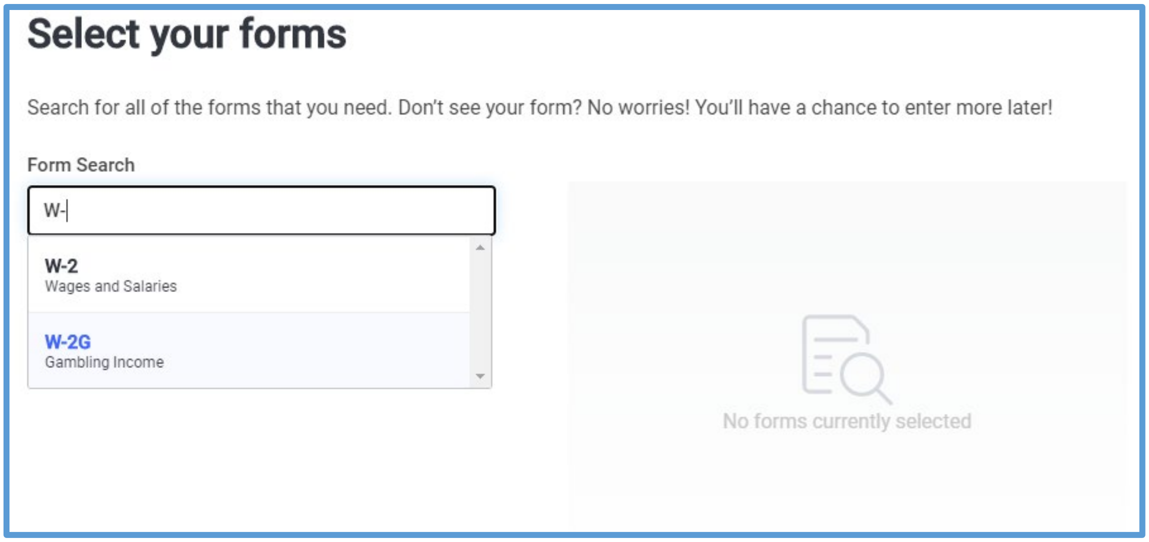
1. Click **Quick File** from the **Taxpayer** menu.



TaxSlayer Pro Online displays the **Quick File** page:



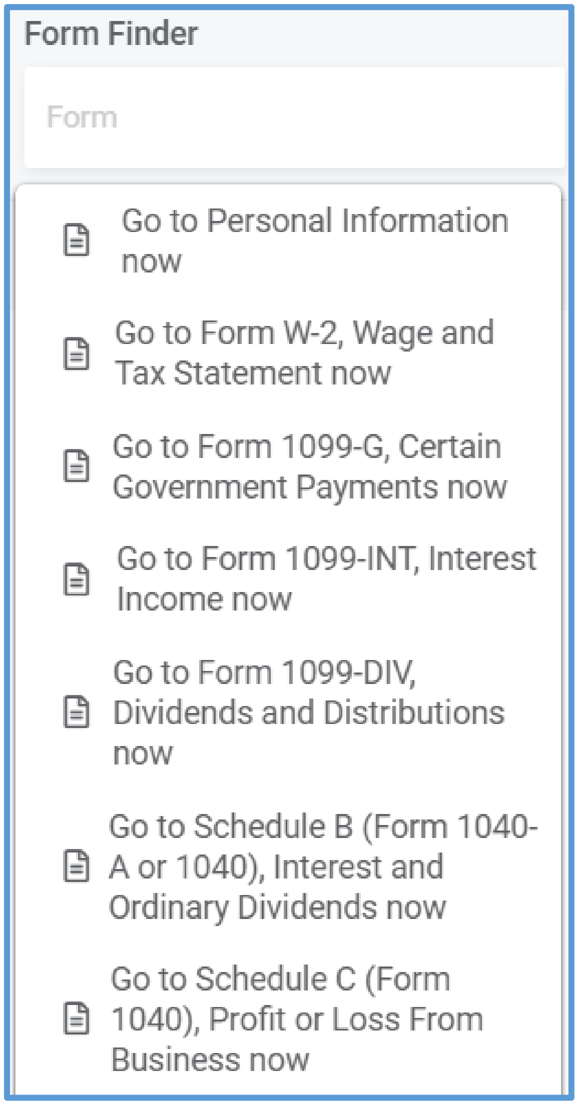
2. Click **CONTINUE**.
3. Type the form name or description to build the list.



4. When you finish, click **Continue**.

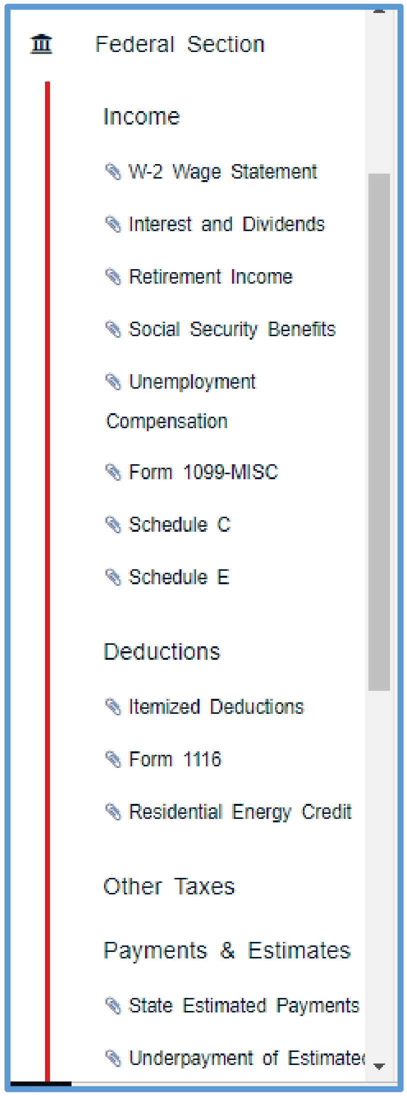
Forms Search

To locate and load an entry form, type the form number in the **Forms Search** box located on the left navigation bar.



Forms Completed

Forms Completed allows you to quickly navigate through the Federal entry pages you already completed in the return. TaxSlayer Pro Online expands the left navigation panel sections to show the completed entry pages.

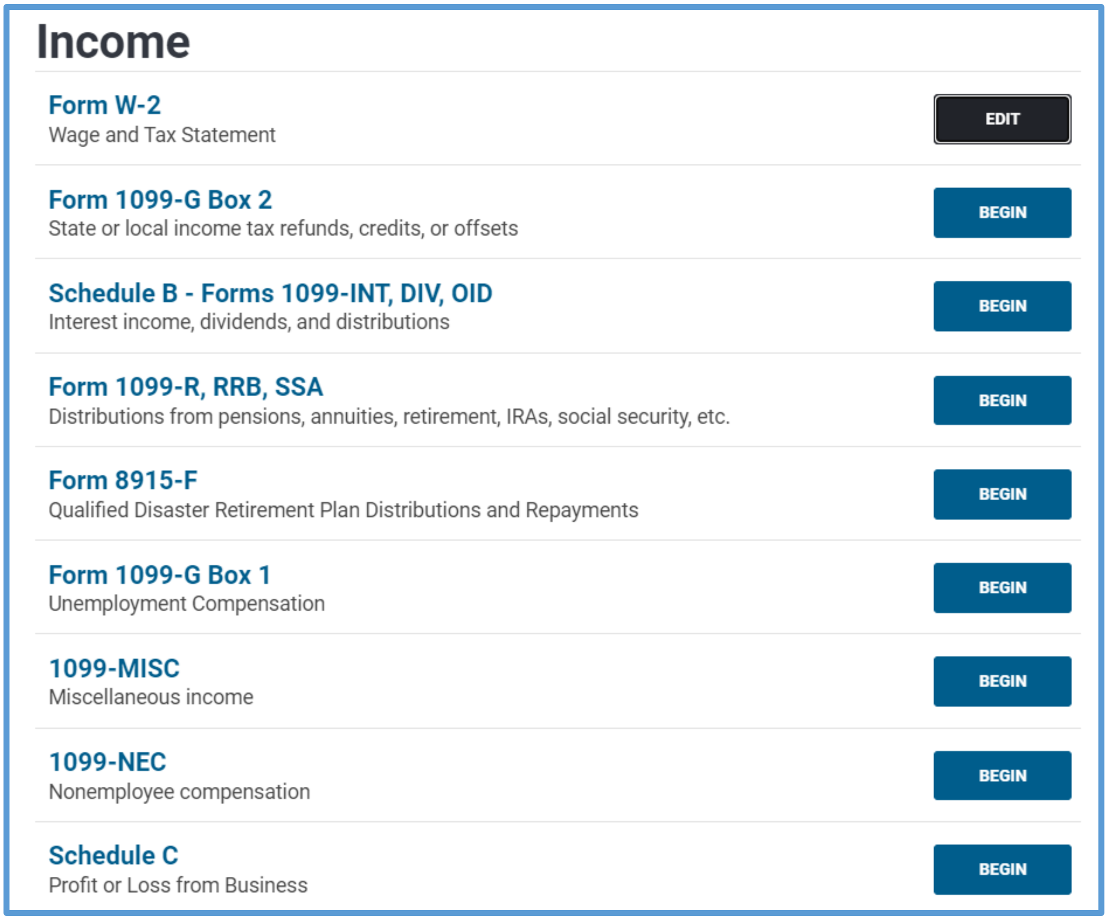


Training

You can use any of the methods above to add information to the return. During training, we will use the default **Enter Myself** method. You should practice with the method you will use at your site.

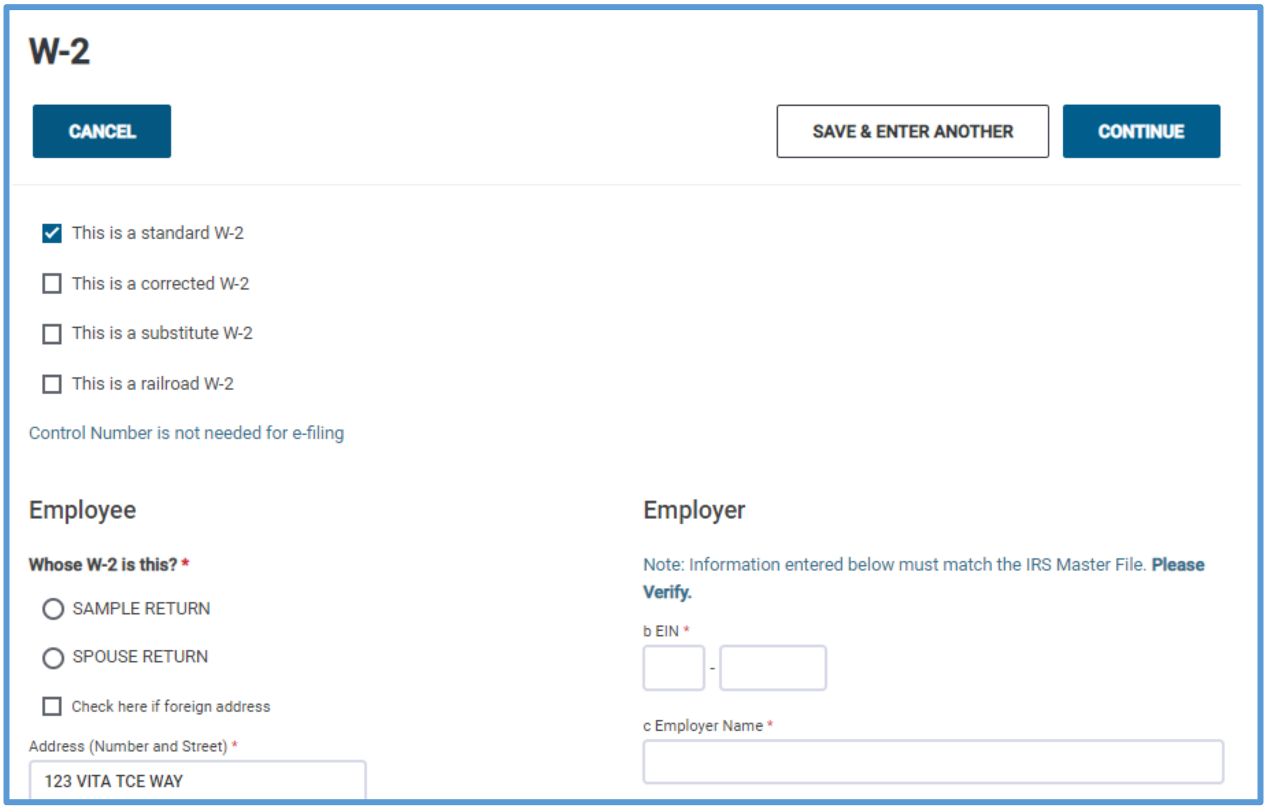
Entering W-2 Income

Most taxpayers receive wages from an employer, reported on Form W-2. To add Form W-2 to the tax return use the following steps from the **Income** page, as shown below:



1. Click the **Form W-2** line to start adding Forms W-2.

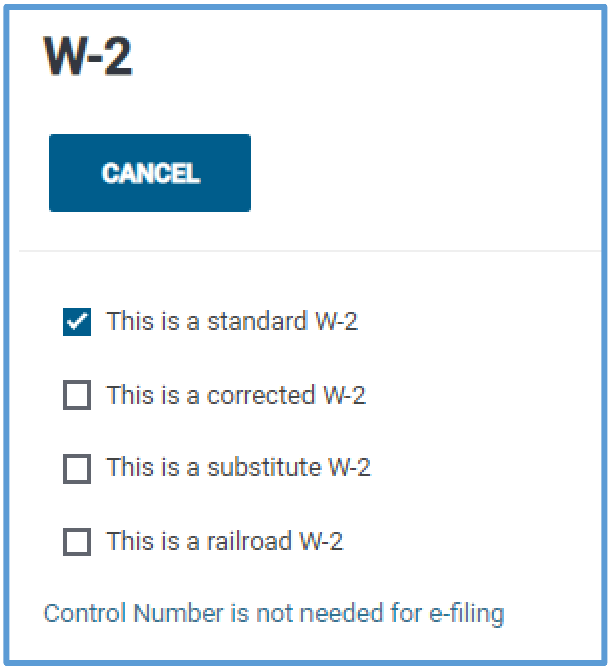
TaxSlayer Pro Online displays the **W-2** page:



2. Type all the information on the Form W-2 in TaxSlayer Pro Online exactly as it appears on the taxpayer’s Form W-2 received from the employer.

Use the following tips for entering information on Form W-2:

Heading Information

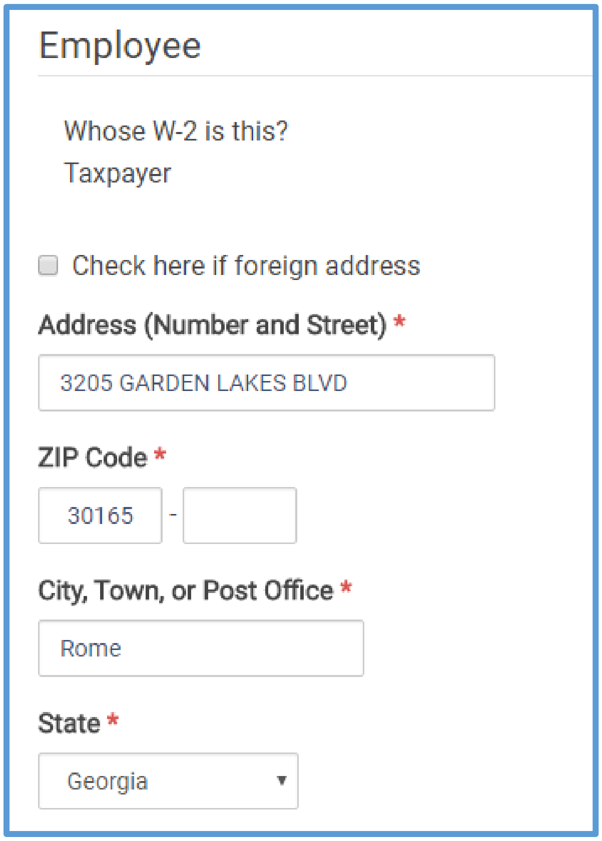


- TaxSlayer Pro Online automatically selects the **This is a standard W-2** check box. TaxSlayer Pro Online clears this check box if you select the check box for one of the following two scenarios:
  - If the taxpayer received a corrected Form W-2 from the employer, select the **This is a corrected W-2** check box.
  - If the taxpayer cannot obtain a Form W-2 from the employer, select the **This is a substitute W-2** check box. TaxSlayer Pro Online generates Form 4852, *Substitute for Form W-2,* with the tax return.

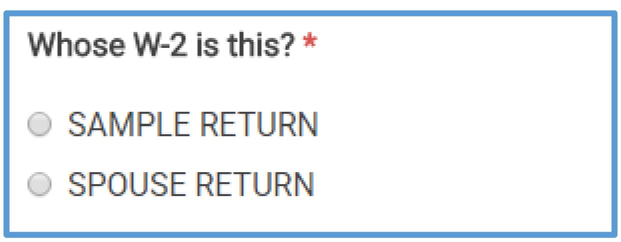
Note: You must have the employer EIN to electronically file the return.

  - If the **This is a railroad W-2** check box is selected, TaxSlayer Pro Online automatically populates the appropriate RRTA codes in box 14.

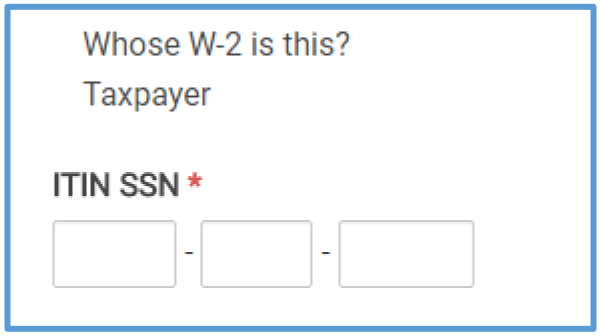
Employee



- If the taxpayer is not married, TaxSlayer Pro Online defaults to the taxpayer for the question, **Whose W-2 is this?**, as shown in the screenshot above. If the taxpayer is married, select whether the Form W-2 is for the taxpayer or spouse, as shown below:



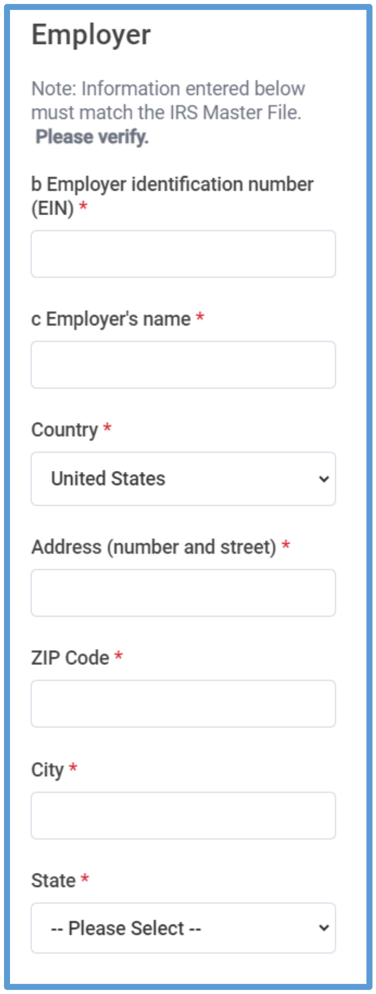
- If you typed an ITIN for the taxpayer’s identifying number in Personal Information, TaxSlayer Pro Online displays the **ITIN SSN** box. Type the ITIN as shown on the taxpayer’s Form W-2:



SUPPORT TIP: If the Social Security number is redacted on the taxpayer’s Form W-2, the taxpayer needs to provide you with the Social Security number or the taxpayer needs to reach out to the employer to get the Social Security number used on the W-2. You cannot electronically file the return without the Social Security number on the Form W-2.

- TaxSlayer Pro Online completes the employee’s address based on the personal information you entered. If the address shown on the employee’s Form W-2 is different, change the address in this section.

Employer


Employer

Note: Information entered below must match the IRS Master File. **Please verify.**

b Employer identification number (EIN) *

c Employer's name *

Country *

United States

Address (number and street) *

ZIP Code *

City *

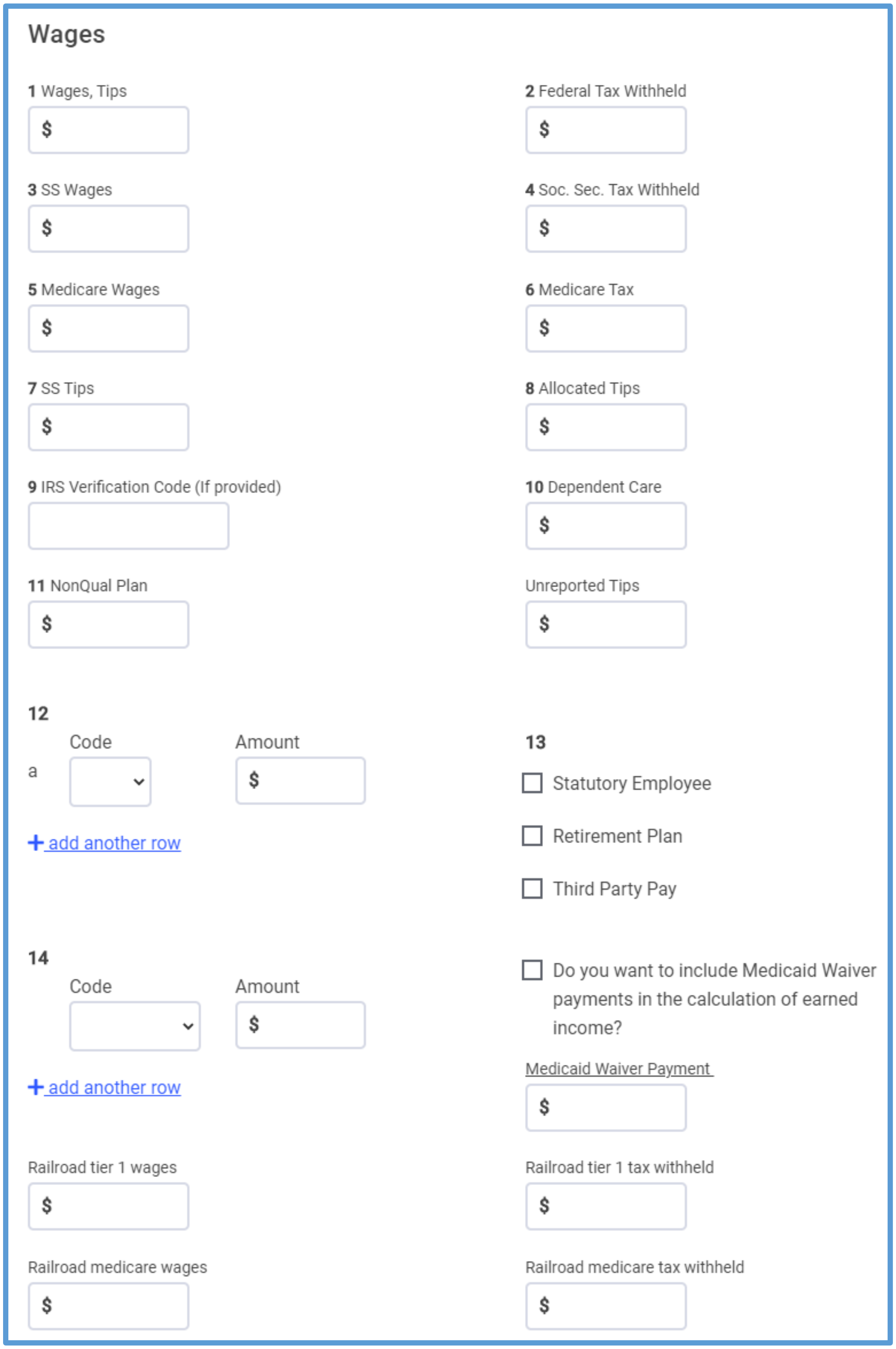
State *

-- Please Select --

- Type the employer's EIN as shown on the paper Form W-2.
- TaxSlayer Pro Online creates an EIN database specific to your site as you complete the employer's name and address from the Form W-2.

TIP: The established EIN database for each site is carried forward each year.

Wages



Wages

1 Wages, Tips $

2 Federal Tax Withheld $

3 SS Wages $

4 Soc. Sec. Tax Withheld $

5 Medicare Wages $

6 Medicare Tax $

7 SS Tips $

8 Allocated Tips $

9 IRS Verification Code (If provided)

10 Dependent Care $

11 NonQual Plan $

Unreported Tips $

12

	Code	Amount
a		$

+ add another row

13

- [ ] Statutory Employee
- [ ] Retirement Plan
- [ ] Third Party Pay

14

Code	Amount
	$

+ add another row

- [ ] Do you want to include Medicaid Waiver payments in the calculation of earned income?

Medicaid Waiver Payment $

Railroad tier 1 wages $

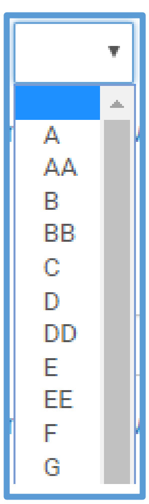
Railroad tier 1 tax withheld $

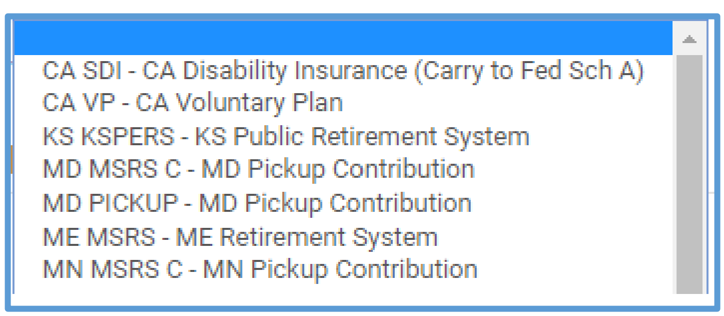
Railroad medicare wages $

Railroad medicare tax withheld $

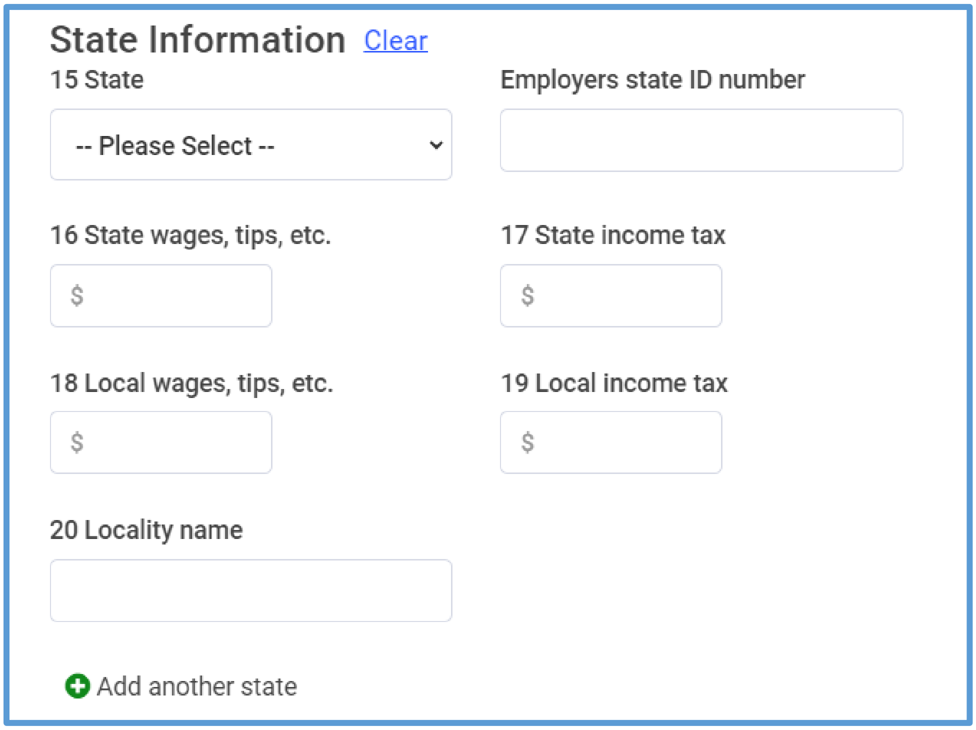
- Type the information in boxes 1-14 exactly as shown on the taxpayer's Form W-2.

- TaxSlayer Pro Online completes the information in boxes 3-6 (Social Security and Medicare wages and tax withheld) based on the wages you type in Box 1. If the information on Form W-2 is different, change the amounts in these boxes.
- TaxSlayer Pro Online adds Form 2441, *Child and Dependent Care Expenses*, to the tax return if you type an amount in Box 10.
- If the employee earned tips that he or she did **not** report to the employer, type the amount in the **Unreported Tips** box. TaxSlayer Pro Online then adds Form 4137, *Social Security and Medicare Tax on Unreported Tip Income*, to the tax return.
- If the employee received a Medicaid Waiver payment, type it in the appropriate box. TaxSlayer Pro Online carries the amount to the **Other Income** line of Schedule 1 as a negative amount with the description **NOTICE 2014-7**.
    - If the taxpayer qualifies to use this amount as earned income in calculating certain refundable credits, select the **Do you want to include Medicaid Waiver payments in the calculation of earned income?** check box.
- If Form W-2 shows amounts in Box 12 or 14, select the code from the drop-down list and type the amount. If applicable, TaxSlayer Pro Online adds the appropriate form and/or calculates the amount to the appropriate location on the tax return.
    - If Form W-2 shows a code in Box 14 that is not available in the drop-down list, select **Other (not listed here).**





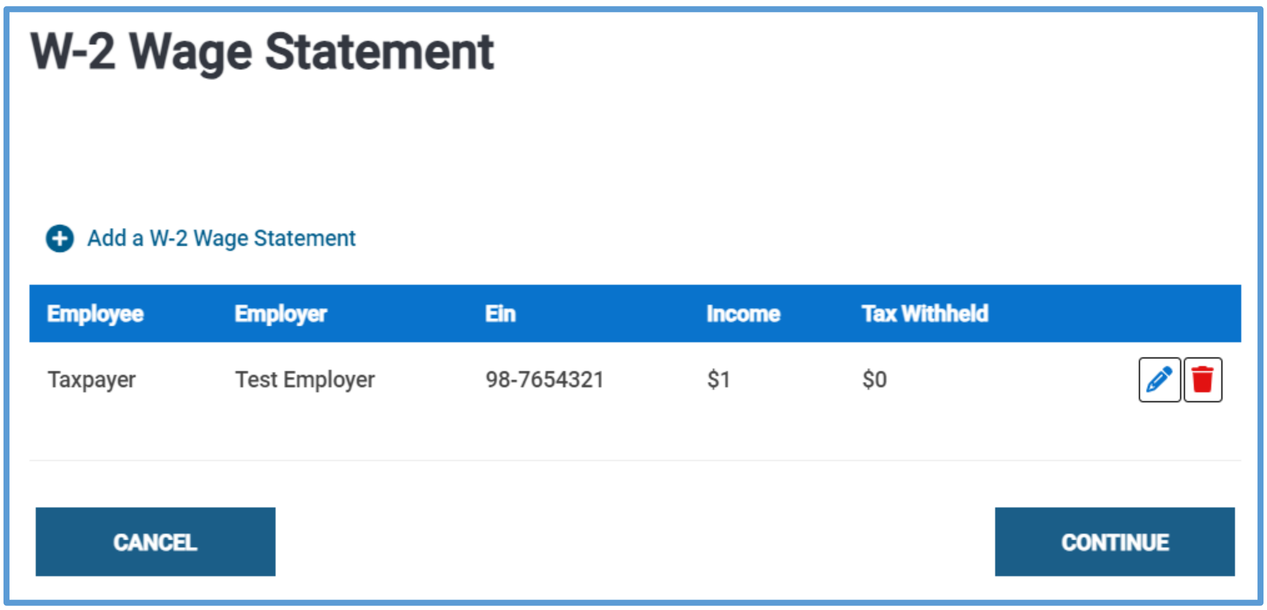
State Information



- Select a state name from the drop-down list.
- When you select the state, TaxSlayer Pro Online completes Box 16 based on the information you typed in Box 1. If the state wages are different on the employee's Form W-2, change the amount in that box.
- Complete Boxes 15-20 using the information on the taxpayer's Form W-2.
- If the employer listed more than one state on Form W-2, click **Add Another State** to add another state section.

3. When you finish adding information on Form W-2, review the form to verify the information and do one of the following:
   a. Click **Save & Enter Another** to display a blank Form W-2.
   b. Click **Continue** to display the **W-2 Wage Statement** page. For this exercise, click **Continue**.

TaxSlayer Pro Online displays the **W-2 Wage Statement** page with the new Form W-2 listed:



4. If you need to add another Form W-2, click **Add a W-2 Wage Statement** from this page. Follow the same steps to add the information from Form W-2.
5. When you finish adding Forms W-2, click **Continue**.

Entering Taxable Refunds

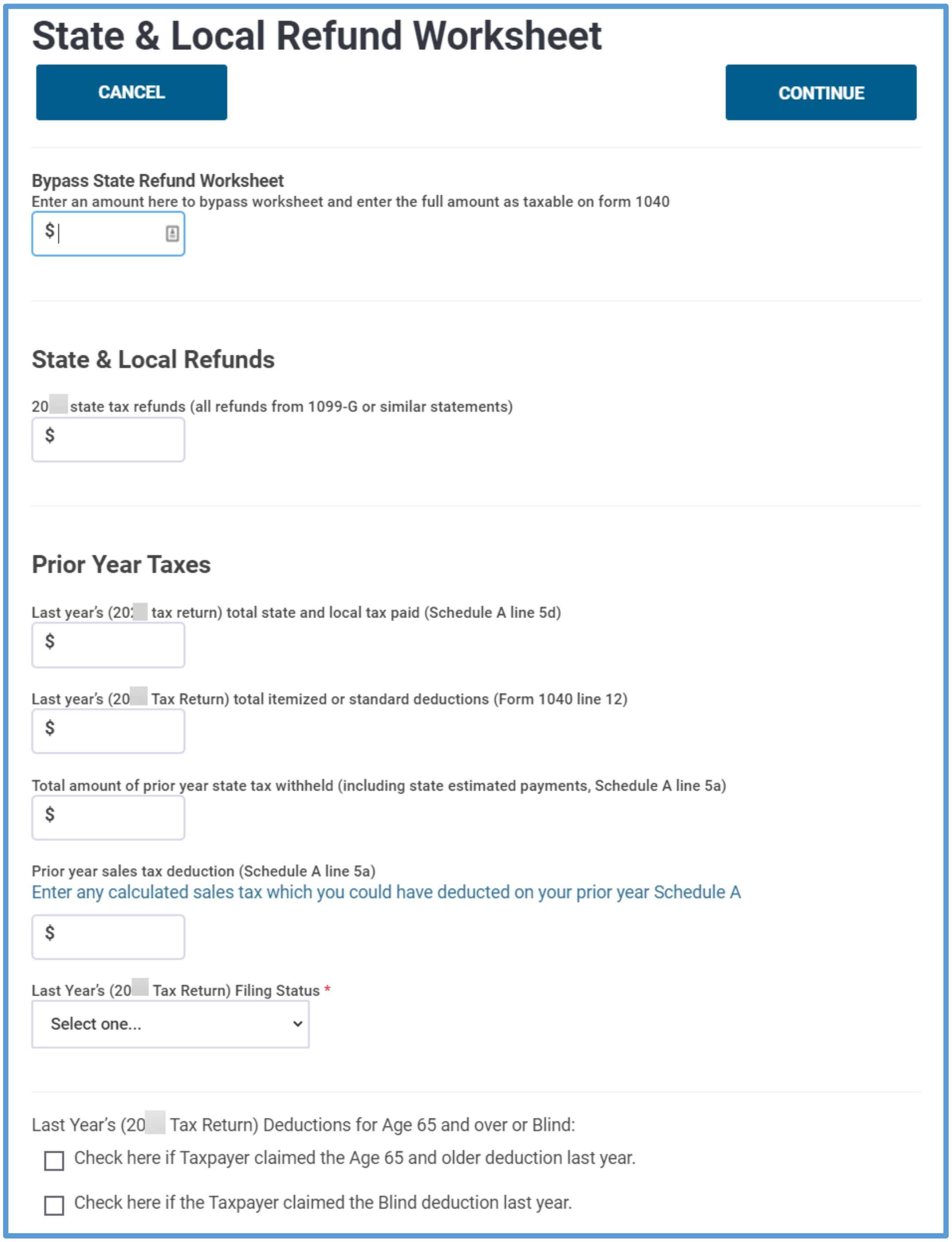
If the taxpayer and/or spouse received a state or local tax refund in the previous year, you need to determine whether that refund is taxable this year. Taxpayers who receive a refund of state or local income taxes may receive Form 1099-G listing their refund amount(s).

- Taxpayers who claimed the standard deduction on the tax return for the year they received a refund of state or local income taxes do not have to include the refund in taxable income.
- Taxpayers who itemized deductions and received a state or local refund may have to include all, part, or none of the refund in federal taxable income.

If the taxpayer and/or spouse received a state or local tax refund in the previous year and itemized deductions on the federal return, use the following steps to complete the **State & Local Refund Worksheet**:

1. Click **BEGIN** on the **Form 1099-G Box 2** to start adding information.

TaxSlayer Pro Online displays the **State & Local Refund Worksheet**:



State & Local Refund Worksheet

CANCEL

CONTINUE

Bypass State Refund Worksheet

Enter an amount here to bypass worksheet and enter the full amount as taxable on form 1040

$

State & Local Refunds

20 state tax refunds (all refunds from 1099-G or similar statements)

$

Prior Year Taxes

Last year's (20 tax return) total state and local tax paid (Schedule A line 5d)

$

Last year's (20 Tax Return) total itemized or standard deductions (Form 1040 line 12)

$

Total amount of prior year state tax withheld (including state estimated payments, Schedule A line 5a)

$

Prior year sales tax deduction (Schedule A line 5a)

Enter any calculated sales tax which you could have deducted on your prior year Schedule A

$

Last Year's (20 Tax Return) Filing Status *

Select one...

Last Year's (20 Tax Return) Deductions for Age 65 and over or Blind:

☐ Check here if Taxpayer claimed the Age 65 and older deduction last year.

☐ Check here if the Taxpayer claimed the Blind deduction last year.

2. Add the amounts from all state and local tax refunds. The taxpayer should have received Forms 1099-G or similar statements to show these amounts. Type the total in the appropriate box.
3. From the previous year's return, find the amount of total state tax. Type that amount in the appropriate box.

4. From the previous year's return, find the amount of the itemized deductions. Type that amount in the appropriate box.
5. From the previous year's return, find the amount of state tax withheld. Type that amount in the appropriate box.
6. Type any applicable prior year sales tax deduction in the appropriate box.
7. Select the taxpayer's filing status from the previous year's return from the drop-down list.
   Find any additional deductions the taxpayer received on the previous year's tax return. Select any check boxes that apply.
8. Click **Continue**.

Entering Interest and Dividends

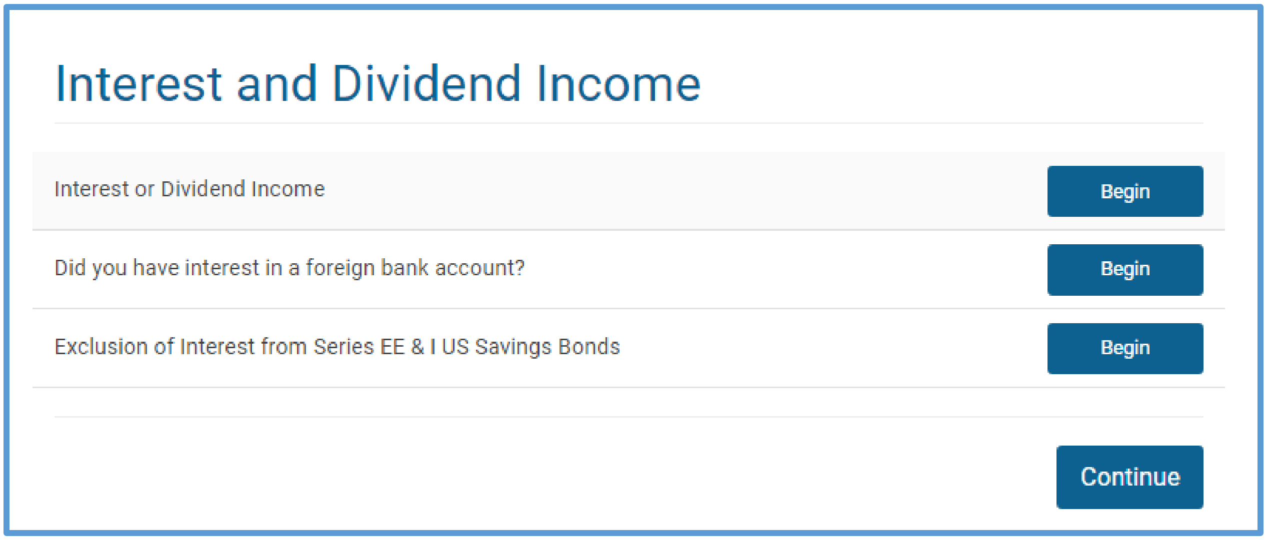
If the taxpayer received interest or dividends, you need to report them on the tax return. Usually, the payer reports these types of income on one of the following forms:

- Form 1099-INT, *Interest Income*
- Form 1099-OID, *Original Issue Discount*
- Form 1099-DIV, *Dividend Income*

If the taxpayer or spouse does have interest or dividend income, use the following step:

- Click the **Schedule B – Form 1099-DIV, INT, OID** line to display the **Interest and Dividend Income** page.

TaxSlayer Pro Online displays the **Interest and Dividend Income** landing page:

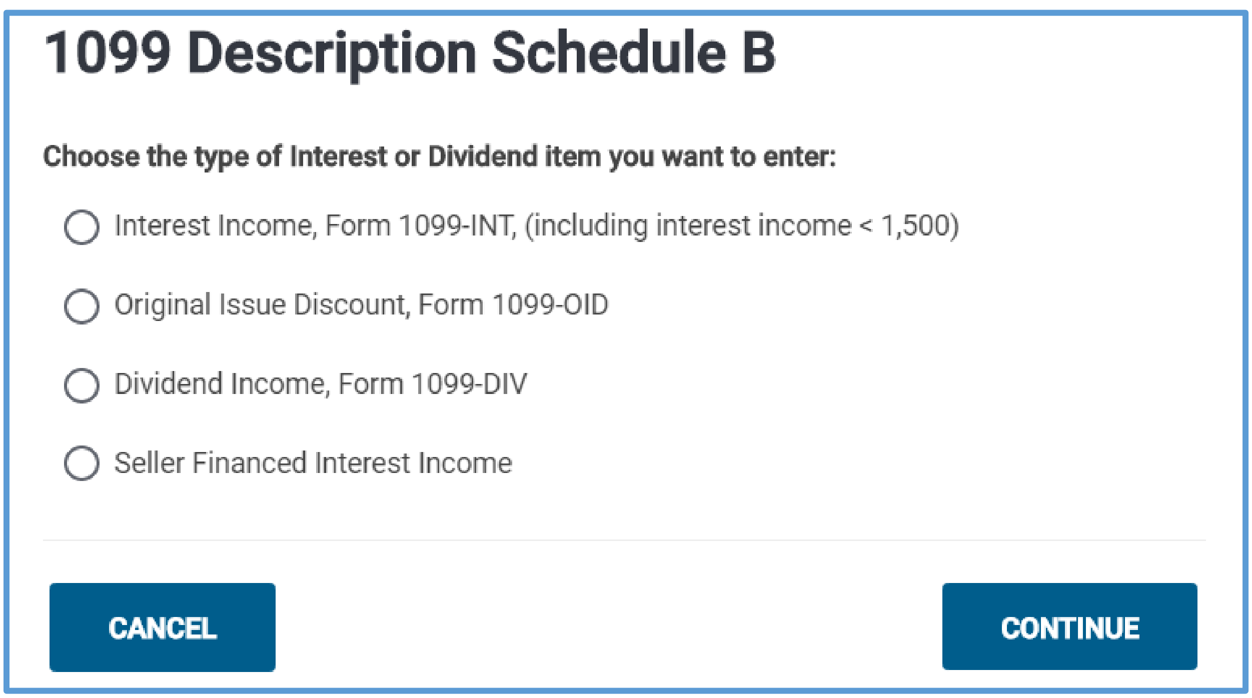


Interest Income

To add taxable interest income from Form 1099-INT, use the following steps:

1. Click **BEGIN** on the **Interest or Dividend Income** line.

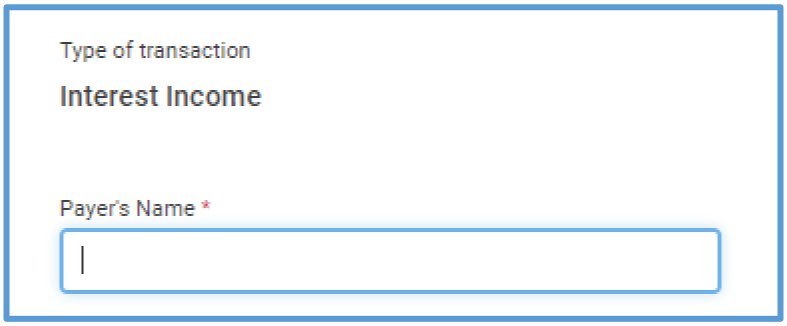
TaxSlayer Pro Online displays the **1099 Description Schedule B** main page:



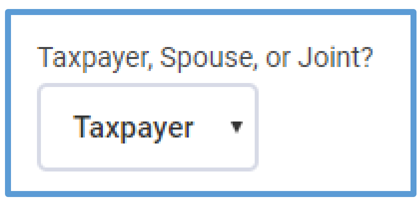
2. Select the type of interest or dividend income you want to enter first. Remember, the taxpayer or spouse probably received one form from each payer. For this example, select **Interest Income, Form 1099-INT**.
3. Click **Continue**.

TaxSlayer Pro Online displays the **Interest Income** page.

4. Type the payer's name in the appropriate box.

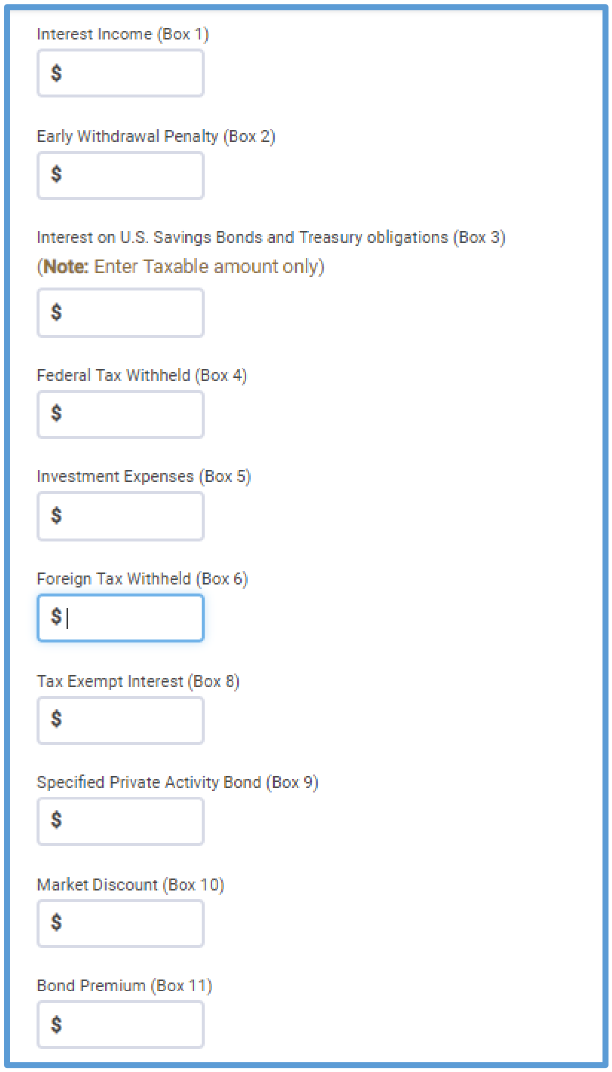


Note: If the taxpayer is married, select whether the interest income is for the taxpayer, spouse, or joint, as shown below:



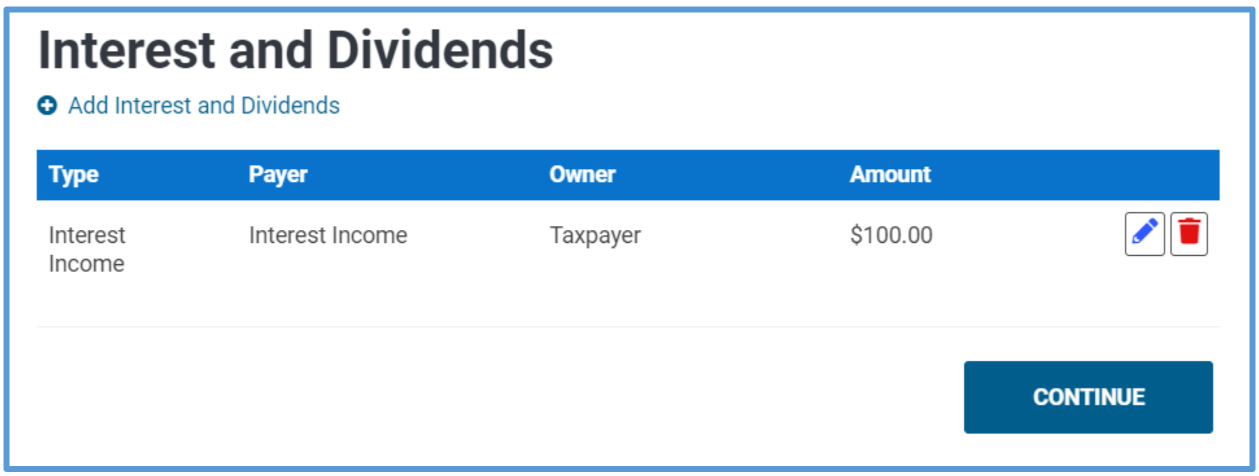
TIP: The payer's TIN/EIN and address information are not required boxes. You can skip these based on your site's established data entry guidelines.

5. Type the amounts in the remaining boxes from the information on the taxpayer's Form 1099-INT. Use the descriptions of the boxes on the paper Form 1099-INT to match the boxes in TaxSlayer Pro Online.



6. When you finish typing information, verify that you typed the correct information and do one of the following:
    a. Click **Save & Enter Another** to display a blank **Interest Income** page.
    b. Click **Continue** to display the **Interest and Dividends** page. For this exercise, click **Continue**.

TaxSlayer Pro Online displays the **Interest and Dividends** page with the information you just entered listed:

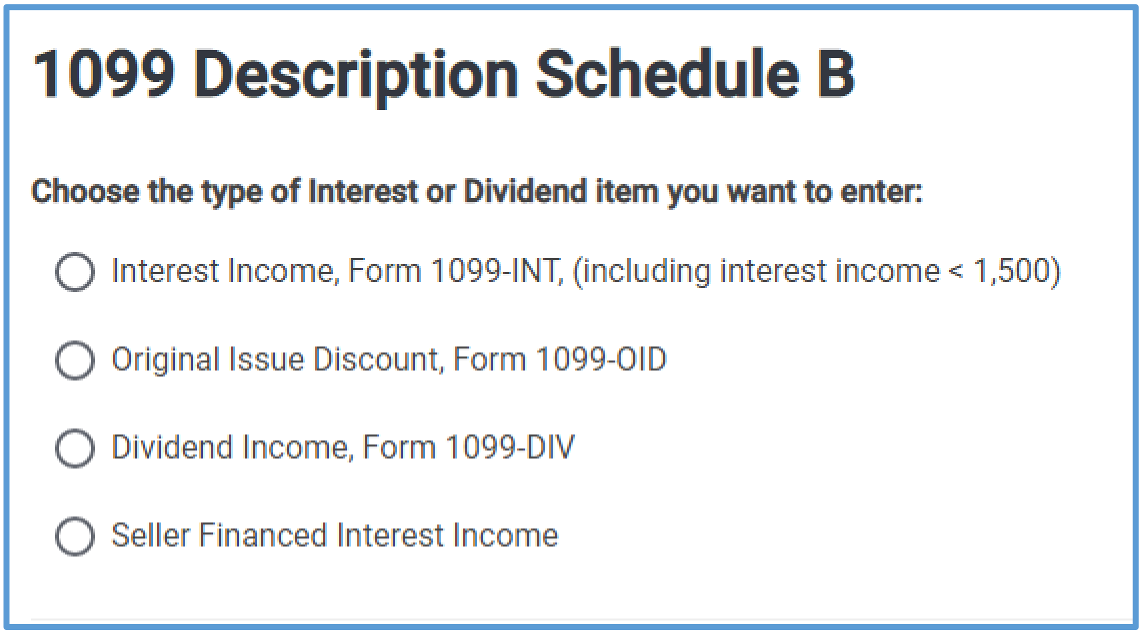


Tax-Exempt Interest or Dividend Income

If the taxpayer received interest income, reported on Form 1099-INT or Form 1099-DIV, that is not taxable on the federal return, use the following steps:

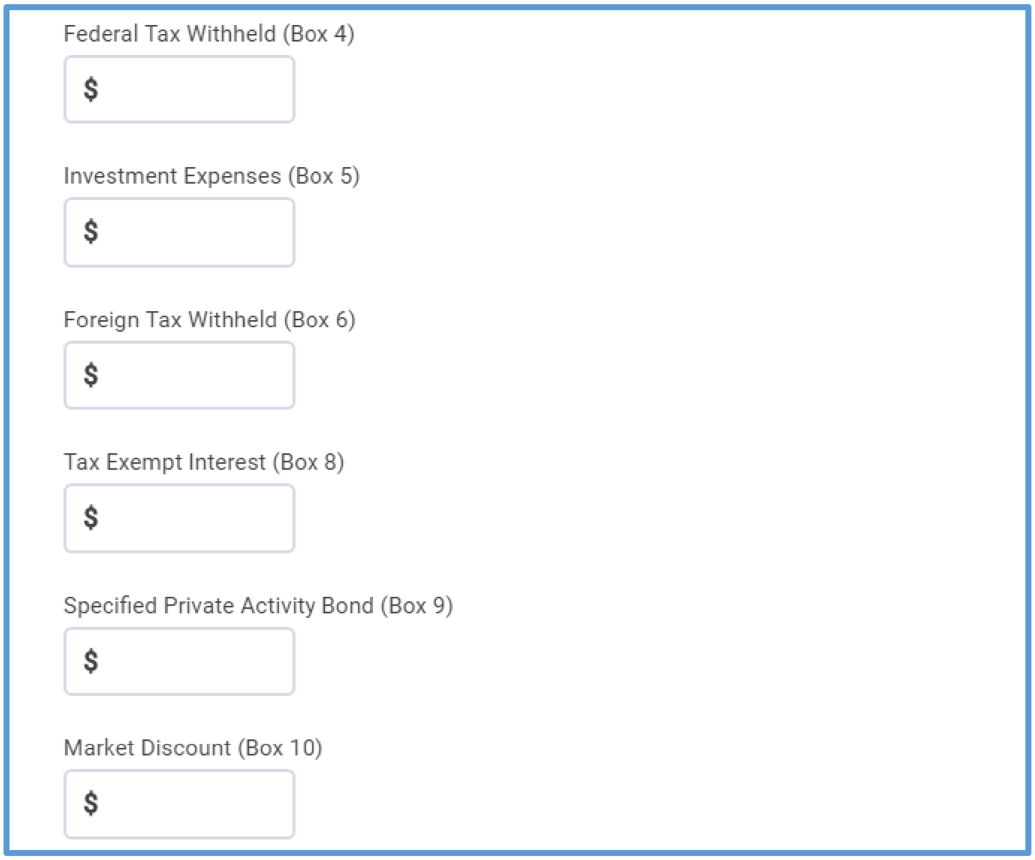
1. Click **Add** to enter additional interest and dividend income.

TaxSlayer Pro Online displays the **1099 Description Schedule B** page:



2. Select the type of tax-exempt interest or tax-exempt dividend income you need to enter. For this example, select **Interest Income, Form 1099-INT**.
3. Click **Continue**.

TaxSlayer Pro Online displays the **Interest Income** page:

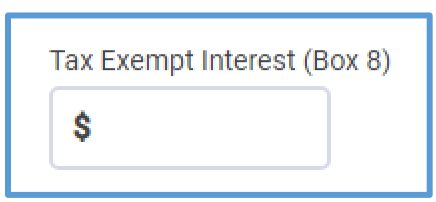


4. Type the payer's name in the appropriate box.

Note: If the taxpayer is married, select whether the tax-exempt interest income is for the taxpayer, spouse, or joint.

TIP: The payer's TIN/EIN and address are not required boxes. You can skip these based on your site's established data entry guidelines.

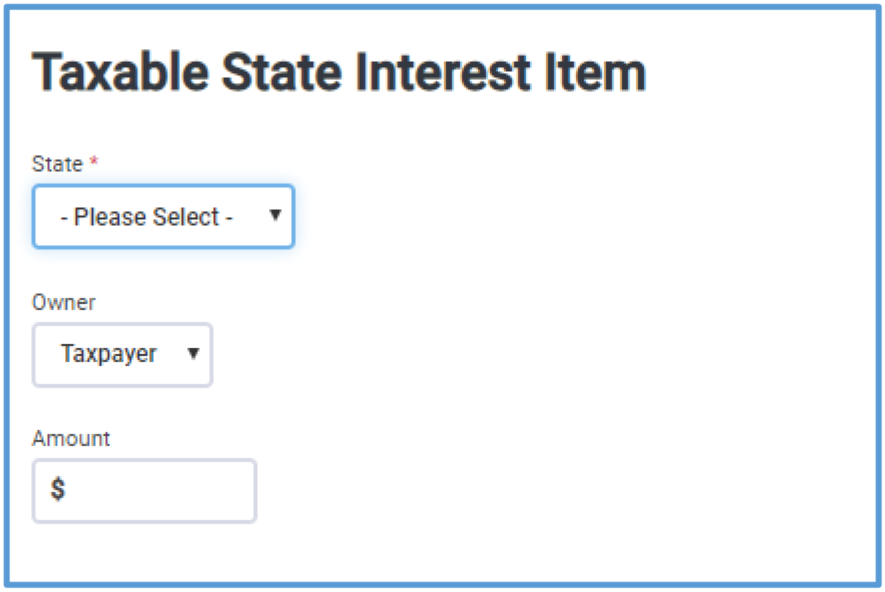
5. Type the amount of tax-exempt interest income in the appropriate box, such as the **Tax Exempt Interest** box, as show below:



Taxable State Interest

6. If all or part of this interest is taxable on the state return, click **Add Interest Items**.

TaxSlayer Pro Online displays the **Taxable State Interest Item** page:

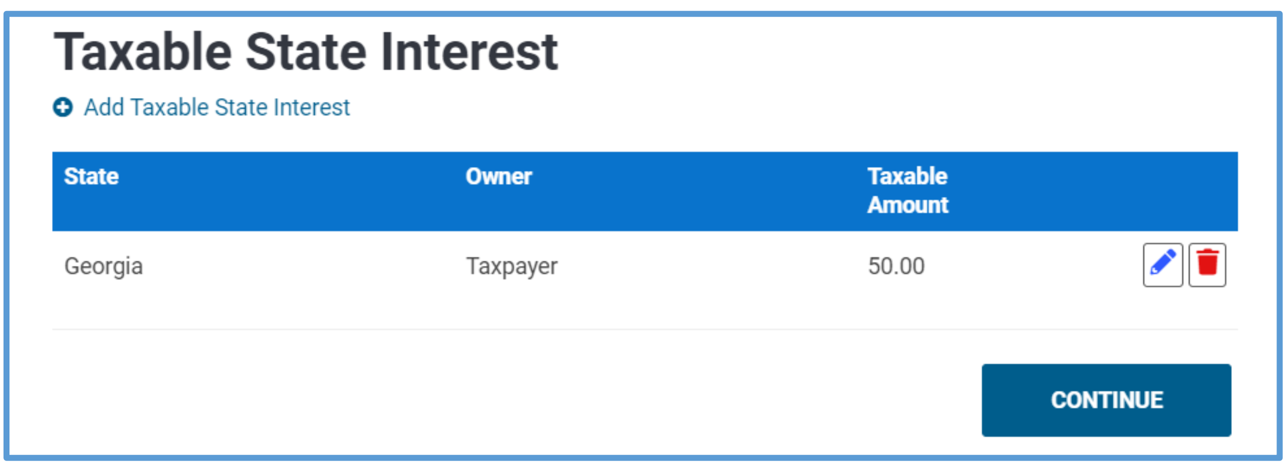


7. Select the state from the drop-down list.

Note: If the taxpayer is married, select whether the interest income is for the taxpayer, spouse, or joint.

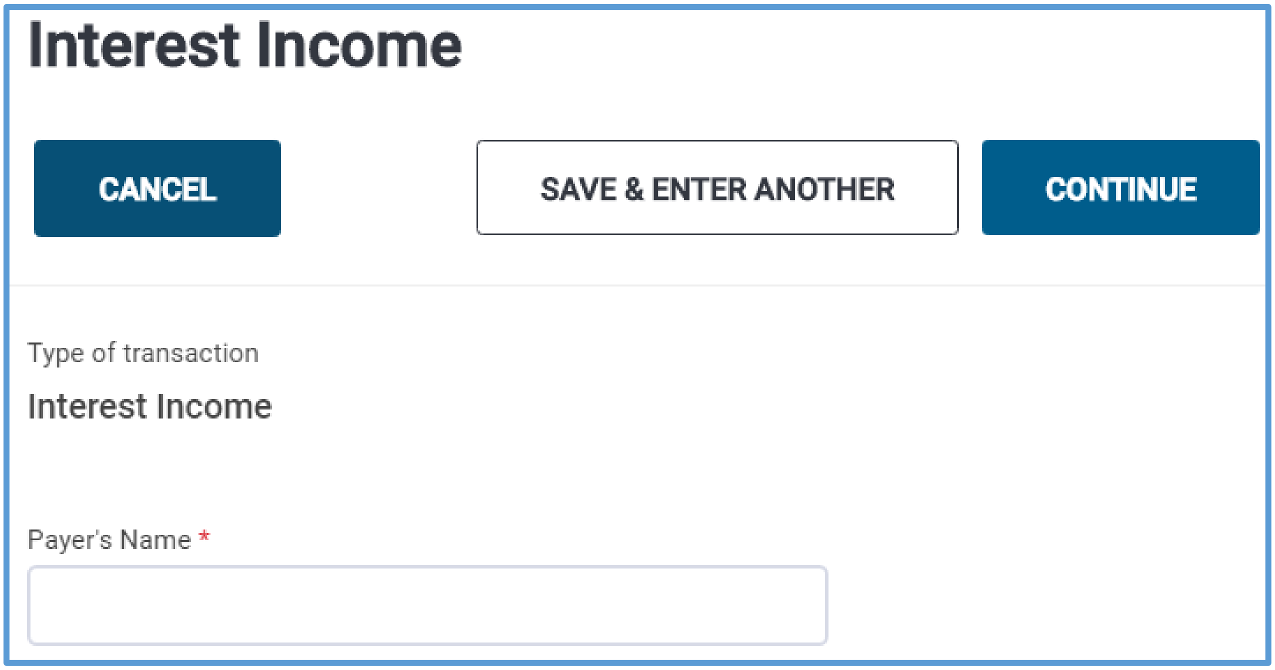
8. Type the amount of interest that is taxable on the state return.
9. Click **Continue**.

TaxSlayer Pro Online displays the **Taxable State Interest** page:



10. Click **Add Taxable State Interest** if you need to add more items for this payer that are taxable to a state, but not to the IRS.
11. When you finish adding taxable state interest, click **Continue**.

TaxSlayer Pro Online displays the **Interest Income** page for this payer:



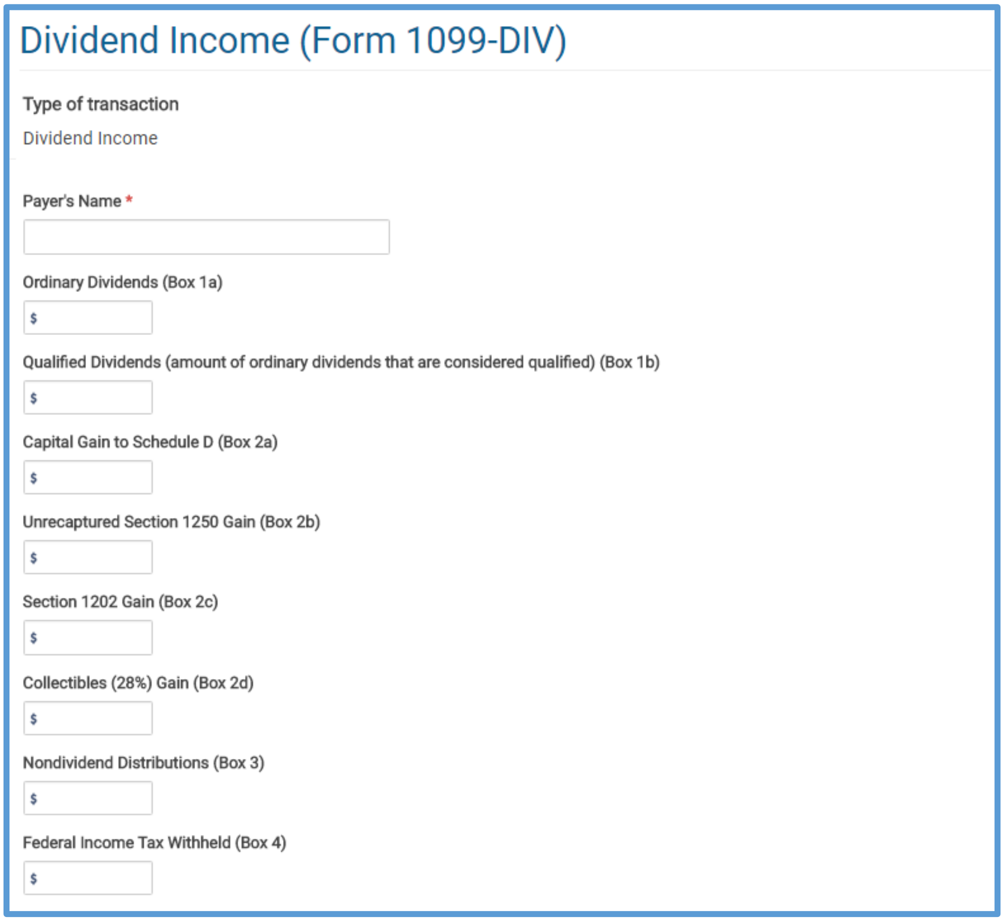
12. Do one of the following:
    a. Click **Save & Enter Another** to display a blank Schedule B Tax-Exempt Interest/Dividend page.
    b. Click **Continue** to display the **Interest and Dividends** page. For this example, click **Continue**.

Dividend Income

If the taxpayer received dividend income, use the following steps from the **1099 Description Schedule B** main page:

1. Click **Add**.
2. Select **Dividend Income, Form 1099-DIV**.
3. Click **Continue**.

TaxSlayer Pro Online displays the **Dividend Income** page:


Dividend Income (Form 1099-DIV)

Type of transaction

Dividend Income

Payer's Name *

Ordinary Dividends (Box 1a)

$

Qualified Dividends (amount of ordinary dividends that are considered qualified) (Box 1b)

$

Capital Gain to Schedule D (Box 2a)

$

Unrecaptured Section 1250 Gain (Box 2b)

$

Section 1202 Gain (Box 2c)

$

Collectibles (28%) Gain (Box 2d)

$

Nondividend Distributions (Box 3)

$

Federal Income Tax Withheld (Box 4)

$

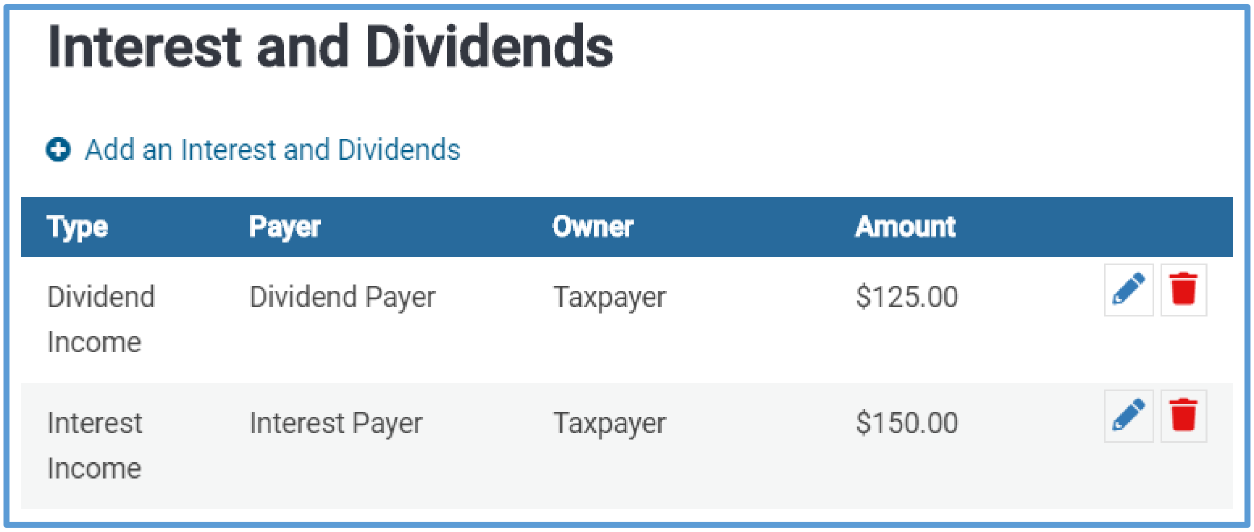
4. Type the payer's name.

Note: If the taxpayer is married, select whether the dividend income is for the taxpayer, spouse, or joint.

5. Type the amounts in the remaining boxes from the information on the taxpayer's Form 1099-DIV. Use the descriptions of the boxes on the paper Form 1099-DIV to match the boxes in TaxSlayer Pro Online.
6. When you finish typing information, verify that you typed the correct information and do one of the following:
    a. Click **Save & Enter Another** to display a blank **Dividend Income** page.
    b. Click **Continue** to display the **Interest and Dividends** page. For this exercise, click **Continue**.

TIP: When you enter the amount of interest to subtract from the state, TaxSlayer Pro Online displays the state selection list.

TaxSlayer Pro Online displays the **Interest and Dividends** page with the information you entered listed:

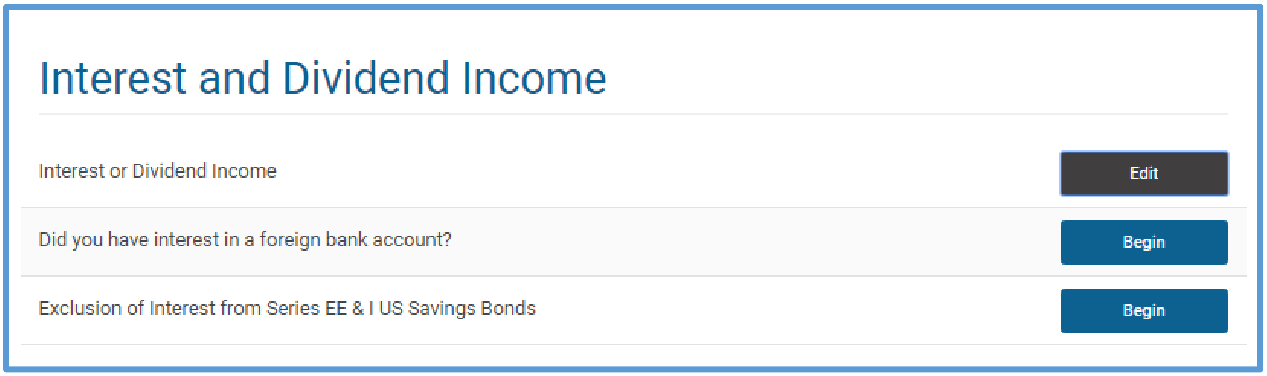


Interest and Dividends

If you need to add more interest and dividend income, use the following steps:

1. Click **Add** and follow the steps listed previously to add information for each payer from which the taxpayer or spouse received interest or dividend income.
2. When you finish adding interest and dividend income, click **Continue**.

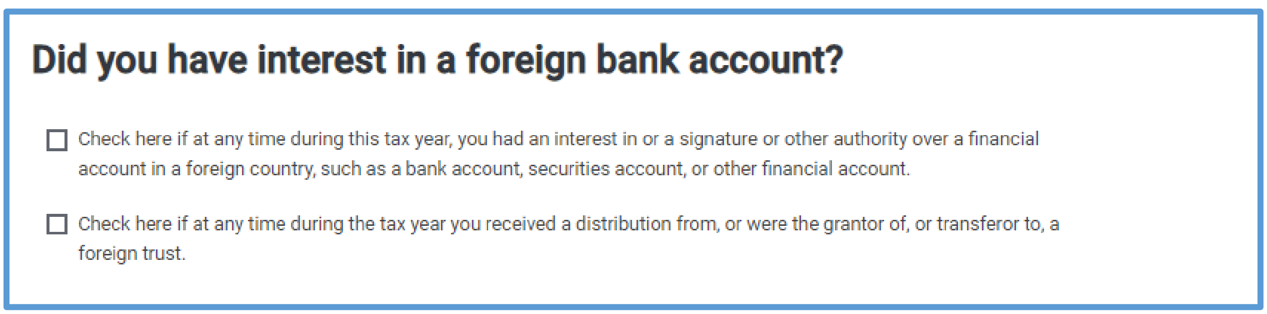
TaxSlayer Pro Online displays the **Interest and Dividend Income** page:



Foreign Country Interest

3. If the taxpayer received interest from a bank in a foreign country, click **BEGIN** on the **Did you have interest in a foreign bank account?** line.

TaxSlayer Pro Online displays the **Did you have interest…** page:



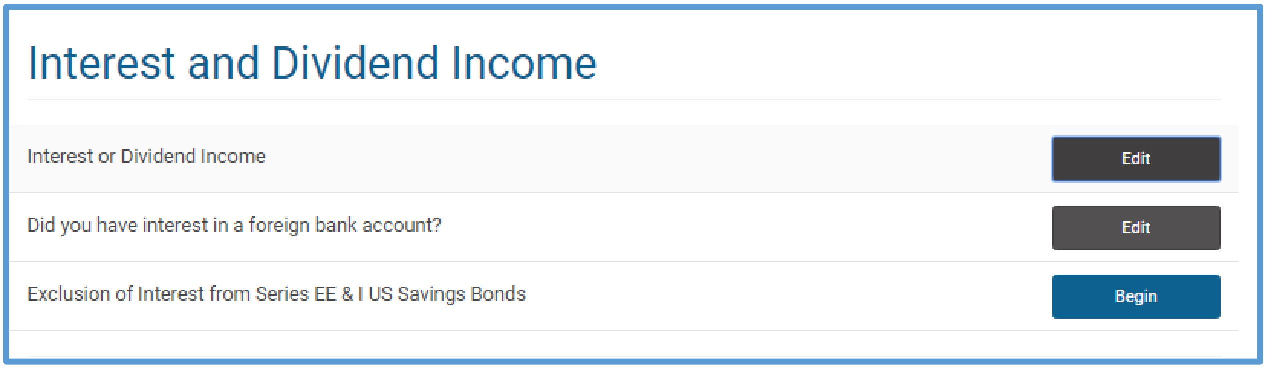
4. Carefully read each check box and select the one(s) that apply.

Note: When you Select check boxes, TaxSlayer Pro Online generates additional questions to answer.

5. If applicable, select the country from the drop-down list.
6. When you finish completing this page, click **Continue**.

TIP: If you open this page but determine that you do not need it, clear the check boxes and click **Continue**.

TaxSlayer Pro Online displays the **Interest and Dividend Income** page:



7. When you finish entering interest and dividend income, click **Continue**.

TaxSlayer Pro Online displays a printer icon on the **Interest and Dividends** line. Click this button to generate a PDF of the Schedule B and corresponding statements based on the information entered in the Interest and Dividend section.

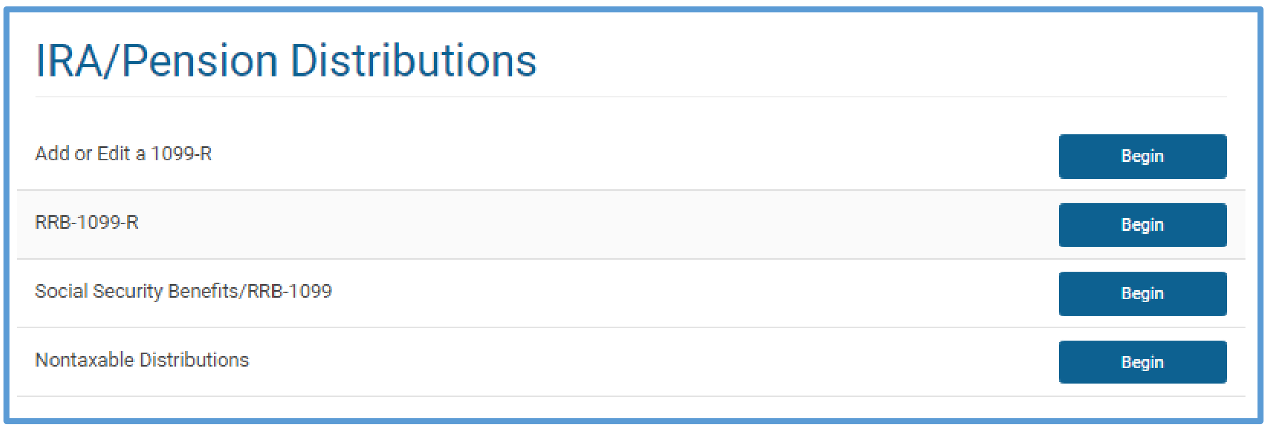
Entering Basic Retirement Income

Taxpayers may receive retirement income, either from an IRA or pension. This section covers entering those types of income.

To add these types of retirement income, begin with the following step:

- Click **BEGIN** on the **Form 1099-R, RRB, SSA** line to display the **IRA/Pension Distributions** landing page.

TaxSlayer Pro Online displays the **IRA/Pension Distributions** landing page:



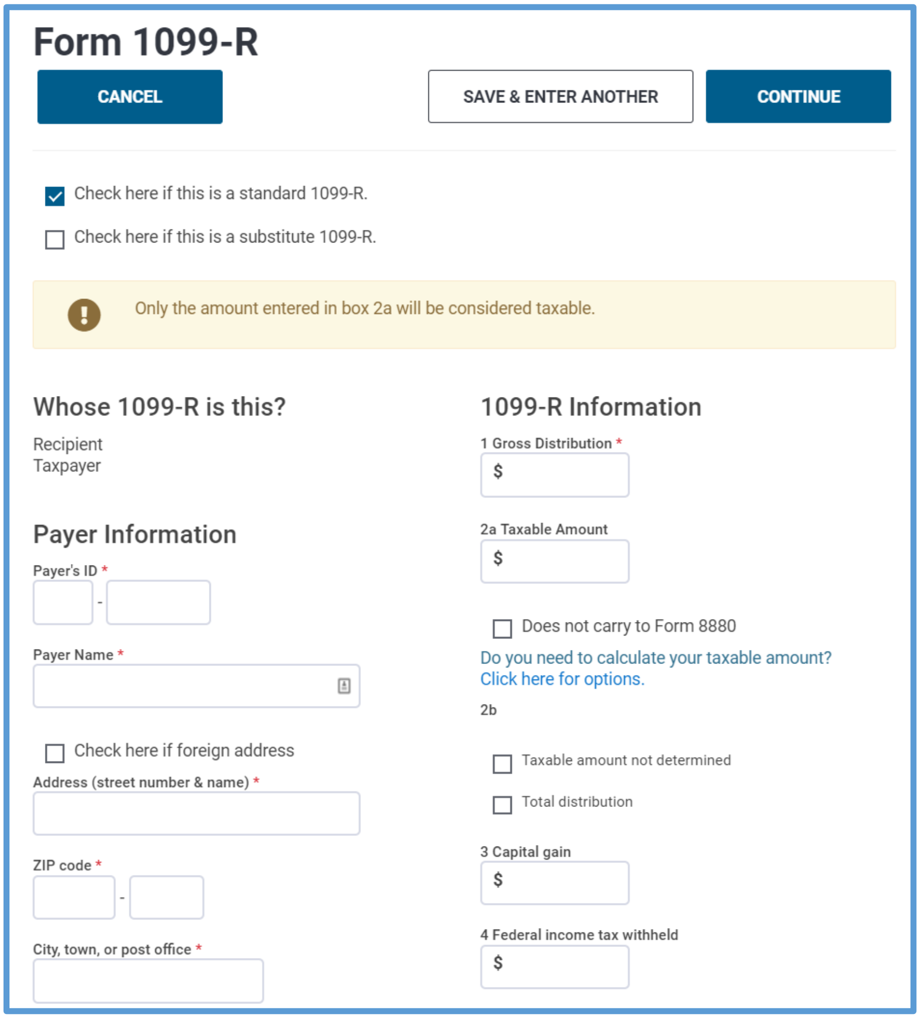
All of the following sections begin with this page.

Form 1099-R Income

If the taxpayer received IRA or pension income, he or she should have received a Form 1099-R from the payer. To add Form 1099-R, use the following steps:

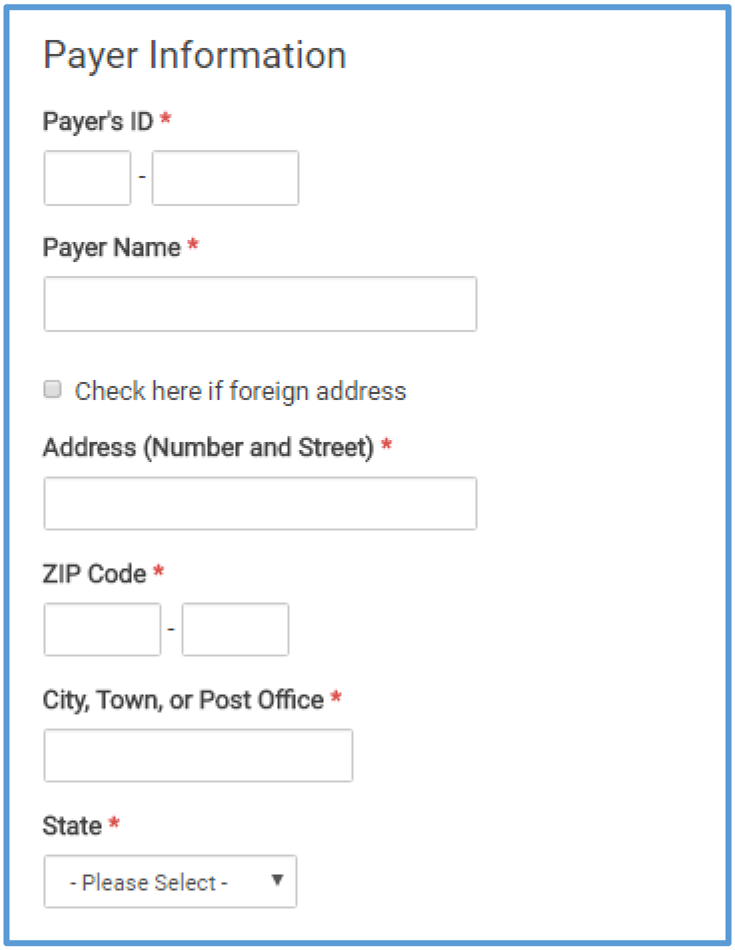
1. Click **BEGIN** on the **Add or Edit a 1099-R** line.

TaxSlayer Pro Online displays the **Form 1099-R** page:



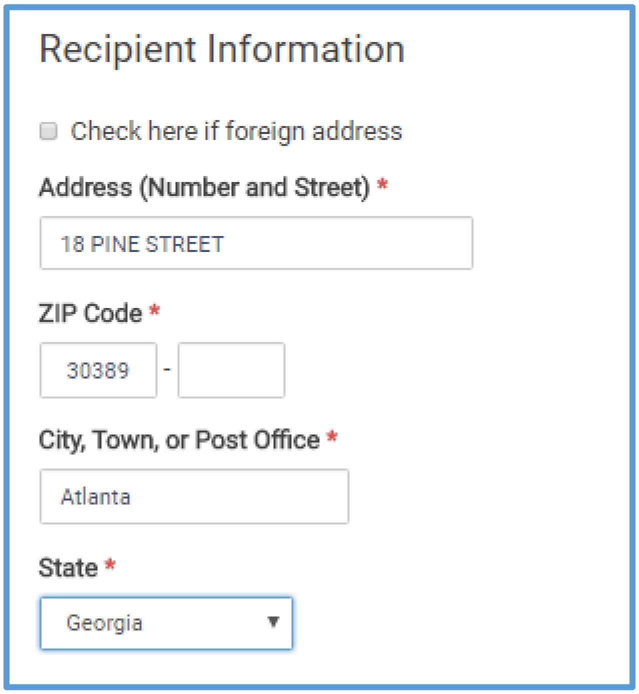
2. As discussed in the Form W-2 section, TaxSlayer Pro Online displays the taxpayer's name if not married. If this is a married filing joint return, select whether this Form 1099-R is for the taxpayer or the spouse.

Payer Information

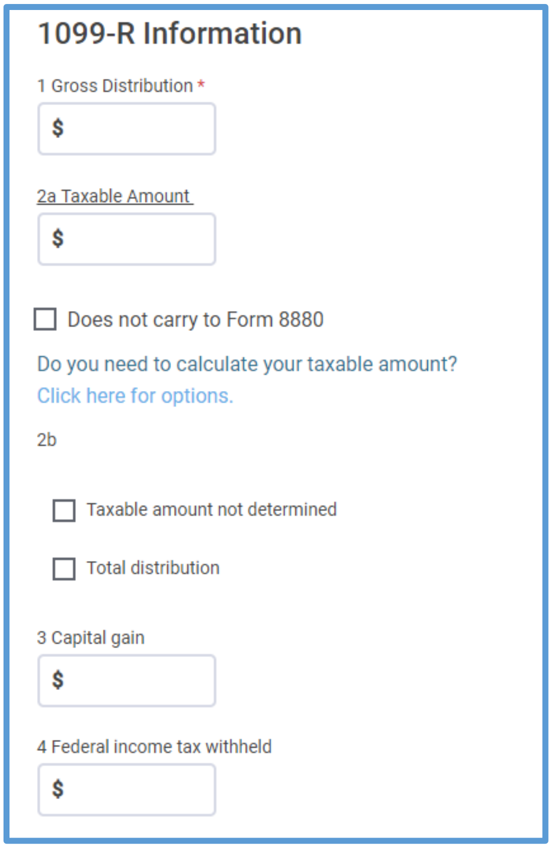


3. Type the payer's information as shown on Form 1099-R.

Recipient Information



4. TaxSlayer Pro Online carries the recipient's address from the personal information you typed. If the taxpayer's address on Form 1099-R is different, make the appropriate changes.


1099-R Information

1 Gross Distribution *

$

2a Taxable Amount

$

☐ Does not carry to Form 8880

Do you need to calculate your taxable amount?
Click here for options.

2b

☐ Taxable amount not determined

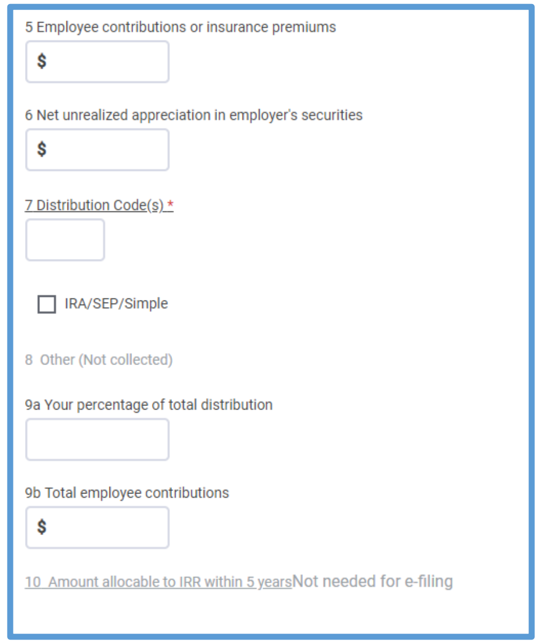
☐ Total distribution

3 Capital gain

$

4 Federal income tax withheld

$


5 Employee contributions or insurance premiums

$

6 Net unrealized appreciation in employer's securities

$

7 Distribution Code(s) *

☐ IRA/SEP/Simple

8 Other (Not collected)

9a Your percentage of total distribution

9b Total employee contributions

$

10 Amount allocable to IRR within 5 years Not needed for e-filing

5. Type the information in boxes 1-9b and 13 as it appears on the paper Form 1099-R the taxpayer received from the payer.
6. Use the following tips when completing this section:
    a. TaxSlayer Pro Online automatically completes box 2a (Taxable Amount) based on the information you type in box 1. If the amount on the taxpayer's Form 1099-R is a different amount, type that amount in the box.
    b. If the taxable distribution does not qualify to be used in calculating the retirement savings contribution credit, select the **Does not qualify for Form 8880** check box.
    c. If the taxpayer's Form 1099-R, Box 2a states that you need to determine the taxable amount, select **Click here for options** to add the Simplified Method Worksheet and/or add the Public Safety Officers Distribution. See below for information on completing the Simplified Method worksheet.
    d. If this Form 1099-R is for an IRA, select the **IRA/SEP/Simple** check box under box 7 as shown on the paper Form 1099-R.

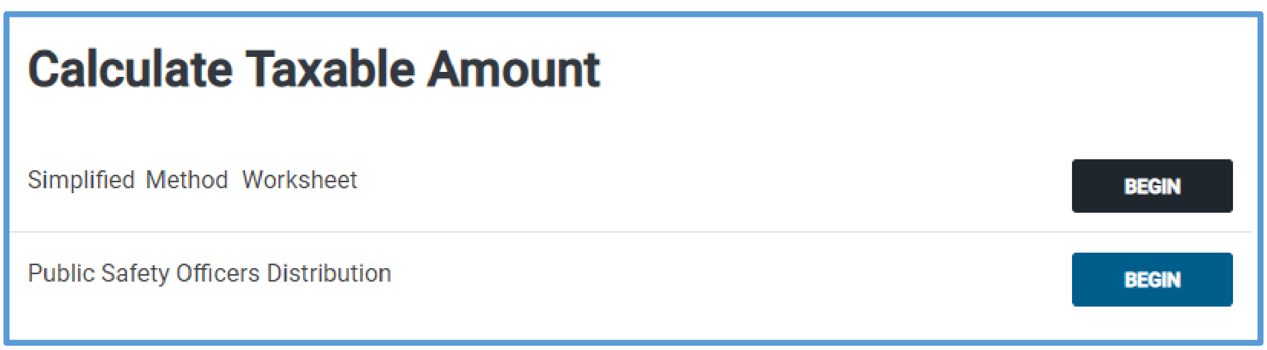
TIP: TaxSlayer Pro Online displays a message box reminding you of the following: **The Taxable amount is automatically carried. This can be corrected if necessary**.

Simplified Method Worksheet

If the payer did not calculate the taxable amount of a pension, and you need to calculate it, use the following steps:

1. Click the **Click here for options** link under box 2a.

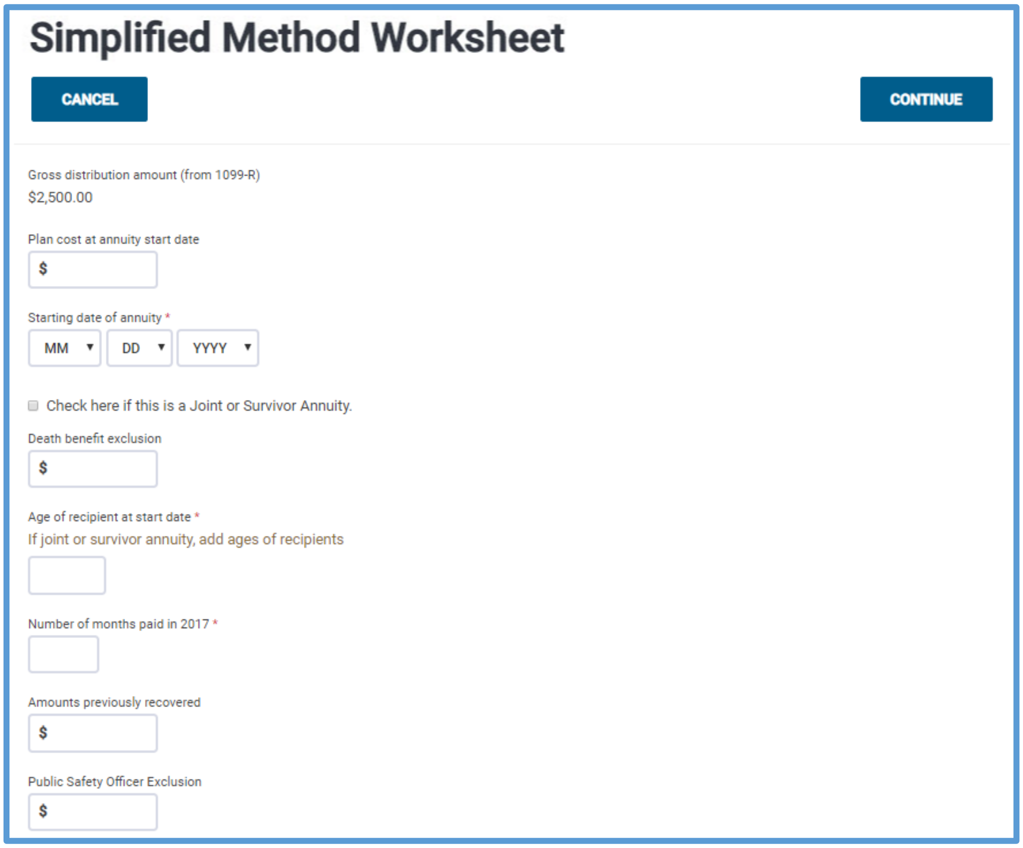
TaxSlayer Pro Online displays the **Calculate Taxable Amount** page:



2. Select **Begin** on the **Simplified Method Worksheet** line to display the **Simplified Method Qualification** page.

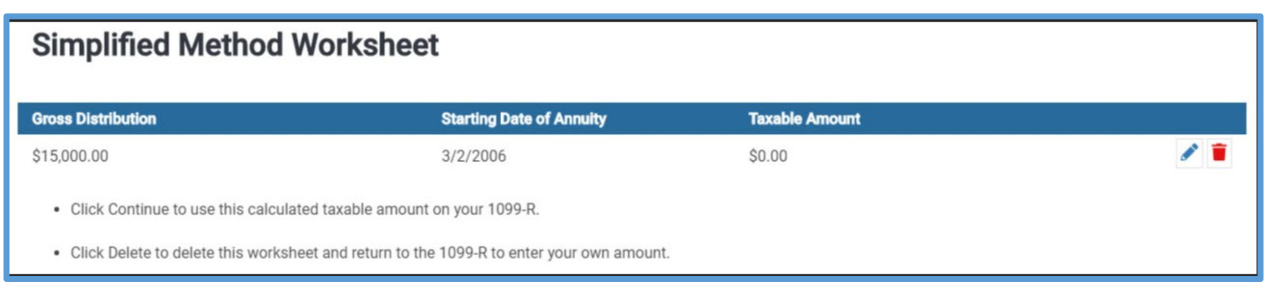
3. Read the information on this page. If the taxpayer qualifies to use the simplified method, click **Continue**.

TaxSlayer Pro Online displays the **Simplified Method Worksheet**:



4. TaxSlayer Pro Online calculates the gross distribution from the information you typed on Form 1099-R.
5. Complete the remaining information on this worksheet based on information from the taxpayer.
6. When you finish typing information, click **Continue**.

TaxSlayer Pro Online displays the **Simplified Method Worksheet** with the summary and calculated taxable amount:



Simplified Method Worksheet

Gross Distribution	Starting Date of Annuity	Taxable Amount
$15,000.00	3/2/2006	$0.00

- Click Continue to use this calculated taxable amount on your 1099-R.
- Click Delete to delete this worksheet and return to the 1099-R to enter your own amount.

7. Click **Continue**.

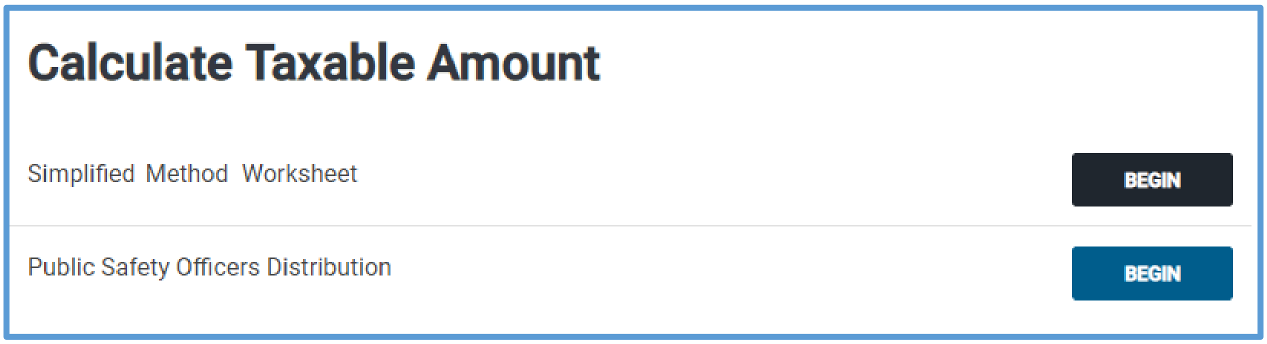
TIP: TaxSlayer Pro Online displays the calculated taxable amount from the Simplified Method worksheet in Box 2a. Select the **Worksheet** link to change or delete the worksheet.

Public Safety Officers Distribution

If the payer does not need to calculate the taxable amount of a pension, but needs to enter the amount for Public Safety Officers (PSO), use the following steps:

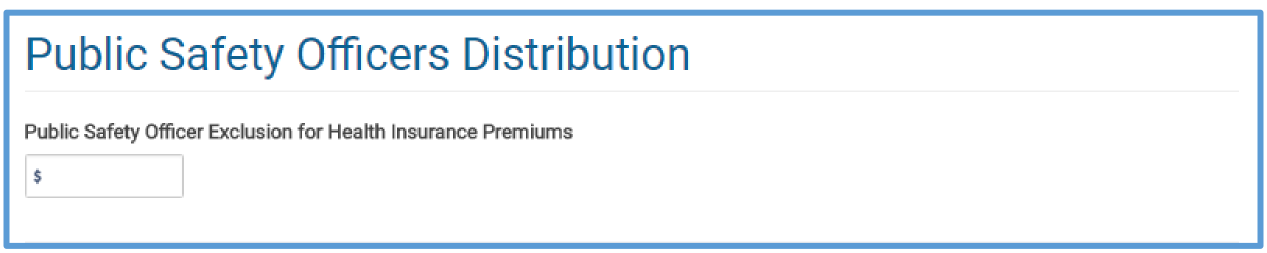
1. Click the **Click here for options** link below box 2a.

TaxSlayer Pro Online displays the **Calculate Taxable Amount** page:



2. Select **Begin** on the **Public Safety Officers Distribution** line.

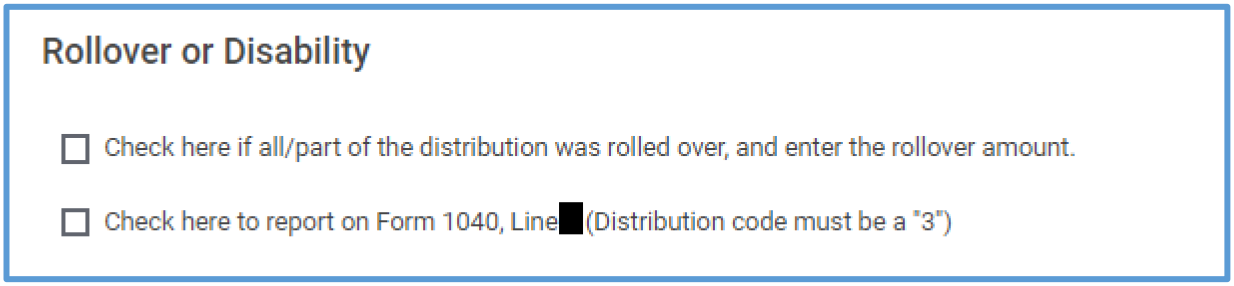
TaxSlayer Pro Online displays the **Public Safety Officers Distribution** page:



3. Type the amount.
4. Click **Continue** to return to the Form 1099-R entry page.

Note: TaxSlayer Pro Online automatically deducts the excluded amount from Box 2A and displays the **PSO** indicator on the appropriate line when generating the PDF.

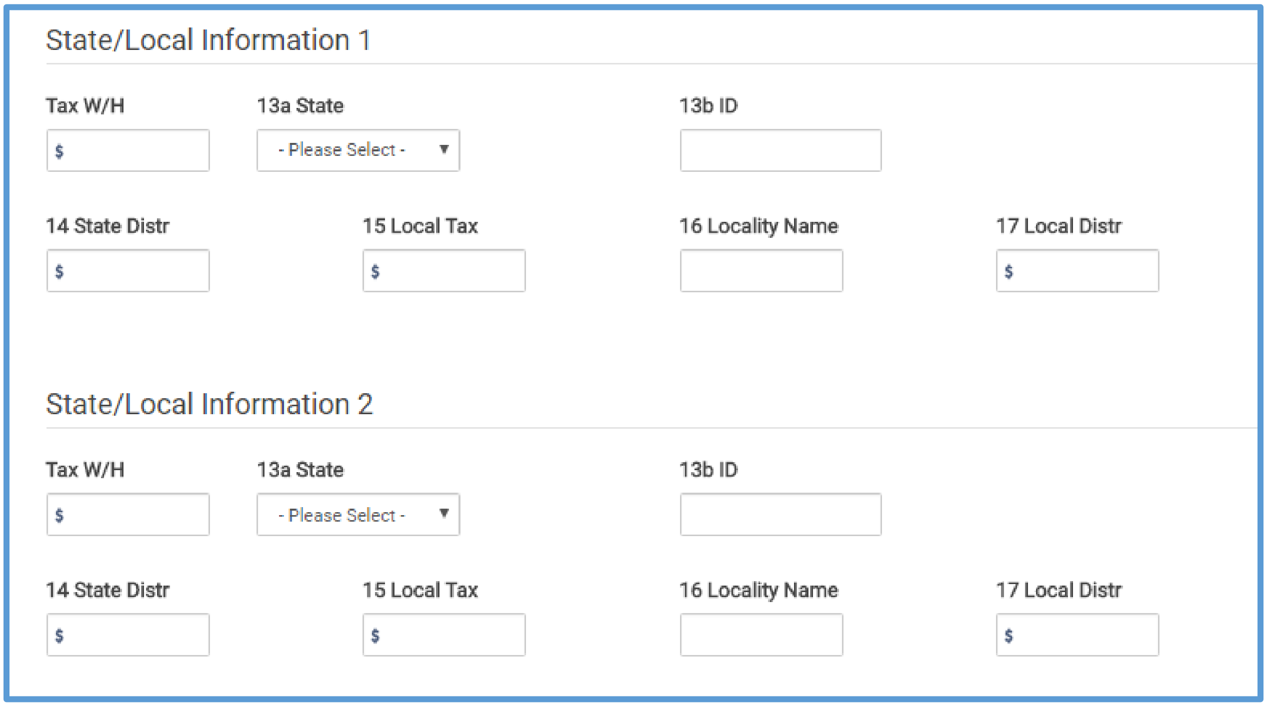
Rollover or Disability



1. Select the appropriate check box if this is an IRA and the taxpayer rolled over part or all of the distribution shown on this Form 1099-R.
    a. When you select the check box, type the amount that the taxpayer rolled over in the appropriate box.
2. If this is a disability distribution and the taxpayer is disabled, qualifying him or her to report the pension amount as earned income, select the **Check here to report on Form 1040, Line 1h** check box. TaxSlayer Pro Online carries this amount to Form 1040, line 1.

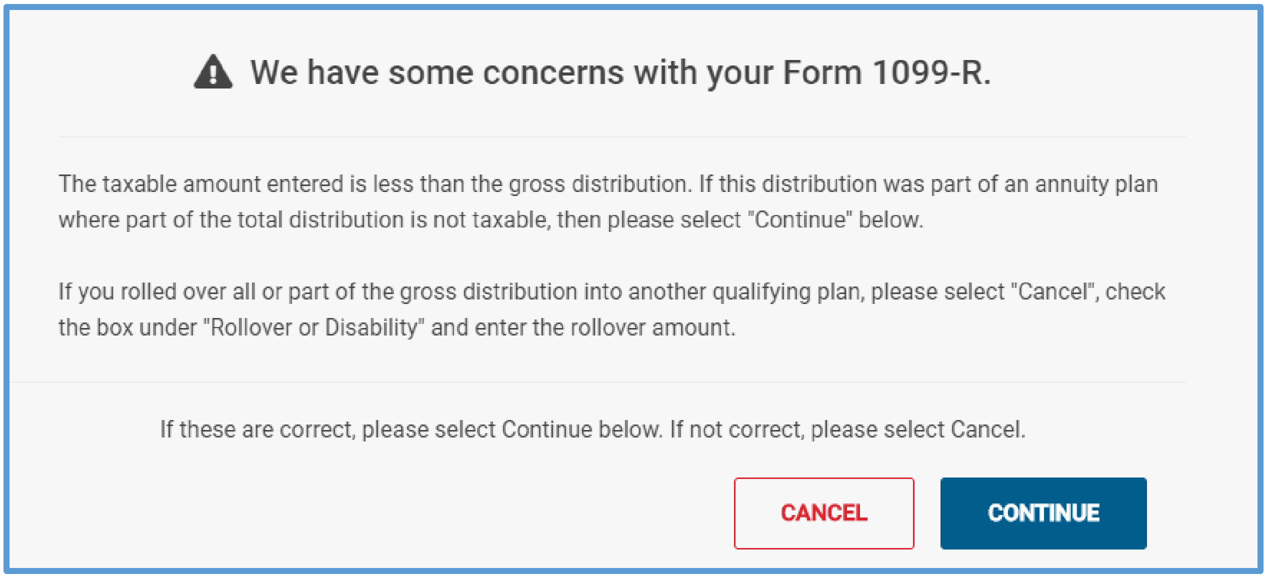
Note: The IRS changes line numbers on forms as needed each year. These line numbers may be different each year.

State/Local Information



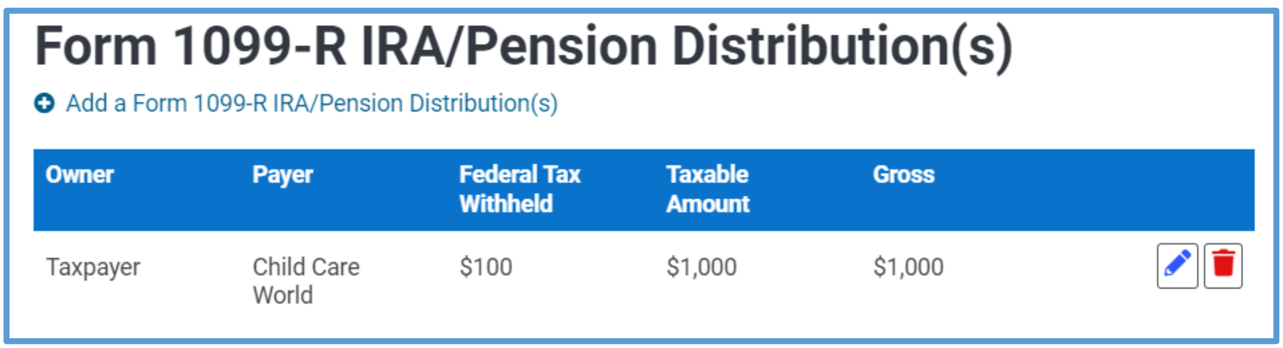
3. Type the state and local information as shown on the Form 1099-R the taxpayer received.
4. When you finish entering information, do one of the following:
    a. Click **Save & Enter Another** to display a blank Form 1099-R.
    b. Click **Continue** to display the **Form 1099-R IRA/Pension Distribution(s)** page. For this exercise, click **Continue**.

TaxSlayer Pro Online displays a confirmation box if the taxable amount is less than the gross distribution:



5. Verify that the information you entered is correct.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Form 1099-R IRA/Pension Distribution(s)** summary page with the Form 1099-R information listed:


Form 1099-R IRA/Pension Distribution(s)

Add a Form 1099-R IRA/Pension Distribution(s)

Owner	Payer	Federal Tax Withheld	Taxable Amount	Gross
Taxpayer	Child Care World	$100	$1,000	$1,000

7. If you need to add more Forms 1099-R, click **Add** and use the same steps to add Form 1099-R.
8. When you finish adding forms, click **Continue**.

Entering Railroad Retirement Benefits

Tier 1 Benefits

If a taxpayer received railroad retirement Tier 1 benefits during the year, he or she should receive Form RRB-1099 from the Railroad Retirement Board. To add Tier 1 benefits to the return, use the same steps that you use in the *Adding Social Security benefits* section. Use the information on Form RRB-1099 to match the information on each box.

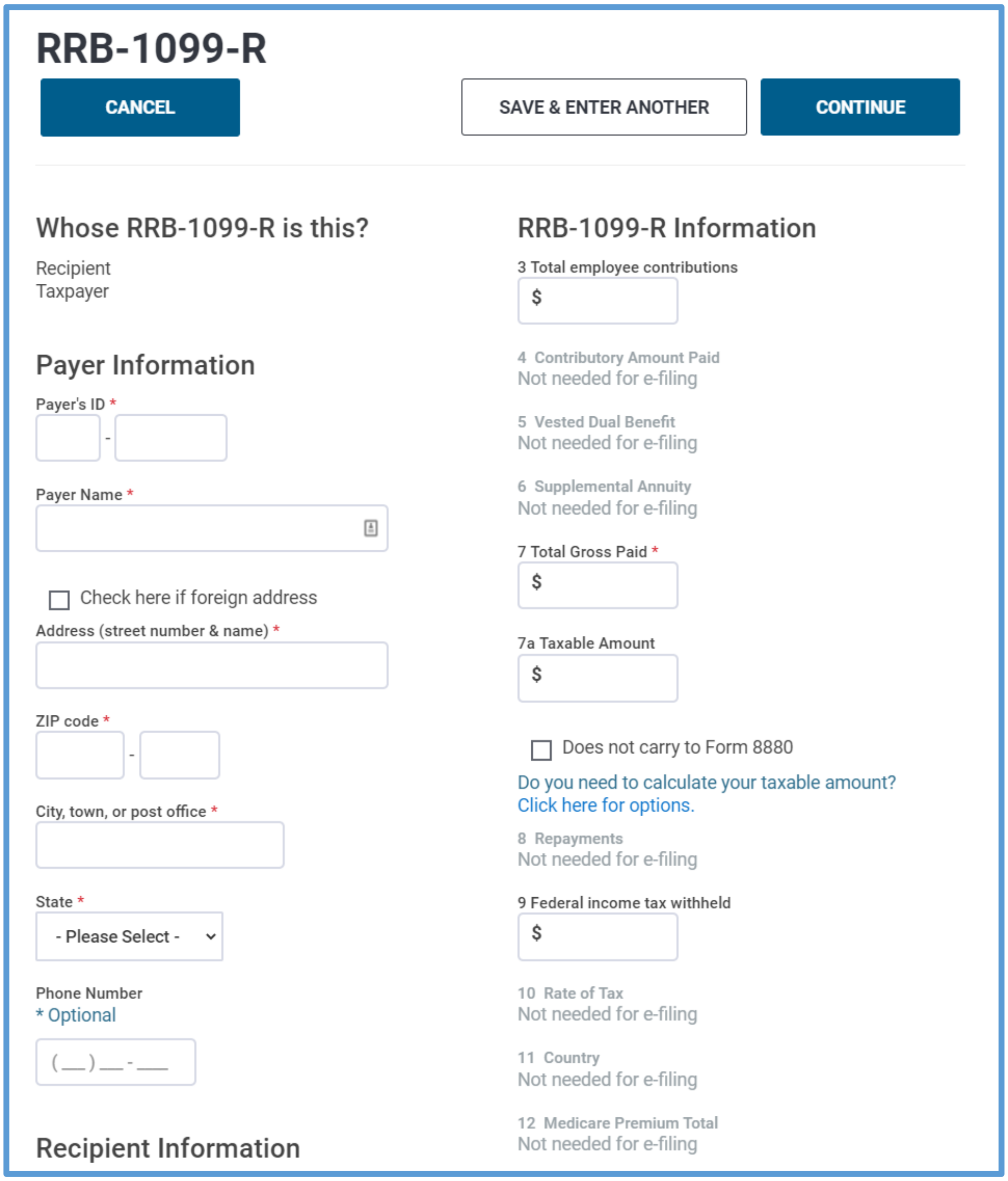
If the taxpayer received both Social Security and Railroad Retirement Tier 1 benefits, add the two together to complete the **Social Security Benefits/RRB-1099** page.

Tier 2 Benefits

If a taxpayer received railroad retirement Tier 2 benefits during the year, he or she should receive Form RRB-1099-R from the Railroad Retirement Board. To add railroad retirement income to the return, use the following steps from the **IRA/Pension Distributions** landing page:

1. Click the **RRB-1099-R** line.

TaxSlayer Pro Online displays the **RRB-1099-R** page:


RRB-1099-R

CANCEL | SAVE & ENTER ANOTHER | CONTINUE

Whose RRB-1099-R is this?

Recipient
Taxpayer

Payer Information

Payer's ID *

Payer Name *

Check here if foreign address

Address (street number & name) *

ZIP code *

City, town, or post office *

State *
- Please Select -

Phone Number
* Optional

(__) __ - __

Recipient Information

RRB-1099-R Information

3 Total employee contributions
$

4 Contributory Amount Paid
Not needed for e-filing

5 Vested Dual Benefit
Not needed for e-filing

6 Supplemental Annuity
Not needed for e-filing

7 Total Gross Paid *
$

7a Taxable Amount
$

Does not carry to Form 8880

Do you need to calculate your taxable amount?
Click here for options.

8 Repayments
Not needed for e-filing

9 Federal income tax withheld
$

10 Rate of Tax
Not needed for e-filing

11 Country
Not needed for e-filing

12 Medicare Premium Total
Not needed for e-filing

2. Type all of the information on this page as the payer entered the information on the paper Form RRB-1099-R.
    a. Many items on this page are similar to Form 1099-R, as we discussed earlier.
    b. If the taxpayer's address is different on Form RRB-1099-R, change the address calculated from personal information.
    c. If this is for disability income, and the taxpayer qualifies to report disability income as earned income, select the **Check here to report on Form 1040, Line 1** check box.

3. When you finish typing information on this page, do one of the following:
    a. Click **Save & Enter Another** to display a blank Form RRB-1099-R page.
    b. Click **Continue** to display the **Form RRB-1099-R** page.

TIPS:

- TaxSlayer Pro Online displays a message box reminding you of the following: **The Taxable amount is automatically carried. This can be corrected if necessary**.
- The calculated taxable amount from the Simplified Method worksheet will be displayed in box 7a. Click the **Click here for options** link to change or delete the worksheet.

TaxSlayer Pro Online displays the **RRB-1099-R** summary page with the payer you added listed:

Form RRB-1099-R

Add a Form RRB-1099-R

Owner	Payer	Federal Tax Withheld	Taxable Amount	Gross
Taxpayer	ABC Accounting	$0	$2,000	$2,000

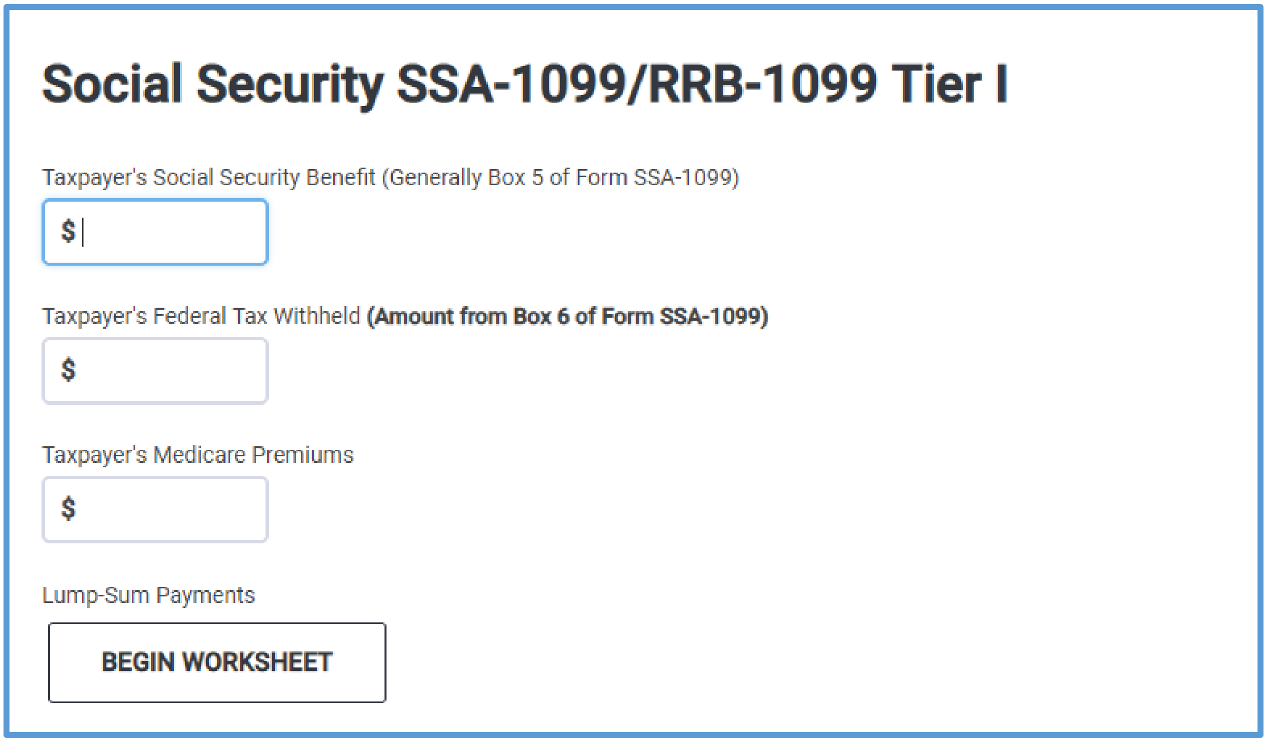
4. If the taxpayer and/or spouse received multiple Forms RRB-1099-R, you can click **Add** to add more forms.
5. Click **Continue**.

Social Security Benefits

If the taxpayer received Social Security benefits, he or she should have received a Form 1099-SSA from the government. To figure the taxable amount of Social Security benefits, use the following steps from the **Social Security SSA-1099/RRB-1099 Tier 1** landing page:

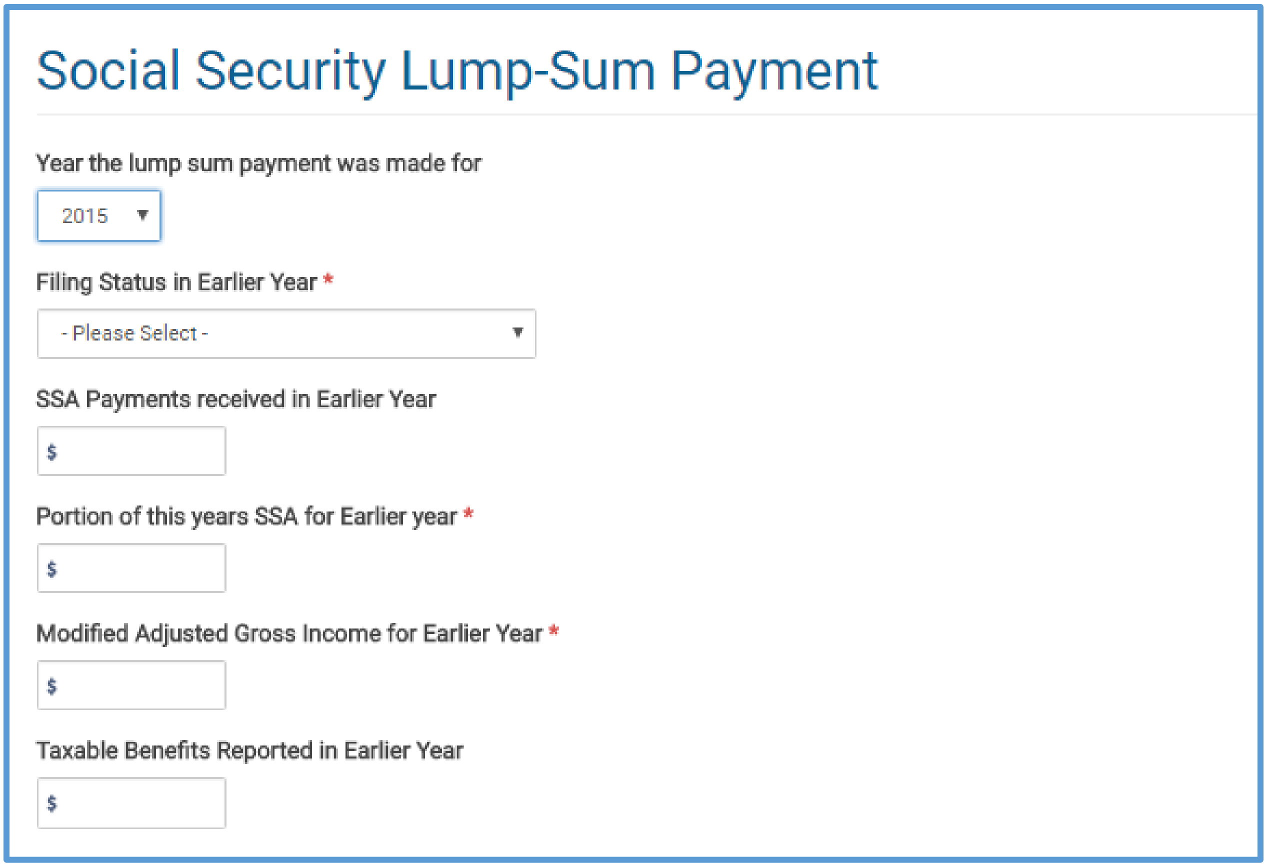
1. Click the **Social Security Benefits/RRB-1099** line.

TaxSlayer Pro Online displays the **Social Security SSA-1099/RRB-1099 Tier 1** page:



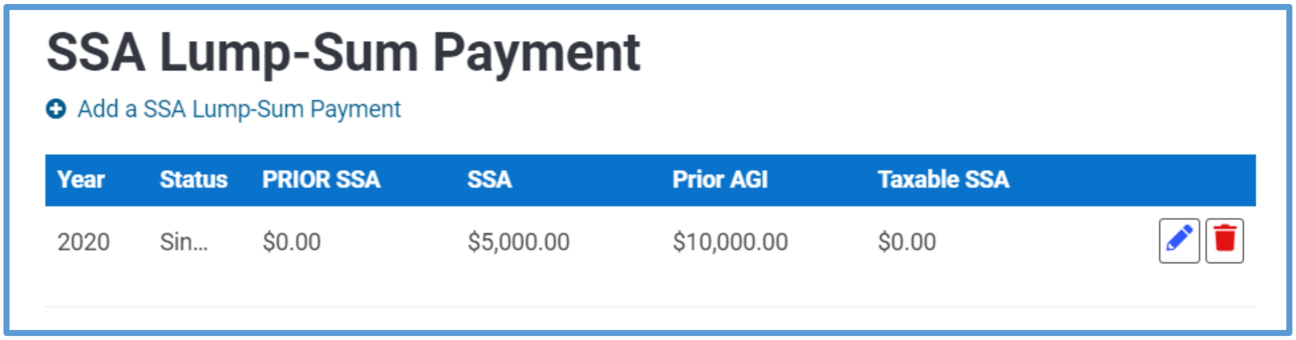
2. Type the Social Security benefits, federal tax withheld, and Medicare premiums as shown on the taxpayer's Form 1099-SSA.
3. If the taxpayer received a lump-sum benefit, click **Begin Worksheet**.

TaxSlayer Pro Online displays the **Social Security Lump-Sum Payment** page:



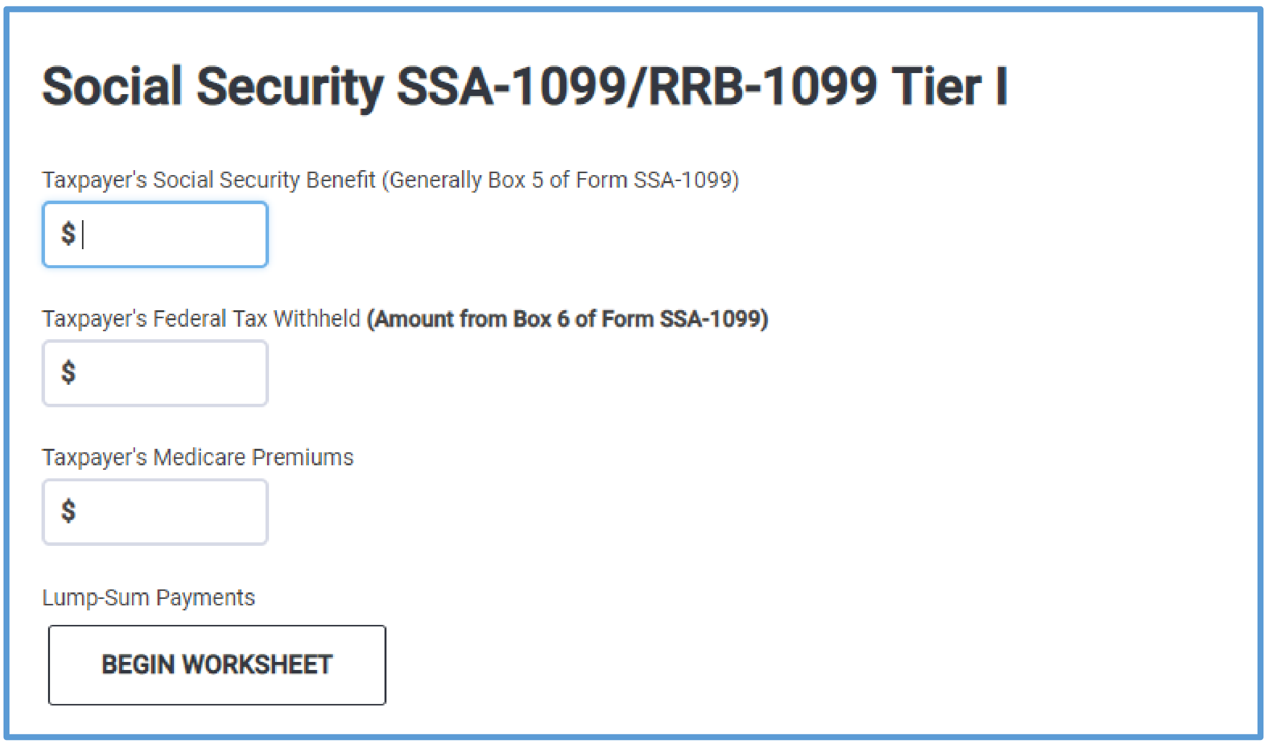
4. Select the year for which the taxpayer received the lump sum.
5. Select the filing status for the year you selected.
6. Type the payments received in the earlier year and the portion of the lump sum received for that year.
7. From the taxpayer's tax return for the earlier year, type the modified adjusted gross income and taxable benefits reported.
8. When you finish entering information on the worksheet, click **Continue**.

TaxSlayer Pro Online displays the **SSA Lump-Sum Payment** summary page with the Social Security lump sum payment listed:



9. If you need to add more lump sum payments, click **Add** and complete the worksheet as discussed.
10. Click **Continue**.

TaxSlayer Pro Online displays the **Social Security 1099 SSA** page:



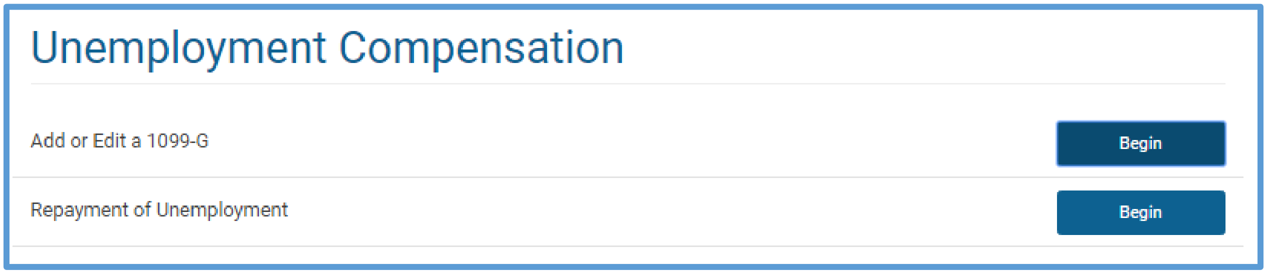
11. Click **Continue** to return to the **Income** page.

Entering Unemployment Compensation

If the taxpayer or spouse received unemployment compensation during the year, he or she should have received a Form 1099-G to report that income. To add unemployment compensation in the return, use the following steps:

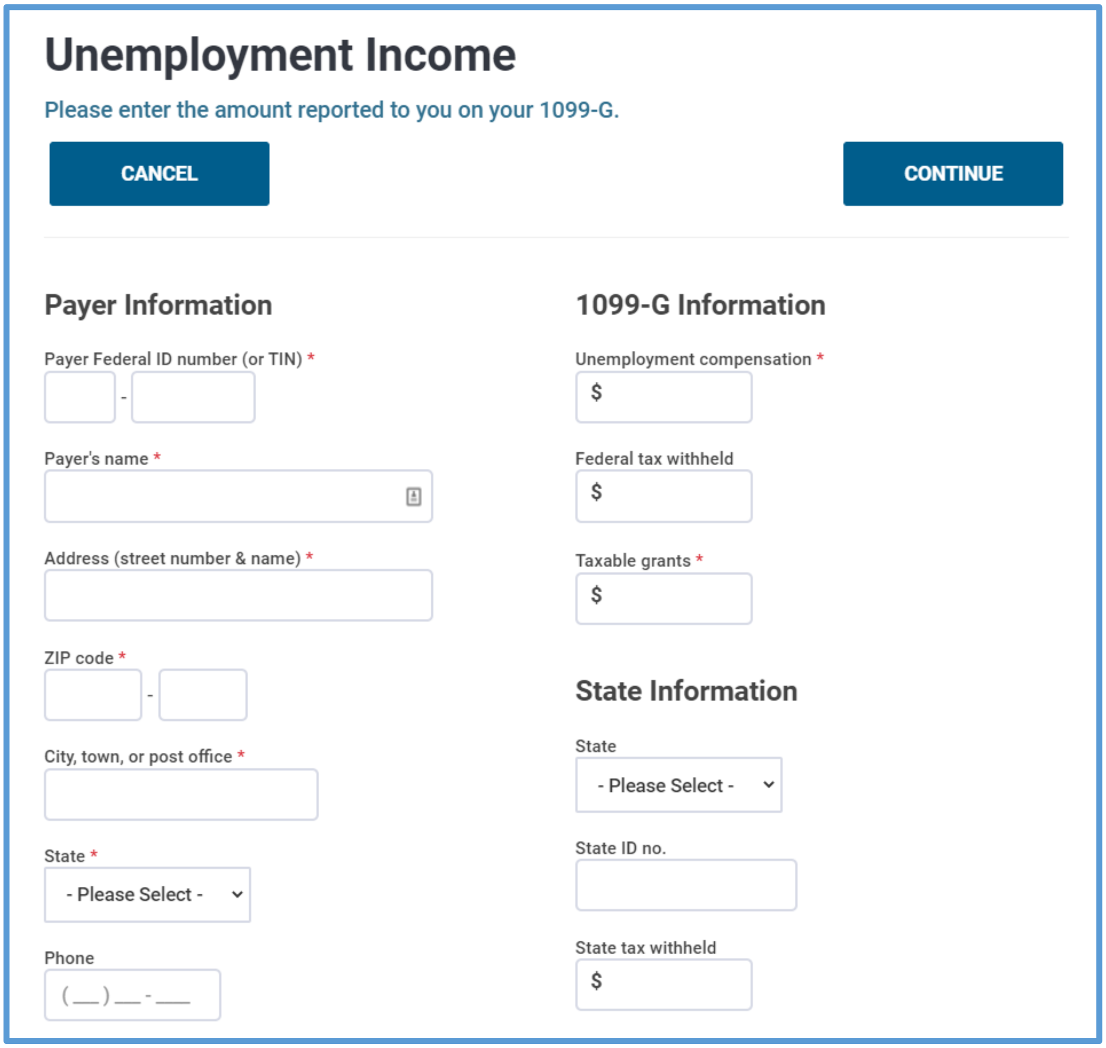
1. Click **BEGIN** on the **Form 1099-G Box 1** line.

TaxSlayer Pro Online displays the **Unemployment Compensation** page:



2. Click **BEGIN** on the **Add or Edit a 1099-G** line.

TaxSlayer Pro Online displays the **Unemployment Income** page:



Unemployment Income

Please enter the amount reported to you on your 1099-G.

CANCEL CONTINUE

Payer Information

Payer Federal ID number (or TIN) *

-

Payer's name *

Address (street number & name) *

ZIP code *

-

City, town, or post office *

State *

- Please Select -

Phone

(__) __ - __

1099-G Information

Unemployment compensation *

$

Federal tax withheld

$

Taxable grants *

$

State Information

State

- Please Select -

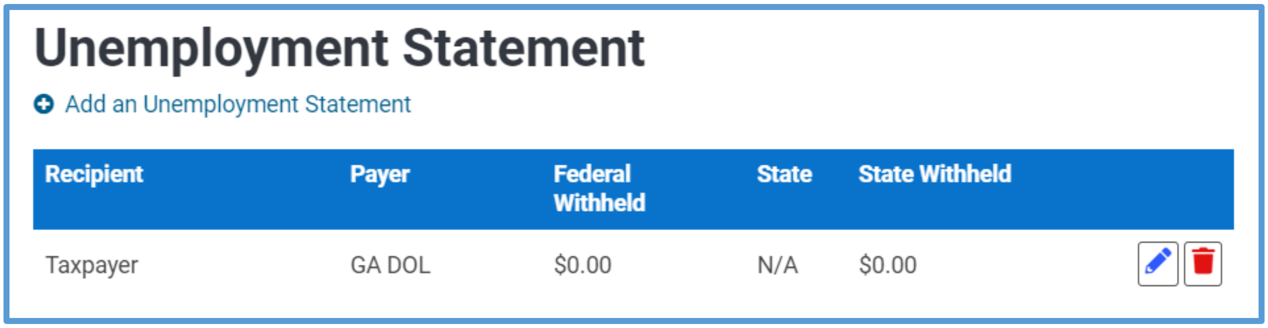
State ID no.

State tax withheld

$

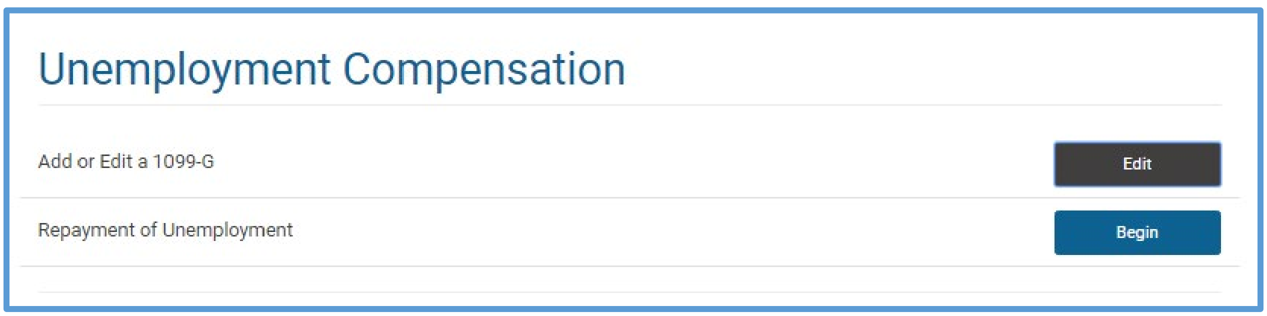
3. Type the information on the page exactly as it appears on the Form 1099-G the taxpayer received. Use the following tip to enter this information:
    a. Compare the recipient's address as shown on the page to the address on the paper Form 1099-G. If it is different, change the address in TaxSlayer Pro Online.
4. When you finish typing information, click **Continue**.

TaxSlayer Pro Online displays the **Unemployment Statement** page with the information you entered listed:



5. If the taxpayer and/or spouse received multiple Forms 1099-G for unemployment compensation, click **Add** to enter the information from the additional forms.
6. When you finish adding unemployment compensation, click **Continue**.

TaxSlayer Pro Online displays the **Unemployment Compensation** page:

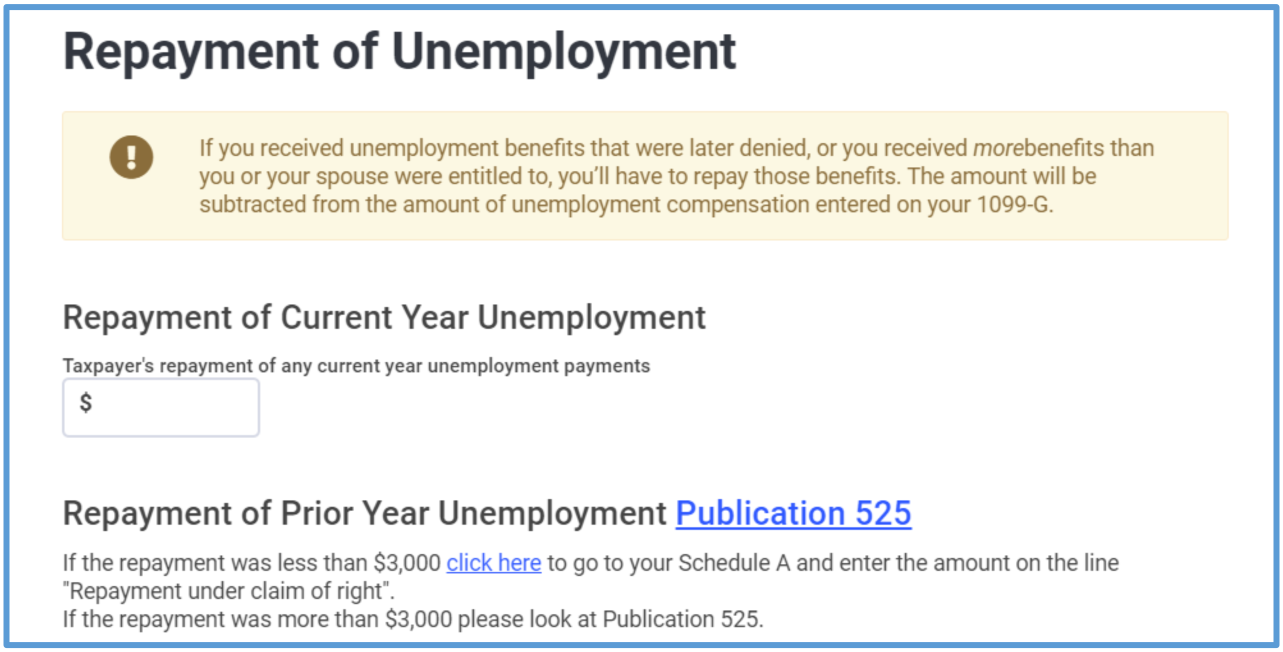


Repayments of Unemployment Compensation

Sometimes, the taxpayer or spouse repays unemployment compensation. In that case, you need to report the unemployment compensation the taxpayer repaid so that amount can be deducted from income.

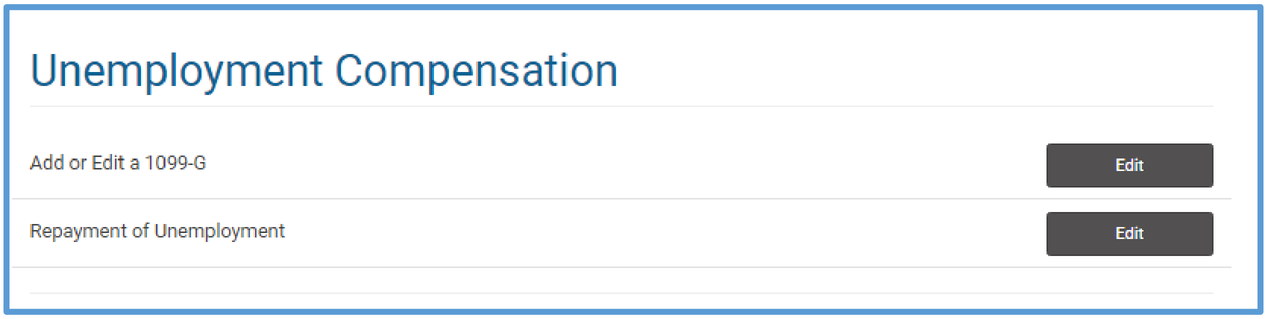
1. Click the **Repayment of Unemployment** line.

TaxSlayer Pro Online displays the **Repayment of Unemployment** page:



2. Determine whether the unemployment repayment was for unemployment the taxpayer received for the current or prior tax year.
3. If the repayment was for the current year, type the amount in the appropriate box. TaxSlayer Pro Online adjusts the amount reported on Schedule 1.
4. If the repayment was for unemployment the taxpayer received in a prior year, read and follow the instructions on the page.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Unemployment Compensation** page:



6. Click **Continue** to display the **Income** page.

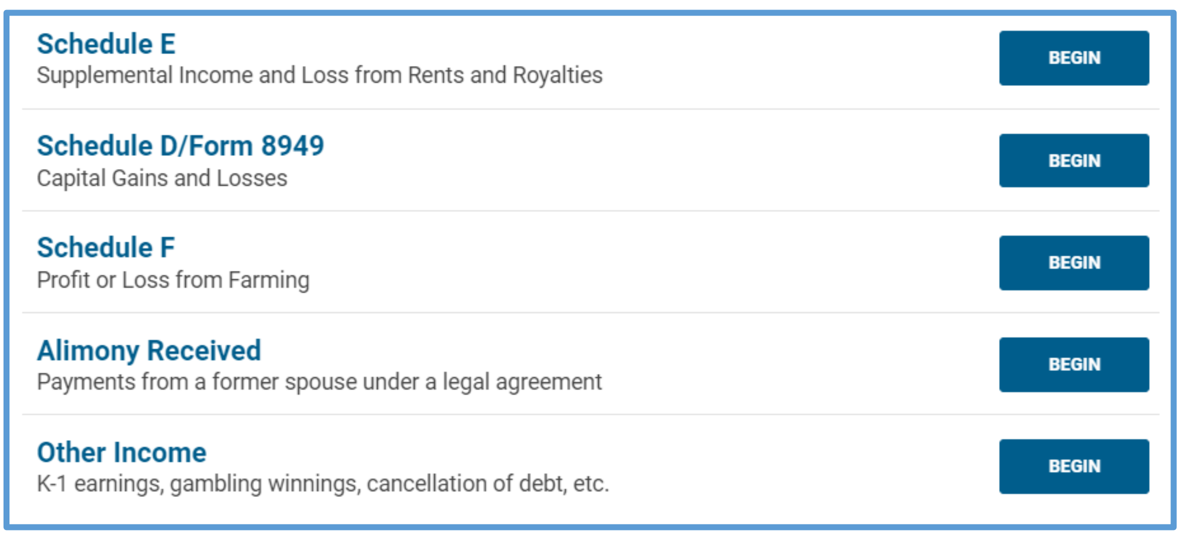
Entering Less Common Income

In this section, we cover some of the less common income types that you may need to add for some taxpayers, including the following:

- Alaska Permanent Fund dividends
- Gambling income
- Taxable scholarships
- Cancellations of debt

To start adding other income, use the following step from the **Income** page:

- Click the **Other Income** line.

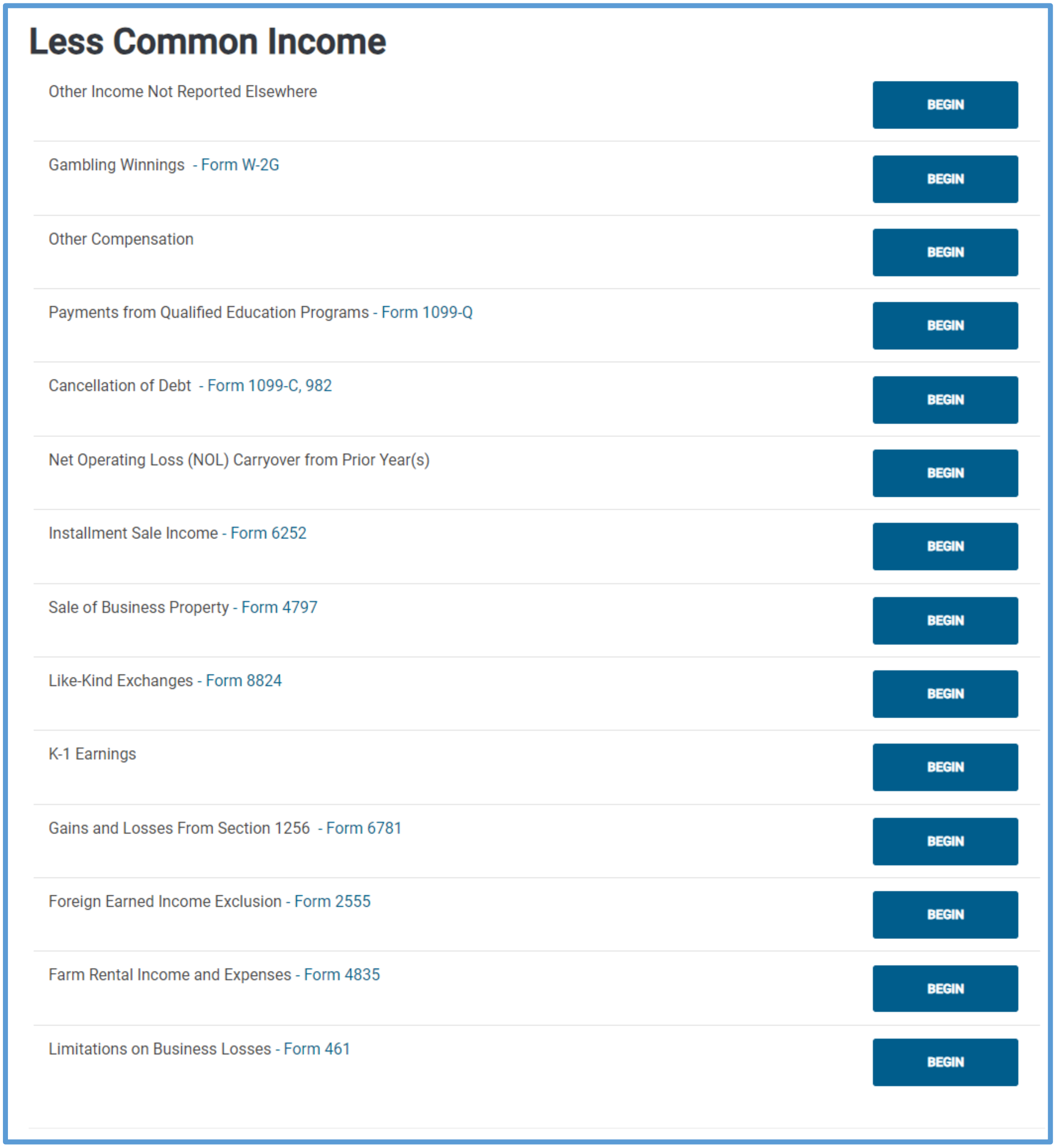


On this page, you can begin adding other income types.

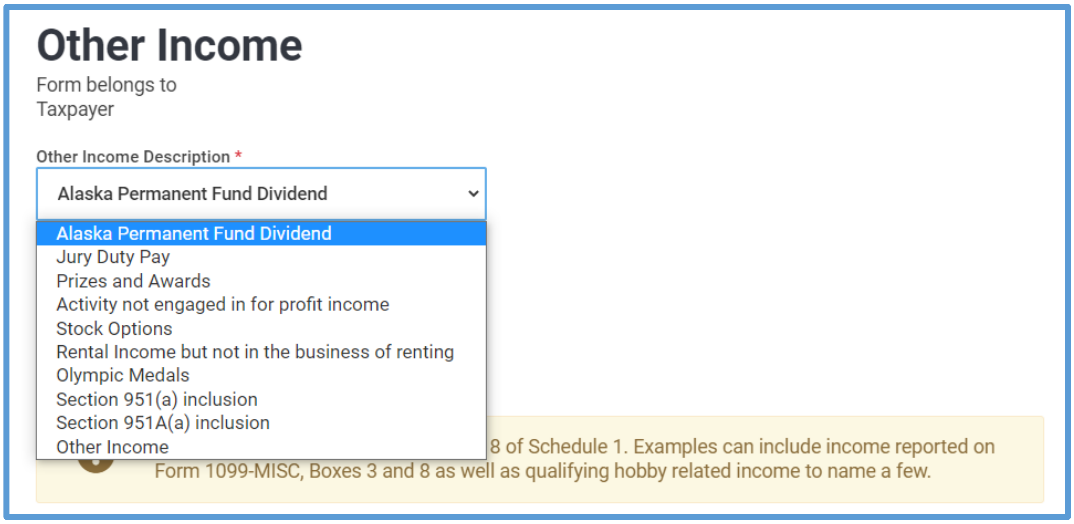
Alaska Permanent Fund Dividends

To add Alaska Permanent Fund dividends, use the following steps:

1. Click the **Other Income Not Reported Elsewhere** line.



TaxSlayer Pro Online displays the **Other Income** page:



2. Select **Alaska Permanent Fund Dividend** from the **Other Income Description dropdown**.
3. Type the amount of the dividend in the appropriate box.
4. Click **Continue**.

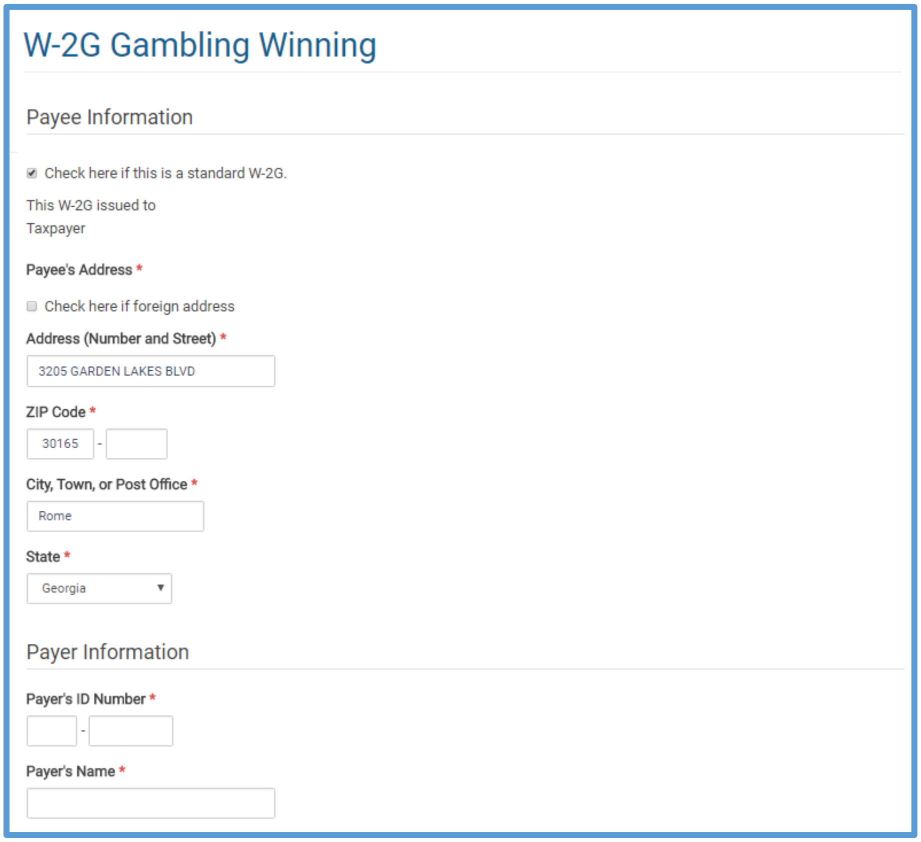
Note: Select the **Earned Income** check box if the IRS considers this income earned for EITC/CTC purposes.

Gambling Income

To add gambling income to the return, use the following steps:

1. Click the **Gambling Winnings W-2G** line.

TaxSlayer Pro Online displays the **W-2G Gambling Winning** page:



W-2G Gambling Winning

Payee Information

☑ Check here if this is a standard W-2G.

This W-2G issued to
Taxpayer

Payee's Address *

☐ Check here if foreign address

Address (Number and Street) *

3205 GARDEN LAKES BLVD

ZIP Code *

30165 -

City, Town, or Post Office *

Rome

State *

Georgia

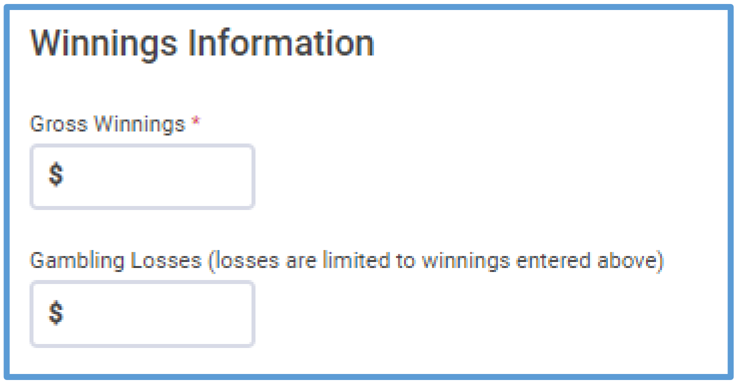
Payer Information

Payer's ID Number *

Payer's Name *

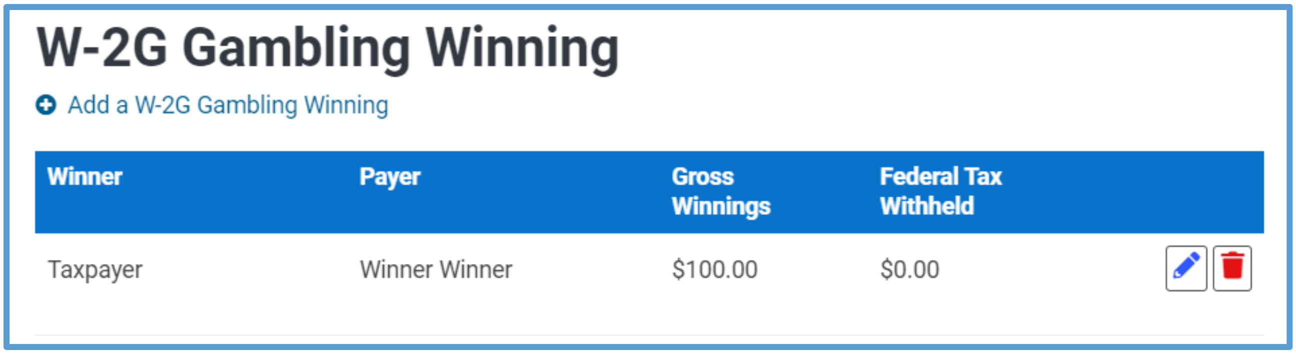
2. Type the information on Form W-2G exactly as it appears on the Form W-2G the taxpayer received from the payer.
3. Type the amount of gambling losses associated with this Form W-2G. TaxSlayer Pro Online automatically carries this amount to Schedule A.

Note: TaxSlayer Pro Online limits losses entered on this page to the amount of winnings entered on this page.



4. Use the following tips to enter Form W-2G information:
    a. If the taxpayer's address on the paper Form W-2G is different from the one calculated from personal information, make changes on this page.
    b. If the payer did not withhold state income tax, leave the following boxes blank:
        i. **State Winnings**
        ii. **State Tax Withheld**
        iii. **State Taxes Paid To**
        iv. **State ID Number**
5. When you finish typing information from the Form W-2G, do one of the following:
    a. Click **Save & Enter Another** to display a blank **W-2G Gambling Winning** page.
    b. Click **Continue** to display the **W-2G Gambling Winning** summary page.

TaxSlayer Pro Online displays the **W-2G Gambling Winning** summary page:



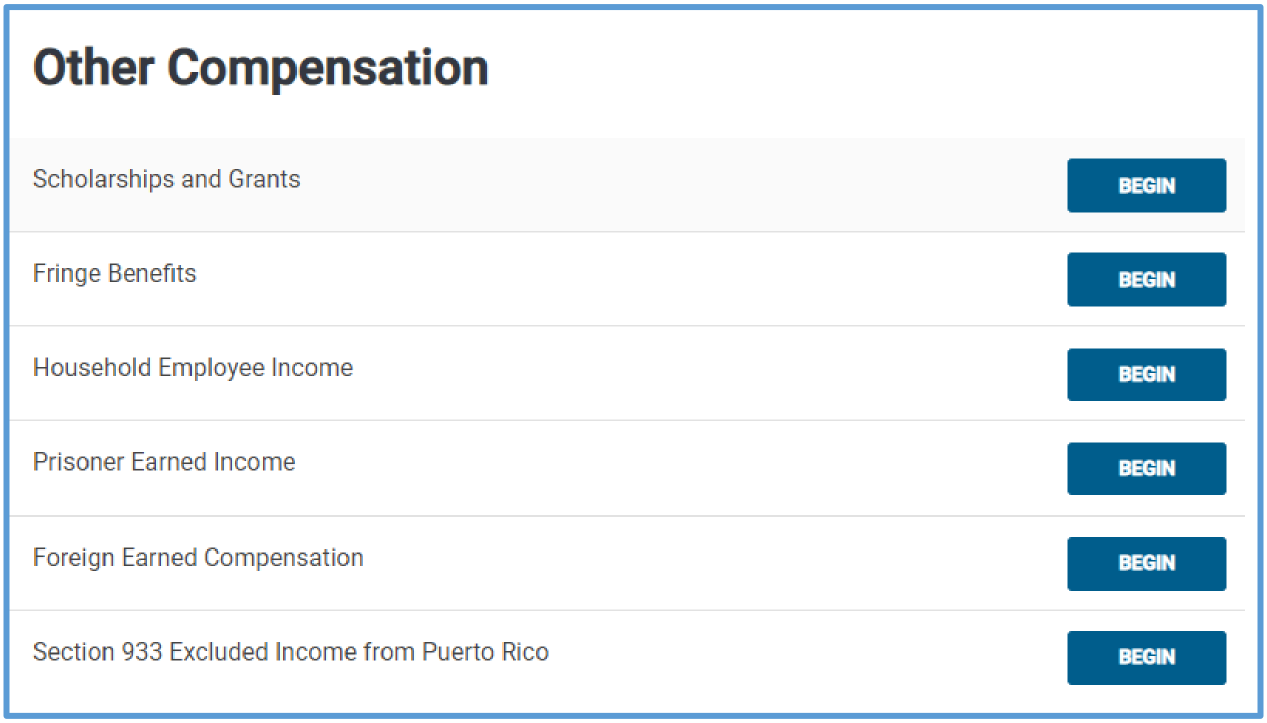
6. When you finish adding forms, click **Continue**.

Taxable Scholarships

Sometimes, a taxpayer receives scholarships or grants. In most cases, you do not need to report these on the tax return. However, if the taxpayer used amounts to pay for other expenses, such as room, board, and travel, you may need to report those amounts as taxable income. See the IRS publications for information on when you need to report scholarships as taxable income. To report taxable scholarships, use the following steps:

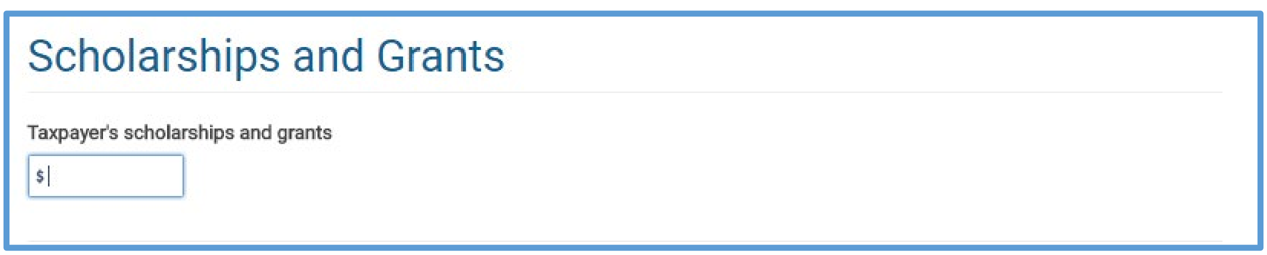
1. Click the **Other Compensation** line.

TaxSlayer Pro Online displays the **Other Compensation** page:



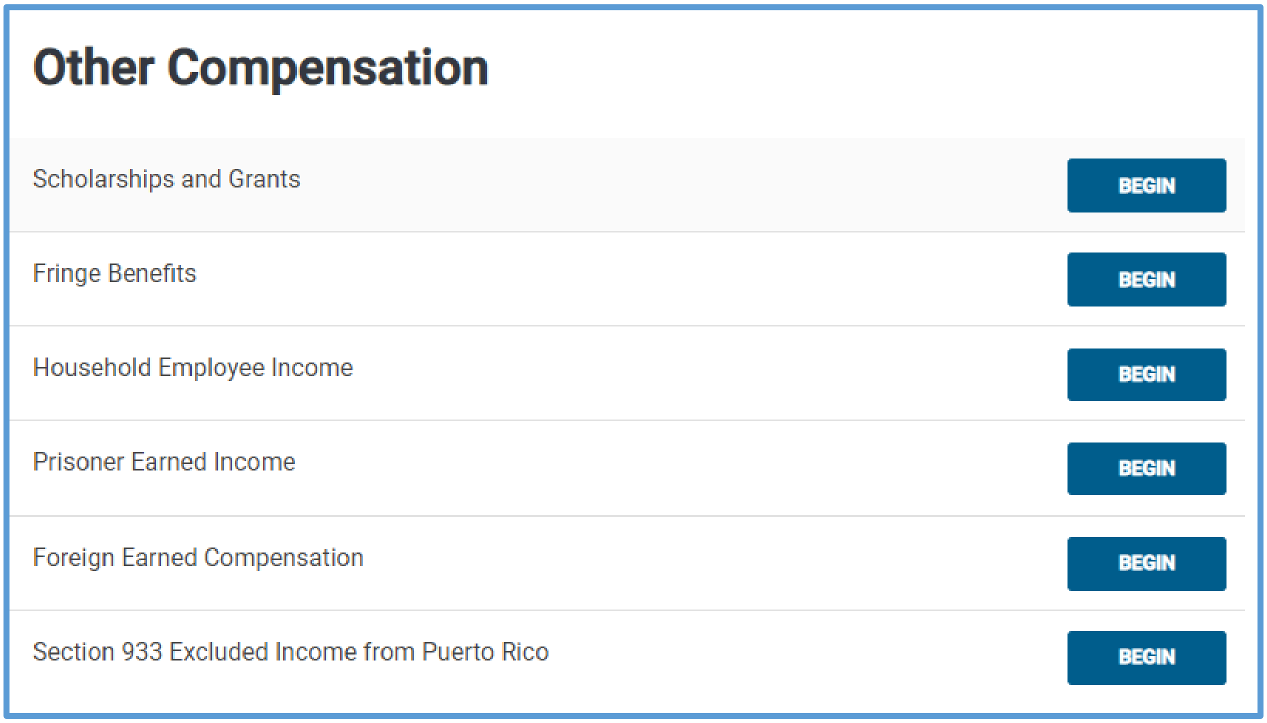
2. Click the **Scholarships and Grants** line.

TaxSlayer Pro Online displays the **Scholarships and Grants** page:



3. Type the amount of taxable scholarships and grants.
4. Click **Continue**.

TaxSlayer Pro Online displays the **Other Compensation** page:



5. Click **Continue** to return to the **Less Common Income** page.

Cancellation of Debt Form1099-C, Form 982

Nonbusiness Credit Card Debt

If a taxpayer received a cancellation of debt (COD) in the previous year, you should report that amount as income. Generally, if a taxpayer receives Form 1099-C for cancelled credit card debt and was solvent (assets greater than liabilities) immediately before the debt was canceled, all the cancelled debt should be included on the **Other Income** line. You do not need any additional supporting forms or schedules to report cancelled credit card debt.

Lenders and creditors are required to issue Form 1099-C if they cancel a debt of $600 or more. If the debt cancelled is less than $600, some lenders or creditors may send a letter or some other form of notification to the taxpayer. Generally, taxpayers must include all cancelled amounts (even if less than $600) on the Other Income line of Form 1040.

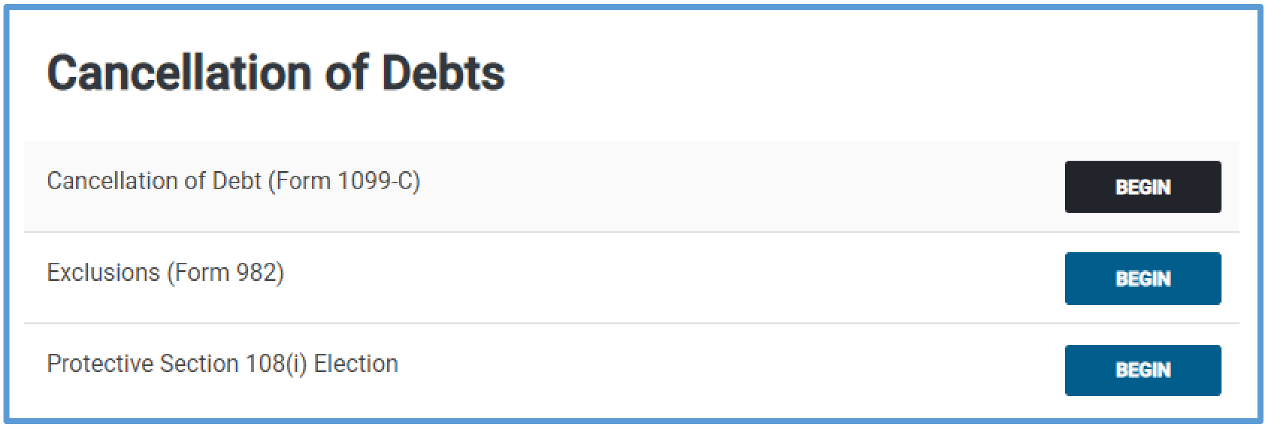
TIP: Make sure that you only prepare returns that are in scope of the VITA/TCE Programs (COD-Nonbusiness credit card debt and COD-

Principal Residence). See IRS Publication 4012 for more COD in scope information.

To add a cancellation of debt, use the following steps:

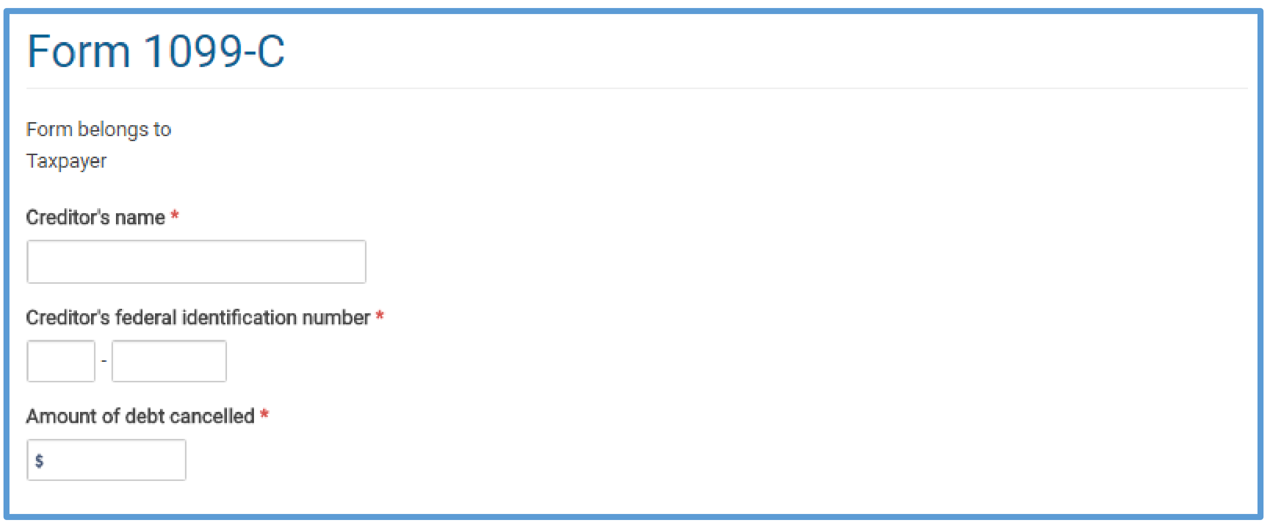
1. Click the **Cancellation of Debt 1099-C, 982** line.

TaxSlayer Pro Online displays the **Cancellation of Debts** page:



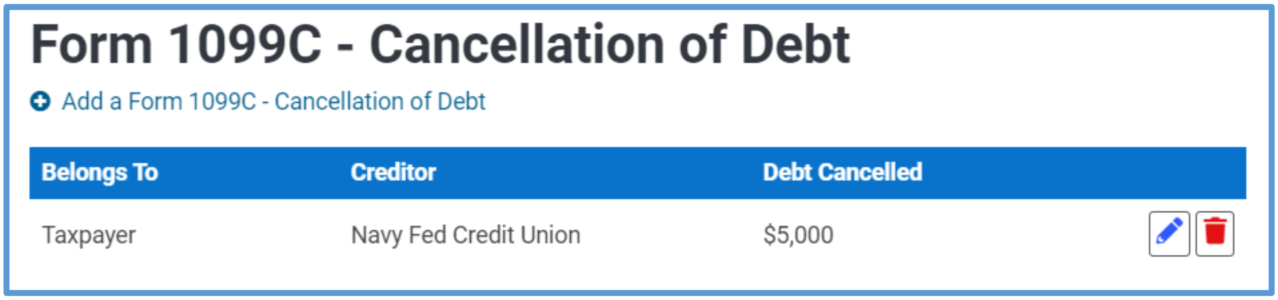
2. Click the **Cancellation of Debt (Form 1099-C)** line.

TaxSlayer Pro Online displays the **Form 1099-C** page:



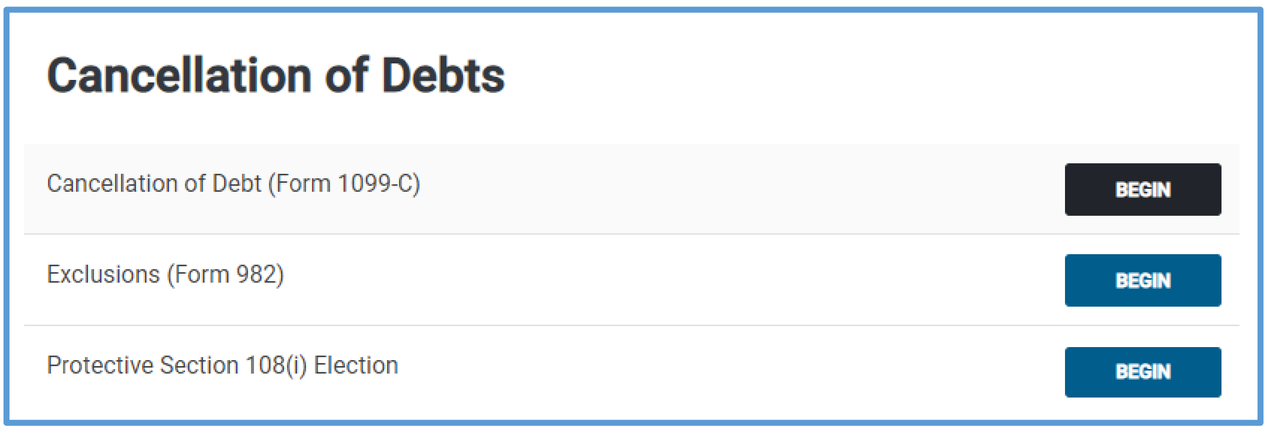
3. Type the creditor's name, federal identification number, and the amount of debt cancelled in the appropriate boxes.
4. Click **Continue**.

TaxSlayer Pro Online displays the **Form 1099C – Cancellation of Debt** page:



5. If the taxpayer received more than one Form 1099-C, click **Add** to enter the information for each one.
6. When you finish adding cancellations of debt, click **Continue**.

TaxSlayer Pro Online displays the **Cancellation of Debts** page:



Exclusions (Form 982)

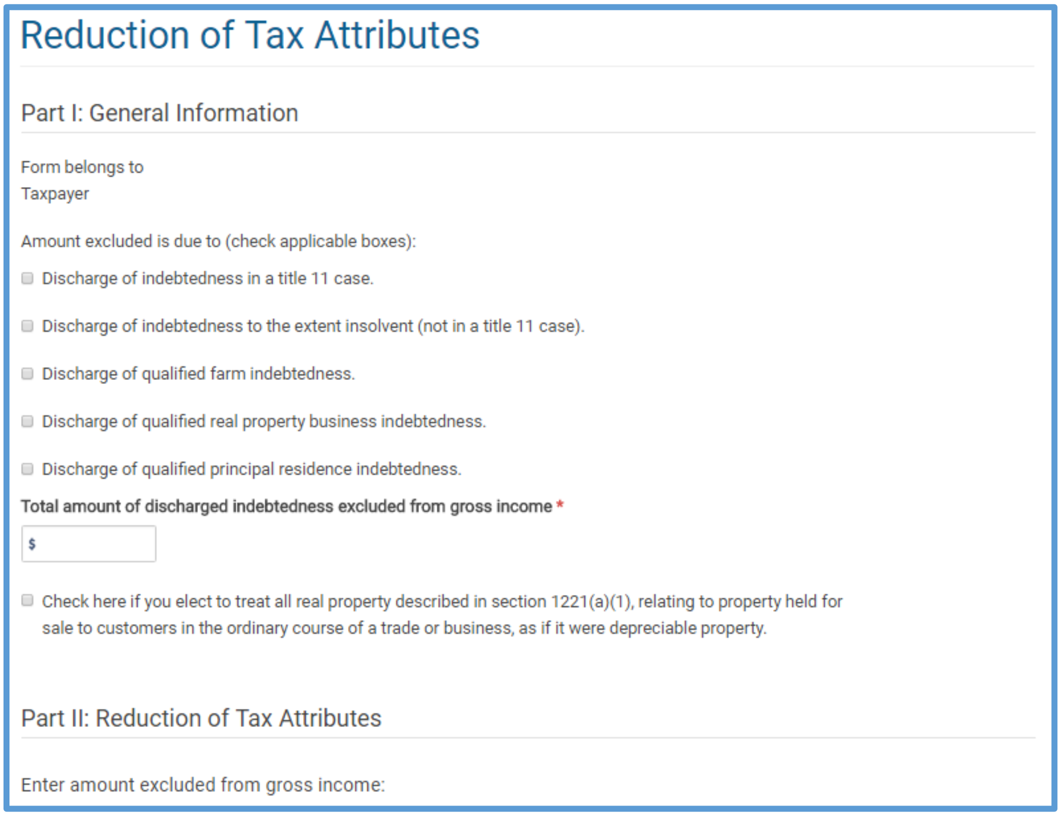
In some cases, the taxpayer can exclude the cancellation of debt from income.

NOTE: Only the discharge of qualified principal residence indebtedness is in scope for the VITA program.

If the taxpayer can exclude all or part of the cancellation of debt from income, use the following steps:

1. Click **BEGIN** on the **Exclusions (Form 982)** line.

TaxSlayer Pro Online displays the **Reduction of Tax Attributes** page:


Reduction of Tax Attributes

Part I: General Information

Form belongs to
Taxpayer

Amount excluded is due to (check applicable boxes):

- [ ] Discharge of indebtedness in a title 11 case.
- [ ] Discharge of indebtedness to the extent insolvent (not in a title 11 case).
- [ ] Discharge of qualified farm indebtedness.
- [ ] Discharge of qualified real property business indebtedness.
- [ ] Discharge of qualified principal residence indebtedness.

Total amount of discharged indebtedness excluded from gross income *

$

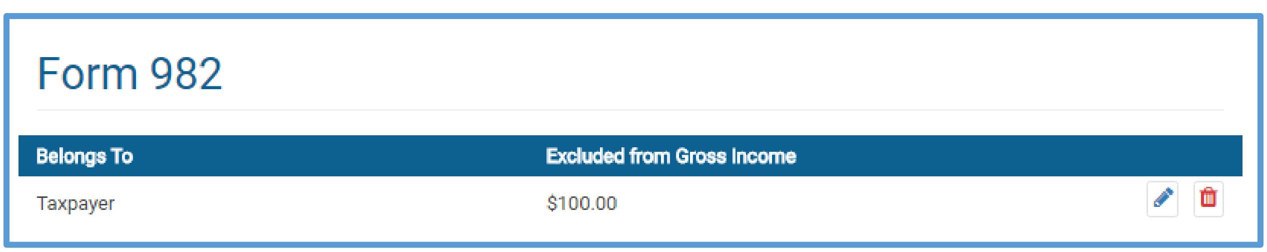
- [ ] Check here if you elect to treat all real property described in section 1221(a)(1), relating to property held for sale to customers in the ordinary course of a trade or business, as if it were depreciable property.

Part II: Reduction of Tax Attributes

Enter amount excluded from gross income:

2. Select the appropriate check box(es) describing the type of cancellation of debt.
3. Type the total amount of debt that the taxpayer is excluding from gross income.
4. Scroll to the bottom of the page and click **Continue**.

TaxSlayer Pro Online displays the **Form 982** page:


Form 982

Belongs To	Excluded from Gross Income
Taxpayer	$100.00

5. Click **Continue**.

Summary

You should now be able to:

- List and define the methods for entering income.
- Complete Form W-2.
- Enter taxable refunds.
- Enter interest and dividends.
- Enter IRAs and pensions.
- Enter Social Security benefits.
- Enter Railroad Retirement benefits.
- Enter unemployment income.
- Add less common income, including the following:
    a. Taxable scholarships.
    b. Alaska Permanent fund dividends.
    c. Gambling income.
    d. Cancellations of debt.

To see a video of what you just learned, go to Entering Basic Income Part 1 and Entering Basic Income Part 2. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

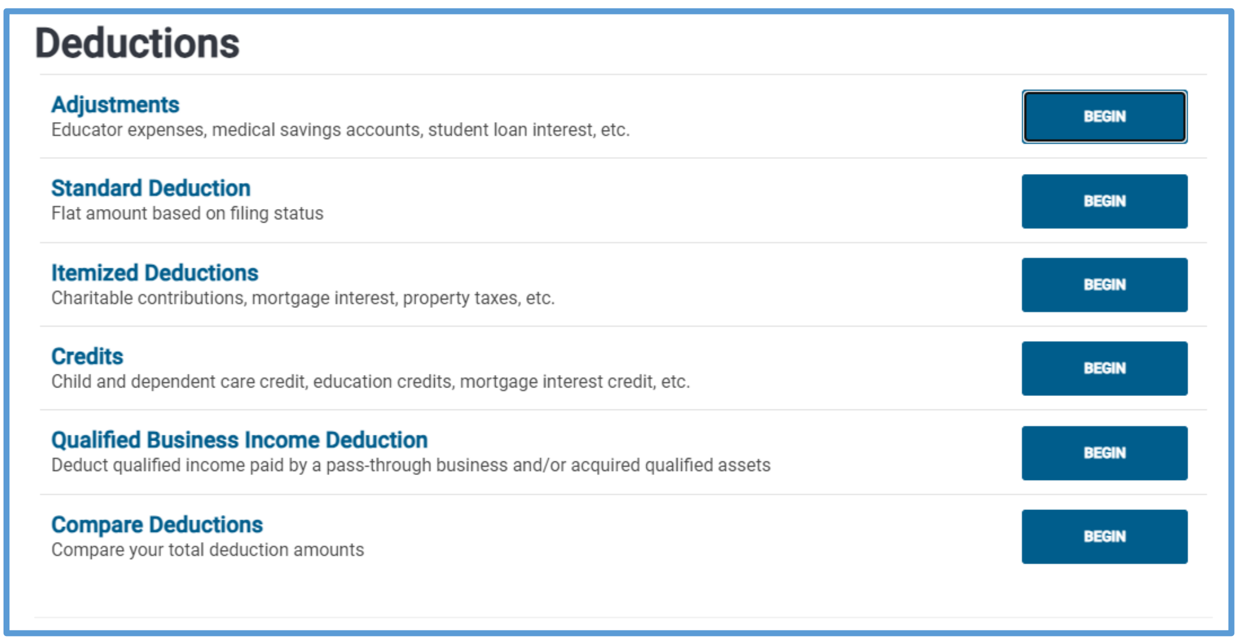
Entering Adjusted Gross Income

After completing this topic, you will be able to:

- Enter educator expense deductions.
- Enter expenses for military reservists traveling more than 100 miles.
- Enter a Health Savings Account deduction.
- Enter moving expenses.
- Enter an adjustment for early withdrawal of savings.
- Enter alimony paid.
- Enter a student loan interest deduction.
- Enter an adjustment for jury duty pay.

Many taxpayers can reduce their gross income using adjustments. To begin adjusting income, use the following steps:

1. In the Federal Section, find the **Deductions** introduction page, as shown below:



2. Click the **Adjustments** line.

TaxSlayer Pro Online displays the **Adjustments** landing page:

DEDUCTIONS

Adjustments

Archer MSAs and Long-Term Care Insurance Contracts
Report contributions and distributions; usually reported to you on Form 1099-SA or Form 5498-SA
BEGIN

Educator Expenses
Report unreimbured business expenses (professional development, classroom supplies, etc.)
BEGIN

Armed Forces reservists, qualified performing artists, certain fee-basis government officials, or those with impairment-related work expenses
Report job-related business expenses, vehicle usage, etc.
BEGIN

Health Savings Accounts (HSAs)
Report HSA contributions (not included on your W-2) and distributions; typically reported to you on Form 1099-SA or 5498-SA
BEGIN

Moving Expenses
Deduction for certain work-related moves
BEGIN

Contributions to SEP, Simple, and Qualified Plans
For self-employed individuals who contributed to personal and/or employee IRAs
BEGIN

Self-Employed Health Insurance Coverage
For self-employed individuals who contributed to personal and/or employee IRAs
BEGIN

Penalty on Early Withdrawal of Savings or Certificate of Deposit (CD)
Self-Employed Health Insurance Coverage
BEGIN

Alimony Paid
Only for divorces finalized before Jan. 1, 2019
BEGIN

Traditional IRA Contributions
You may be able to claim a deduction based on your contributions
BEGIN

Nondeductible IRAs
Report the basis of traditional and Roth IRAs, conversions, nondeductible contributions, and Roth IRA distributions
BEGIN

Student Loan Interest
Usually reported to you on Form 1098-E and eligible for a deduction
BEGIN

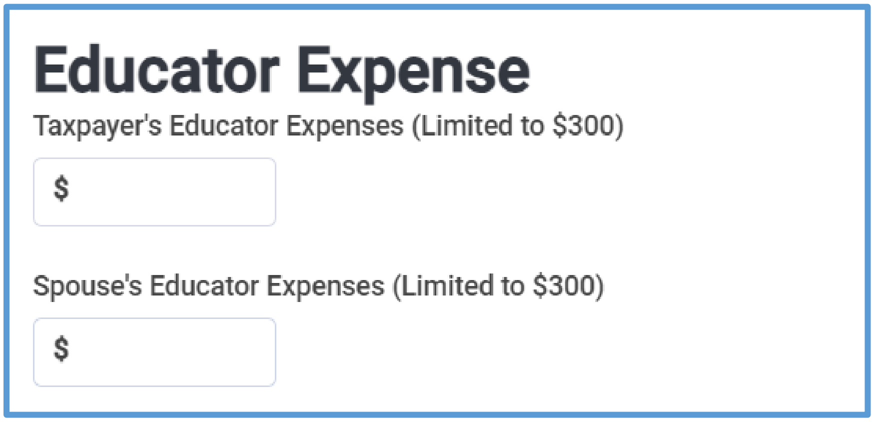
Other Adjustments
Jury duty pay, personal property rental expenses, certain attorney fees, etc.
BEGIN

Entering Educator Expense Deductions

Teachers who pay qualifying classroom expenses may be able to claim a deduction for all or part of those expenses. To enter an educator expense deduction, use the following steps:

1. From the **Adjustments** page, click the **Educator Expenses** line.

TaxSlayer Pro Online displays the **Educator Expense** page:



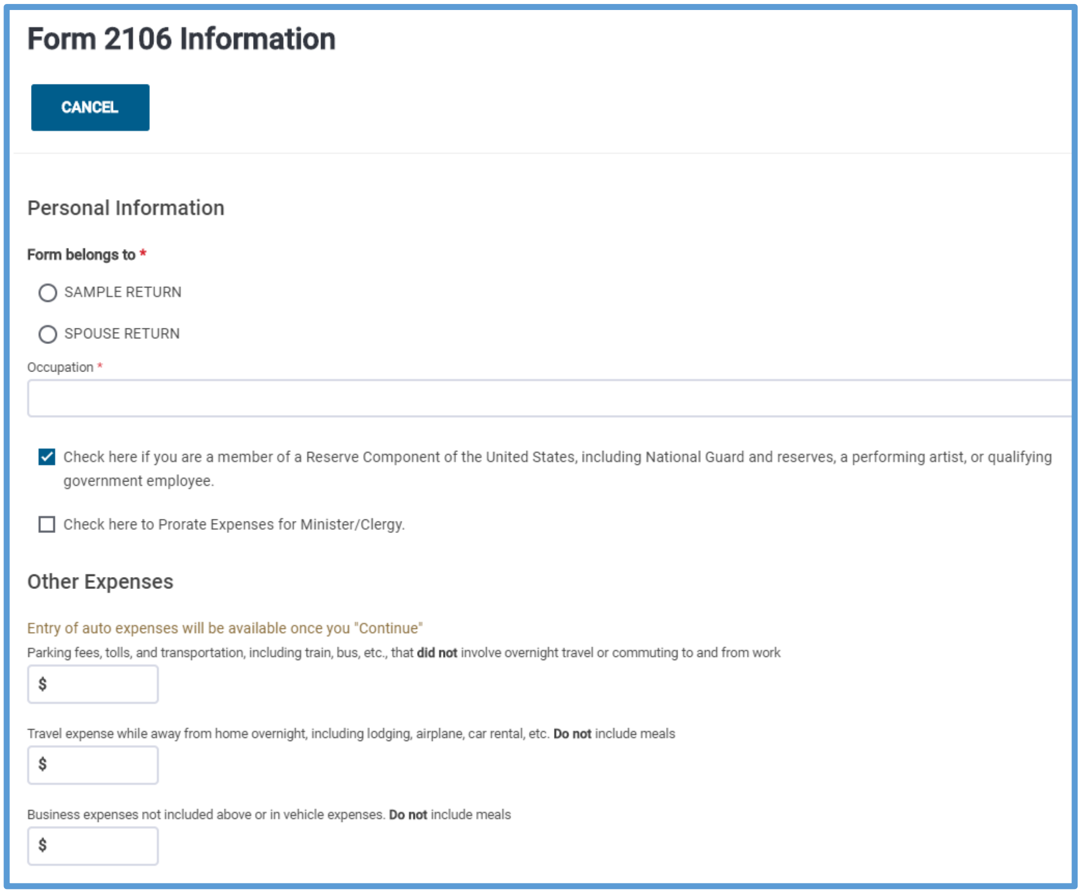
2. Type the amount of educator expenses, up to $300, for each taxpayer and/or spouse. The taxpayer may be able to deduct expenses that are more than the $300 (or $600 for married filing jointly) limit on Schedule A.
3. Click **Continue**.

Entering Military Reservist Travel Expenses

If the taxpayer paid for travel expenses related to his or her job as a military reservist, he or she may be able to deduct those expenses in the Adjustments section on the tax return. To deduct job-related travel expenses, use the following steps:

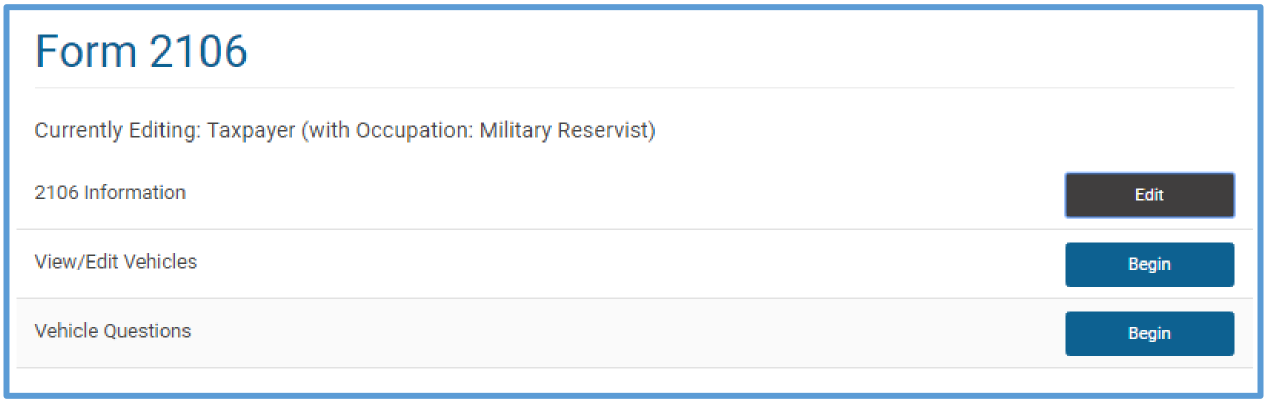
1. From the **Adjustments** page, click the **Armed Forces reservists, qualified performing artists, certain fee-based government officials, or those with impairment-related work expenses** line.

TaxSlayer Pro Online displays the **Form 2106 Information** page with the **Check here if you are a reservist…** line selected:



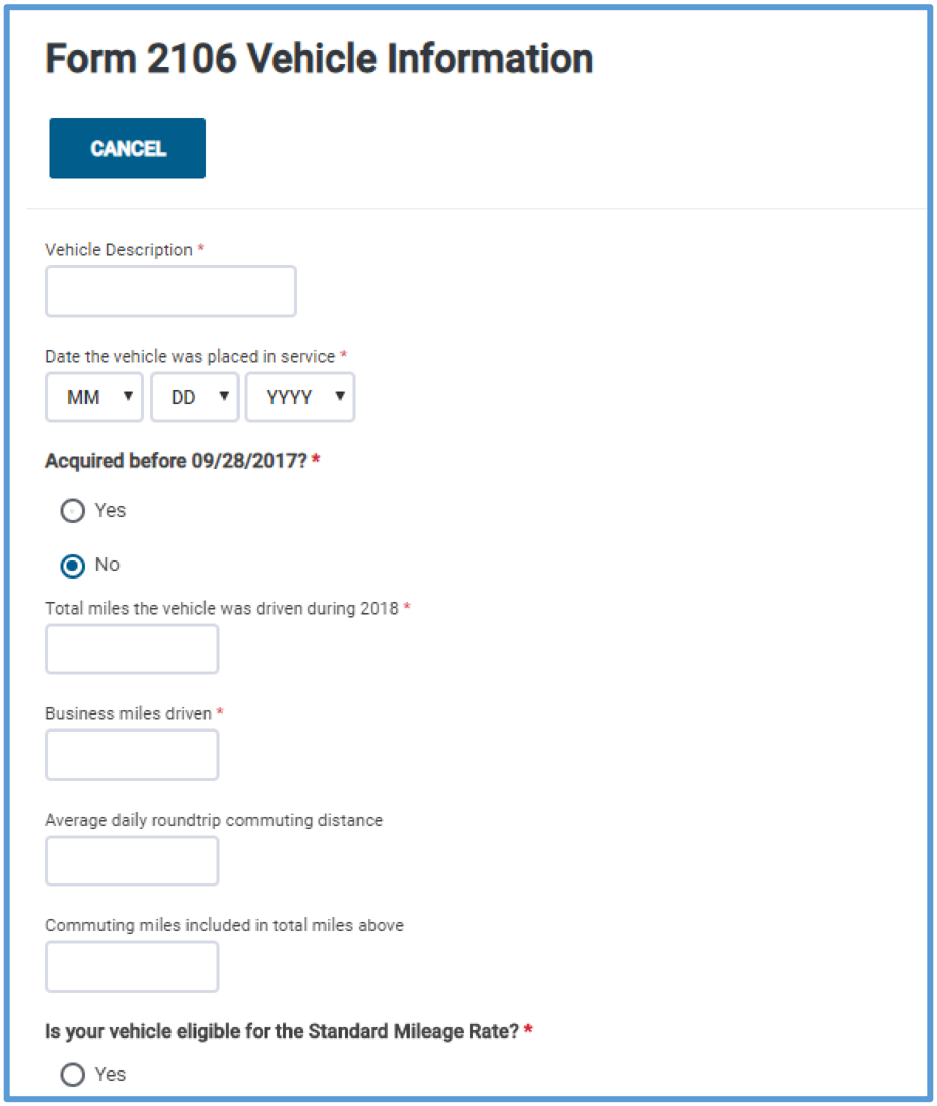
2. If this return is for a married couple, select whether the Form 2106 belongs to the taxpayer or spouse.
3. Type the occupation.
4. In the **Other Expenses** section, read each line carefully and type the amount based on information provided by the taxpayer.
5. In the **Meals and Entertainment Expenses** section, type the full amount of any qualifying meal and entertainment expenses in the appropriate line. TaxSlayer Pro Online reduces the amount by the appropriate percentage.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Form 2106** summary page:



7. If the taxpayer used his or her own vehicle and has vehicle expenses, click the **View/Edit Vehicles** line.

TaxSlayer Pro Online displays the **Form 2106 Vehicle Information** page:

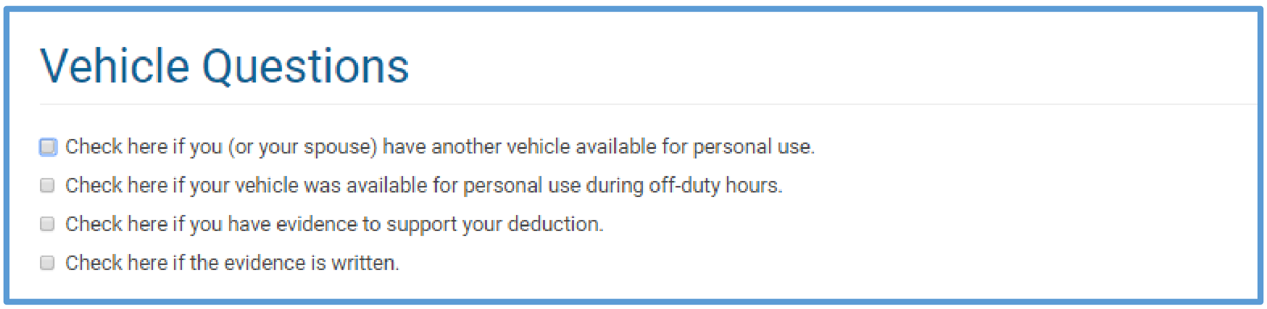


8. Type the vehicle information, including the business miles driven and the commuting miles information.
9. Select the appropriate radio button to show whether the vehicle is eligible for the standard mileage rate.
10. Click **Continue**.

TaxSlayer Pro Online displays the **Form 2106 Vehicle** summary page:

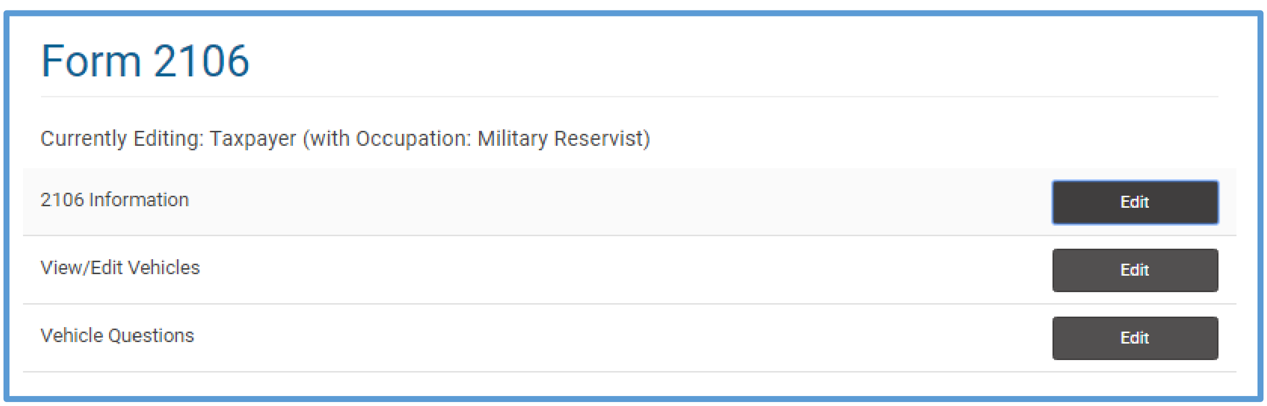
11. If the taxpayer used more than one vehicle for job-related travel expenses, click **Add** and use the same steps to add each vehicle.
12. When you finish adding vehicles, click **Continue**.

TaxSlayer Pro Online displays the **Vehicle Questions** page:



13. Read each check box carefully and select any that apply.
14. Click **Continue**.

TaxSlayer Pro Online displays the **Form 2106** summary page:



15. Click **Continue**.

TaxSlayer Pro Online displays the **Form 2106** page:

Form 2106

Description	Type
Taxpayer (with Occupation: Military Reservist)	Reservist, Performing Artist, or Qualifying Government Employee

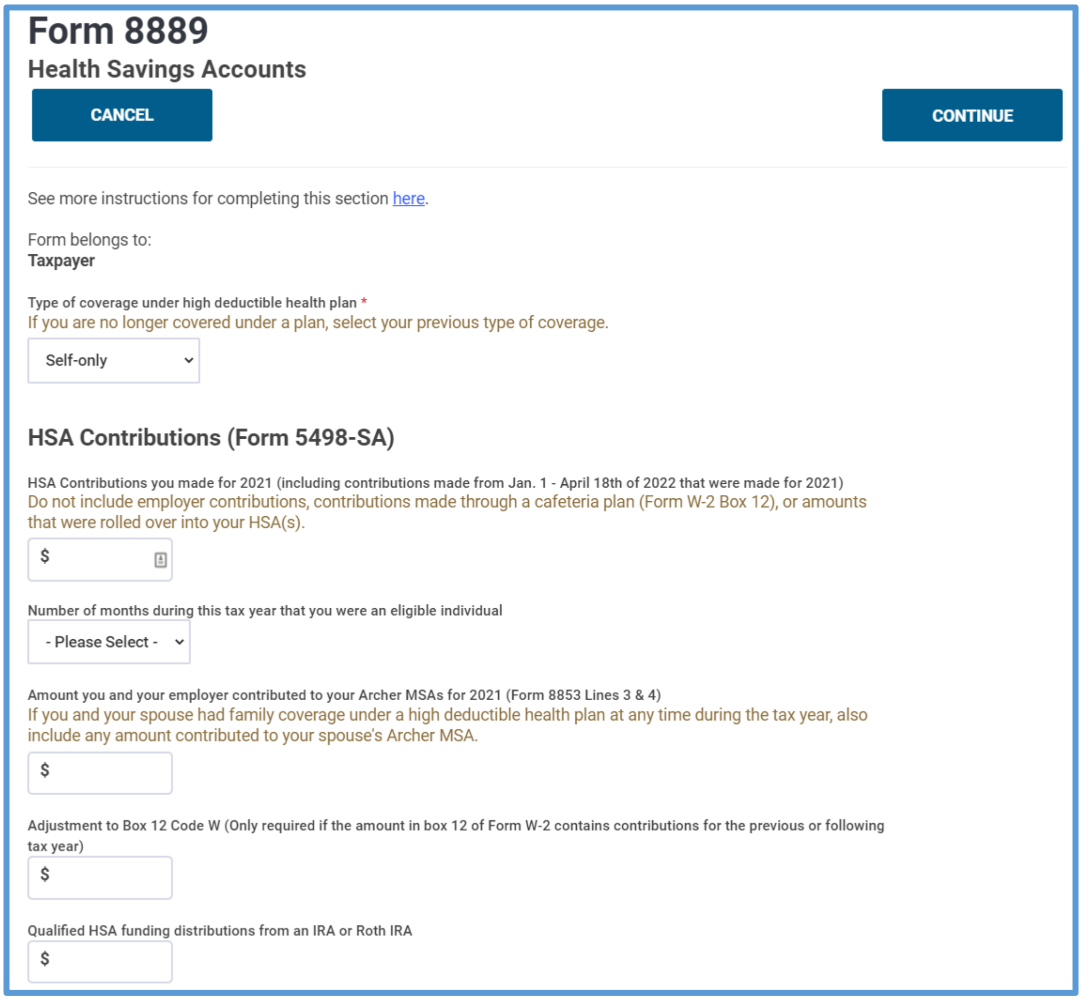
16. Click **Continue**.

Entering a Health Savings Account Deduction

If the taxpayer contributed to a health savings account during the year, he or she may be able to deduct those contributions. To enter a health savings account deduction, use the following steps:

1. From the **Adjustments** page, click the **Health Savings Account (HSAs)** line.

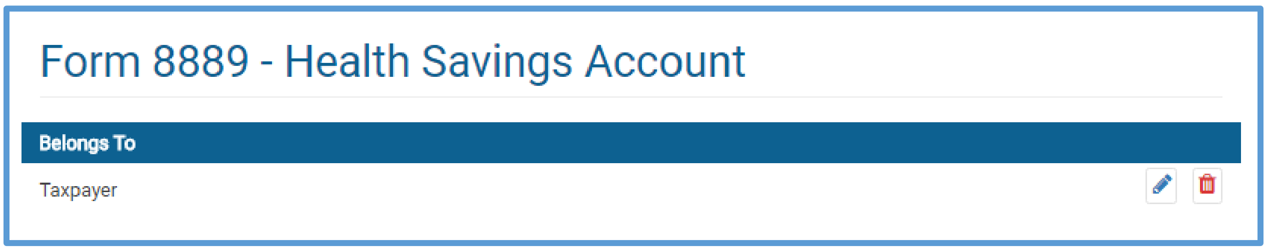
TaxSlayer Pro Online displays the **Form 8889 – Health Savings Account** page:



2. If the tax return is for married taxpayers, select whether the form belongs to the taxpayer or spouse.
3. Select whether the coverage under a high deductible health plan is for self-only or a family.
4. Type the amount of any contributions on the appropriate line.

5. Select the number of months during the year that the taxpayer was an eligible individual.
6. Type amounts in any applicable boxes in the **HSA Distributions** section.
7. Type amounts in any applicable boxes in the **HSA Adjustments** section.
8. Click **Continue**.

TaxSlayer Pro Online displays the **Form 8889 – Health Savings Account** page, listing the Form 8889 you completed:



9. Click **Continue**.

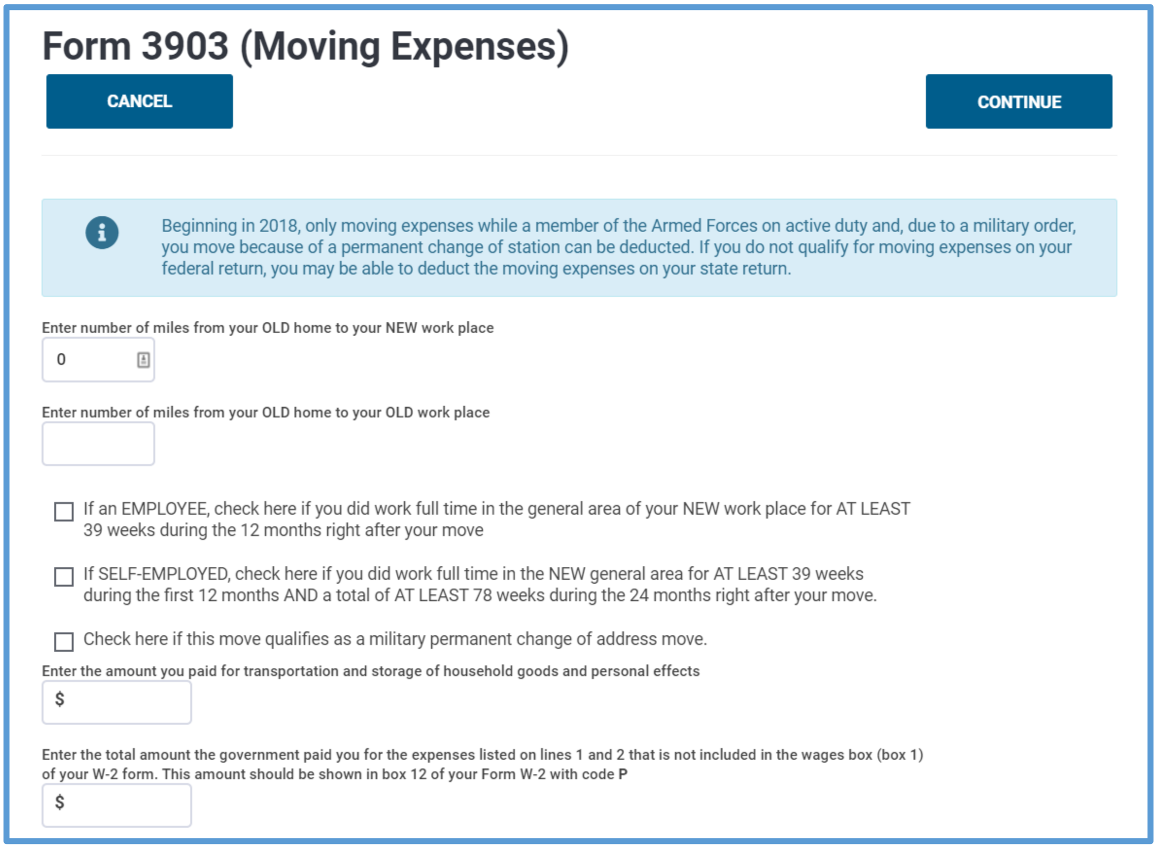
Entering Moving Expenses

Taxpayers who pay qualifying moving expenses may be able to claim a deduction for all or part of those expenses. To enter a moving expense deduction, use the following steps from the **Adjustments** page:

Note: Beginning in 2018, members of the Armed Forces can only deduct moving expenses while on active duty, due to a military order, and for a permanent change of state. If the taxpayer does not qualify to deduct moving expenses on the federal return, you may be able to deduct the moving expenses on the state return.

1. Click the **Moving Expenses** line.

TaxSlayer Pro Online displays the **Form 3903 (Moving Expenses)** page:


Form 3903 (Moving Expenses)

CANCEL

CONTINUE

Beginning in 2018, only moving expenses while a member of the Armed Forces on active duty and, due to a military order, you move because of a permanent change of station can be deducted. If you do not qualify for moving expenses on your federal return, you may be able to deduct the moving expenses on your state return.

Enter number of miles from your OLD home to your NEW work place

0

Enter number of miles from your OLD home to your OLD work place

☐ If an EMPLOYEE, check here if you did work full time in the general area of your NEW work place for AT LEAST 39 weeks during the 12 months right after your move

☐ If SELF-EMPLOYED, check here if you did work full time in the NEW general area for AT LEAST 39 weeks during the first 12 months AND a total of AT LEAST 78 weeks during the 24 months right after your move.

☐ Check here if this move qualifies as a military permanent change of address move.

Enter the amount you paid for transportation and storage of household goods and personal effects

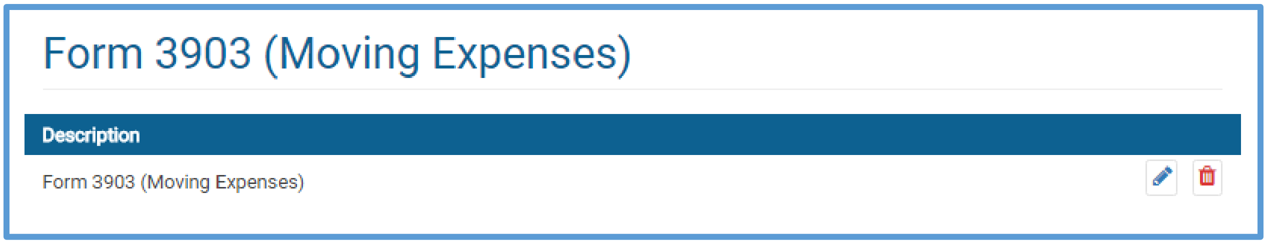
$

Enter the total amount the government paid you for the expenses listed on lines 1 and 2 that is not included in the wages box (box 1) of your W-2 form. This amount should be shown in box 12 of your Form W-2 with code P

$

2. Type the number of miles from the taxpayer's old home to his or her new workplace, and from the old home to the old workplace.
3. Select any check boxes that apply, including **Check here if this move qualifies as a military permanent change of address move**.
4. Read each line on the form carefully and type the amount of expenses.
5. If the taxpayer used his or her personal vehicle for the moving trip, select **Yes** from the appropriate drop-down list and type the number of miles driven and the amount of gas and oil from the vehicle, if applicable.
6. When you finish entering information in this page, click **Continue**.

TaxSlayer Pro Online displays the **Form 3903 (Moving Expenses)** summary page:



7. Click **Continue**.

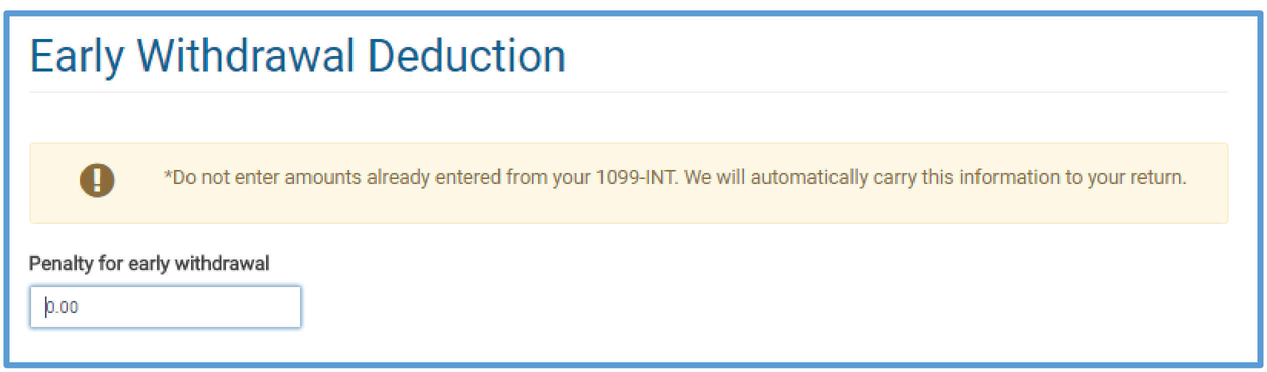
Entering an Adjustment for Penalty on Early Withdrawal of Savings

If the taxpayer paid an early withdrawal penalty for savings, he or she can deduct the amount. If the amount of early withdrawal penalty was listed on Form 1099-INT for interest income, you should enter that as you enter interest income. TaxSlayer Pro Online automatically calculates those amounts as an adjustment. Only use this section for a penalty on early withdrawal of savings that you did **not** report in interest income.

To deduct a penalty on early withdrawal of savings, use the following steps:

1. From the **Adjustments** page, click the **Penalty on Early Withdrawal of Savings or Certificate of Deposit (CD)** line.

TaxSlayer Pro Online displays the **Early Withdrawal Deduction** page:



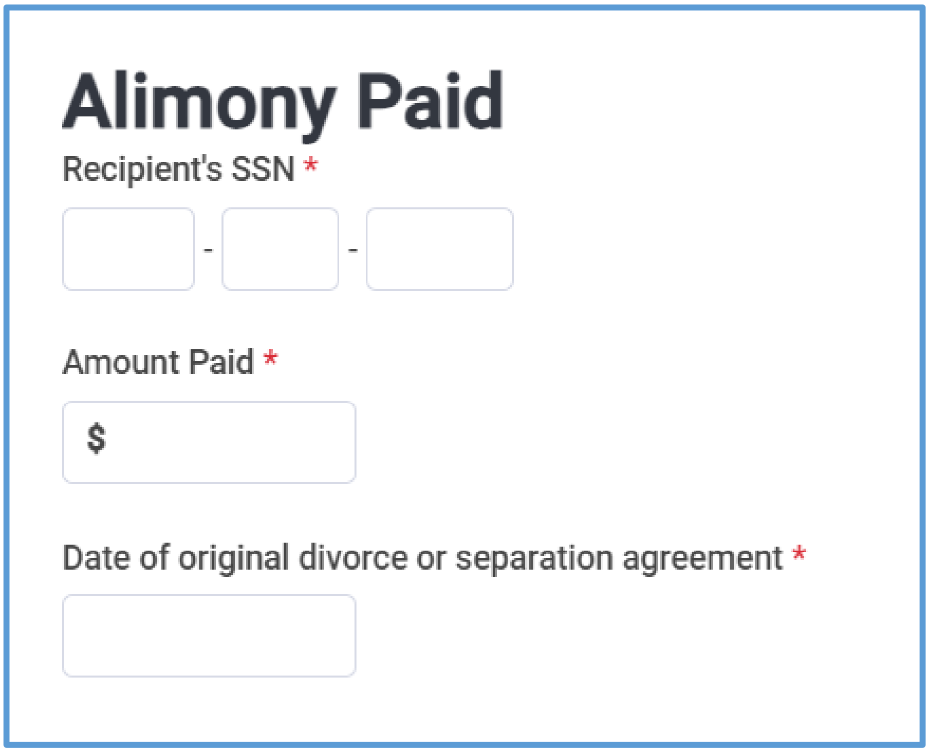
2. Type the amount of any penalty for early withdrawal of savings that you did **not** include when entering interest income.
3. Click **Continue**.

Entering Alimony Paid

Taxpayers who pay alimony may be able to claim a deduction for the alimony paid. To enter an alimony deduction, use the following steps:

1. On the **Adjustments** page, click the **Alimony Paid** line.

TaxSlayer Pro Online displays the **Alimony Paid** page:

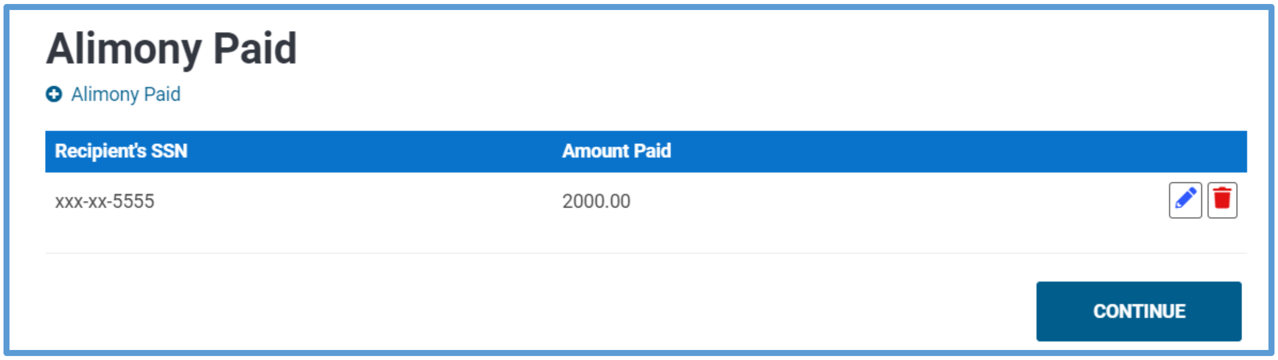


2. Type the recipient's taxpayer identification number in the Social Security number box.

Note: The IRS requires the recipient's Social Security number for electronic filing. If the taxpayer does **not** know the recipient's Social Security number, type *111-00-1111* and mark the return to be filed as a paper return.

3. Type the total amount of alimony paid to this recipient.
4. Enter the date of original divorce or separation agreement.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Alimony Paid** summary page:



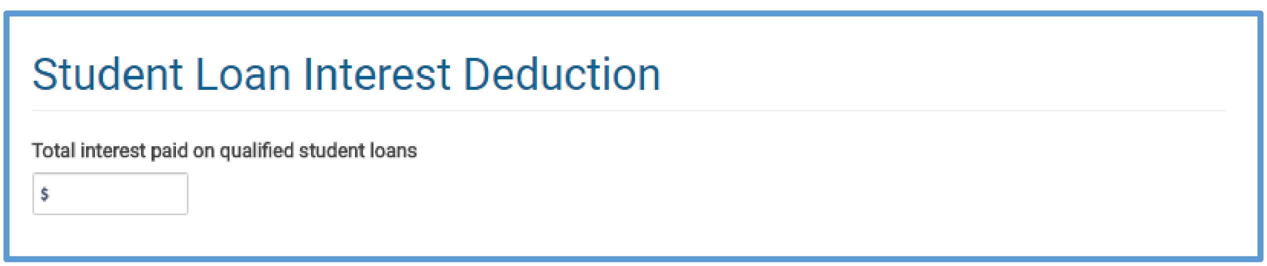
6. If the taxpayer paid alimony to more than one former spouse, click **Add** and enter the information for each recipient.
7. Click **Continue**.

Deducting Student Loan Interest

If the taxpayer made repayments on a student loan during the year, he or she probably paid interest with those payments. Most taxpayers can deduct any student loan interest paid during the year. To deduct student loan interest, use the following steps:

1. From the **Adjustments** page, click the **Student Loan Interest** line.

TaxSlayer Pro Online displays the **Student Loan Interest Deduction** page:



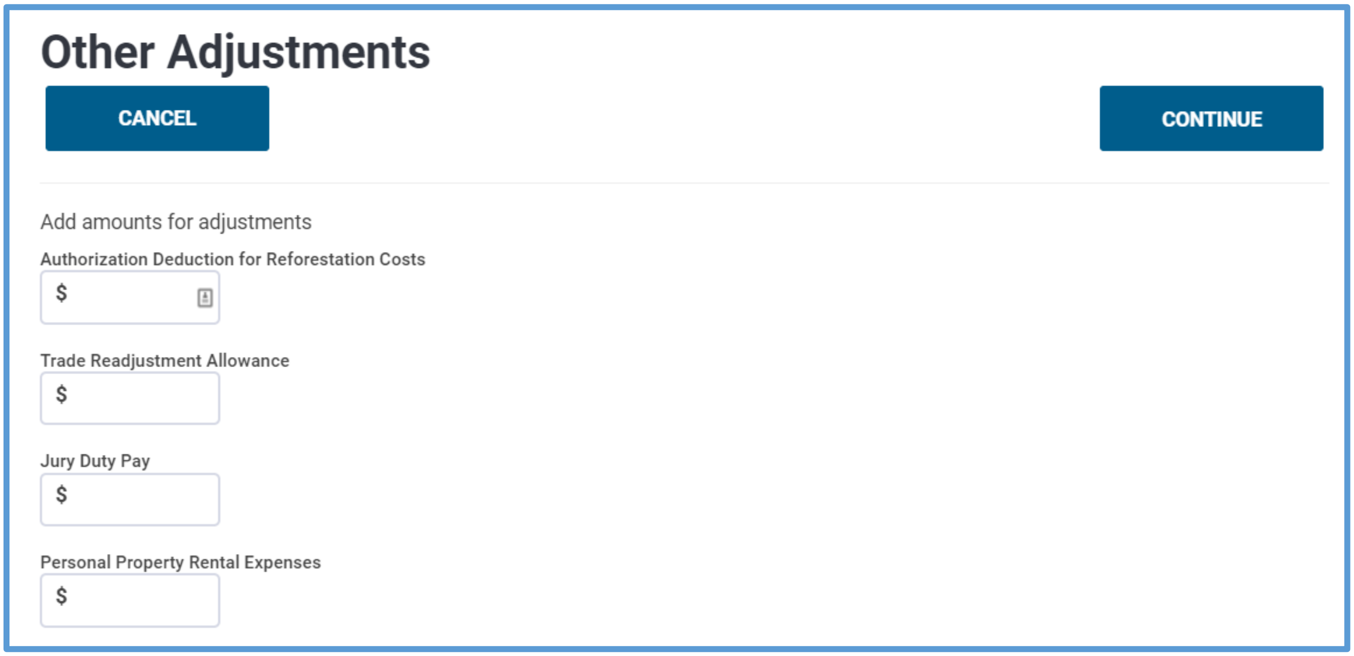
2. Type the total amount of qualified student loan interest in the box.
3. Click **Continue**.

Deducting Jury Duty Pay

If the taxpayer received jury duty pay during the year, and was required to give that jury duty pay to his or her employer, the taxpayer can deduct the amount given to the employer. To deduct jury duty pay, use the following steps:

1. From the **Adjustments** page, click the **Other Adjustments** line.

TaxSlayer Pro Online displays the **Other Adjustments** page:



2. Type the amount of jury duty pay in the appropriate box.
3. Click **Continue** to save.

Note: For information on IRA deductions, see the *Advanced Tax Topics* lesson.

Summary

You should now be able to:

- Enter educator expense deductions.
- Enter expenses for military reservists traveling more than 100 miles.
- Enter a Health Savings Account deduction.
- Enter moving expenses.
- Enter an adjustment for early withdrawal of savings.
- Enter alimony paid.
- Enter a student loan interest deduction.
- Enter an adjustment for jury duty pay.

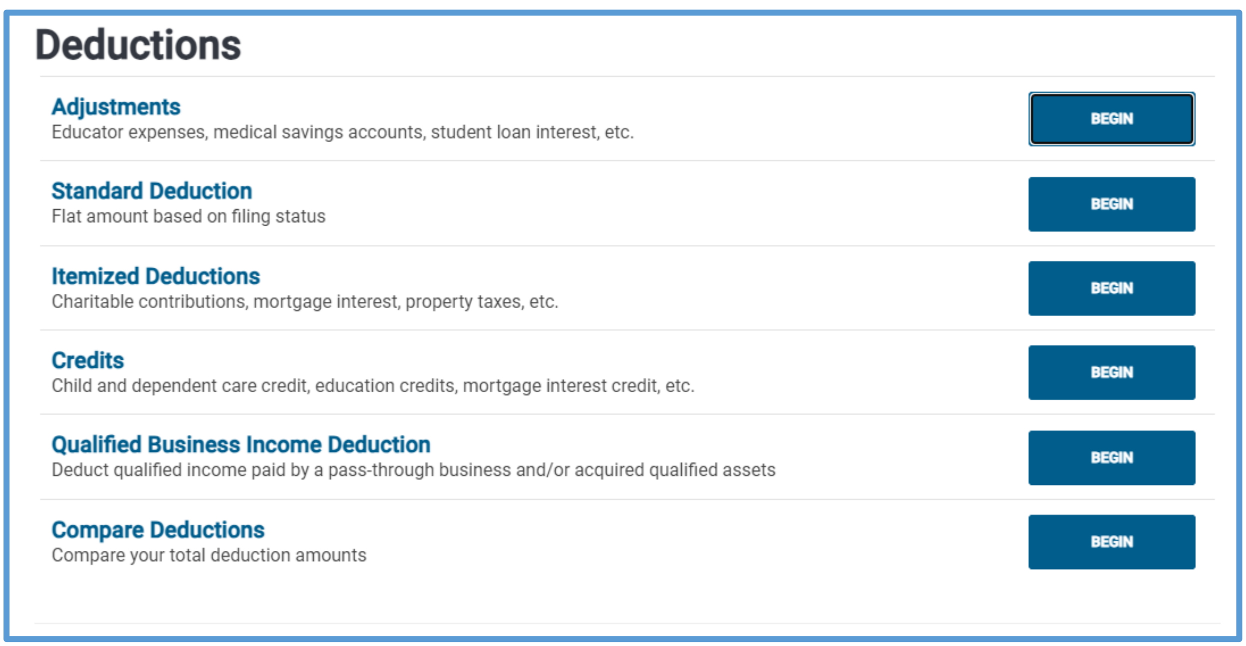
To see a video of what you just learned, go to Entering Adjusted Gross Income. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Entering Standard and Itemized Deductions

After completing this topic, you will be able to:

- Use the standard deduction for the taxpayer.
- Use itemized deductions even when the standard deduction is better for the taxpayer.
- Enter medical and dental expenses.
- Enter taxes that qualify as itemized deductions.
- Deduct mortgage interest.
- Deduct charitable contributions.
- Deduct unreimbursed employee business expenses.
- Deduct job-related travel expenses as itemized deductions.
- Report miscellaneous itemized deductions.
- Deduct other itemized deductions.

Taxpayers can reduce their taxable income amount using either the standard or itemized deduction. To begin with the standard or itemized deduction, use the following steps from the **Deductions** landing page:



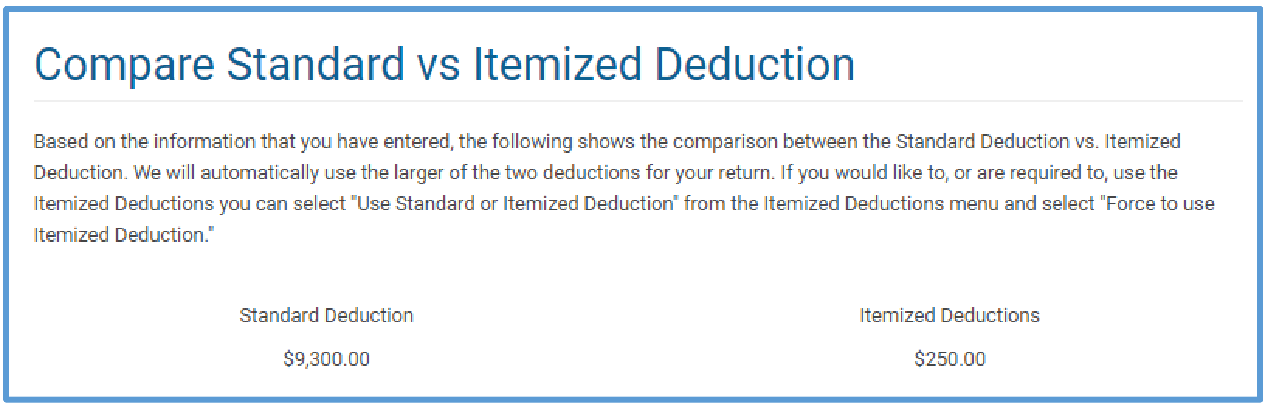
Using the Standard Deduction

TaxSlayer Pro Online determines the greater of the standard or itemized deductions based on the information entered in the return. If the taxpayer only qualifies to use the standard deduction, you do not need to do anything additional to the return.

After you finish entering all deductions, you can use this page to see whether the standard or itemized deduction is better for the taxpayer. To do so, use the following step:

- Click **BEGIN** on the **Compare Deductions** line.

TaxSlayer Pro Online displays the **Compare Standard vs Itemized Deduction** page:

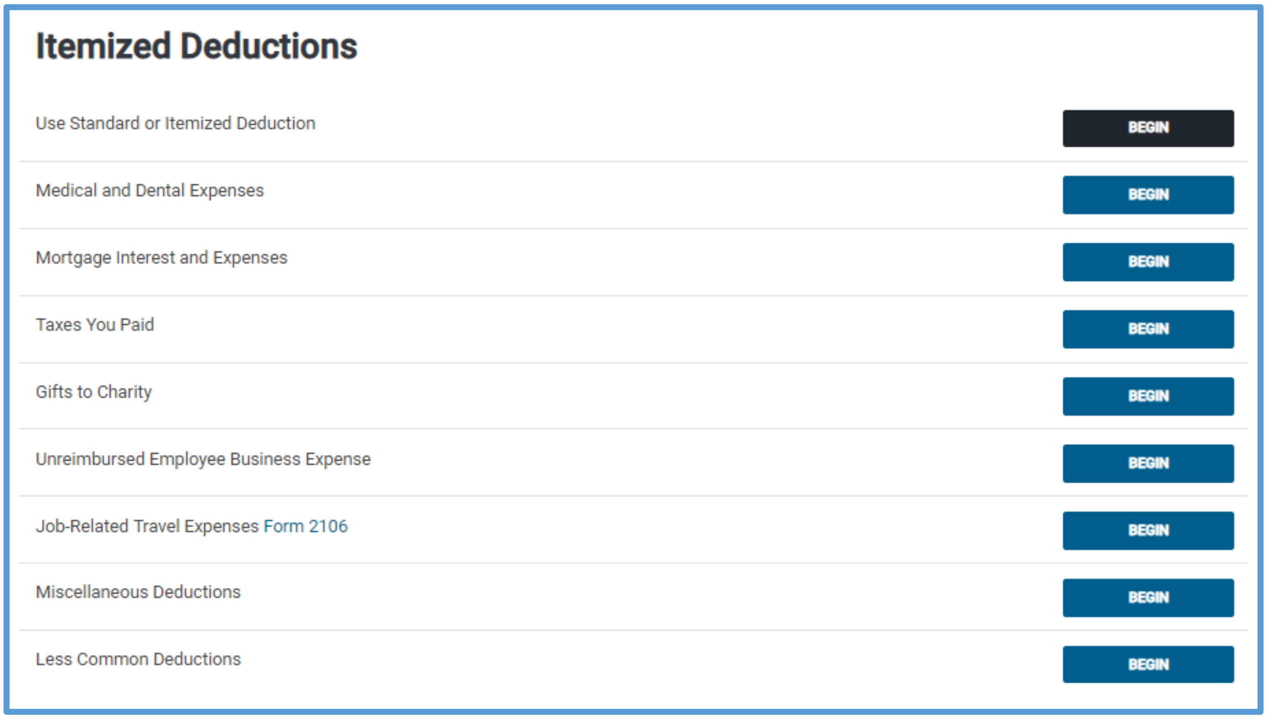


Adding Itemized Deductions

TaxSlayer Pro Online automatically calculates additional itemized deductions, such as state income taxes paid from a Form W-2 or 1099-R. If the taxpayer has other itemized deductions that you need to add, use the following steps:

1. From the **Deductions** landing page, click **BEGIN** on the **Itemized Deductions** line.

TaxSlayer Pro Online displays the **Itemized Deductions** page:



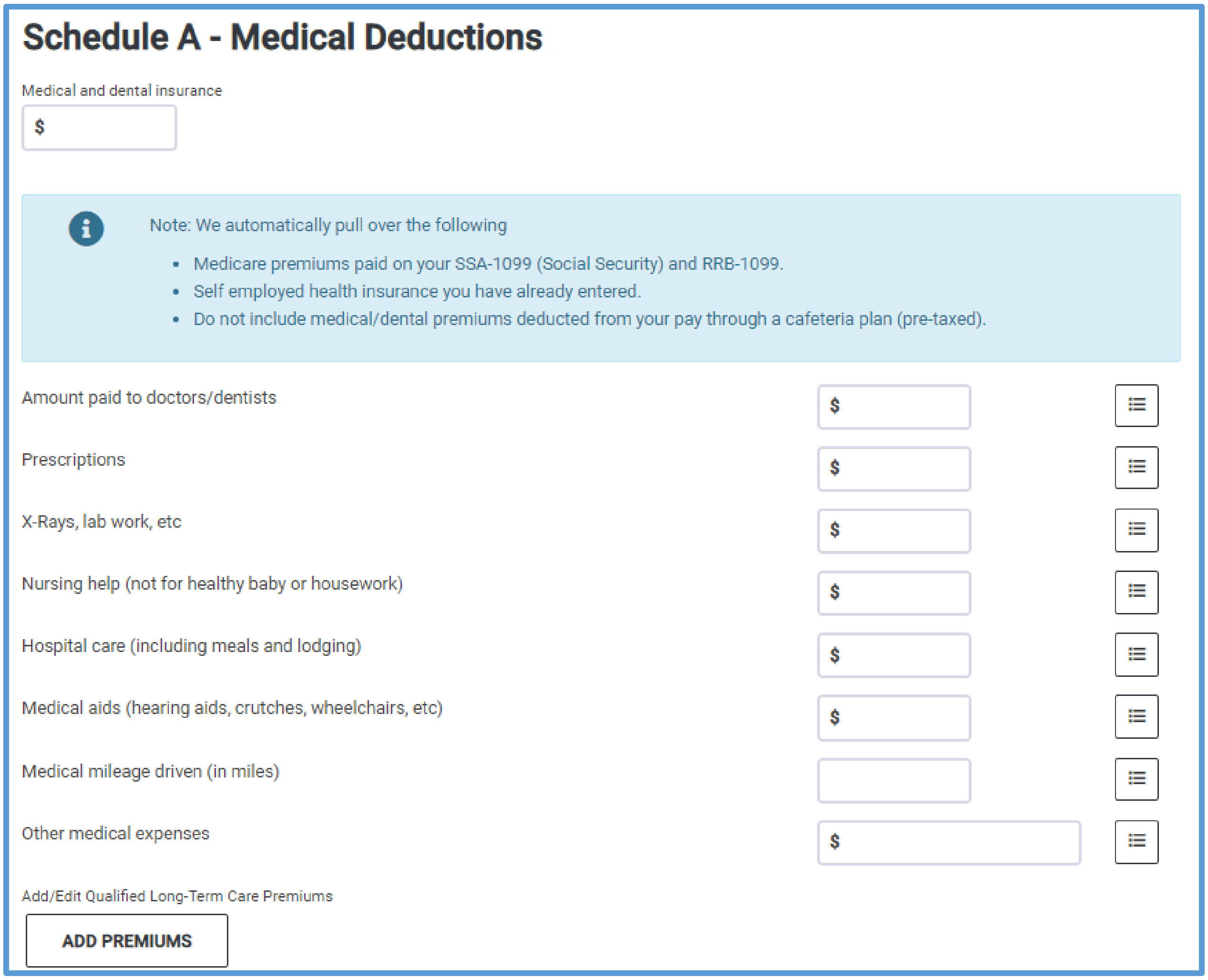
2. Use this page as a starting point for all of the remaining sections of this lesson.

Adding Medical and Dental Expenses

If the taxpayer paid unreimbursed medical expenses during the year, he or she may be able to deduct a portion of those expenses as itemized deductions. To deduct medical and dental expenses, use the following steps:

1. From the **Itemized Deductions** page, click **BEGIN** on the **Medical and Dental Expenses** line.

TaxSlayer Pro Online displays the **Schedule A – Medical Deductions** page:



Schedule A - Medical Deductions

Medical and dental insurance

$

Note: We automatically pull over the following

- Medicare premiums paid on your SSA-1099 (Social Security) and RRB-1099.
- Self employed health insurance you have already entered.
- Do not include medical/dental premiums deducted from your pay through a cafeteria plan (pre-taxed).

Amount paid to doctors/dentists	$
Prescriptions	$
X-Rays, lab work, etc	$
Nursing help (not for healthy baby or housework)	$
Hospital care (including meals and lodging)	$
Medical aids (hearing aids, crutches, wheelchairs, etc)	$
Medical mileage driven (in miles)	
Other medical expenses	$

Add/Edit Qualified Long-Term Care Premiums

ADD PREMIUMS

2. Read each line carefully and enter the amounts based on information provided by the taxpayer.
    a. TaxSlayer Pro Online automatically deducts certain health insurance payments. Read the information on the page carefully to determine what amounts you should **not** include.
    b. Click the **Supporting Statements** icon to itemize a list if the taxpayer has more than one. Click **Continue** when you finish adding amounts to carry the total to the **Medical Deductions** line.

Amount Paid to Doctors/Dentists

Add Amount paid to doctors/dentists Statement

Description	Amount
Dr Smith	$1,500.00
Dr Davis	$1,700.00

Add Amount paid to doctors/dentists Statement

    c. If the taxpayer paid qualified long-term care premiums, click **Add Premiums** and type the total premiums paid.
3. When you finish adding medical deductions, click **Continue**.

TaxSlayer Pro Online displays the **Schedule A – Medical Deductions** summary page:

Schedule A - Medical Deductions

Medical and dental insurance	Amount paid to doctors/dentists	Other Medical Expenses
$0.00	$3,200.00	$0.00

4. Click **Continue**.

Deducting Taxes

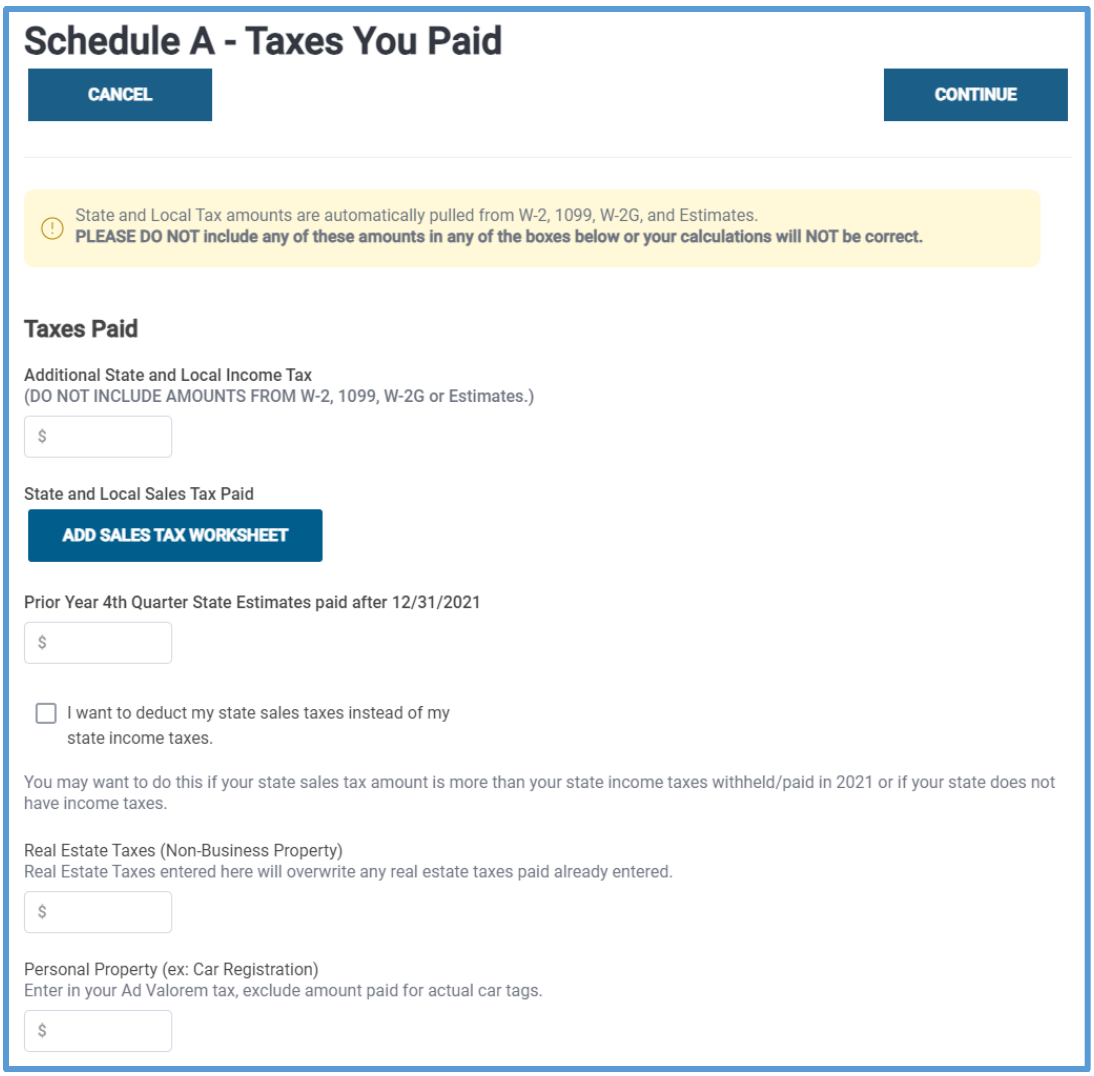
The IRS allows taxpayers to deduct several types of taxes as itemized deductions, including the following:

- State and local income or general sales tax.
- Real estate taxes.
- Personal property taxes.
- Other taxes.

To add taxes paid that qualify as itemized deductions, use the following steps from the **Itemized Deductions** landing page:

1. Click **BEGIN** on the **Taxes You Paid** line.

TaxSlayer Pro Online displays the **Schedule A – Taxes You Paid** page:



State and Local Taxes

State and Local Income Tax

If the taxpayer paid state and local income tax during the year, TaxSlayer Pro Online automatically adds those taxes to Schedule A based on information you enter on Form W-2, Form 1099-R, estimated tax payment worksheets, and other forms where the payer may have deducted state and local income taxes.

In some cases, the taxpayer may have paid state taxes that you have not previously added to the return. If you need to add state and local income tax paid, use the following step on the **Schedule A – Taxes You Paid** page:

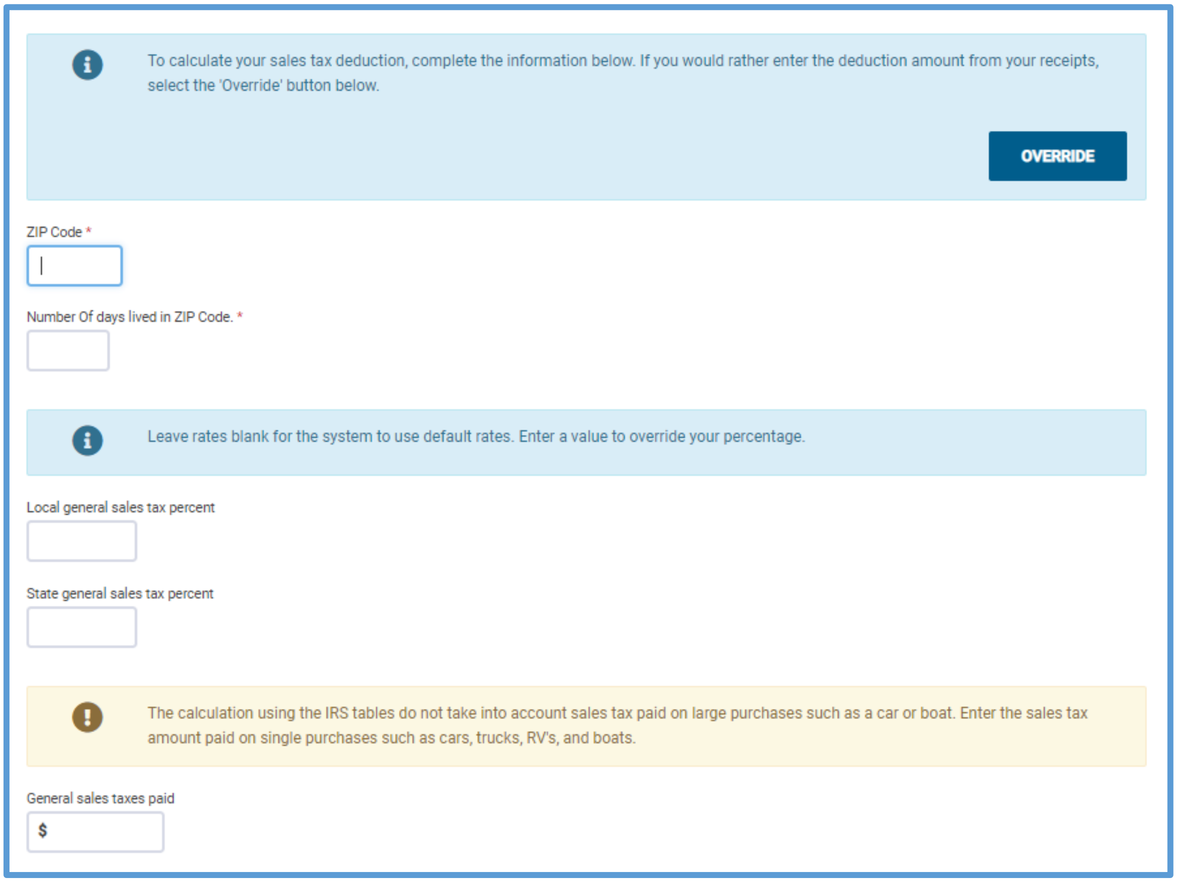
- Type the amount of any state and local income tax paid in the **Additional State and Local Income Tax** box. Remember that you should not include any amounts from Forms W-2, 1099, or W-2G already entered into the return. Also, do not include any estimated tax payments.

General Sales Taxes

Some taxpayers qualify to claim general sales tax paid instead of state and local income tax paid. If the taxpayer needs to figure the better of the two, you can add sales tax to the return. To take the sales tax deduction, use the following steps from the **Schedule A – Taxes You Paid** page:

1. Click **Add Sales Tax Worksheet**.

TaxSlayer Pro Online displays the **Sales Tax Deduction** page:

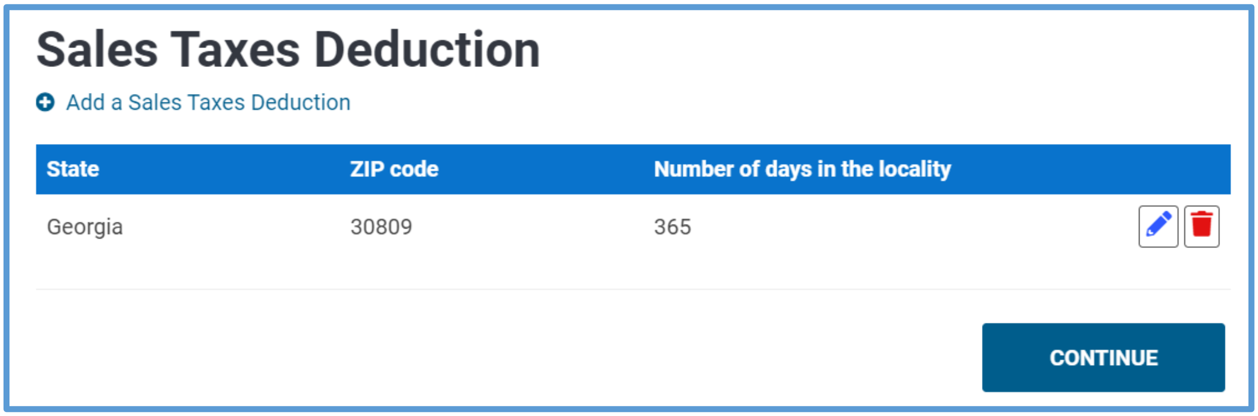


2. Type the Zip code in the appropriate box.
3. Type the number of days lived in the zip code

Note: Leave the rates blank. TaxSlayer Pro Online calculates these amounts based on the tax rate tables. If you type a value in the percentage boxes, TaxSlayer Pro Online performs calculations based on the entered percentage instead of the applicable tax rate table.

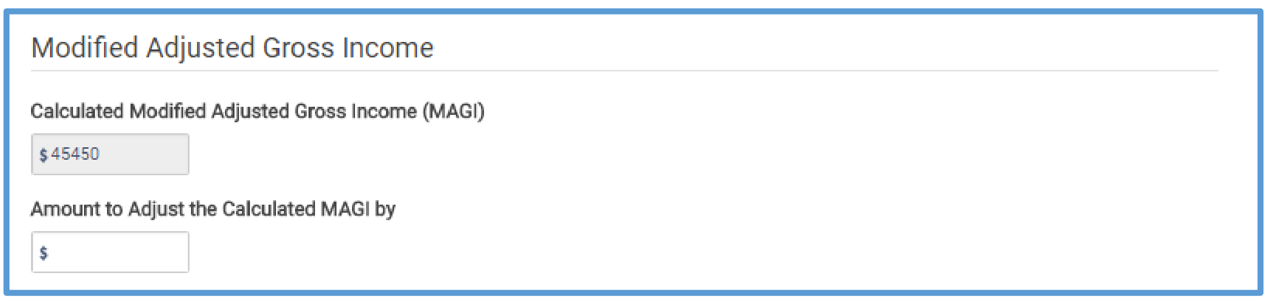
4. If the taxpayer made purchases that qualify as large purchases to be added to the general rates, type the amount of general sales tax paid in the appropriate box.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Sales Taxes Deduction** summary page:



6. If the taxpayer has another state to add (for example, if he or she lived in more than one state during the year), click **Add** and use the same steps to add other states.
7. Click **Continue**.

TIP: If you need to adjust the calculated Modified AGI for the General Sales Tax calculation, use the **Modified Adjusted Gross Income** box on the **Taxes You Paid** page.



Real Estate Taxes

If the taxpayer paid real estate taxes during the year, he or she may be able to deduct those taxes as itemized deductions. To deduct real estate taxes, use the following step from the **Schedule A – Taxes You Paid** page:

- Type the total amount of real estate taxes paid in the **Real Estate Taxes (Non-Business Property)** box.

TIP: If you enter real estate taxes here, type the total real estate taxes paid that qualify as itemized deductions. You can also enter real estate taxes paid when you enter the mortgage interest deduction. **Do not** add real estate taxes paid in both places.

Personal Property Taxes

If the taxpayer paid vehicle property taxes, he or she may be able to deduct those as an itemized deduction. To enter property taxes, use the following step from the **Schedule A – Taxes You Paid** page:

- Type the total amount of deductible personal property taxes in the **Personal Property** box.

Other Taxes

If the taxpayer has other deductible taxes that you have not already entered on this page, use the following step:

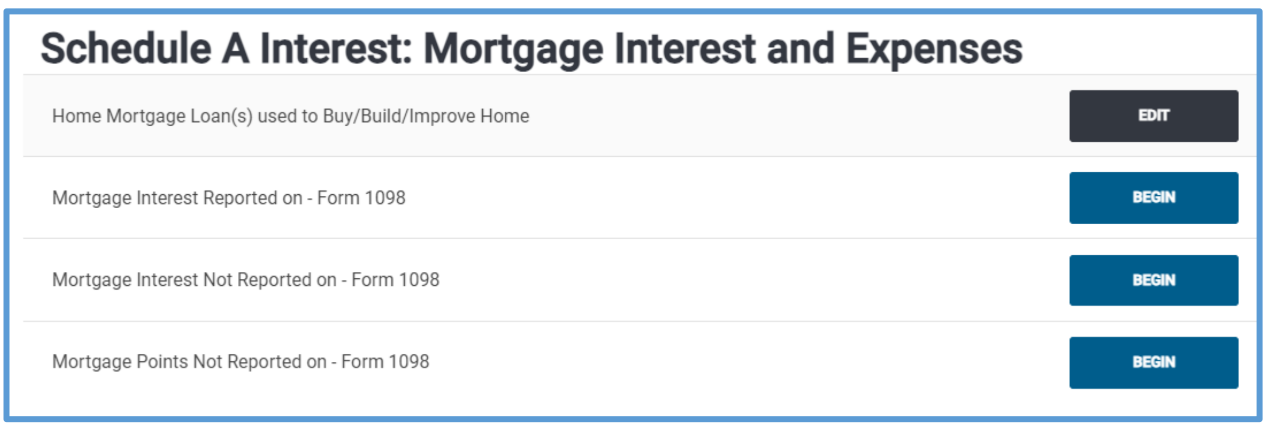
- Type the description and amount on the **Other Taxes** line.

Deducting Mortgage Interest

If the taxpayer owned a home and paid mortgage interest during the year, he or she may be able to deduct that interest as an itemized deduction. To deduct home mortgage interest, use the following steps from the **Itemized Deductions** page:

1. Click **BEGIN** on the **Mortgage Interest and Expenses** line.

TaxSlayer Pro Online displays the **Schedule A Interest: Mortgage Interest and Expenses** page:

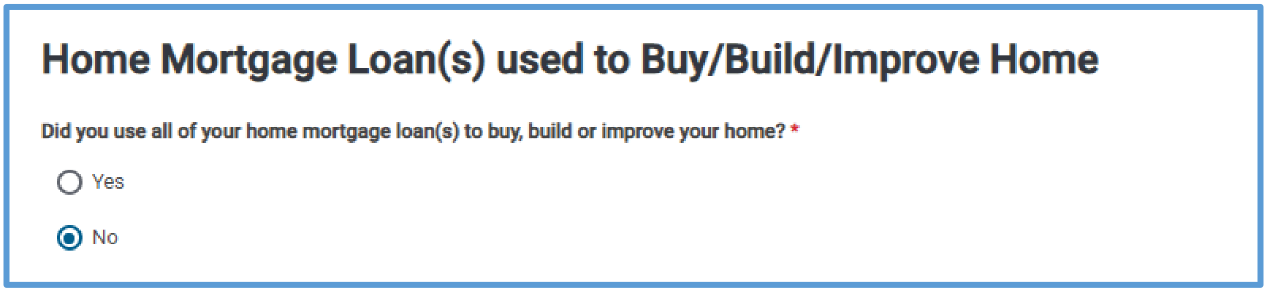


Home Mortgage Loan(s) Used to Buy/Build/Improve Home

The current law makes a distinction between home mortgage loans used to buy, build, or improve a home and home mortgage loans used for other purposes. If the taxpayer deducts home mortgage interest, you must answer the applicable question.

2. Click **BEGIN** on the **Home Mortgage Loan(s) used to Buy/Build/Improve Home** line.

TaxSlayer Pro Online displays the **Home Mortgage Loan(s) used to Buy/Build/Improve Home** page:



3. Read the question and select the appropriate answer.
4. Click **CONTINUE**.

Note: If the answer to this question is **No**, TaxSlayer Pro Online sets a flag for the IRS indicating that the mortgage interest reported should be limited based on current tax law. The preparer must make any adjustments.

Form 1098 Mortgage Interest

3. If the taxpayer received a Form 1098 to report the mortgage interest, click **BEGIN** on the **Mortgage Interest Reported on Form 1098** line.

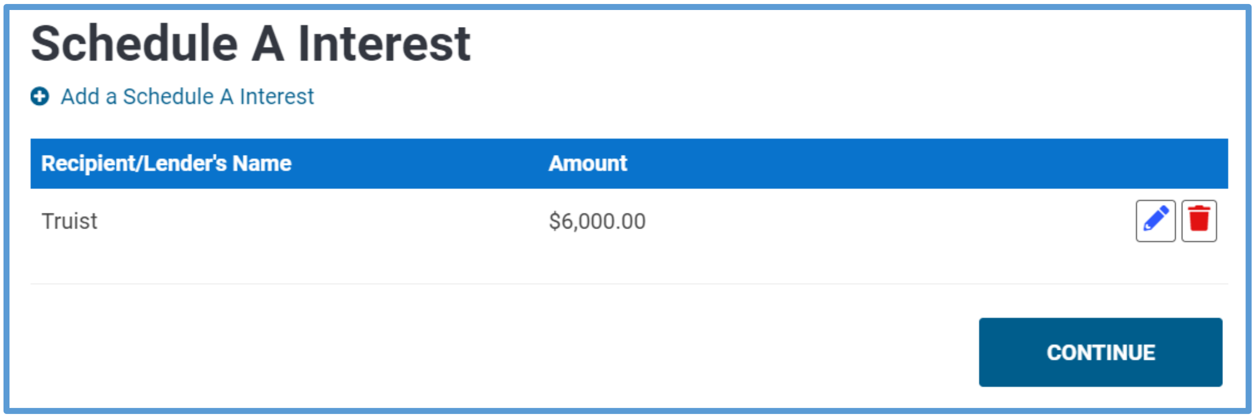
TaxSlayer Pro Online displays the **Mortgage Interest Reported on 1098** page:

4. Click **Add Interest and Points Paid**.

TaxSlayer Pro Online displays the **Mortgage Interest Reported on 1098** page:

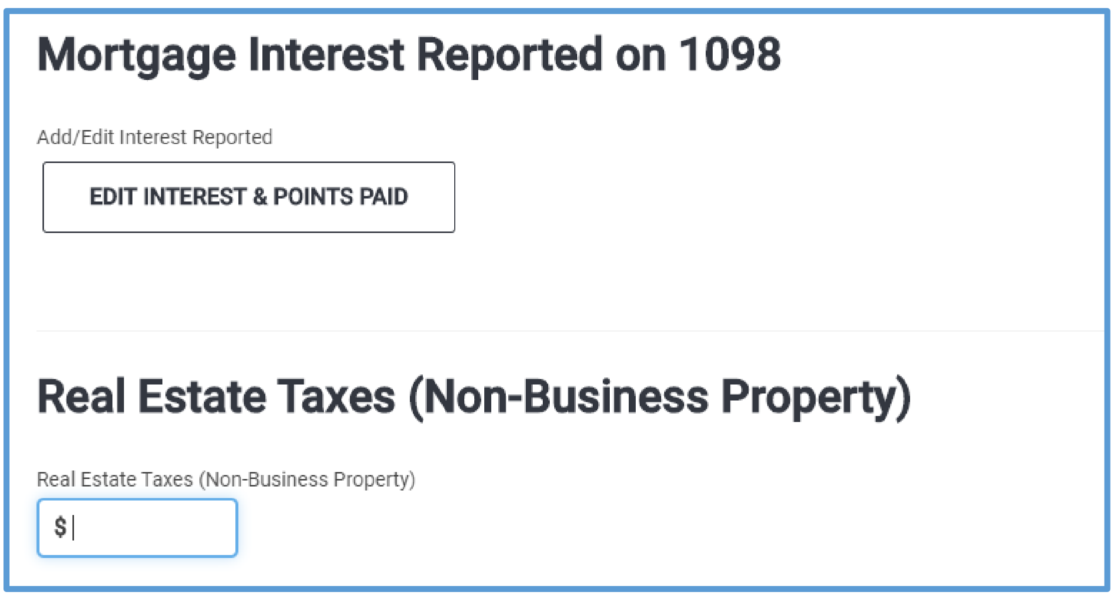
5. Type the lender's name, amount of interest paid, and amount of any deductible points paid.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule A Interest** page, listing the Form 1098 information you entered:



7. If the taxpayer received additional Forms 1098, click **Add** and follow the same steps to add those forms.
8. Click **Continue**.

TaxSlayer Pro Online displays the **Mortgage Interest Reported on 1098** page:



9. If the Form 1098 includes real estate taxes paid on the properties, type the total amount in the **Real Estate Taxes (Non-Business Property)** box.

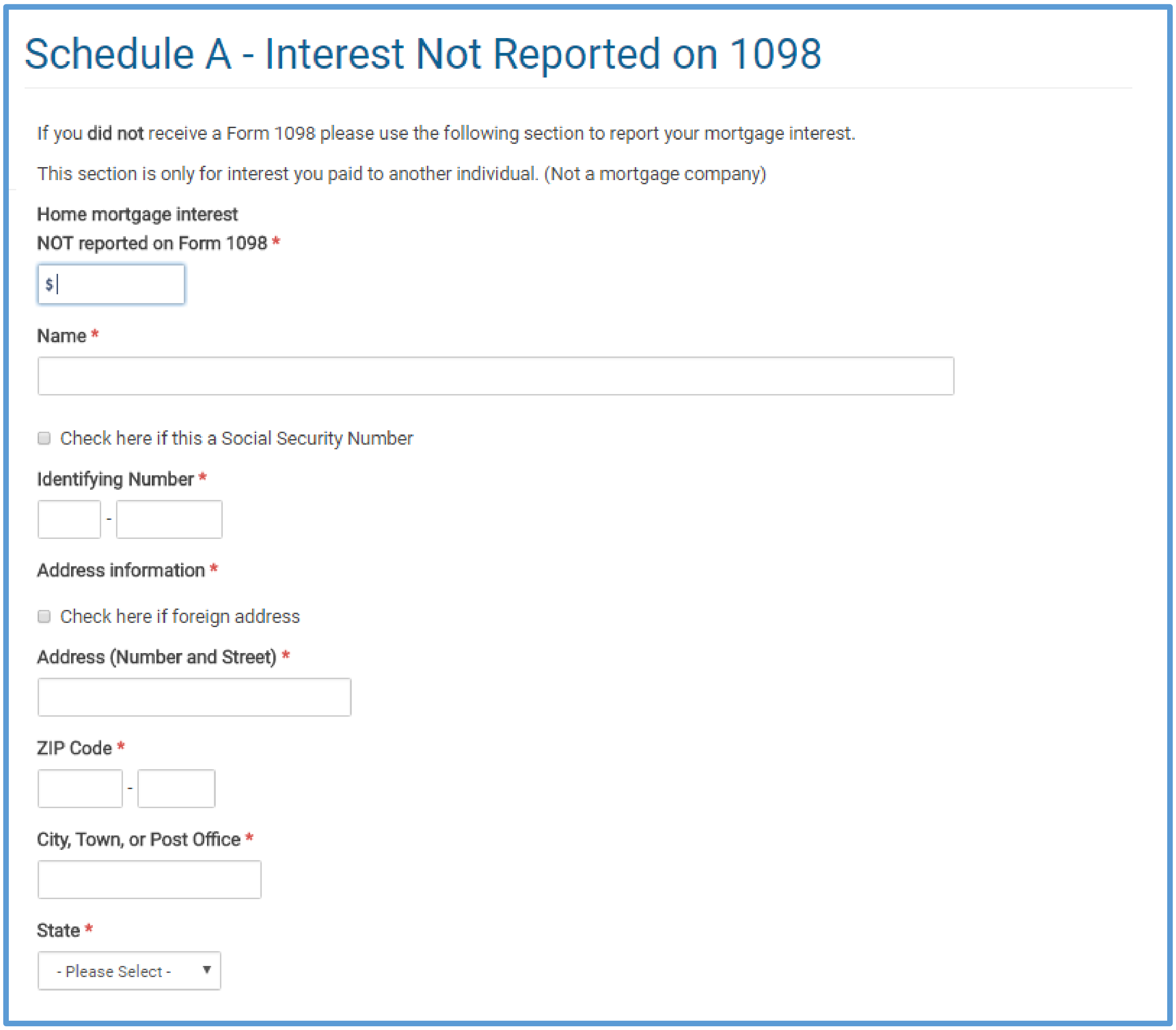
TIP: If you already entered real estate taxes in the **Taxes You Paid** section, do not type them here.

10. Click **Continue**.

Mortgage Interest with no Form 1098

11. If the taxpayer paid mortgage interest to an individual that was not reported to him or her on a Form 1098, click **BEGIN** on the appropriate line.

TaxSlayer Pro Online displays the **Schedule A – Interest Not Reported on 1098** page:


Schedule A - Interest Not Reported on 1098

If you **did not** receive a Form 1098 please use the following section to report your mortgage interest.

This section is only for interest you paid to another individual. (Not a mortgage company)

Home mortgage interest
NOT reported on Form 1098 *

$

Name *

Check here if this a Social Security Number

Identifying Number *

Address information *

Check here if foreign address

Address (Number and Street) *

ZIP Code *

City, Town, or Post Office *

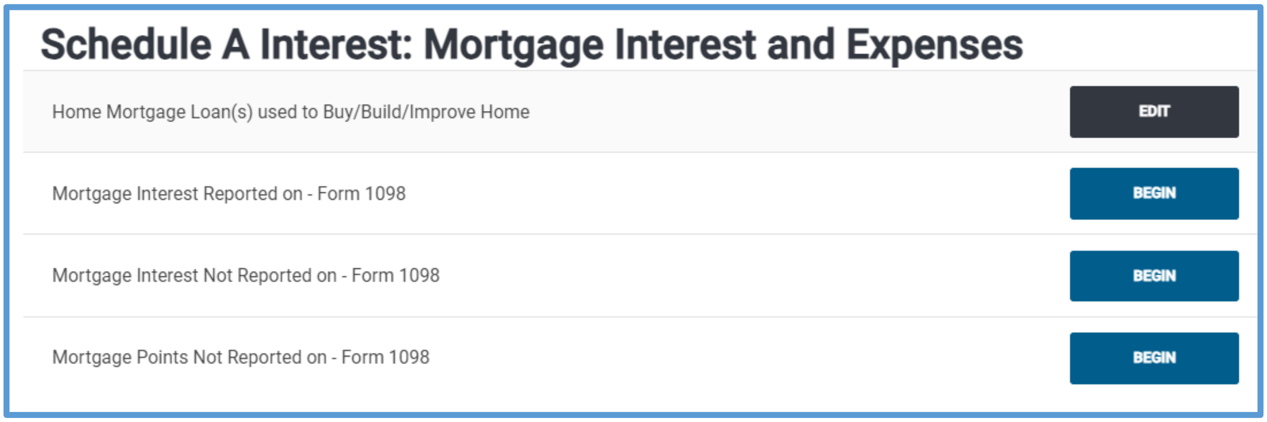
State *

- Please Select -

12. Type the amount of mortgage interest paid and the lender’s name in the appropriate boxes.

13. Type the lender's identifying number. If the identifying number is a Social Security number, select the **Check here if this is a Social Security Number** check box.
14. Type the lender's address.
15. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule A Interest** page:



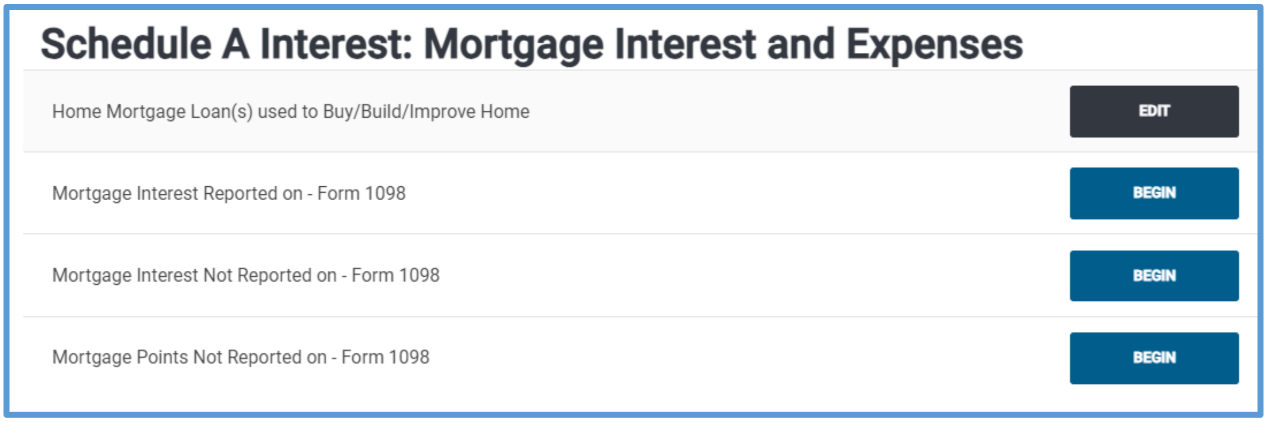
Points with no Form 1098

16. If the taxpayer paid deductible points during the year and did not receive a Form 1098 to report those points, click **BEGIN** on the appropriate line.

TaxSlayer Pro Online displays the **Points Not Reported on Form 1098** page:

17. Type the amounts in the appropriate boxes.
18. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule A Interest** page:

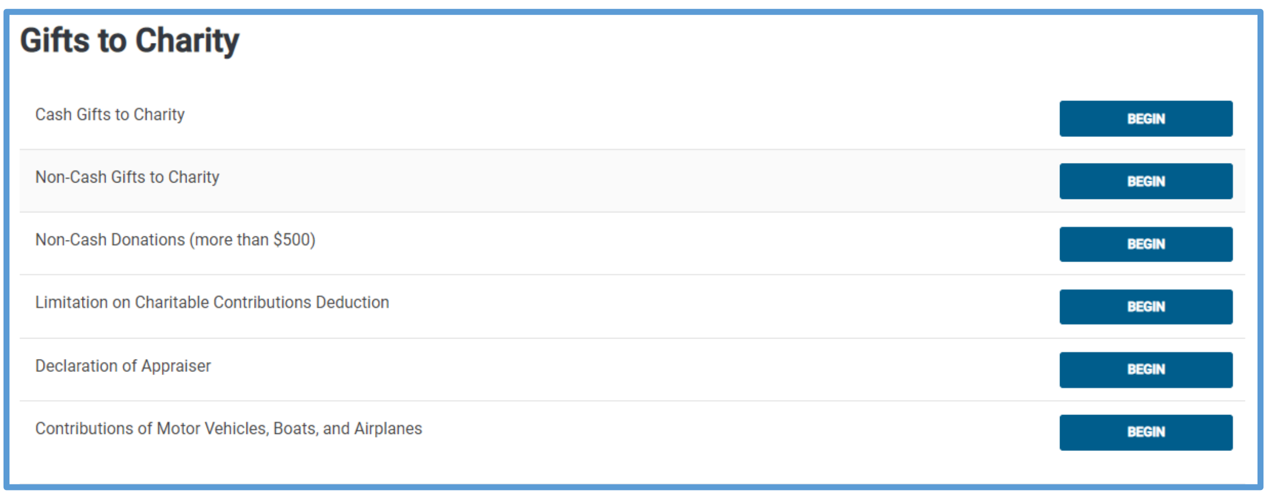


Deducting Charitable Contributions

If the taxpayer made contributions to a qualifying charitable organization, he or she may be able to deduct those contributions as an itemized deduction. To deduct charitable contributions, use the following steps from the **Itemized Deductions** page:

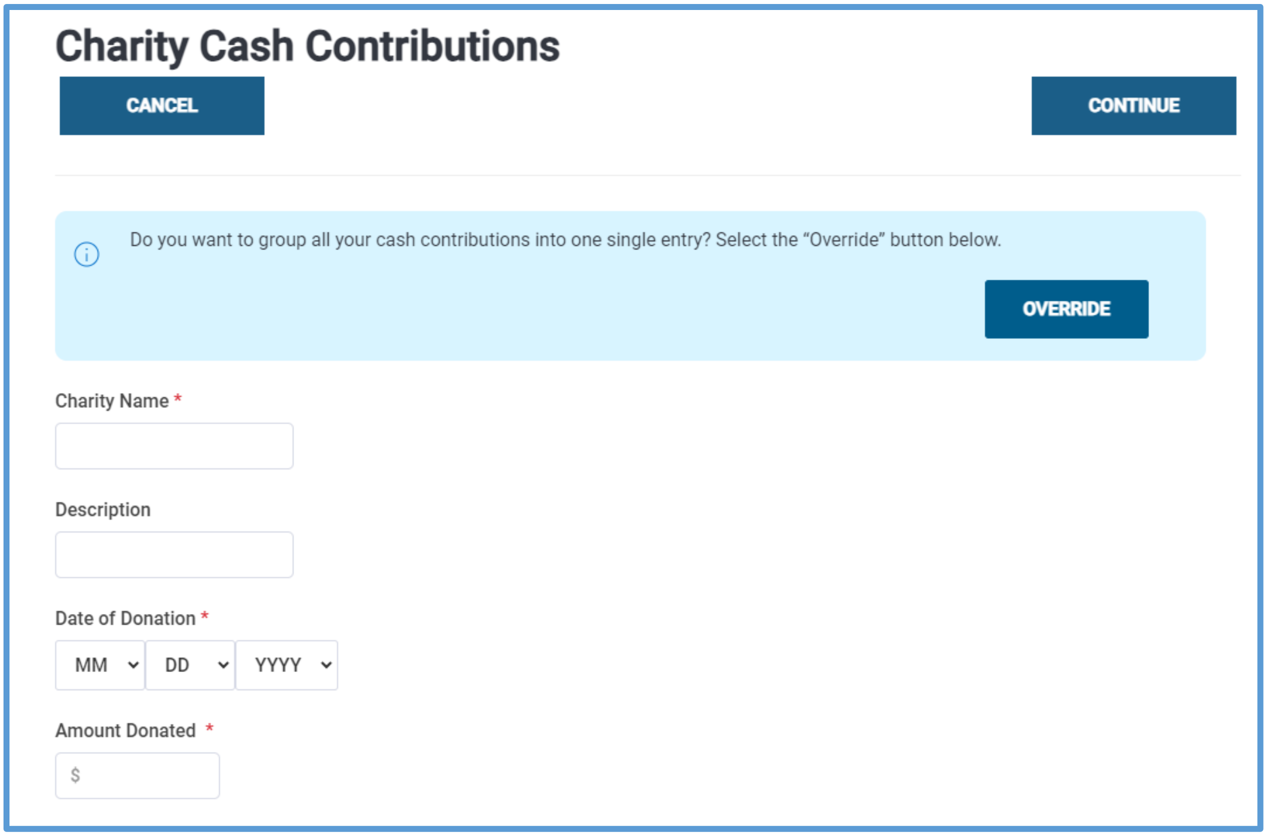
1. Click **BEGIN** on the **Gifts to Charity** line.

TaxSlayer Pro Online displays the **Gifts to Charity** page:



2. If the taxpayer has cash gifts to charity, click **BEGIN** on the **Cash Gifts to Charity** line.

TaxSlayer Pro Online displays the **Charity Cash Contributions** page:

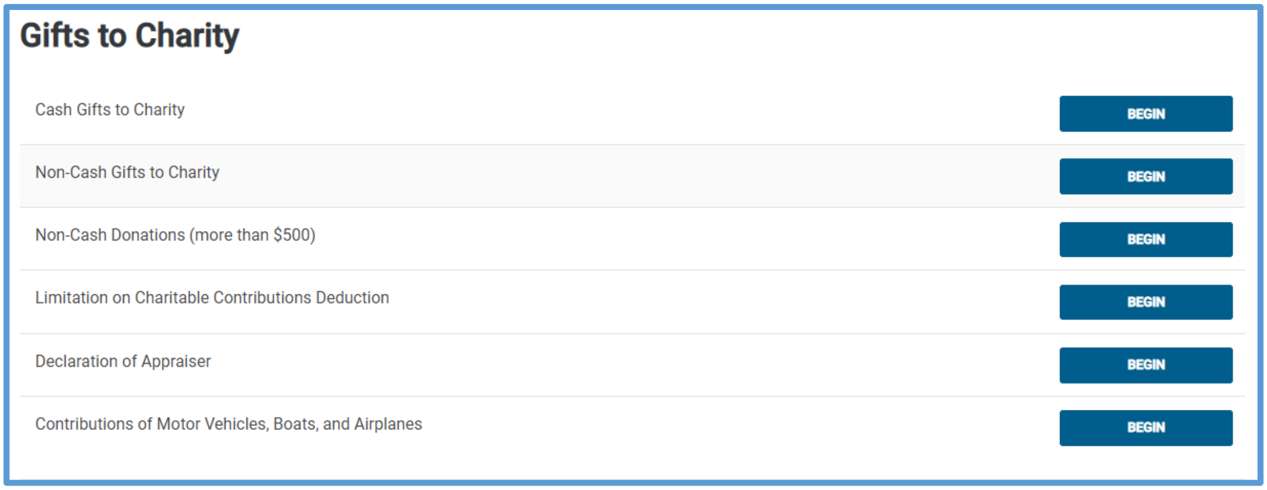


3. Type the charity's name, a description, the amount donated, and the date the taxpayer made the donation.

TIP: If you want to group all of the taxpayer's cash contributions as one entry, click **Override** and type the total amount of cash contributions.

4. Click **Continue**.

TaxSlayer Pro Online displays the **Gifts to Charity** page:

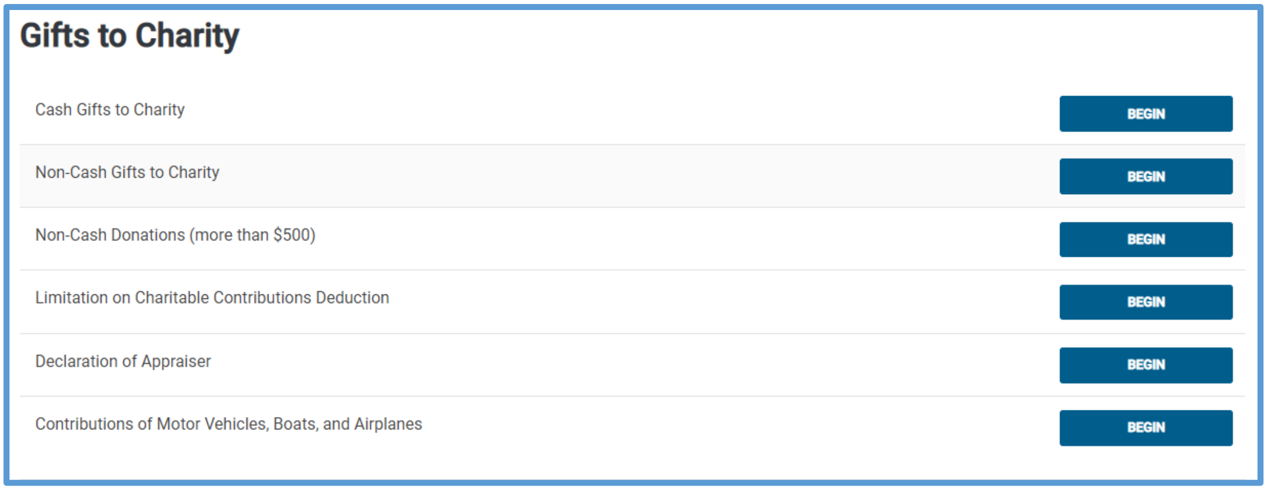


5. If the taxpayer has qualifying charitable miles or non-cash gifts of $500 or less, click **BEGIN** on the **Non-Cash Gifts to Charity** page.

TaxSlayer Pro Online displays the **Schedule A Gifts to Charity Information** page:

6. Type the number of miles the taxpayer used his or her vehicle for charity in the **Charitable Miles** box.
7. If the taxpayer made non-cash gifts to charities totaling less than $500, type the total amount of non-cash contributions in the appropriate box.
8. If the taxpayer carried over a deduction for charitable contributions in the prior year, type the amount of the charitable contribution carryover from the prior year.
9. Click **Continue**.

TaxSlayer Pro Online displays the **Gifts to Charity** page:



10. When you finish adding charitable donations, click **Continue**.

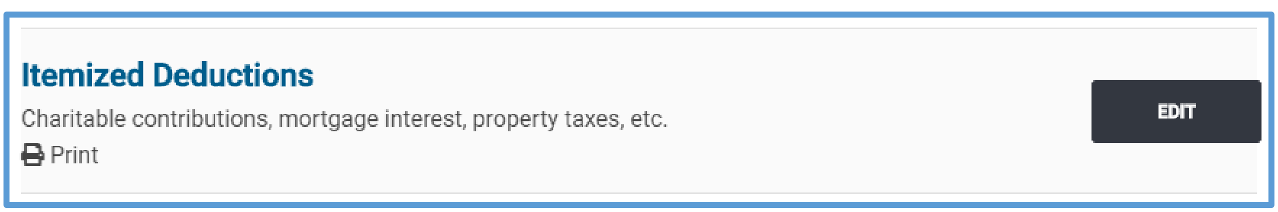
Deducting Unreimbursed Employee Business and Travel Expenses

These deductions are no longer applicable to Federal itemized deductions due to the Tax Cuts and Jobs Act (TCJA). Complete these menus only to enter data that may be applicable to your state return(s).

Entering Miscellaneous Deductions

Miscellaneous deductions are no longer applicable to Federal itemized deductions due to the Tax Cuts and Jobs Act (TCJA). Complete these menus only to enter data that may be applicable to your state return(s).

TIP: TaxSlayer Pro Online displays a printer icon on the **Itemized Deductions** line. Click this button to generate a PDF of the Schedule A based on the information entered in the itemized section. TaxSlayer Pro Online generates the Schedule A PDF even if the standard deduction is greater.

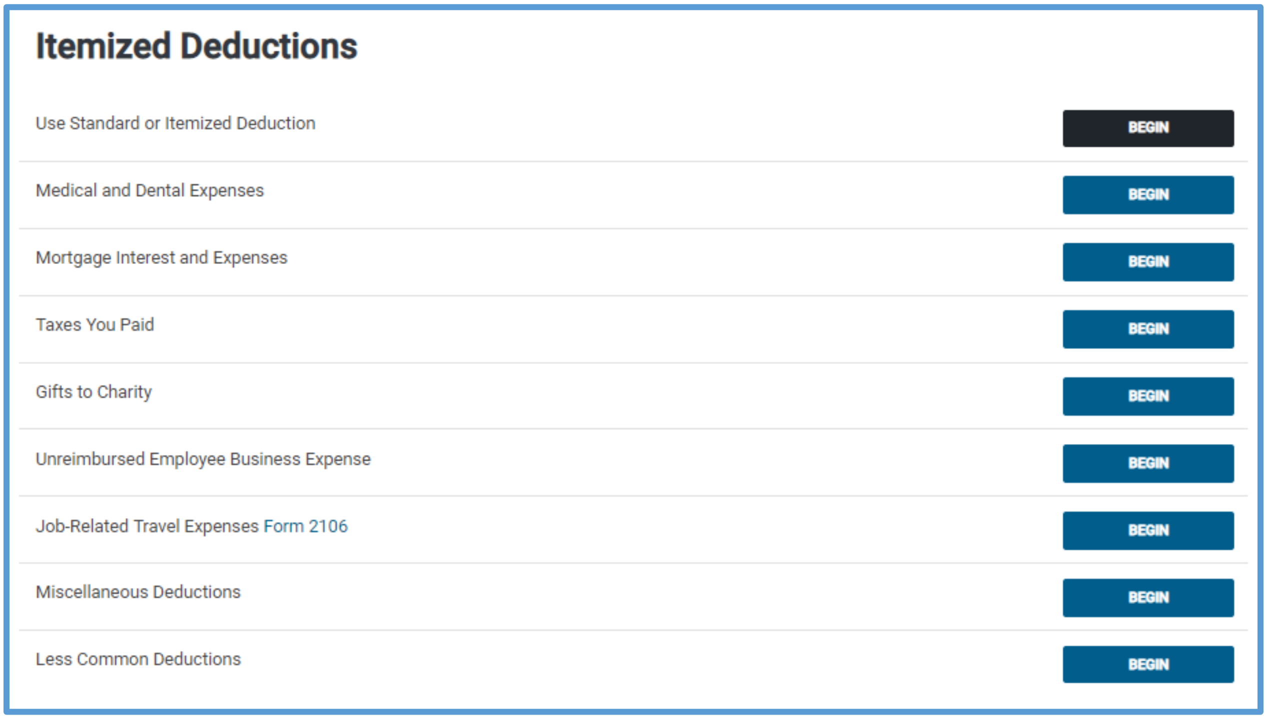


Who Must Use Itemized Deductions

If the taxpayer's filing status is married filing separately and the spouse itemizes deductions on his or her return, the taxpayer must itemize, even if the standard deduction is better for the taxpayer. To accomplish this in TaxSlayer Pro Online, use the following steps:

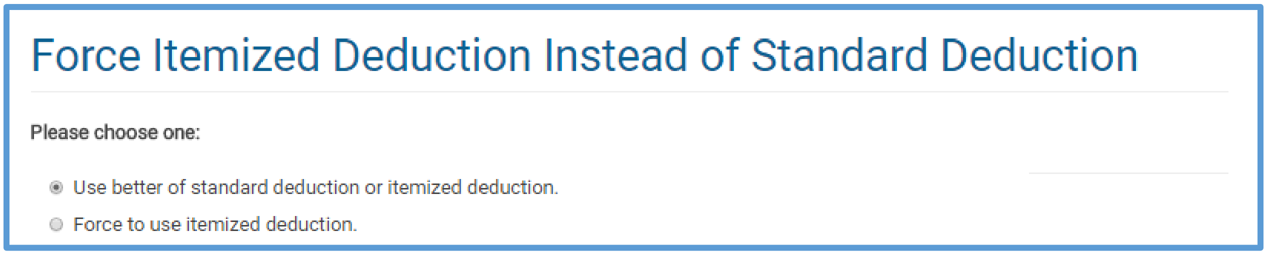
1. From the **Deductions** page, click **Itemized Deductions**.

TaxSlayer Pro Online displays the **Itemized Deductions** landing page:



2. Click **Begin** on the **Use Standard or Itemized Deduction** line.

TaxSlayer Pro Online displays the **Force Itemized Deduction Instead of Standard Deduction** page:



3. Click **Force to use itemized deduction.**
4. Click **Continue**.

TaxSlayer Pro Online now uses the itemized deduction regardless of which is better for the taxpayer.

Summary

You should now be able to:

- Use the standard deduction for the taxpayer.
- Use itemized deductions even when the standard deduction is better for the taxpayer.
- Enter medical and dental expenses.
- Enter taxes that qualify as itemized deductions.
- Deduct mortgage interest.
- Deduct charitable contributions.
- Deduct unreimbursed employee business expenses.
- Deduct job-related travel expenses as itemized deductions.
- Report miscellaneous itemized deductions.
- Deduct other itemized deductions.

To see a video of what you just learned, go to Entering Standard and Itemized Deductions. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

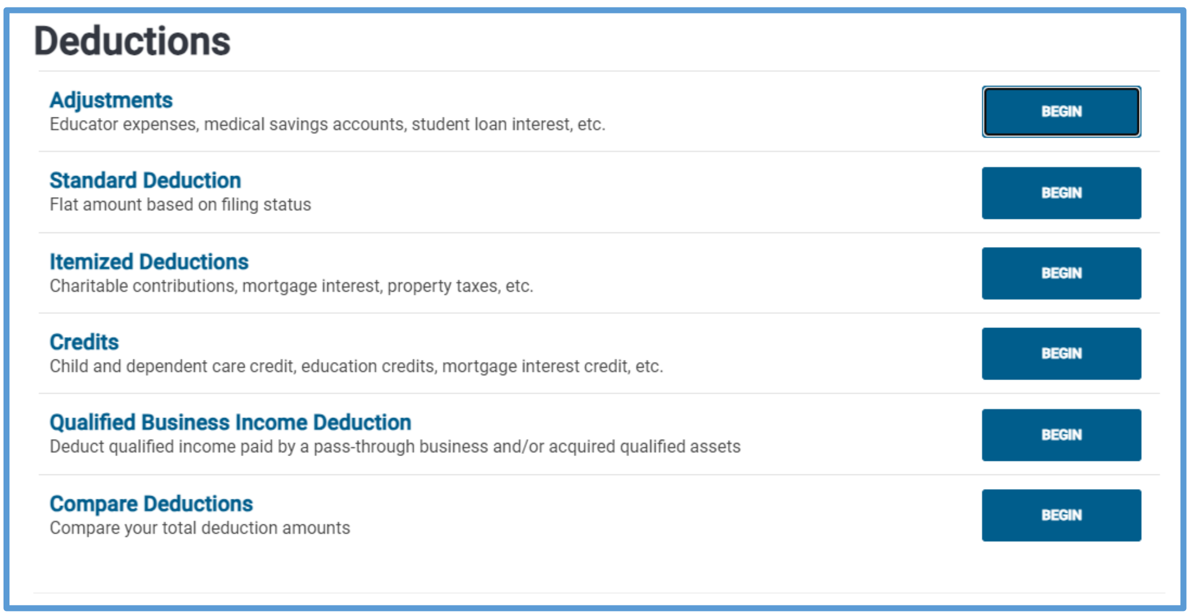
Basic Credits

After completing this topic, you will be able to:

- Enter the child and dependent care credit.
- Enter the earned income tax credit.
- Enter education credits.
- Enter the retirement savings credit.
- Enter the child tax credit.
- Enter the foreign tax credit.

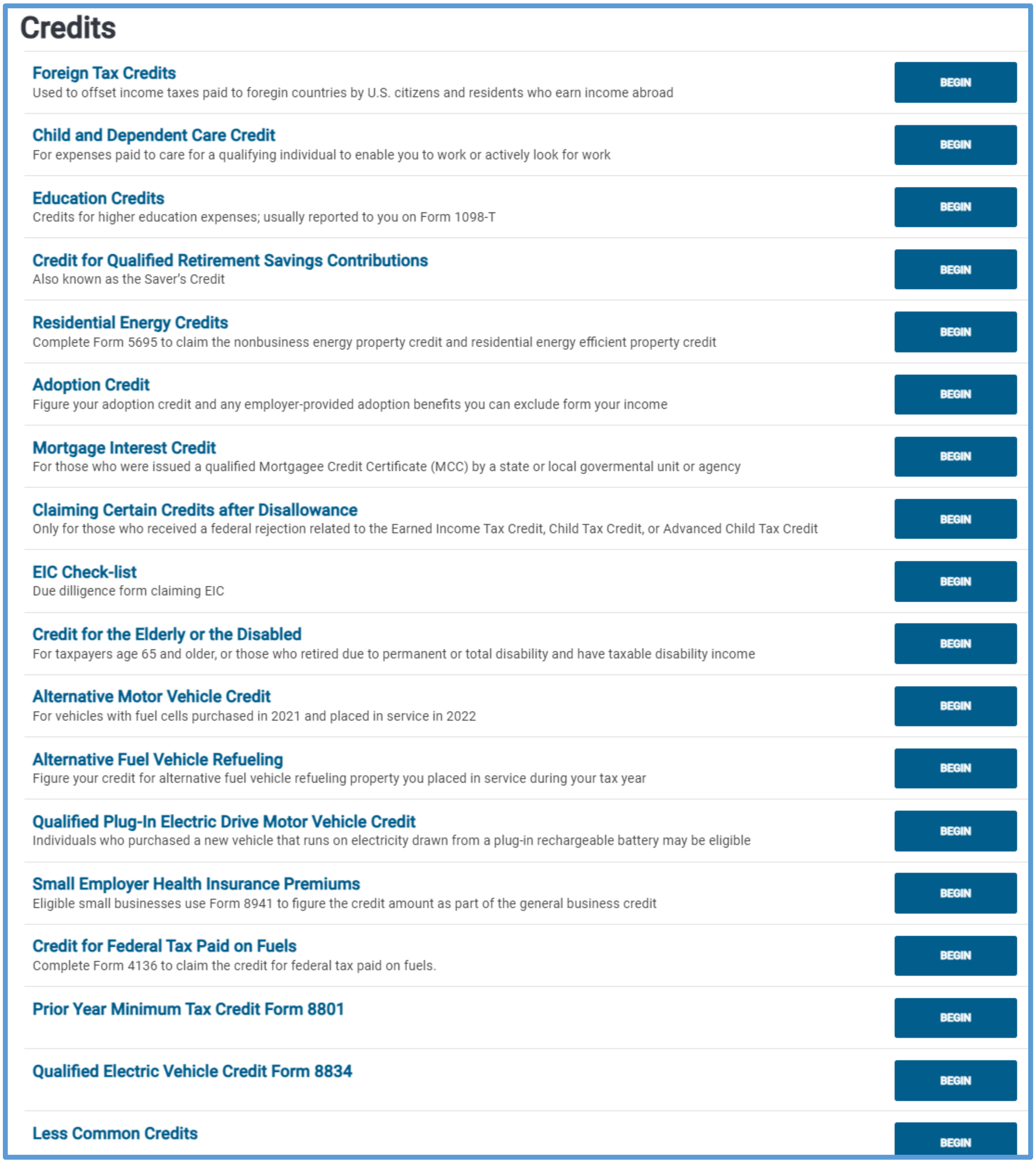
Many taxpayers can reduce their tax liability using credits. To begin entering information, use the following steps:

TaxSlayer Pro Online displays the **Deductions** landing page:



3. Click the **Credits Menu** line.

TaxSlayer Pro Online displays the **Credits** landing page:



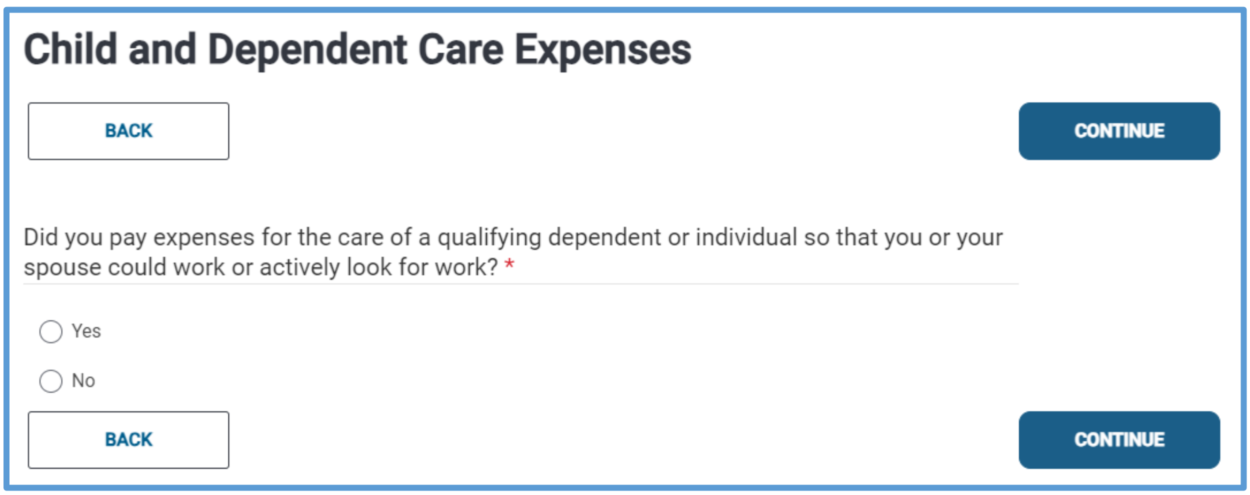
4. Use this page as a starting point for each section in this lesson.

Entering the Child and Dependent Care Credit

If the taxpayer has dependents under the age of 13, he or she may have paid child care expenses during the year. If the taxpayer qualifies, he or she may be able to take a credit for those expenses. To enter the child and dependent care credit, use the following steps from the **Credits** landing page:

1. Click the **Child and Dependent Care Credit** line.

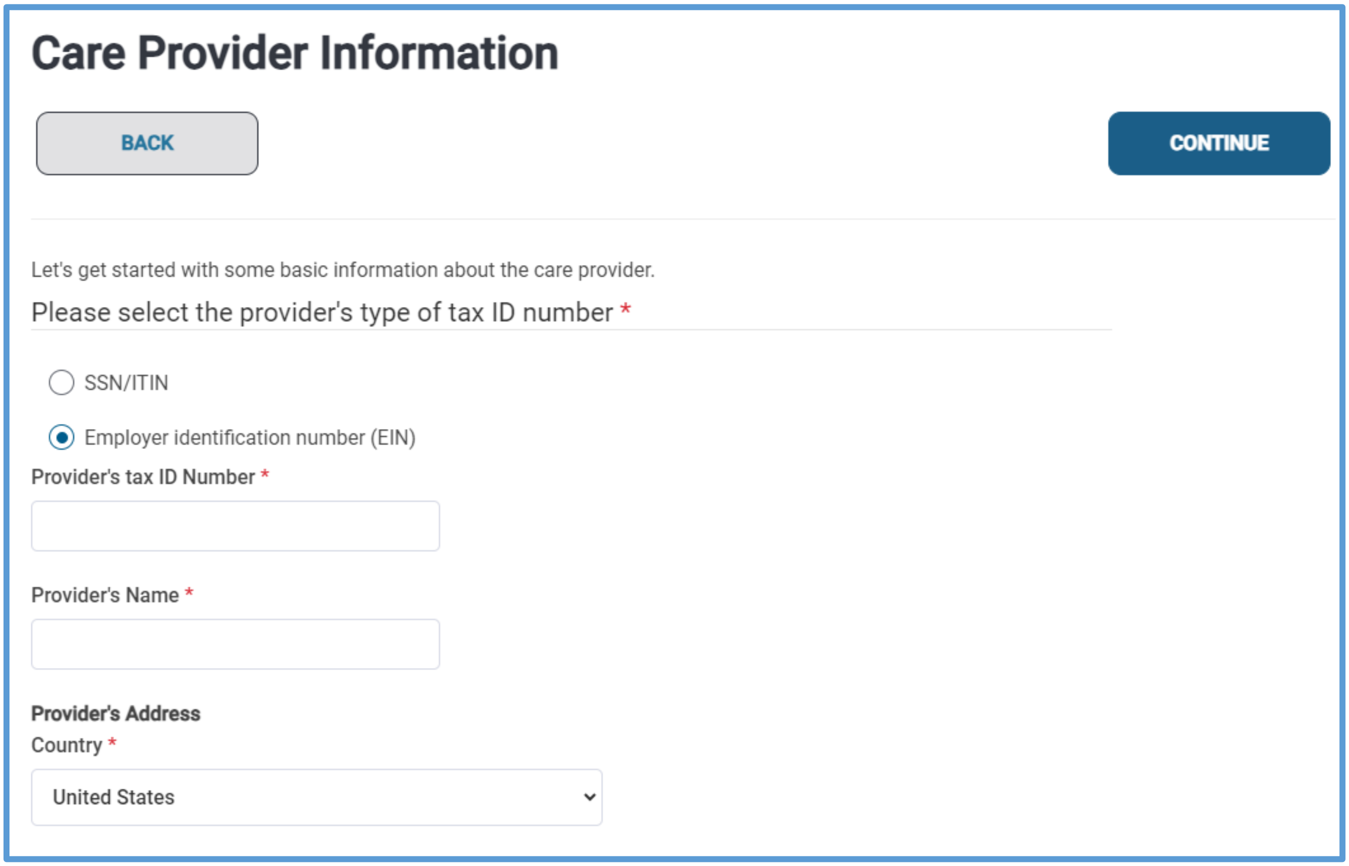
TaxSlayer Pro Online displays the **Child and Dependent Care Expenses** page:



Child Care Providers

2. Select **YES** and **click Continue**, if applicable.

TaxSlayer Pro Online displays the **Child Care Provider Information** page:

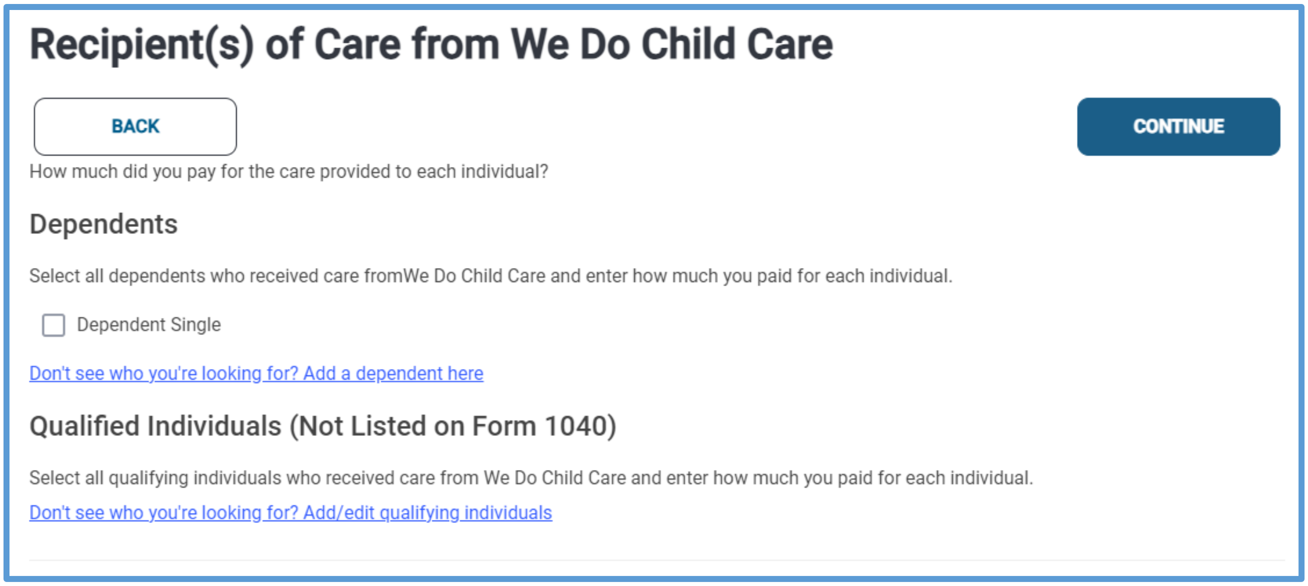


3. Select the **SSN/ITIN** radio button if the child care provider's tax identification number is a Social Security number. If the number is an EIN, leave the selection as it is.
4. Type the child care provider's tax identification number, name, address, phone number, and the total amount paid to the provider.

TIP: If you have previously entered this child care provider, TaxSlayer Pro Online fills the name and address when you type the tax identification number.

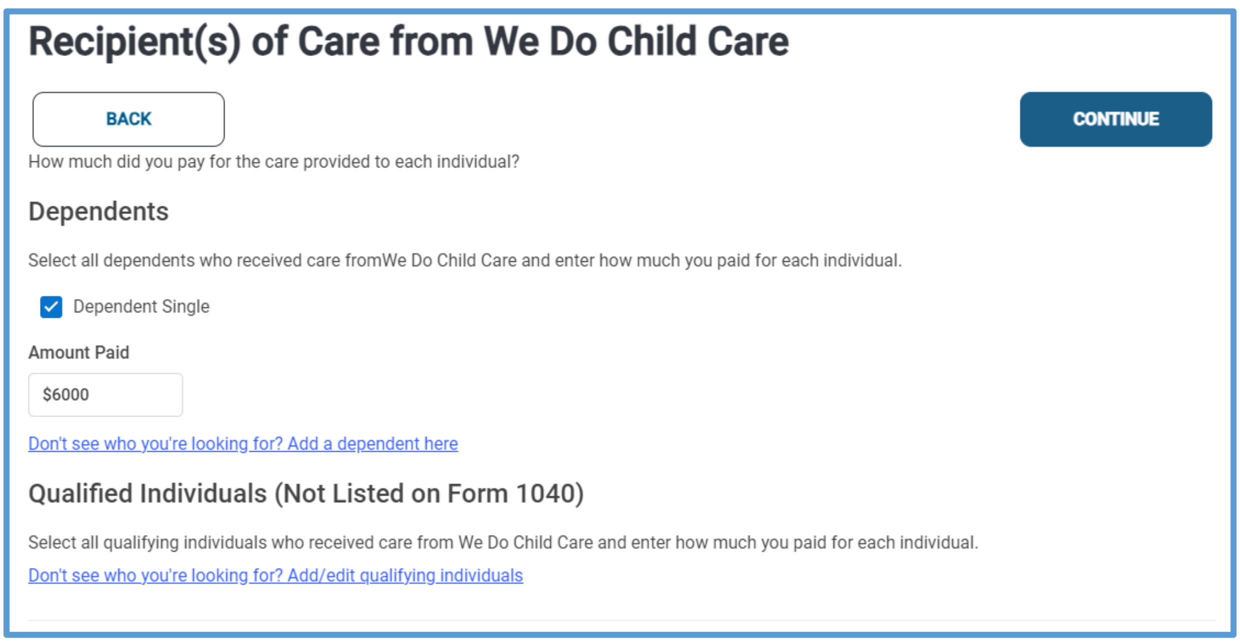
5. Read the remaining lines on the form and complete them if necessary based on information provided from the taxpayer.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Recipient(s) of Care** page with the eligible dependents listed:



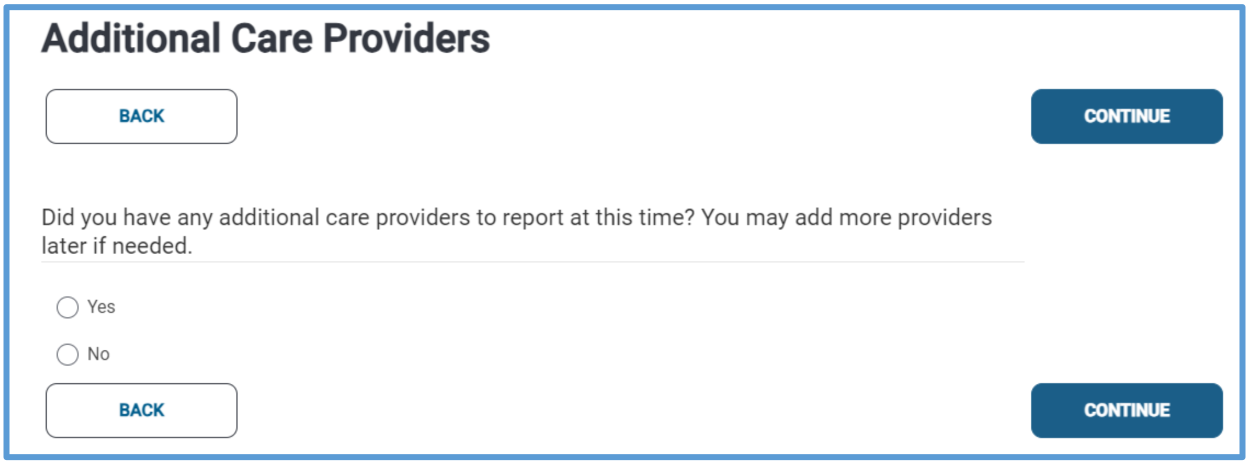
7. Select the box next to the dependent who received child care from this provider.

TaxSlayer Pro Online displays the **Amount Paid** box:



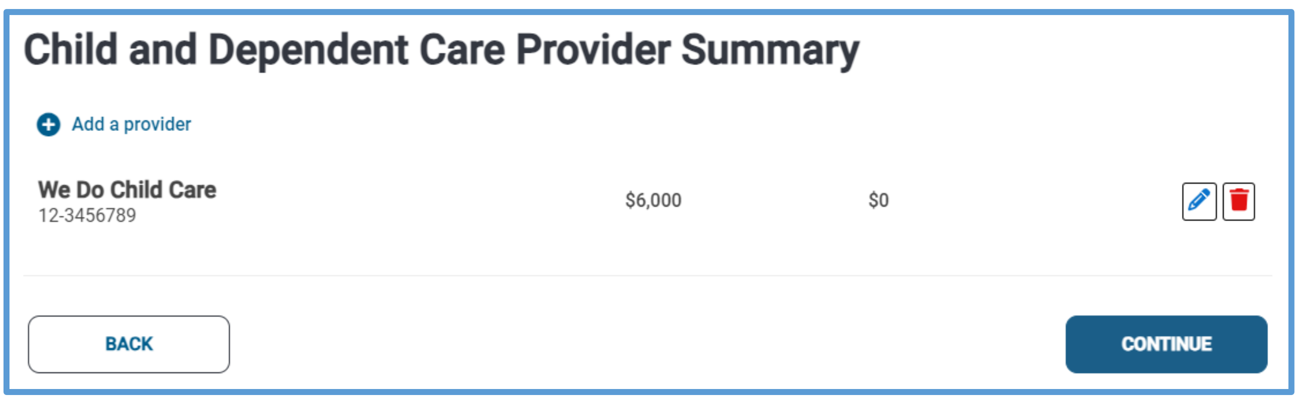
8. Type the expenses paid in the box.
9. When you finish, click **CONTINUE**.

TaxSlayer Pro Online displays the **Additional Care Providers** page:



10. When you finish adding child care providers, click **No**.
11. Click **CONTINUE**.

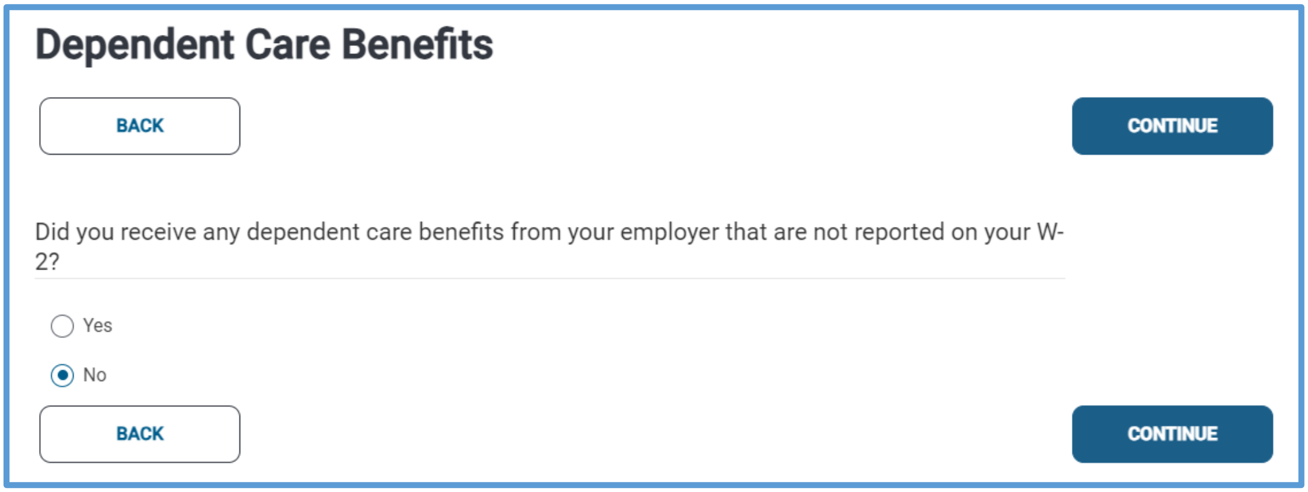
TaxSlayer Pro Online displays the **Child and Dependent Care Provider Summary**:



Click **Add a Provider** if you need to add additional child care providers for the same or other eligible dependents on the return and follow the steps above.

12. Click **CONTINUE**.

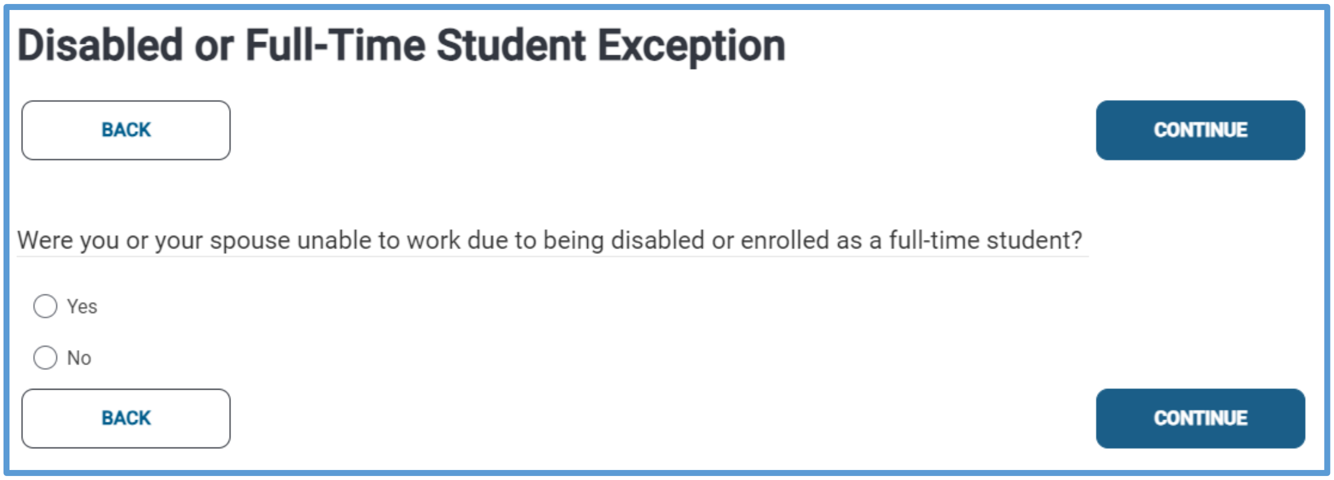
TaxSlayer Pro Online displays the **Dependent Care Benefits** page:



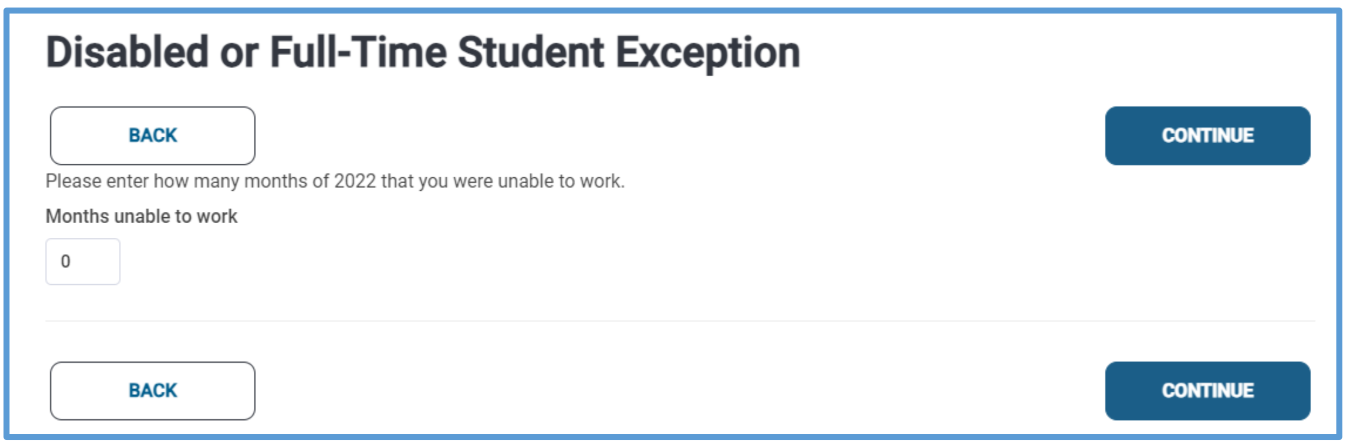
13. Read the question, provide your answer, and click **Continue**. If **Yes**, TaxSlayer Pro Online displays the **Dependent Care Benefits page**.
14. Provide the necessary information and click **Continue**.

NOTE: Do not re-enter amounts already reported in Box 10 of the W-2(s).

TaxSlayer Pro Online displays the **Disabled or Full-Time Student Exception** page:

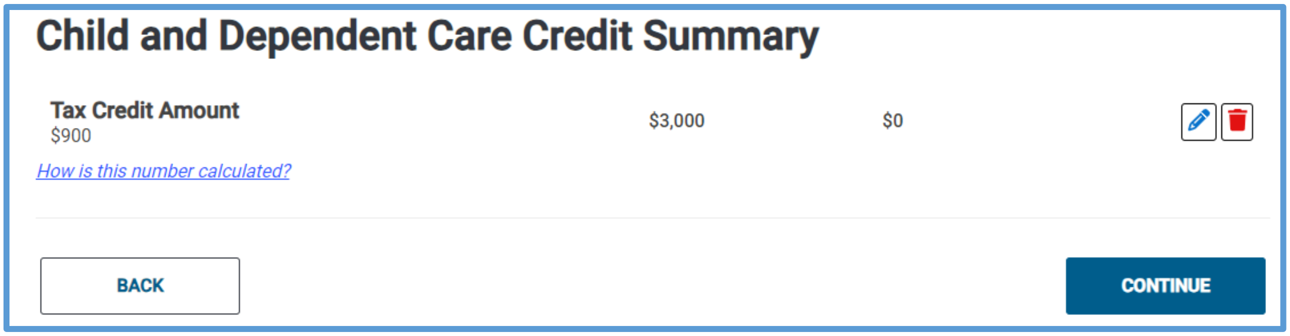


15. If applicable, select **Yes** and click **Continue.**
16. Enter the number of months the taxpayer or spouse was unable to work.



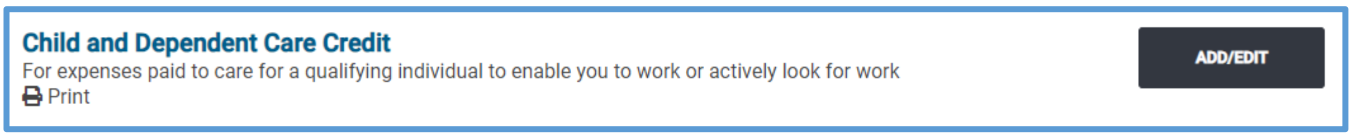
17. Next, type any delayed expenses from the prior year, if applicable, and then click **Continue**..

TaxSlayer Pro Online displays the **Child and Dependent Care Credit Summary** page:



18. Click **CONTINUE**.

TaxSlayer Pro Online displays a printer icon on the **Child and Dependent Care Credit** line. Click this icon to generate a PDF of Form 2441 based on the information entered.

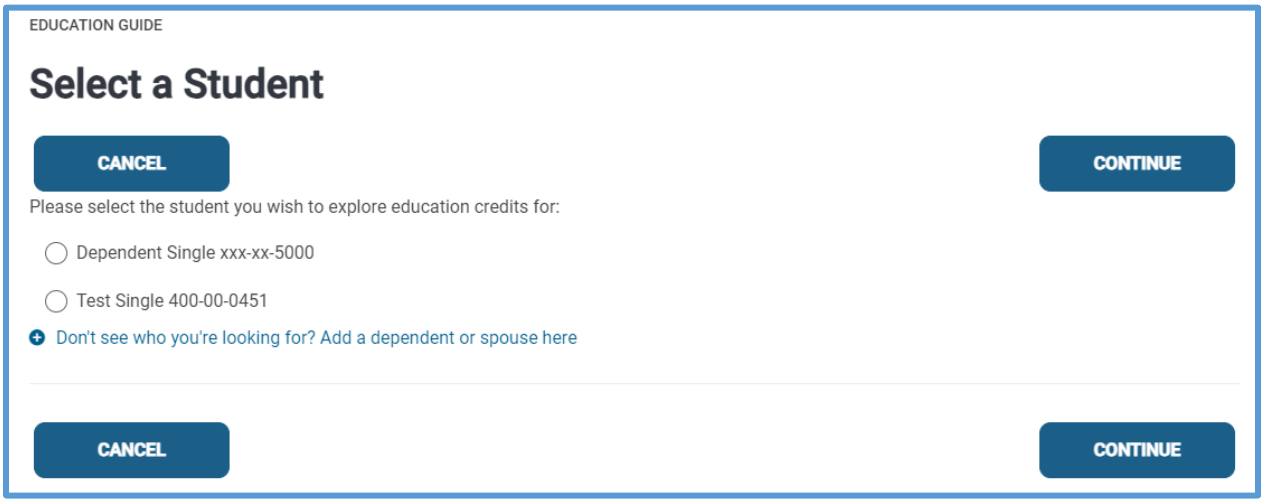


Figuring Education Credits

Taxpayers who pay qualifying education expenses for a qualifying student may be able to claim a credit based on the education expenses. To enter education credits, use the following steps from the **Credits** landing page:

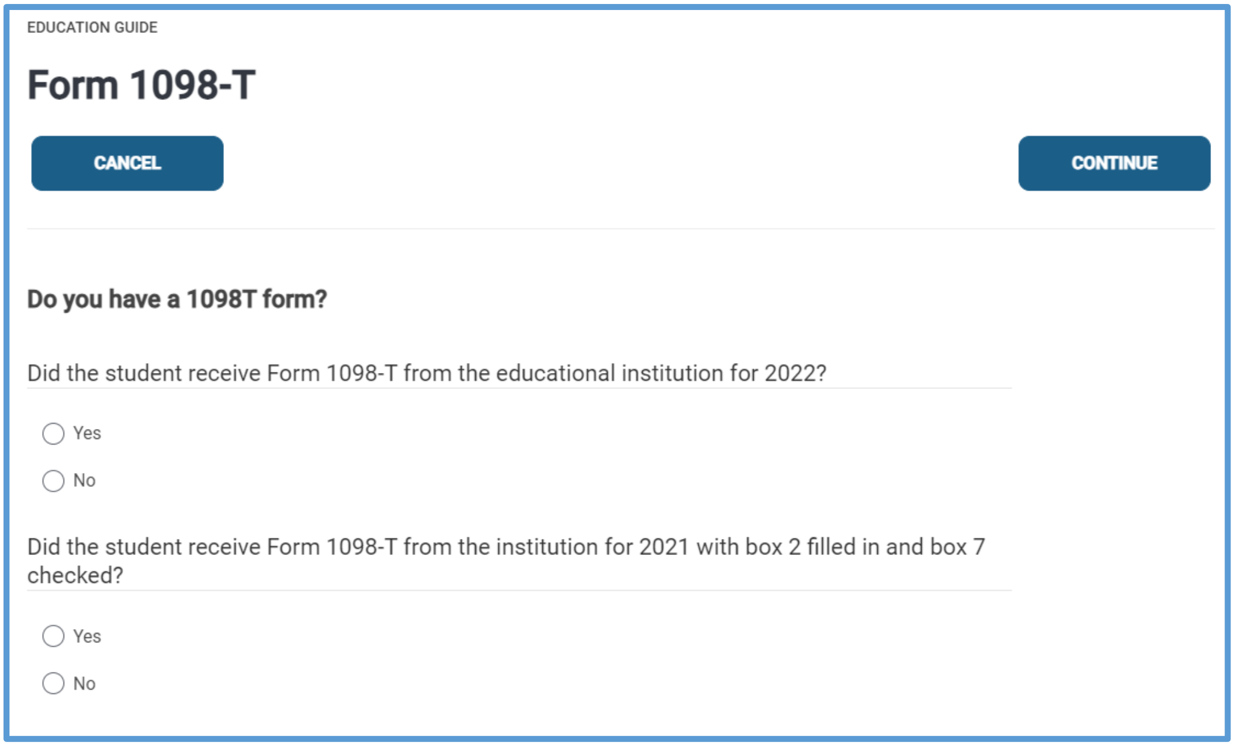
1. Click the **Education Credits** line.

TaxSlayer Pro Online displays the **Select a Student** page:



2. TaxSlayer Pro Online displays the names and identifying numbers of the taxpayer, spouse, and any dependents. Select the eligible student.
3. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Form 1098-T** page:


EDUCATION GUIDE

Form 1098-T

CANCEL CONTINUE

Do you have a 1098T form?

Did the student receive Form 1098-T from the educational institution for 2022?

Yes

No

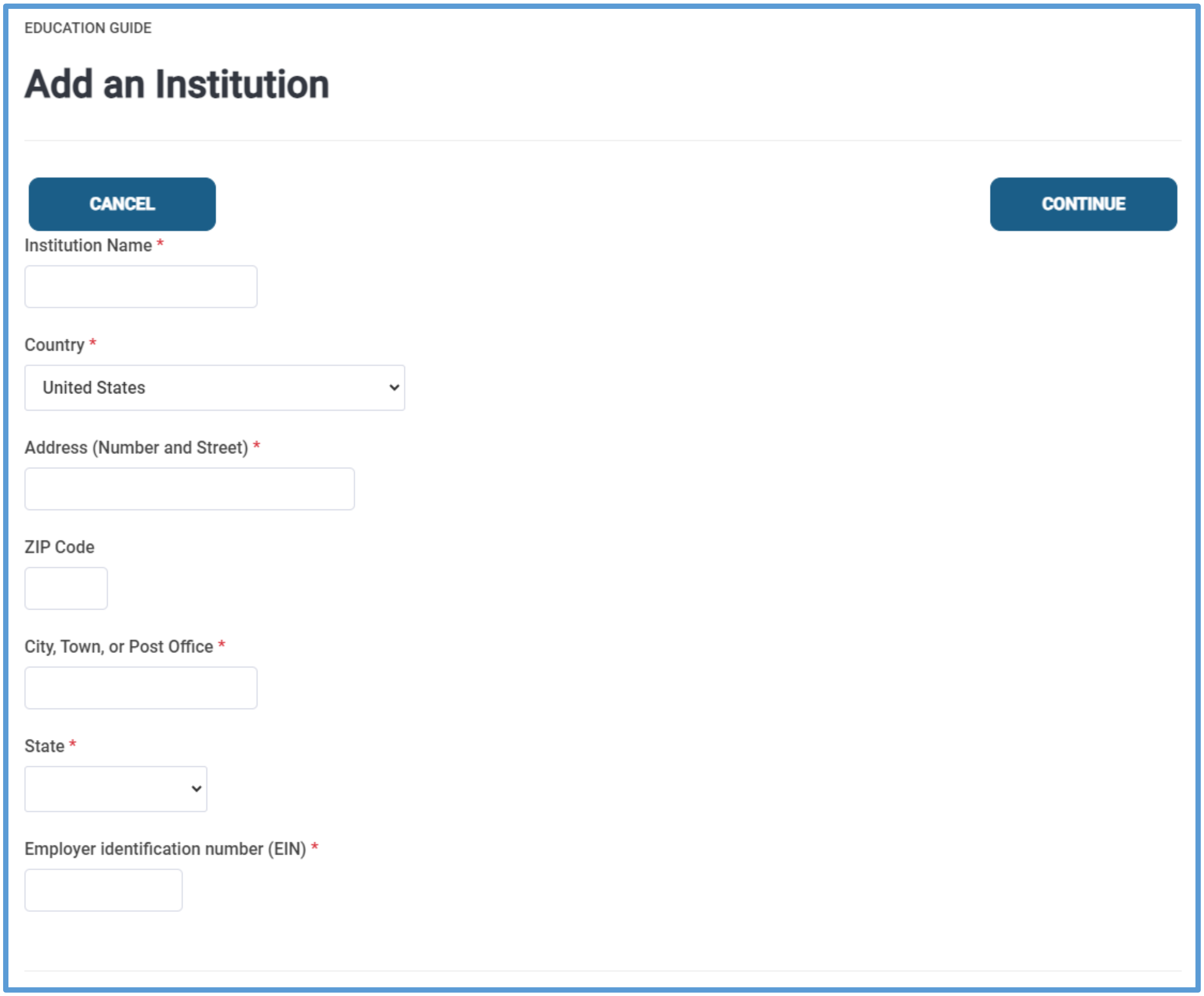
Did the student receive Form 1098-T from the institution for 2021 with box 2 filled in and box 7 checked?

Yes

No

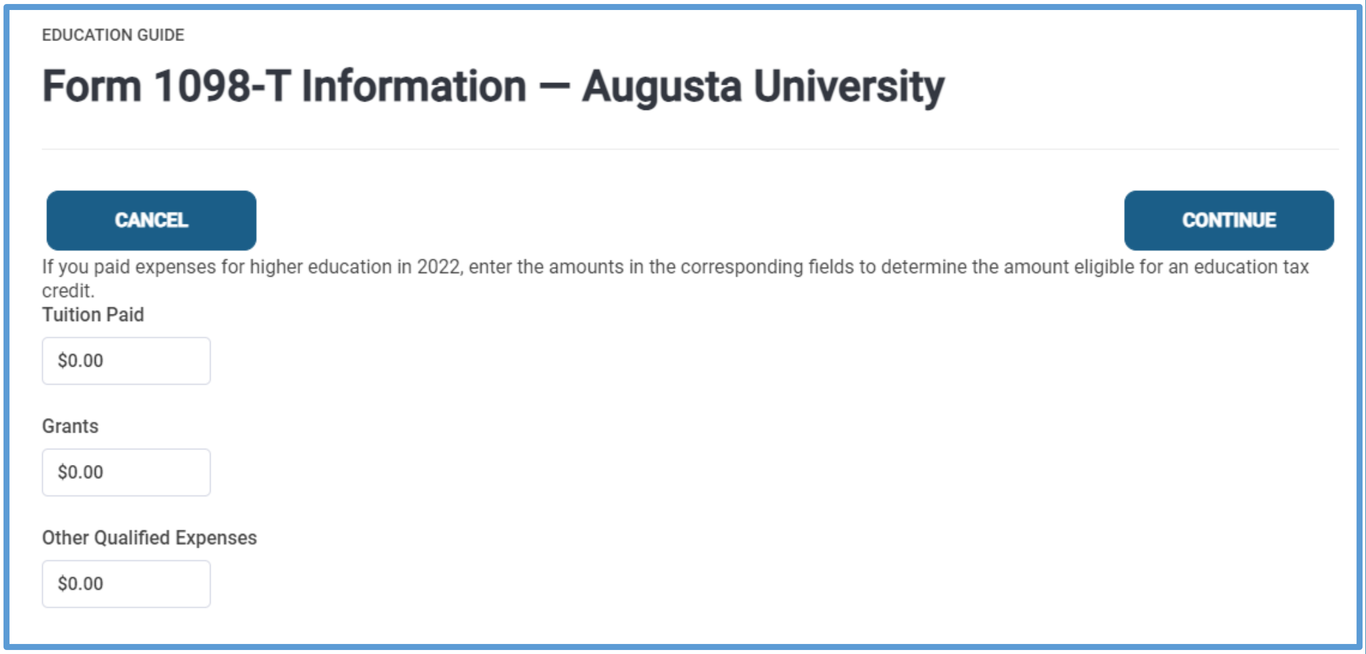
4. Answer the questions based on information provided by the taxpayer.
5. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Add an Institution** page:



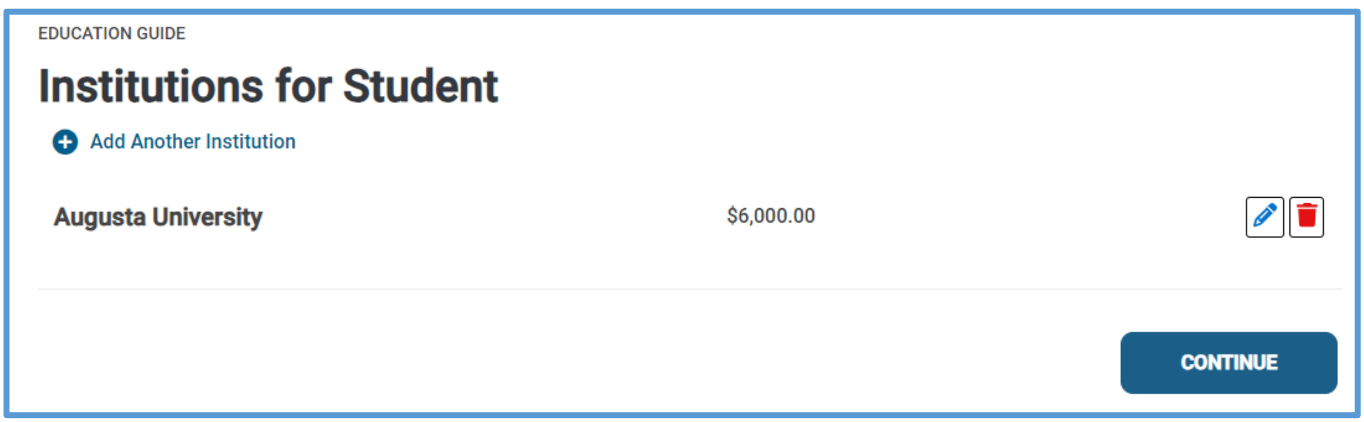
6. Enter the details of the educational institution.
7. Click **Continue**.

TaxSlayer Pro Online displays the **Form 1098-T Information** page:



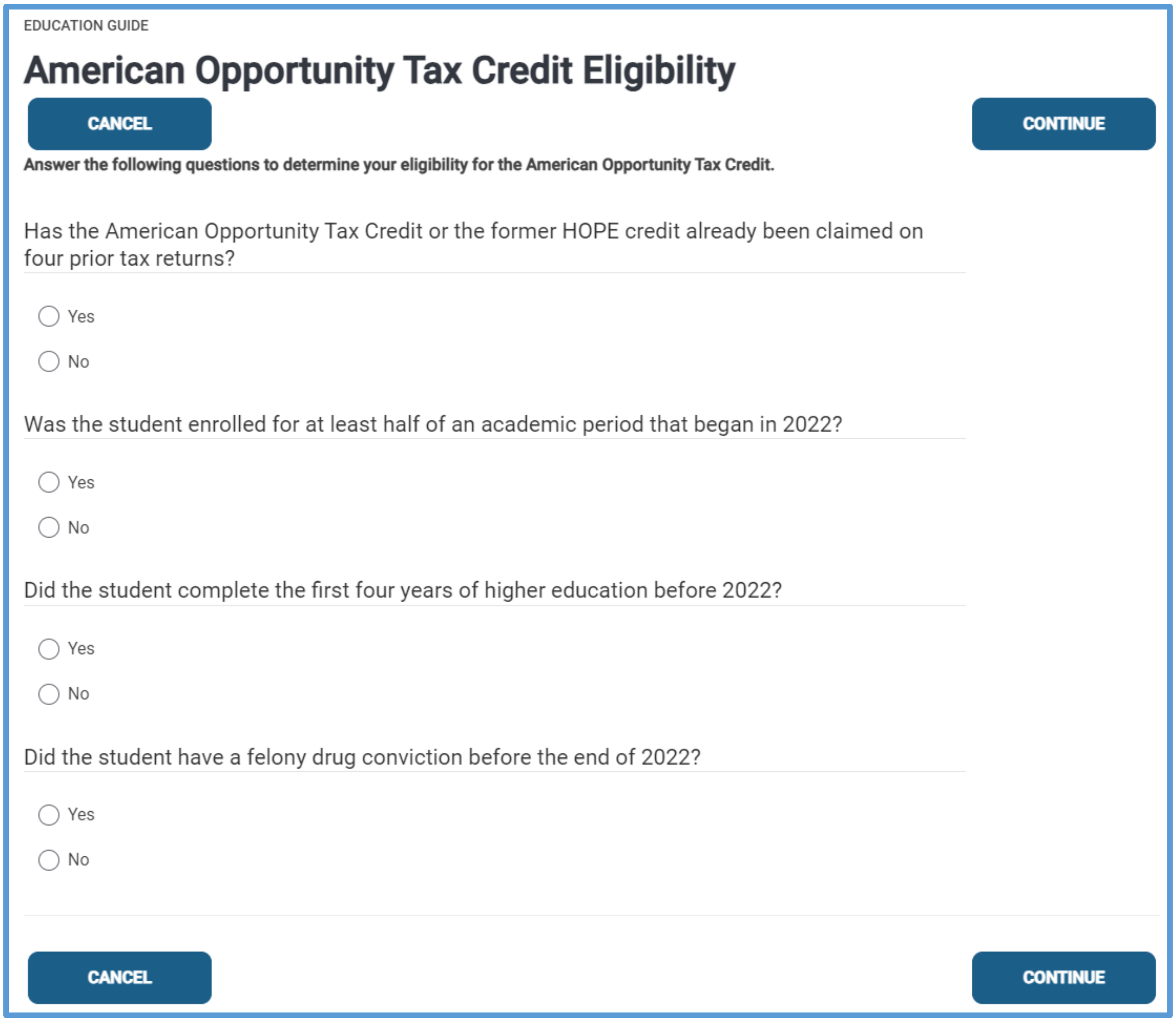
8. Enter details from the Form 1098-T as well as any other qualified expenses not found on Form 1098-T.
9. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Institutions for Student** page:



10. If additional educational institutions are needed, click **Add Another Institution** and follow the steps above.

TaxSlayer Pro Online displays additional information to help calculate the credit:



EDUCATION GUIDE

American Opportunity Tax Credit Eligibility

CANCEL CONTINUE

Answer the following questions to determine your eligibility for the American Opportunity Tax Credit.

Has the American Opportunity Tax Credit or the former HOPE credit already been claimed on four prior tax returns?

- Yes
- No

Was the student enrolled for at least half of an academic period that began in 2022?

- Yes
- No

Did the student complete the first four years of higher education before 2022?

- Yes
- No

Did the student have a felony drug conviction before the end of 2022?

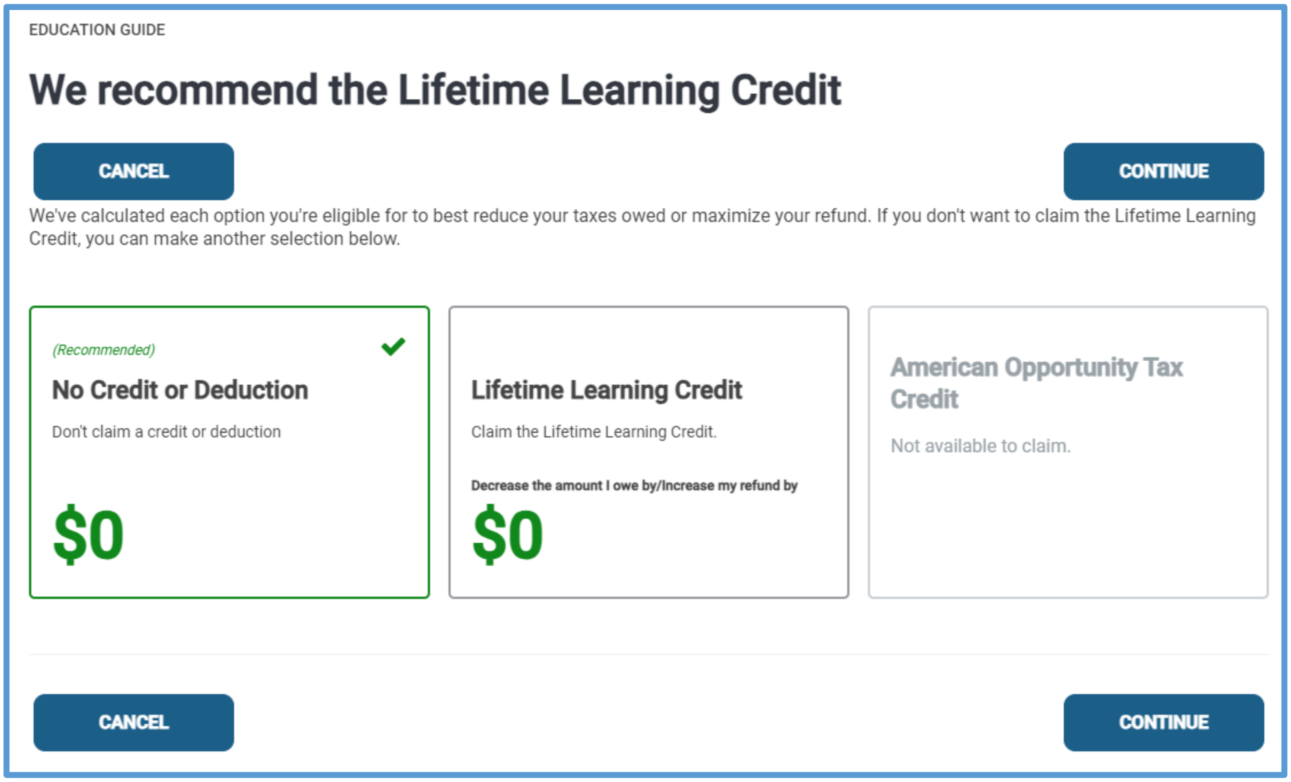
- Yes
- No

CANCEL CONTINUE

11. Select the correct answers to the questions.
12. Click **Continue**.

TIP: If the taxpayer meets the criteria to only receive the nonrefundable portion of the American Opportunity Credit, TaxSlayer Pro Online prompts you to answer additional questions.

TaxSlayer Pro Online makes a recommendation for the credit most beneficial to the student:



TIP: TaxSlayer Pro Online does not display the eligible names in the **Select an Eligible Student** drop-down list after you complete a credit for that student. You cannot take both the American Opportunity and Lifetime Learning Credits for the same student in the same tax year.

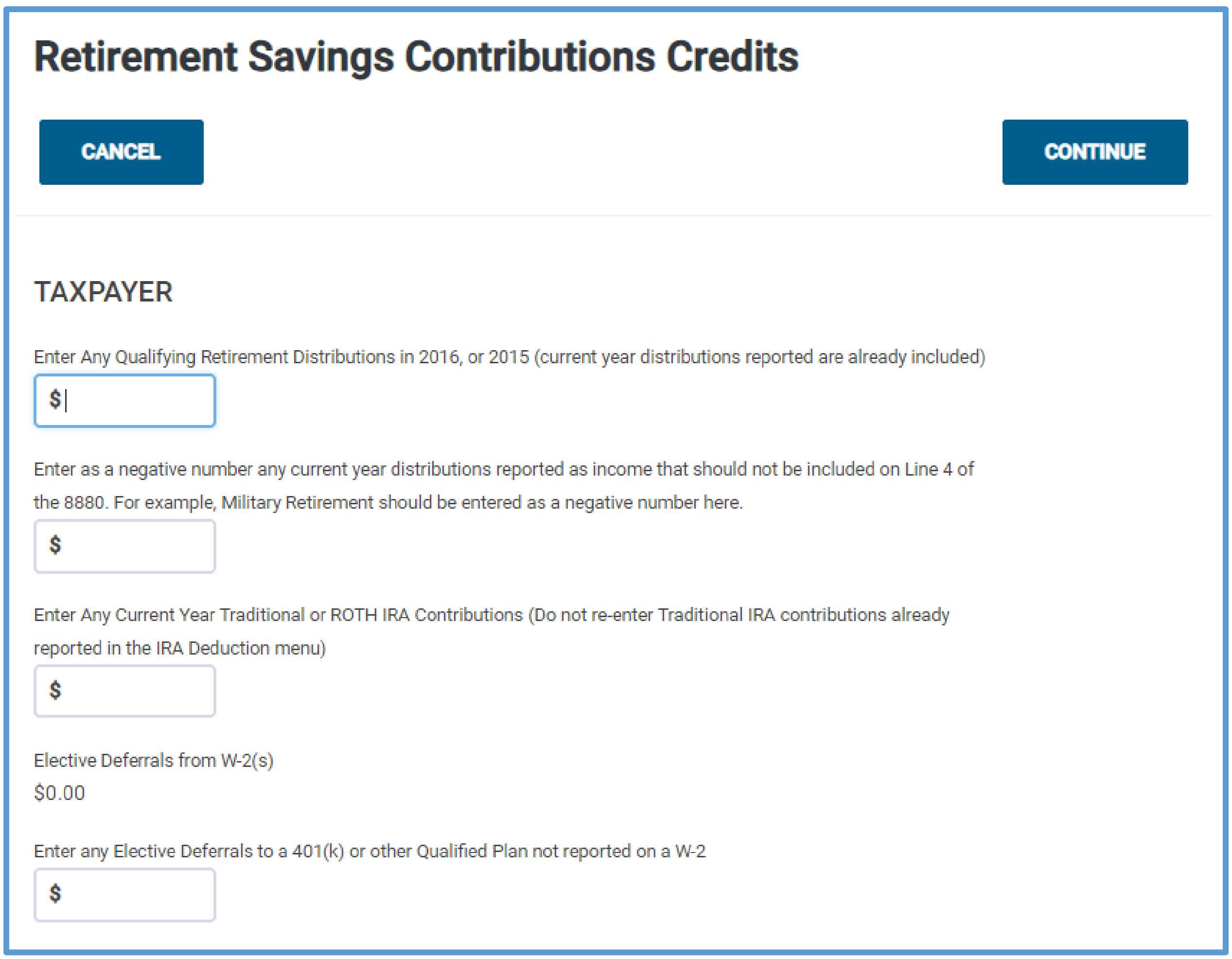
TaxSlayer Pro Online calculates any refundable portion of the American Opportunity Credit to the appropriate schedule.

Figuring the Retirement Savings Contribution Credit

Taxpayers who pay qualifying retirement contributions may be able to claim a credit based on those contributions. To enter the retirement savings contribution credit, use the following steps from the **Credits** landing page:

1. Click the **Credit for Qualified Retirement Savings Contributions** line.

TaxSlayer Pro Online displays the **Retirement Savings Contributions Credits** page:



2. Carefully read each line and type the amount of the taxpayer's distributions or contributions in the appropriate box.

TIP: TaxSlayer Pro Online calculates any contributions you already entered for traditional IRAs or 401(k)s based on information you already entered in the return, including amounts from Form W-2. Do **not** include those contributions here.

3. Click **Continue**.

TaxSlayer Pro Online displays the **Retirement Savings Contributions Credits** summary page:

4. Click **Continue**.

Tip: TaxSlayer Pro Online displays a printer icon on the **Retirement Savings Credit** line that generates a PDF of Form 8880 based on the information entered.

Figuring the Child Tax Credit

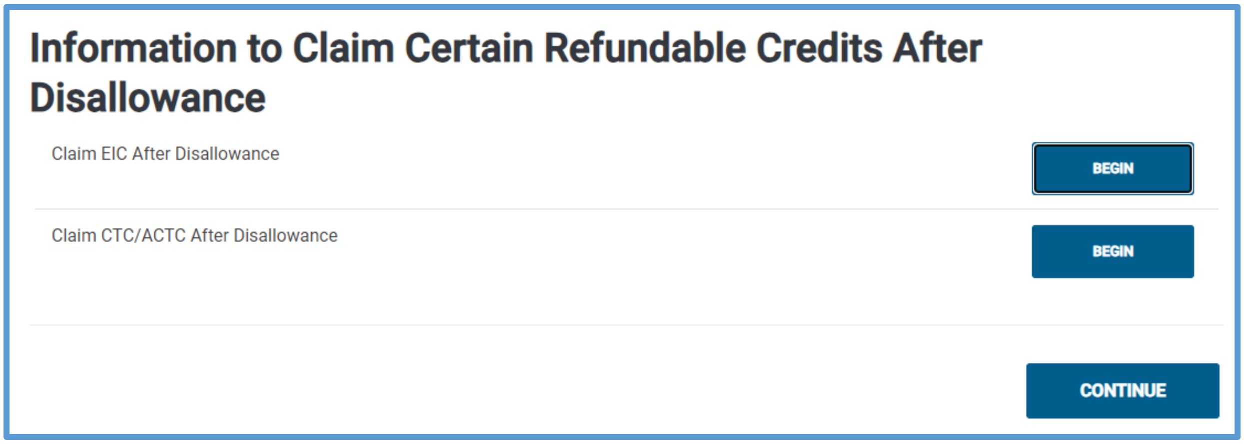
Taxpayers with qualifying children may be able to claim a credit for those children if they meet certain rules. TaxSlayer Pro Online automatically calculates the child tax credit based on the other information you enter in the return. If you want to verify the amount of the child tax credit, view the return summary. To do this, see the *Printing a Return* section.

Rejected Return for Prior Year Disallowance

If the IRS rejects the return due to a disallowance in a prior year, use the following steps from the **Credits** landing page:

1. Click the **Claiming Certain Credits after Disallowance** line.
2. Click the **Information to Claim Certain Credits after Disallowance** line.

TaxSlayer Pro Online displays the **Information to Claim Certain Credits after Disallowance** page:



3. Click the line for the credit that was previously disallowed. .
4. Answer the questions in this section as appropriate based on the answers provided by the taxpayer.

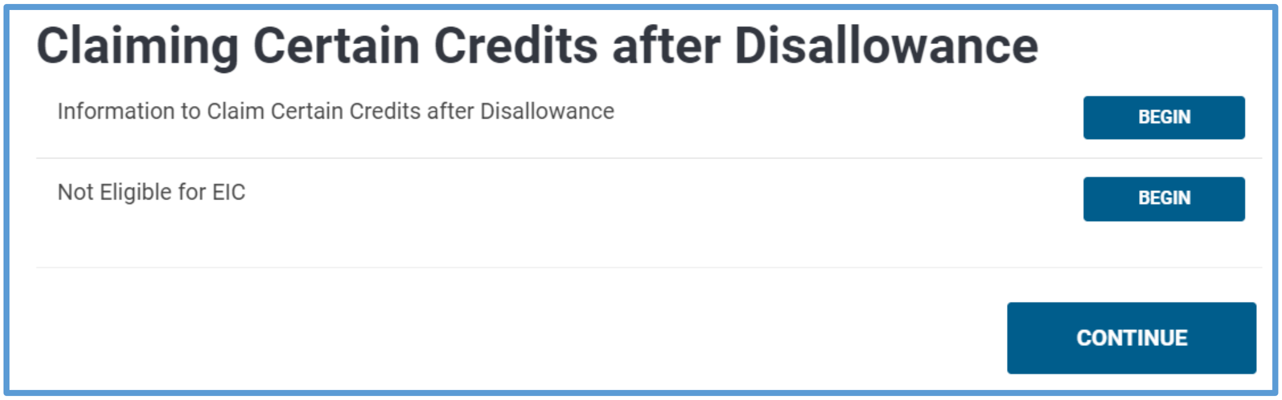
Figuring the Earned Income Tax Credit

If the taxpayer qualifies for the Earned Income Credit (EIC), TaxSlayer Pro Online calculates the credit based on the information you enter in the filing status, personal information, dependent information, and income sections. See those lessons for additional information on completing that information.

If TaxSlayer Pro Online determines that the taxpayer may qualify for EIC, you may still need to answer additional questions to claim EIC after disallowance. Use the following steps from the **Credits landing** page:

1. Click the **Claiming Certain Credits after Disallowance** line.

TaxSlayer Pro Online displays the **Claiming Certain Credits after Disallowance** page:



2. Click the **Information to Claim Certain Credits After Disallowance** line.
3. Click the **Claim EIC After Disallowance** line.

On this page, choose from the following two options:

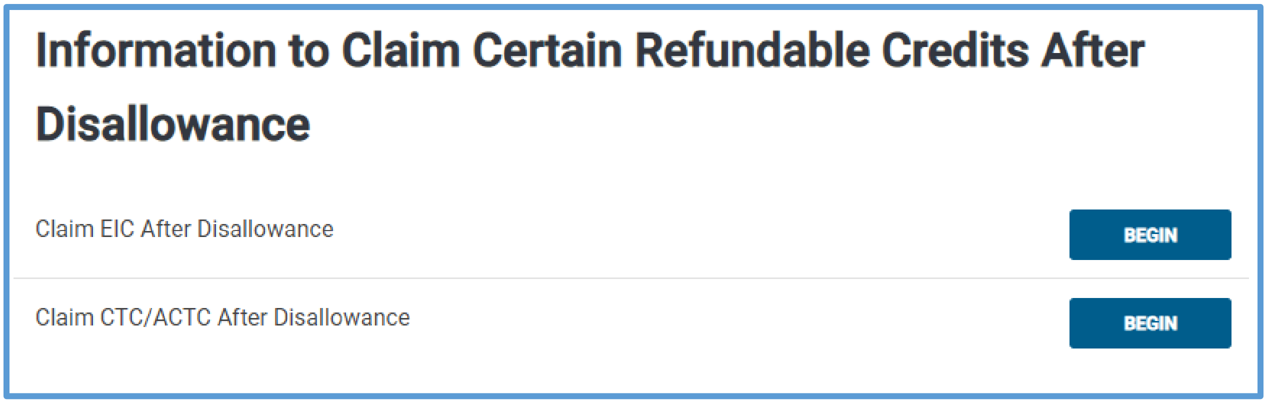
- If the taxpayer was disallowed the earned income credit in a previous year, click the appropriate option.
- If the taxpayer is not eligible for EIC for any other reason, click the appropriate option.

See the following sections for completing information for these two options.

Earned Income Credit Previous Disallowance

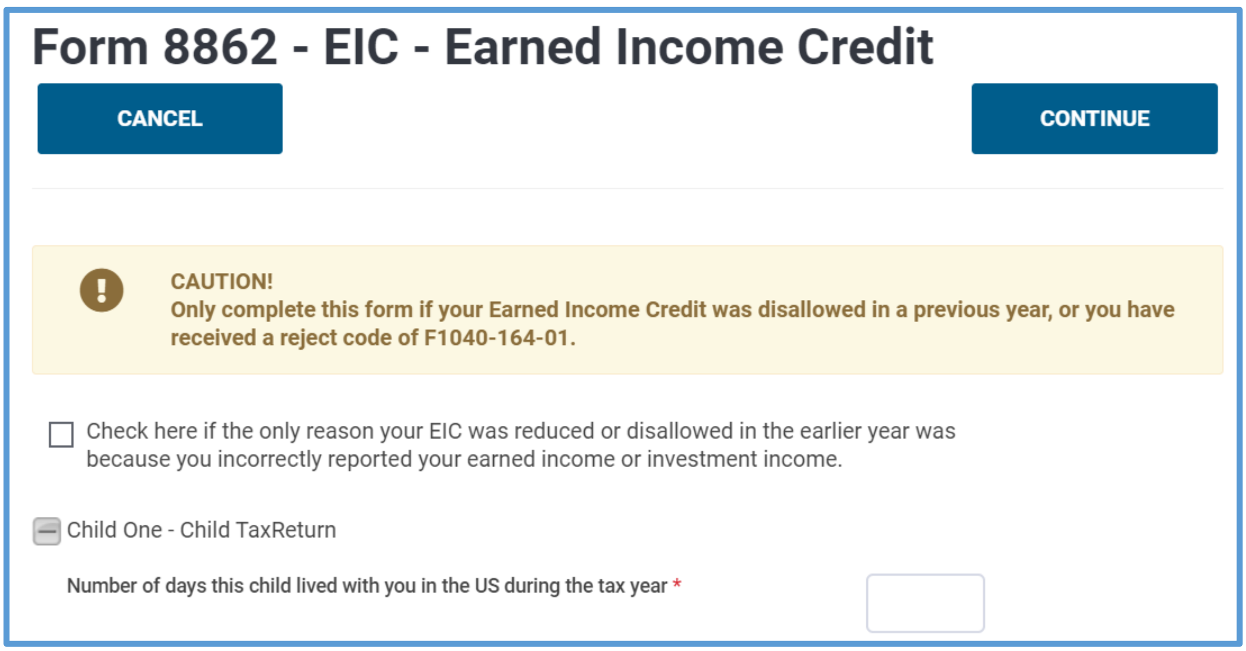
4. If the taxpayer was disallowed the earned income credit in a previous year, click the **Information to Claim Certain Refundable Credits after Disallowance** line.

TaxSlayer Pro Online displays the **Information to Claim Certain Refundable Credits After Disallowance** page:



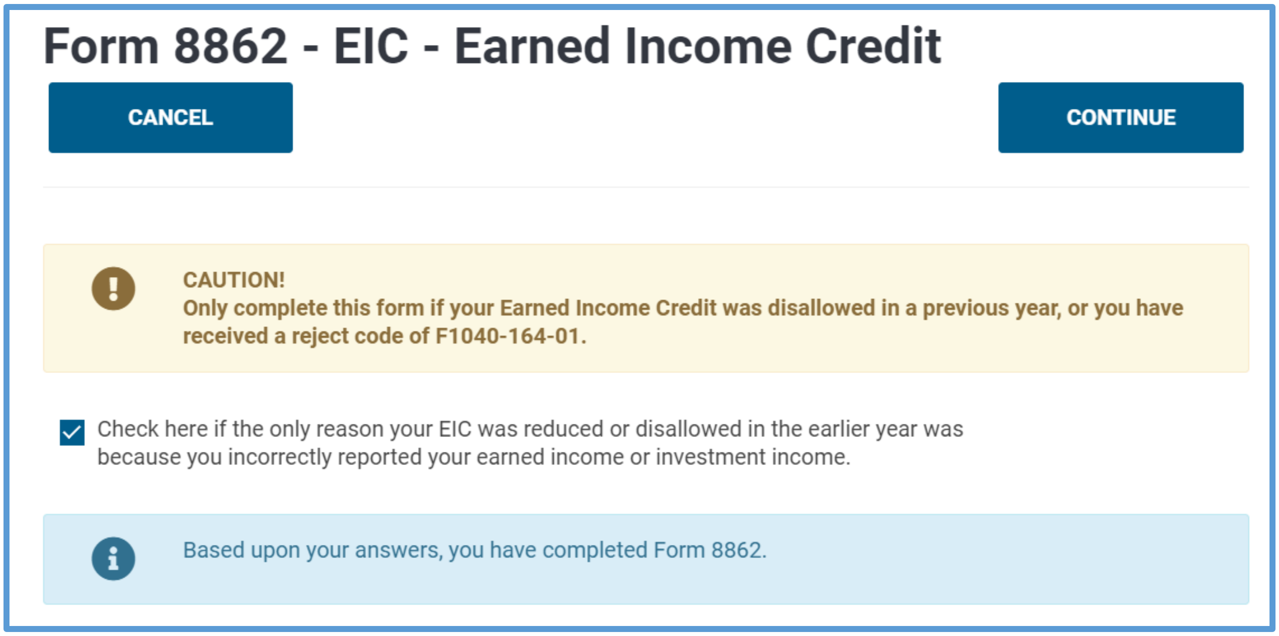
5. Click the **Claim EIC After Disallowance** line.

TaxSlayer Pro Online displays the **Form 8862 – EIC – Earned Income Credit** page:



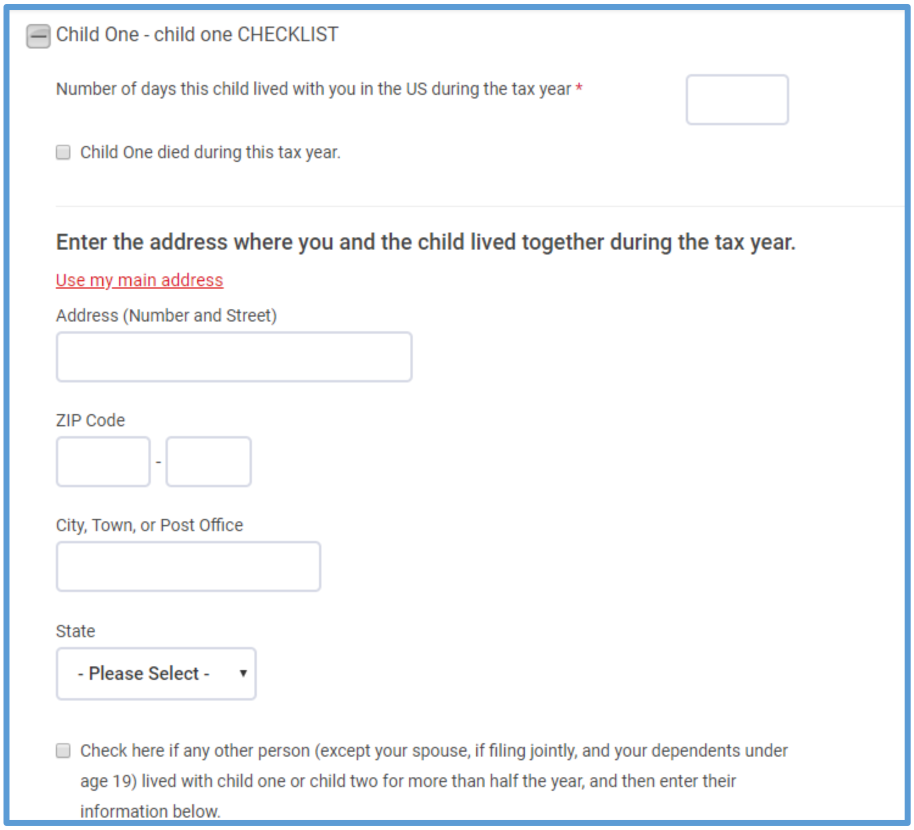
6. Do one of the following:
    a. If the taxpayer incorrectly reported earned income or investment income in a prior year, and that was the only reason for the disallowance, select the check box.

TaxSlayer Pro Online changes the page to show that you completed Form 8862 for the taxpayer:



b. Select a qualifying child.

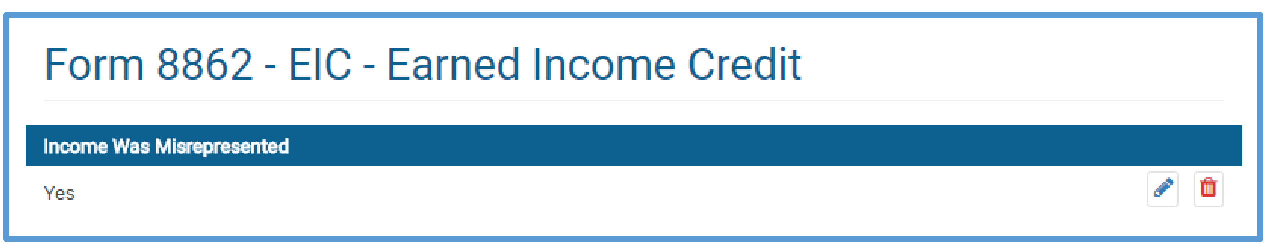
TaxSlayer Pro Online displays the **Form 8862** information to be completed for the qualifying child:



i. Complete all of the information for the child.
ii. Select and complete the information for any other qualifying children.

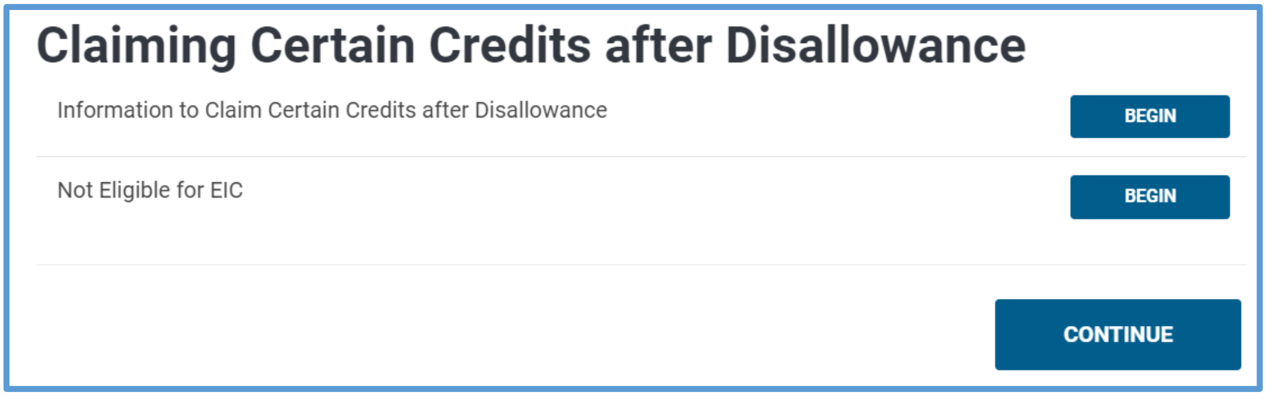
7. Click **Continue**.

TaxSlayer Pro Online displays the **Form 8862 – EIC – Earned Income Credit** page showing a summary of Form 8862:



8. Click **Continue**.

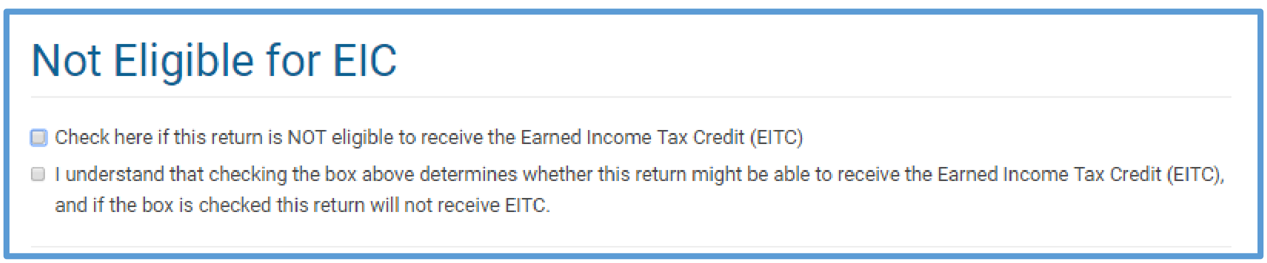
TaxSlayer Pro Online displays the **Claiming Certain Credits after Disallowance** page:



Not Eligible

9. If the taxpayer is not eligible for Earned Income Credit for any reason (including a previous year disallowance), click the **Not Eligible for EIC** line.

TaxSlayer Pro Online displays the **Not Eligible for EIC** page:



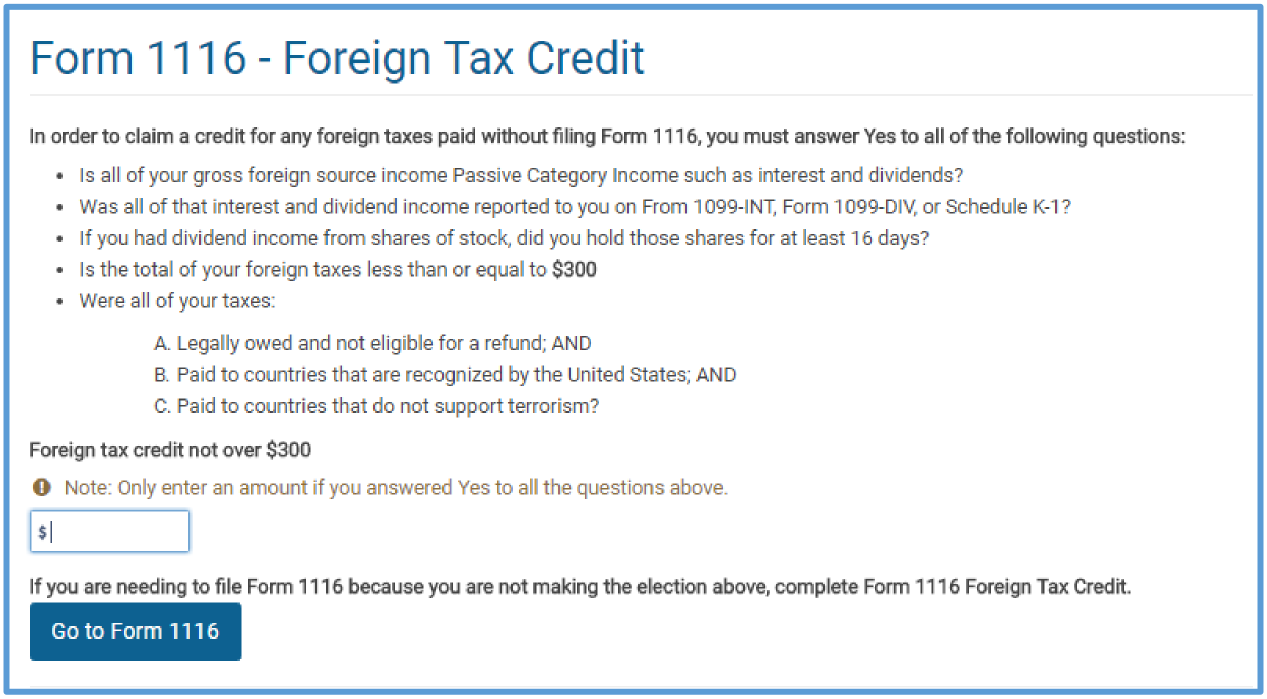
10. Select both the check boxes after reading them carefully to determine that the taxpayer agrees to not claim earned income credit on this return.
11. Click **Continue**.

Calculating the Foreign Tax Credit

If a taxpayer has income from another country, and paid tax to that country, he or she may be eligible to take a credit for the taxes paid. To enter the foreign tax credit, use the following steps from the **Credits landing** page:

1. Click the **Foreign Tax Credit Form 1116** line.

TaxSlayer Pro Online displays the **Form 1116 – Foreign Tax Credit** page:



2. Make sure the taxpayer is eligible for the foreign tax credit, read the information on the page, and verify that the taxpayer meets all of the conditions.
3. Type the amount of foreign tax in the box.
4. Click **Continue**.

NOTE: If the taxpayer needs to complete the entire Form 1116, click **Go to Form 1116** to display the **Foreign Tax Credit** page.

Summary

You should now be able to:

- Enter the child and dependent care credit.
- Enter the earned income tax credit.
- Enter education credits.
- Enter the retirement savings credit.
- Enter the child tax credit.
- Enter the foreign tax credit.

To see a video of what you just learned, go to Entering Basic Credits. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

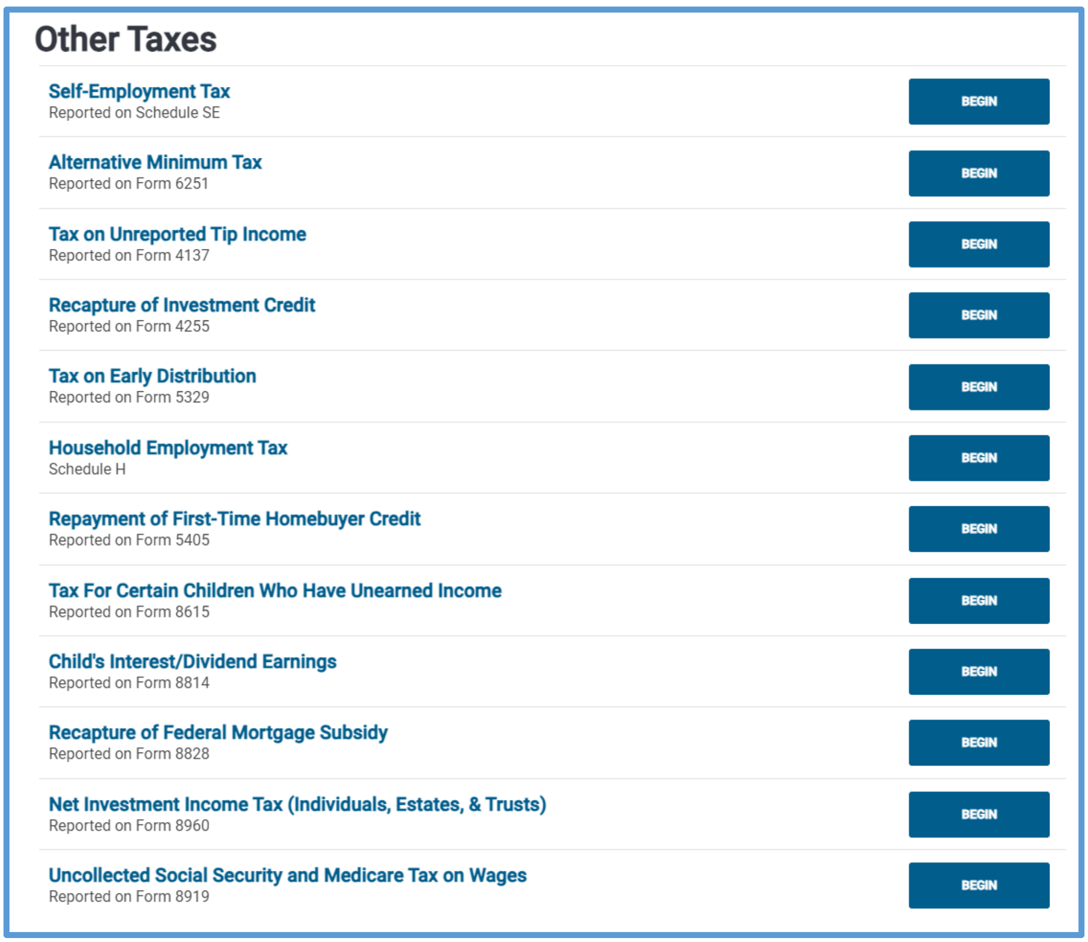
Entering Other Taxes

After completing this topic, you will be able to:

- Explain how TaxSlayer Pro Online calculates self-employment tax.
- Enter unreported Social Security and Medicare taxes.
- Enter a tax on early distributions.
- Repay the first-time homebuyer credit.
- Report the tax on a child's interest and dividends.
- Enter uncollected Social Security and Medicare tax on wages.

Some taxpayers may have other taxes added to the return. This lesson covers those taxes. To report those taxes, use the following steps:

1. In the Federal Section, find the **Other Taxes** landing page, as shown below:



2. Use this page as the starting point for each section in this lesson.

Understanding Self-Employment Tax Calculations

Self-employed taxpayers must pay self-employment tax in order to contribute to Social Security and Medicare. If the taxpayer has a business and you entered a Schedule C, TaxSlayer Pro Online automatically calculates self-employment tax and enters it on the tax return. Make sure you entered all income from the self-employed taxpayer or spouse on the Schedule C to calculate the self-employment taxes and the automatic adjustment to income for the deductible portion of this tax.

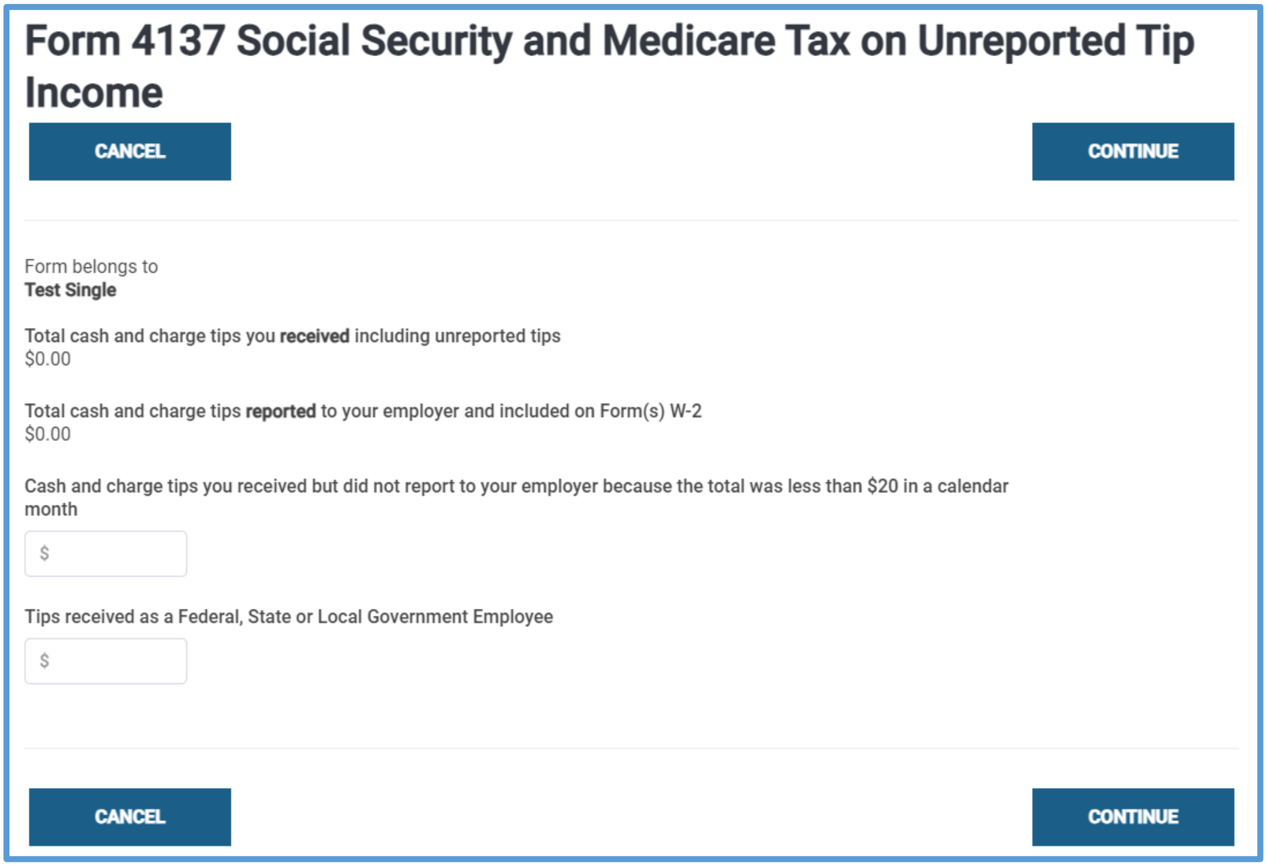
If you need to enter other income or make adjustments on Schedule SE, you should use the Schedule C to ensure proper calculations in the return.

Entering Unreported Social Security and Medicare Tax

Taxpayers who receive tips must report those tips in order to contribute to Social Security and Medicare. If the taxpayer has tips included on Forms W-2, TaxSlayer Pro Online automatically calculates this tax and enters it on Form 4137 in the tax return. If the taxpayer has unreported tips not reported elsewhere, you need to adjust the tip income. To do this, use the following steps from the **Other Taxes** landing page:

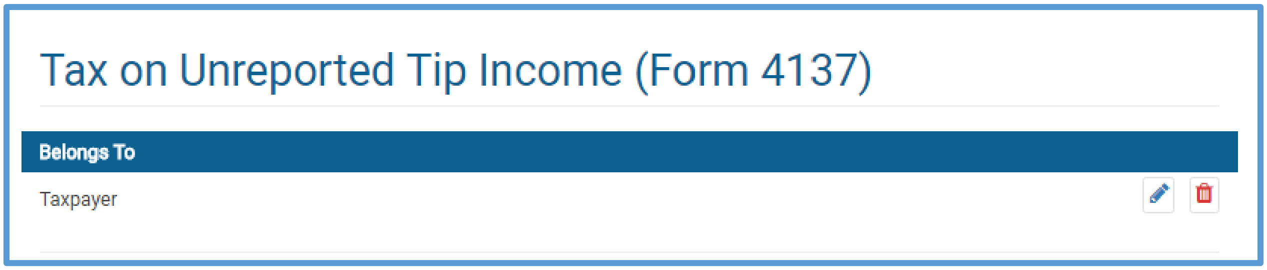
1. Click the **Tax on Unreported Tip Income** line.

TaxSlayer Pro Online displays the **Form 4137 Social Security and Medicare Tax on Unreported Tip Income** page:



2. If this return is for a married couple, select whether you are completing this form for the taxpayer or the spouse.
3. TaxSlayer Pro Online displays the amount of tips already reported. Verify this amount for accuracy.
4. Type the amount of tips not reported to the taxpayer's employer or tips received as a government employee in the appropriate box.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Tax on Unreported Tip Income (Form 4137)** page:



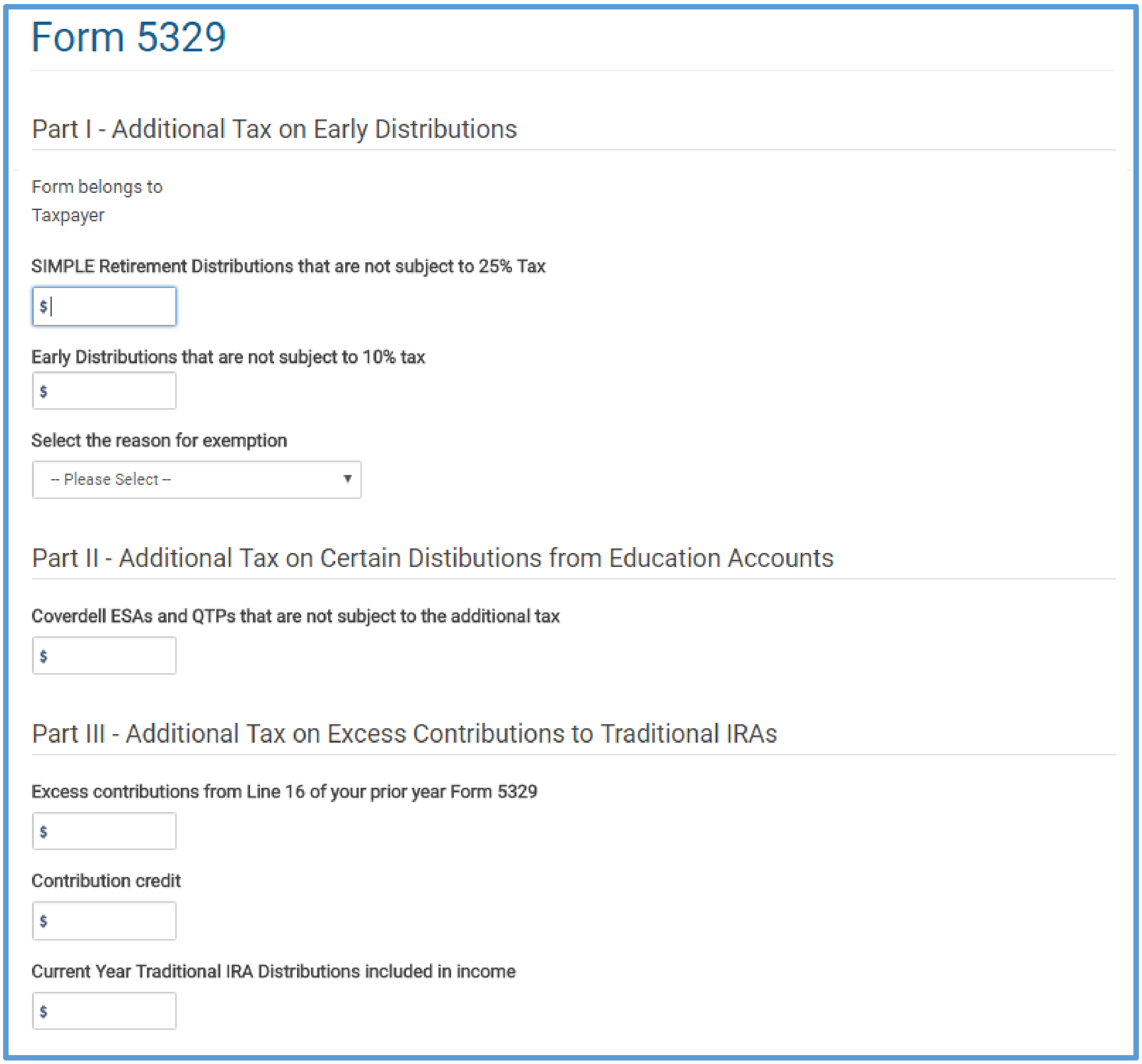
6. Click **Continue**.

Entering a Tax on Early Distributions

Taxpayers who receive distributions on retirement plans may be required to pay a tax on any early distributions. TaxSlayer Pro Online automatically calculates Form 5329 based on the type of distribution. If you need to enter additional information, or an exclusion on the tax, use the following steps from the **Other Taxes** landing page:

1. Click the **Tax on Early Distribution** line.

TaxSlayer Pro Online displays the **Form 5329** page:



Form 5329

Part I - Additional Tax on Early Distributions

Form belongs to
Taxpayer

SIMPLE Retirement Distributions that are not subject to 25% Tax
$

Early Distributions that are not subject to 10% tax
$

Select the reason for exemption
-- Please Select --

Part II - Additional Tax on Certain Distibutions from Education Accounts

Coverdell ESAs and QTPs that are not subject to the additional tax
$

Part III - Additional Tax on Excess Contributions to Traditional IRAs

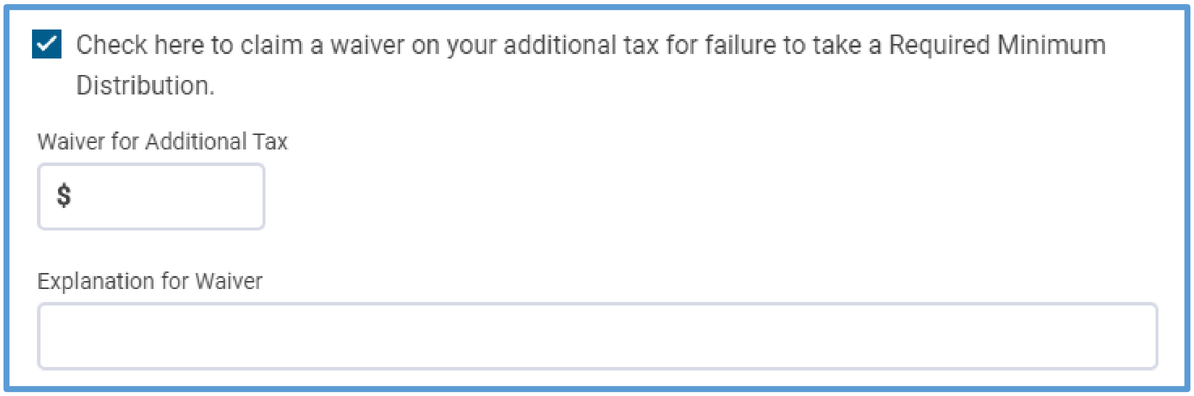
Excess contributions from Line 16 of your prior year Form 5329
$

Contribution credit
$

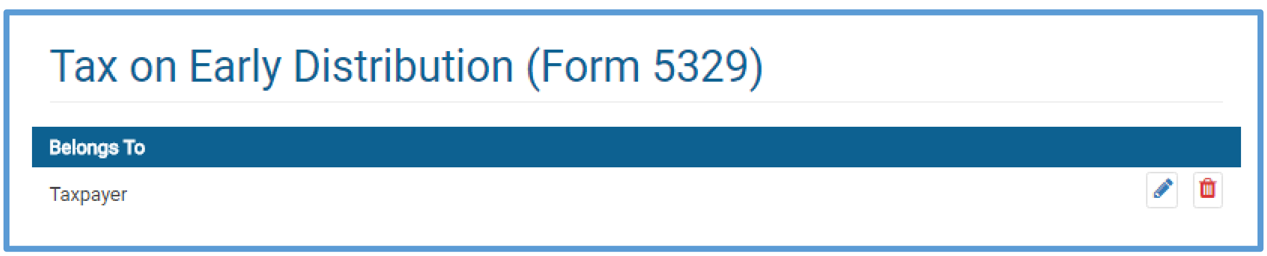
Current Year Traditional IRA Distributions included in income
$

2. If this return is for a married couple, select whether you are completing this form for the taxpayer or the spouse.
3. Type the amount of any early distributions that qualify for an exclusion of the tax in the appropriate box.
4. Select the reason for exemption of tax from the drop-down list.
5. Click **Continue**.

TIP: If the taxpayer needs to waive the additional tax for failure to take a Required Minimum Distribution (RMD), select the appropriate check box, and type the reason for the waiver request**.**



TaxSlayer Pro Online displays the **Tax on Early Distribution (Form 5329)** page:



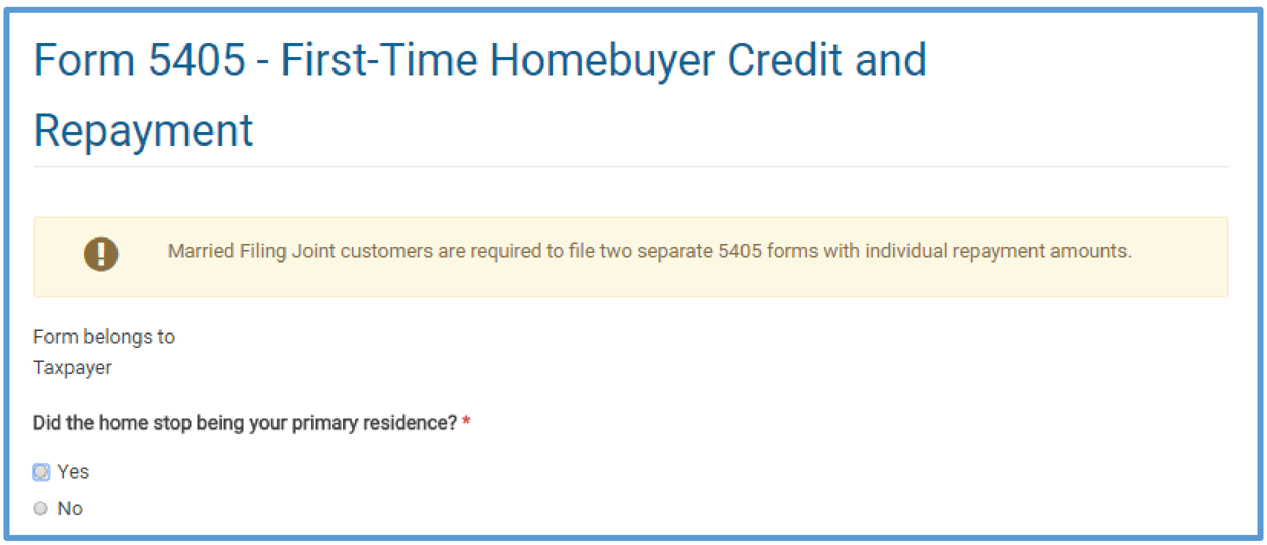
6. Click **Continue**.

Repaying the First-Time Homebuyer's Credit

Some taxpayers who purchased a home in 2008-2011 received a credit for part of the amount of the purchase. Depending on the year, the credit may have been a loan to the taxpayer and must be repaid. If the taxpayer needs to repay the first-time homebuyer's credit, use the following steps from the **Other Taxes** landing page:

1. Click the **Repayment of First-time Homebuyer Credit** line.

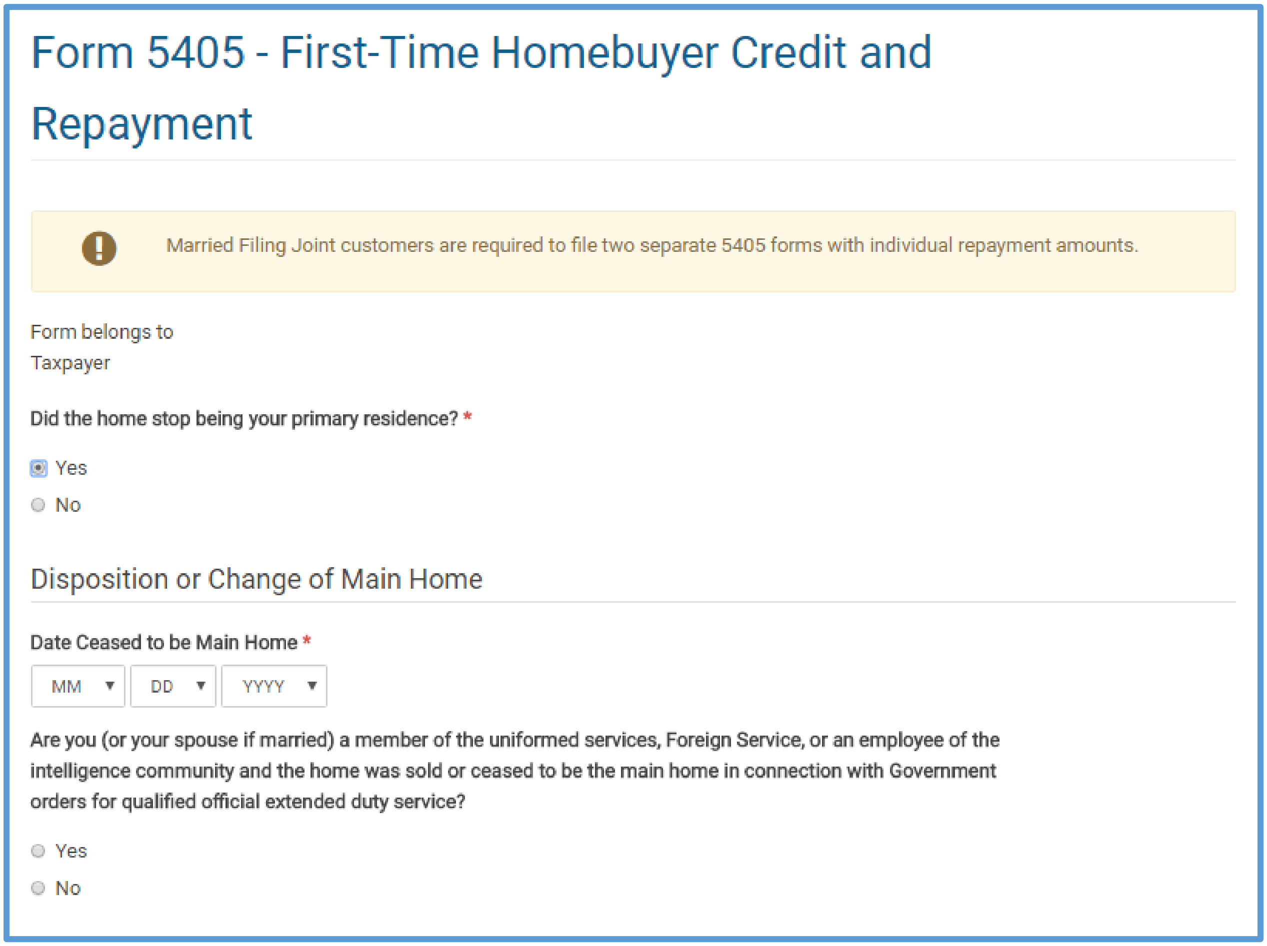
TaxSlayer Pro Online displays the **Form 5405 – First-Time Homebuyer Credit and Repayment** page:



2. If this return is for a married couple, select whether you are completing this form for the taxpayer or spouse.
3. Answer the question concerning whether the home stopped being the taxpayer's primary residence.

Change of Main Home

If you selected **Yes**, TaxSlayer Pro Online displays the **Disposition or Change of Main Home** section:



4. Select the date the home stopped being the taxpayer's primary residence.
5. Select an answer to the question concerning whether the taxpayer or spouse is a member of uniformed services or other qualified service orders.

If you answer **No** to the question, TaxSlayer Pro Online displays the **Type of Disposition/Change** section:

Type of Disposition/Change

- ☐ I sold the home (including through foreclosure) to an unrelated person and had a gain on the sale.
- ☐ I sold the home (including through foreclosure) to an unrelated person and DID NOT have a gain on the sale.
- ☐ I sold the home to a related person.
- ☐ I converted the home to a rental or business use OR I still own the home but no longer use it as my main home.
- ☐ I transferred the home to my spouse or ex-spouse as part of my divorce settlement. (Enter the name of your spouse or ex-spouse below.)
- ☐ The taxpayer who claimed the credit died.
- ☐ My home was destroyed, condemned, or disposed of under threat of condemnation and I had a gain. Check applicable boxes below.
- ☐ My home was destroyed, condemned, or disposed of under threat of condemnation and I did not have a gain. Check the applicable boxes below.

6. Select the check box for the reason the home ceased to be the taxpayer's main home.

TaxSlayer Pro Online displays additional sections based on the check box you selected. For this example, TaxSlayer Pro Online displays the **Repayment of Credit** and **Sale of Home** sections:

Repayment of Credit

Please enter the full credit amount you received on Form 5405 for 2008, 2009, 2010, or 2011. (This amount would have been 10% of the purchase price up to either $7,500 or $8,000) *

$

Enter the full amount repaid with your prior year tax returns

$

We automatically calculate your required payment amount based on the total credit you received. If you would like to add an additional amount to what is already calculated, enter that amount here

$

*Click here to visit the IRS First Time Homebuyer credit account look-up tool.

Sale Of Home

Selling price of home, insurance proceeds, or gross condemnation award *

$

Selling expenses (including commissions, advertising and legal fees, and seller-paid loan charges) or expenses in getting the condemnation award

$

Adjusted basis of home sold (from line 13 of Worksheet 1 in Pub. 523)

$

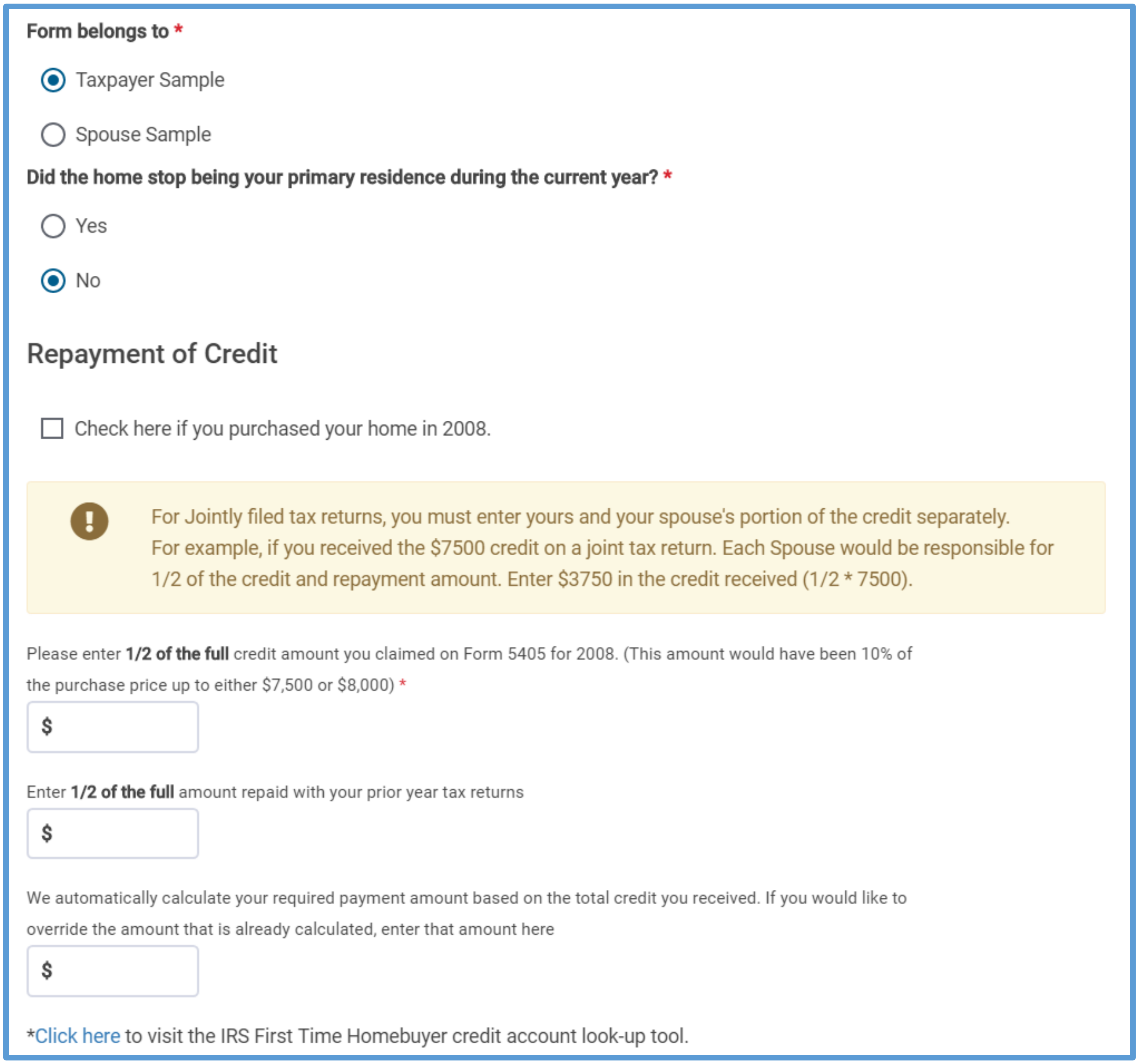
Enter the first-time homebuyer credit claimed on Form 5405 minus the amount you repaid with your prior year tax returns *

$

7. Read each line and type the applicable amount in the box.
8. Click **Continue**.

Continued Primary Residence

If you selected **No**, TaxSlayer Pro Online displays the **Repayment of Credit** section:



1. Read each line carefully and type the appropriate amount in the box.
2. Click **Continue**.

TaxSlayer Pro Online displays the **Form 5405 – First-Time Homebuyer Credit and Repayment** page:

Form 5405 - First-Time Homebuyer Credit and Repayment

Belongs To	Prior Year Credit	Prior Year Repayment
Taxpayer	$6,000.00	$3,000.00

3. Click **Continue**.

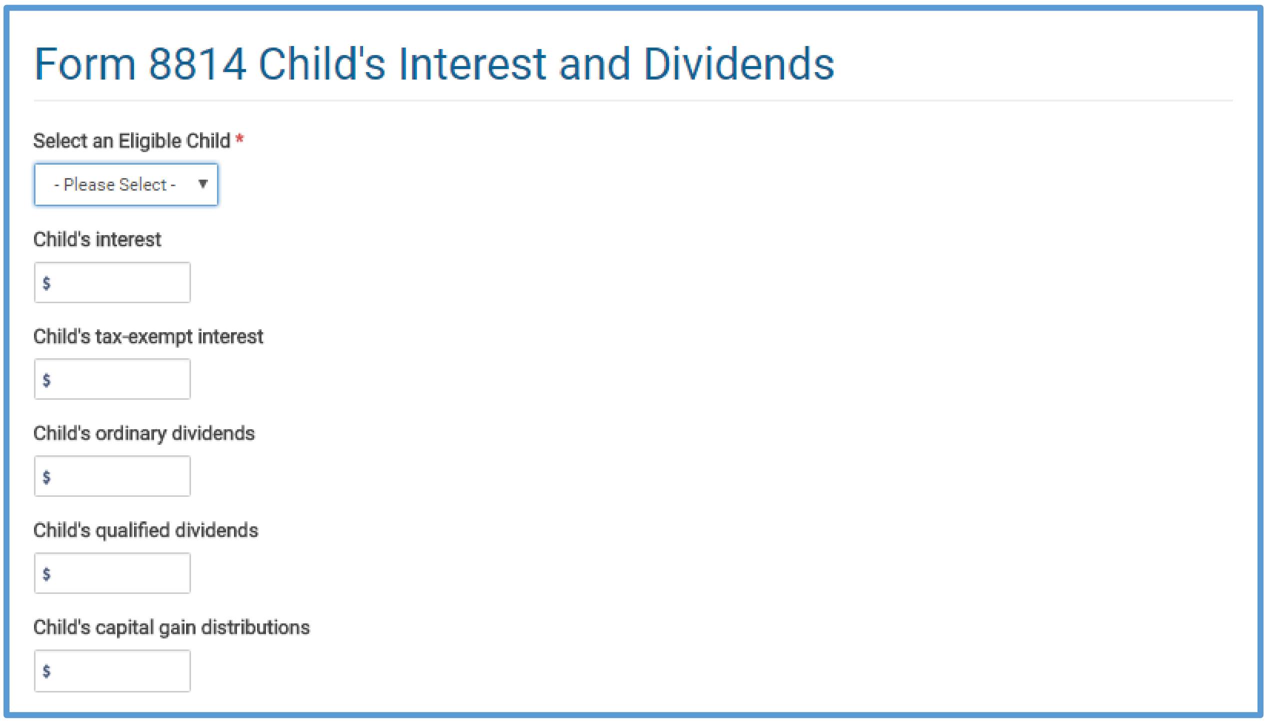
NOTE: Remember to ask the taxpayer if he or she received the first-time homebuyer credit if you complete a Schedule A with either a mortgage interest deduction or a real estate property tax deduction. The taxpayer must repay a minimum of $500 each year. If you do not enter the minimum repayment for the taxpayer, the IRS will reject the tax return.

Reporting a Child's Interest and Dividends

Some taxpayers have children who receive investment income. In some cases, the taxpayer can report the child's investment income on his or her tax return instead of filing a separate return for the child. If you need to enter a child's interest and dividend income, use the following steps from the **Other Taxes** landing page:

1. Click the **Child's Interest/Dividend Earnings** line.

TaxSlayer Pro Online displays the **Form 8814 Child's Interest and Dividends** page:



Form 8814 Child's Interest and Dividends

Select an Eligible Child *

- Please Select -

Child's interest

$

Child's tax-exempt interest

$

Child's ordinary dividends

$

Child's qualified dividends

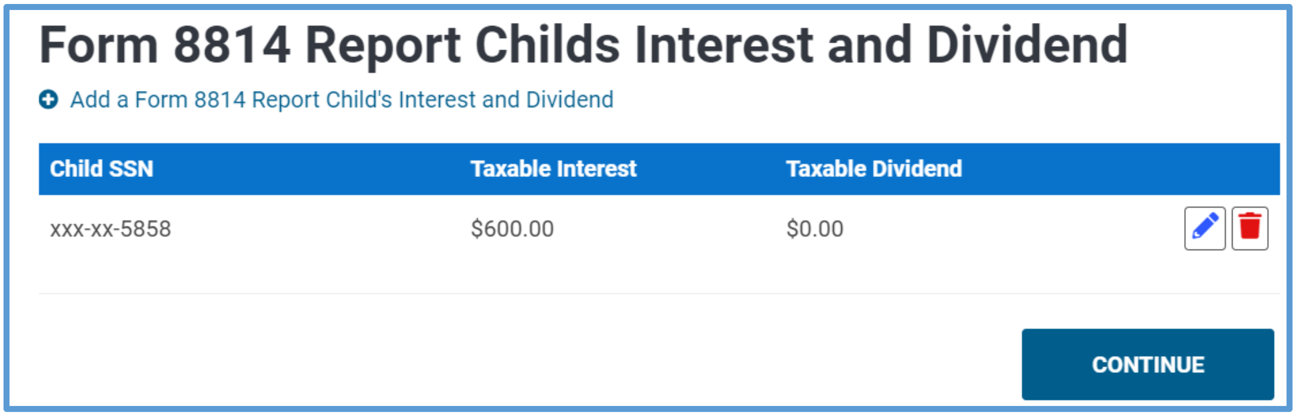
$

Child's capital gain distributions

$

2. Select an eligible child from the drop-down list.
3. Read each line carefully and type the child's interest and dividends in the appropriate boxes.
4. Click **Continue**.

TaxSlayer Pro Online displays the **Form 8814 Report Childs Interest and Dividend** summary page:



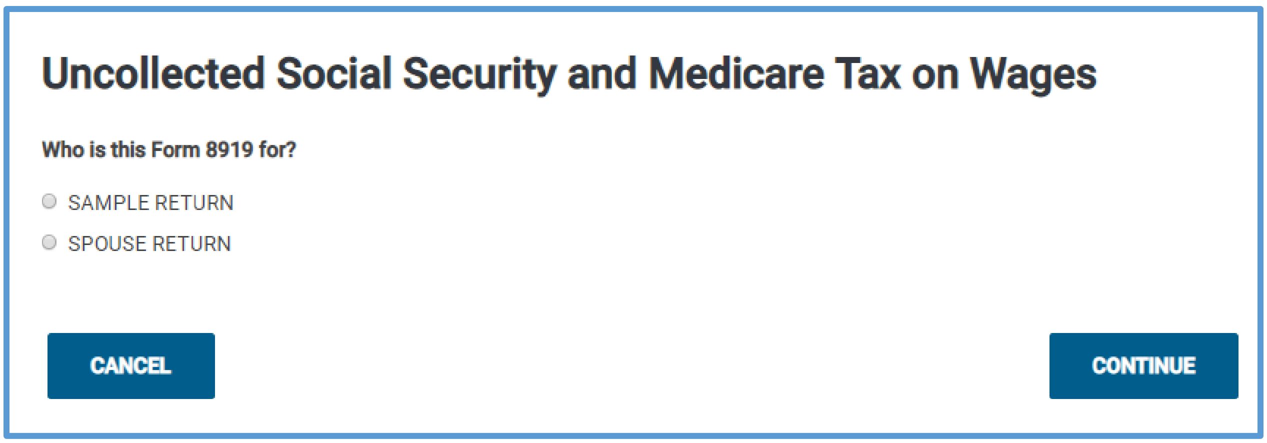
5. If the taxpayer has more children for which you need to enter interest and dividends, click **Add** and use the same steps to add each child's investment income.
6. When you finish adding children's investment income, click **Continue**.

Entering Uncollected Social Security and Medicare Tax on Wages

Some taxpayers need to figure and report their share of the uncollected Social Security and Medicare taxes due on compensation. This usually applies if the taxpayer was an employee but treated as an independent contractor by the employer.

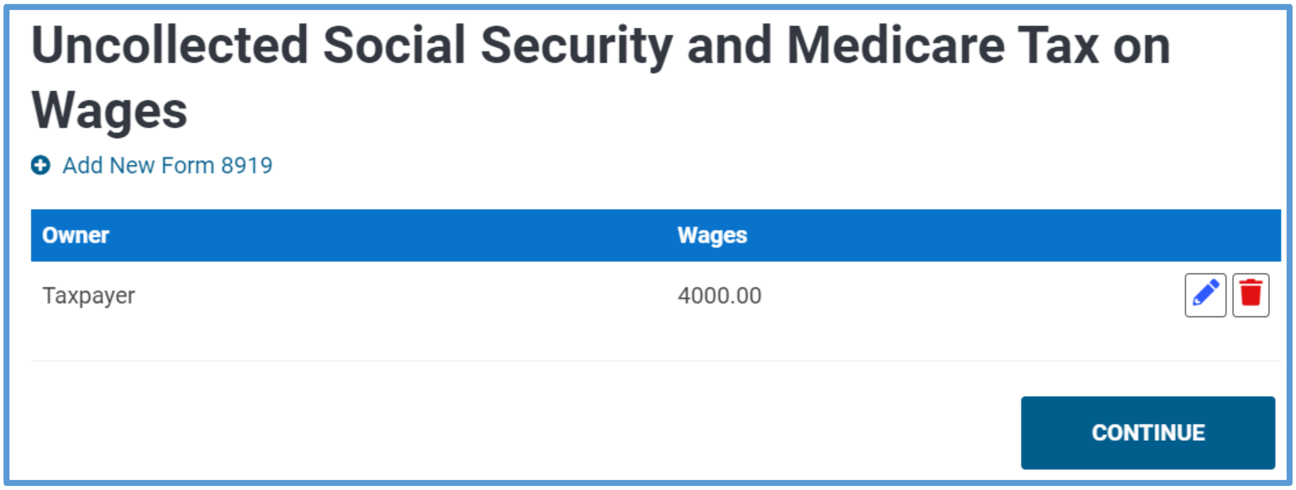
1. Click the **Uncollected Social Security and Medicare Tax on Wages** line.

TaxSlayer Pro Online displays the **Uncollected Social Security and Medicare Tax on Wages** page:



2. If this return is for a married couple, select whether you are completing this form for the taxpayer or the spouse.
3. Type the employer's name and Federal ID number.
4. Type the date of IRS determination of correspondence.
5. Type the total wages for which the employer did not withhold Social Security or Medicare taxes.
6. Indicate whether the taxpayer received a Form 1099-MISC.
7. Select the reasons the taxpayer needs to file Form 8919.
8. Click **CONTINUE.**

TaxSlayer Pro Online displays the **Uncollected Social Security and Medicare Tax on Wages** page:



Click **CONTINUE.**

Summary

You should now be able to:

- Explain how TaxSlayer Pro Online calculates self-employment tax.
- Enter unreported Social Security and Medicare taxes.
- Enter a tax on early distributions.
- Repay the first-time homebuyer credit.
- Report the tax on a child's interest and dividends.
- Enter Uncollected Social Security and Medicare tax on wages.

To see a video of what you just learned, go to Entering Other Taxes. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Entering Payments and Estimates

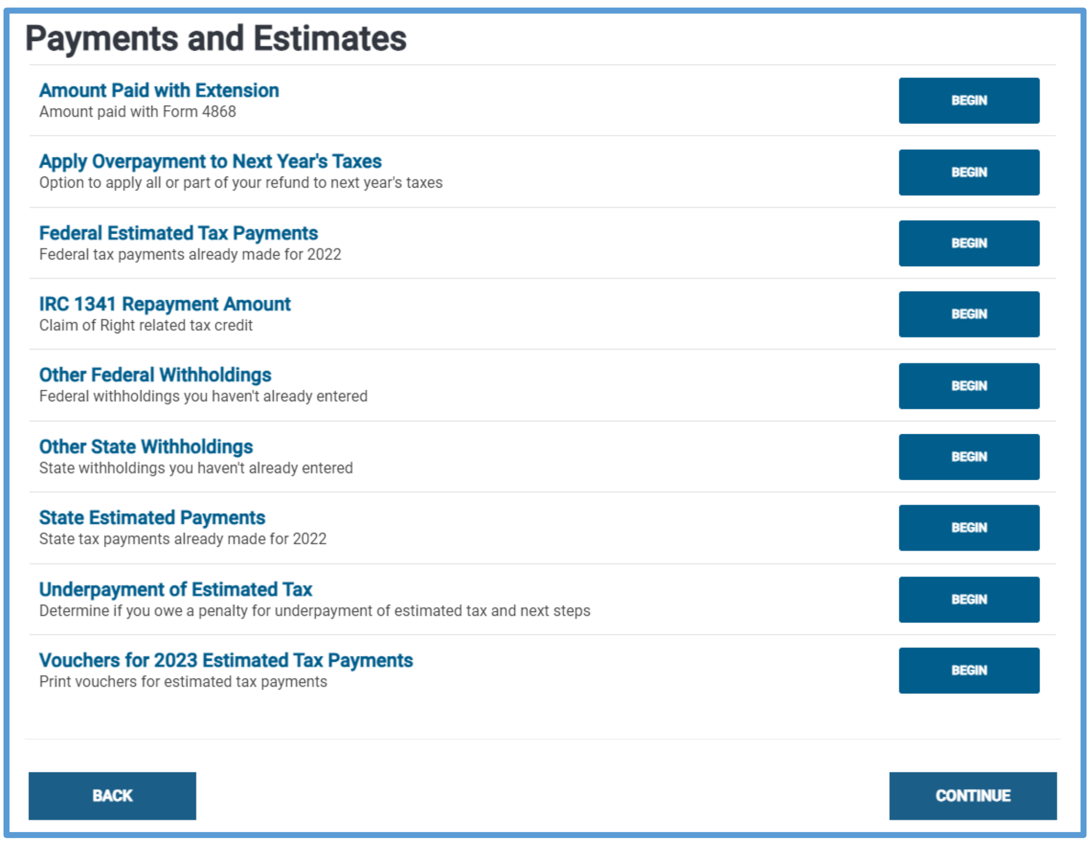
After completing this topic, you will be able to:

- Enter federal estimated tax payments.
- Enter state estimated tax payments.
- Enter other federal withholding.
- Figure an underpayment of estimated tax.
- Complete estimated tax vouchers.
- Complete any miscellaneous forms.

Entering Federal Estimated Tax Payments

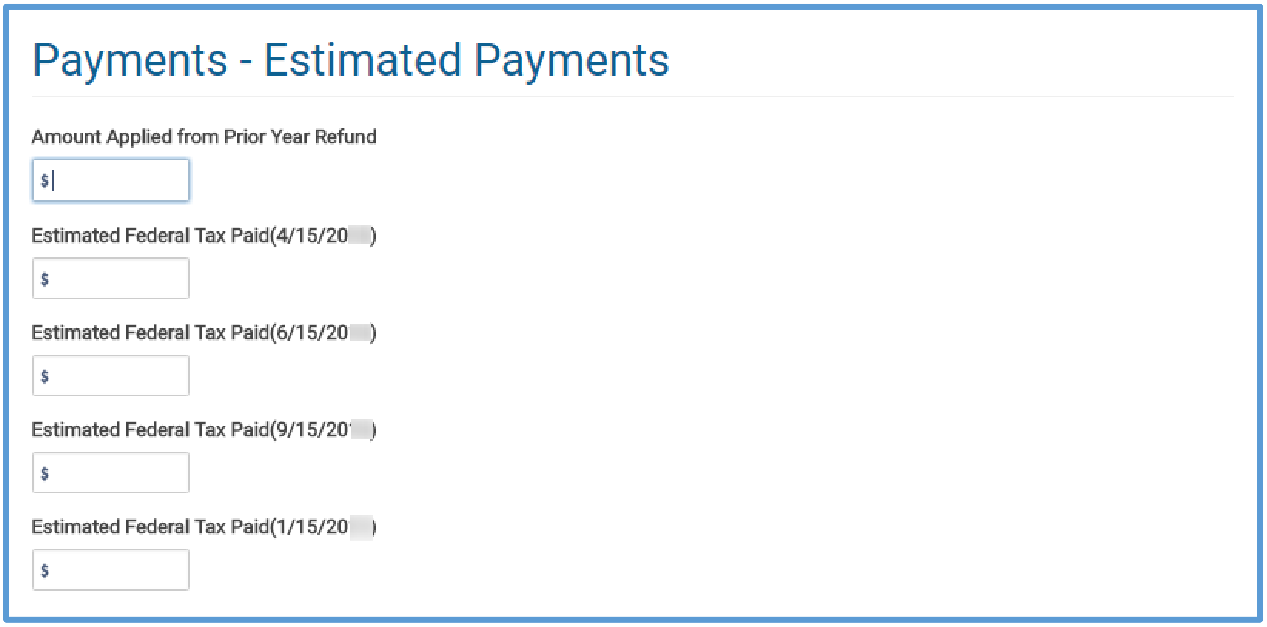
Some taxpayers pay Federal estimated tax payments during the year. If the taxpayer did so, you can add those to the return so the taxpayer gets credit for paying the estimated payments. To add these payments, use the following steps:

1. Find the **Payments and Estimates** page, as shown below:



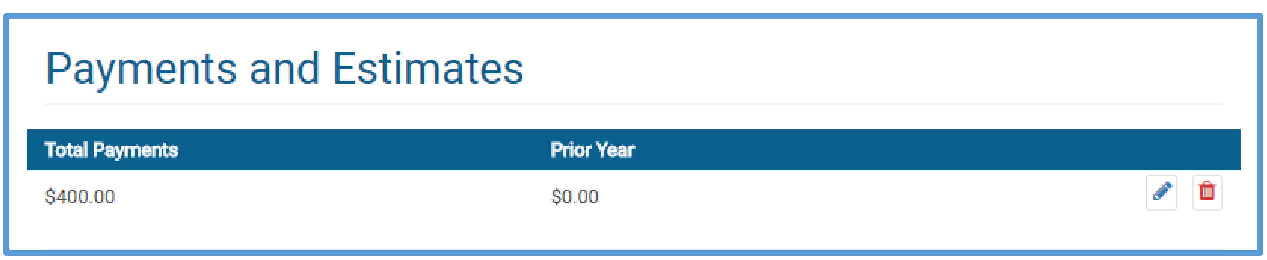
2. Click the **Federal Estimated Tax Payments** line.

TaxSlayer Pro Online displays the **Payments – Estimated Payments** page:



3. Type the amount of any payments the taxpayer applied to estimated taxes from the previous year's refund in the first box.
4. In the remaining boxes, type the amount of any estimated tax payment in the appropriate box based on the payment date.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Payments and Estimates** page listing the estimated tax payments you entered:



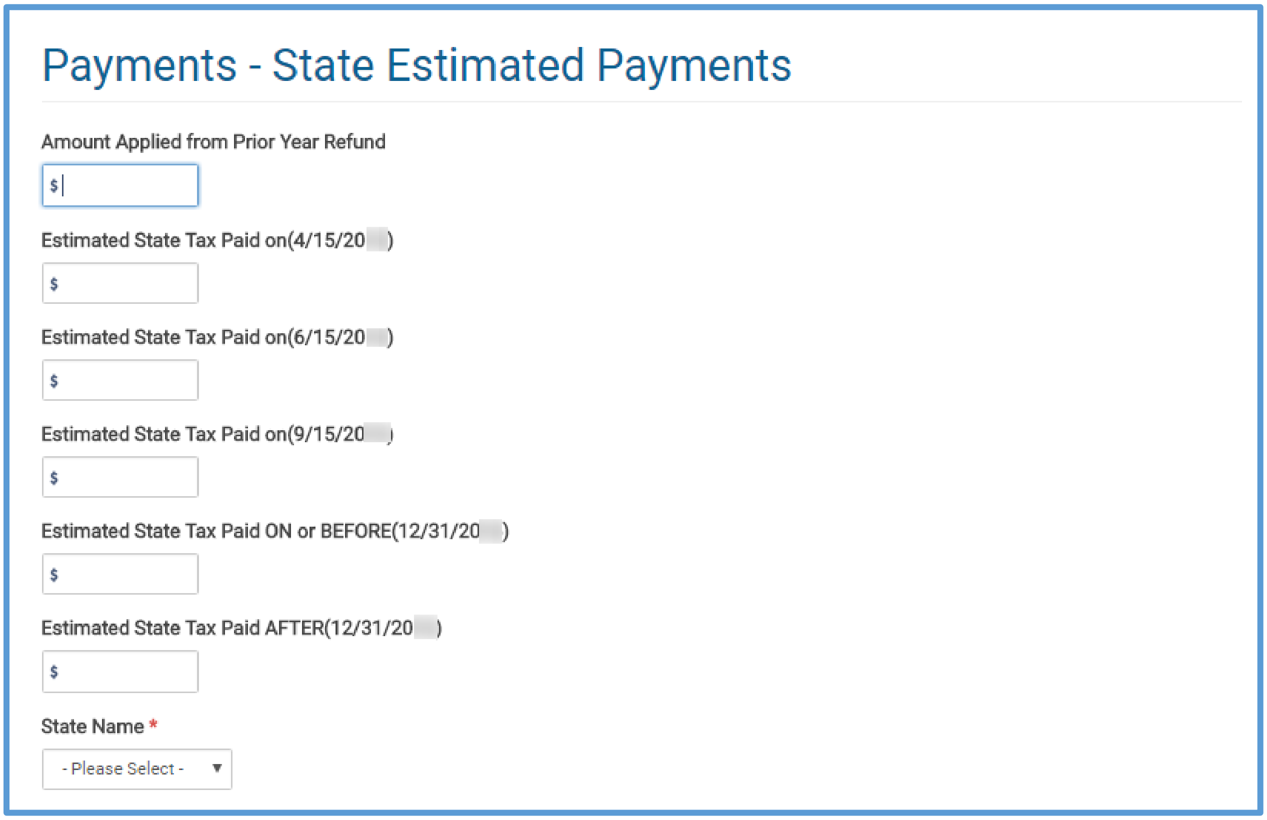
6. Click **Continue**.

Entering State Estimated Tax Payments

Some taxpayers pay state estimated tax payments during the year. To add state estimated tax payments, use the following steps from the **Payments and Estimates** page:

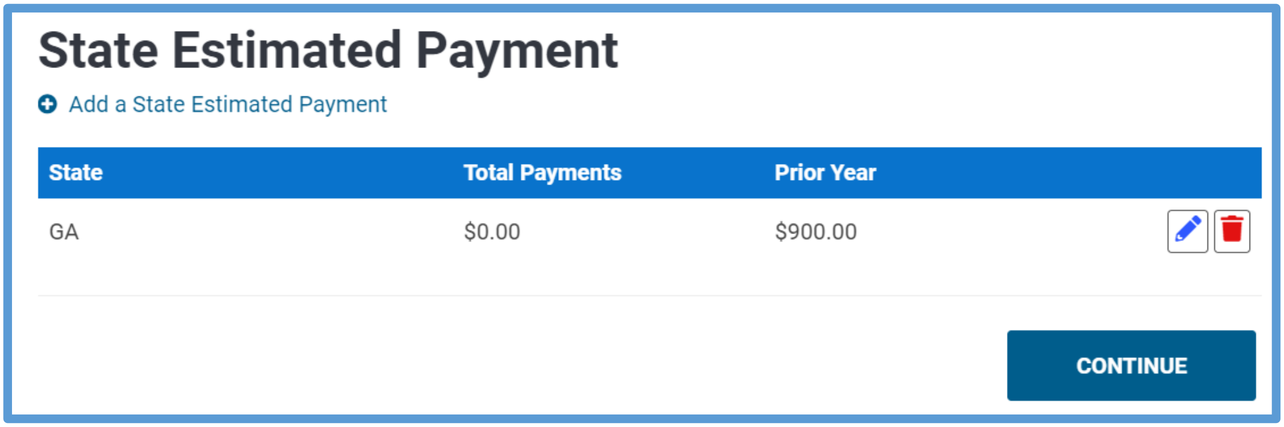
1. Click the **State Estimated Payments** line.

TaxSlayer Pro Online displays the **Payments – State Estimated Payments** page:



2. Type the amount of any payments the taxpayer applied to estimated taxes from the previous year's refund in the first box.
3. In the remaining boxes, type the amount of any estimated tax payment in the appropriate box based on the payment date.
4. Select the state to which the taxpayer paid these payments from the **State Name** drop-down list.
5. Click **Continue**.

TaxSlayer Pro Online displays the **State Estimated Payment** page listing the estimated tax payments you entered:



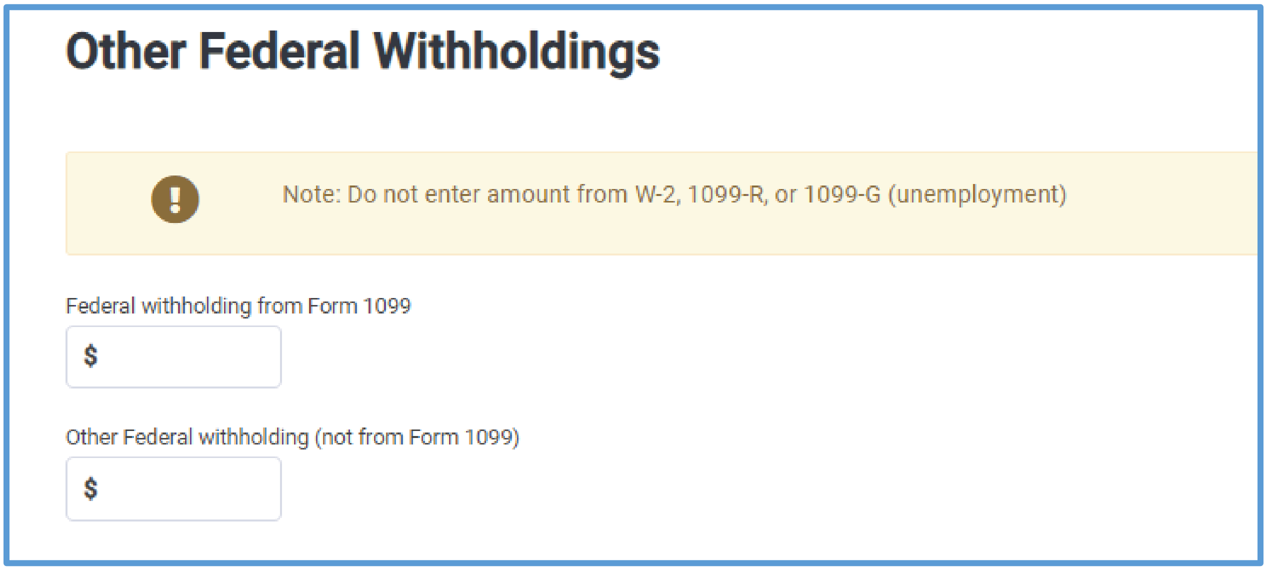
6. If the taxpayer made estimated tax payments to more than one state, click **Add** for each state and use the same steps to add estimated tax payments for that state.
7. Click **Continue**.

Entering Other Federal Withholdings

Some taxpayers pay other withholdings to the IRS during the year. If the taxpayer did so, you can add those to the return so the taxpayer gets credit for paying that tax. To add federal withholdings not listed elsewhere on the return, use the following steps from the **Payments and Estimates** page:

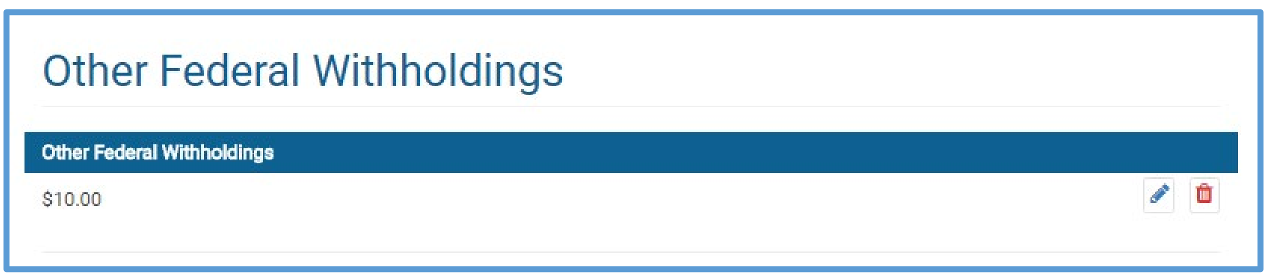
8. Click the **Other Federal Withholdings** line.

TaxSlayer Pro Online displays the **Other Federal Withholdings** page:



9. Type the amount of federal withholdings you have not previously entered in the tax return on the appropriate line.
10. Click **Continue**.

TaxSlayer Pro Online displays the **Other Federal Withholdings** page with the withholding listed:



11. Click **Continue**.

Calculating an Underpayment of Estimated Tax

If the taxpayer did not pay enough tax during the year, either through withholdings or estimated tax payments, TaxSlayer Pro Online displays a warning during the e-file process.

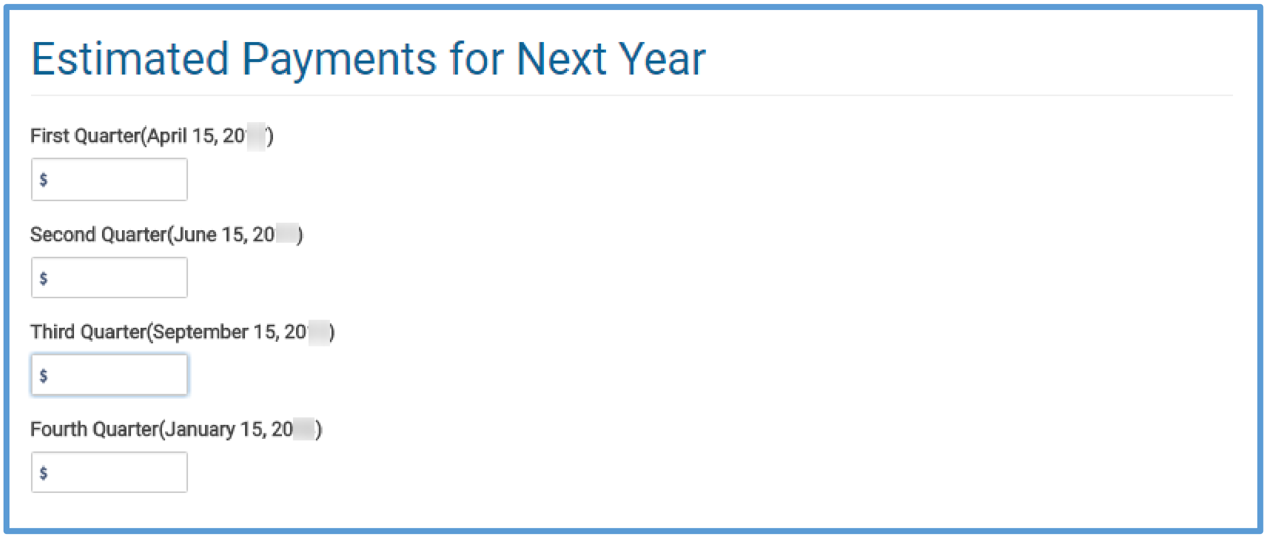
NOTE: Continue through the warning **without** adding Form 2210. Calculating the underpayment of estimated tax penalty is out of scope.

Creating Estimated Payment Vouchers

Some taxpayers need to pay estimated tax payments each year and want you to create the vouchers they need to use to make those payments. To create estimated tax payment vouchers, use the following steps from the **Payments and Estimates** page:

1. Click the **Vouchers for Estimated Tax Payments** line.

TaxSlayer Pro Online displays the **Estimated Payments for Next Year** page:

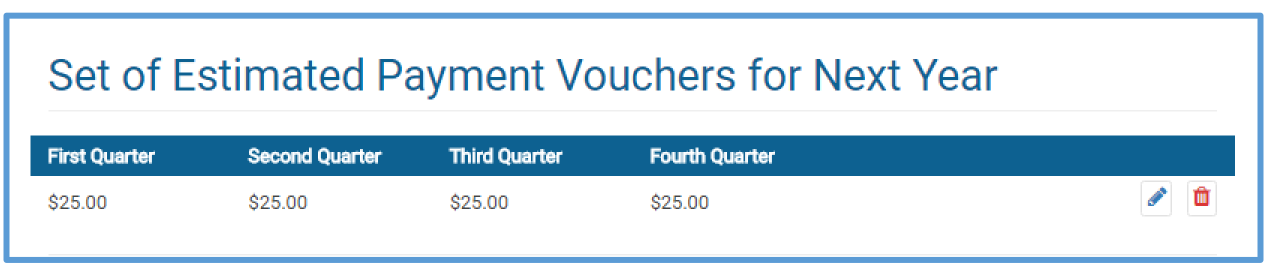


2. Type the amount of estimated payment for each quarter in the appropriate box.

TIP: Use the IRS instructions for Form 1040-ES to figure the amount of estimated tax the taxpayer needs to pay for each quarter. You can use their total tax minus payments on this year's return as a guide.

3. Click **Continue**.

TaxSlayer Pro Online displays the **Set of Estimated Payment Vouchers for Next Year** page:


Set of Estimated Payment Vouchers for Next Year

First Quarter	Second Quarter	Third Quarter	Fourth Quarter
$25.00	$25.00	$25.00	$25.00

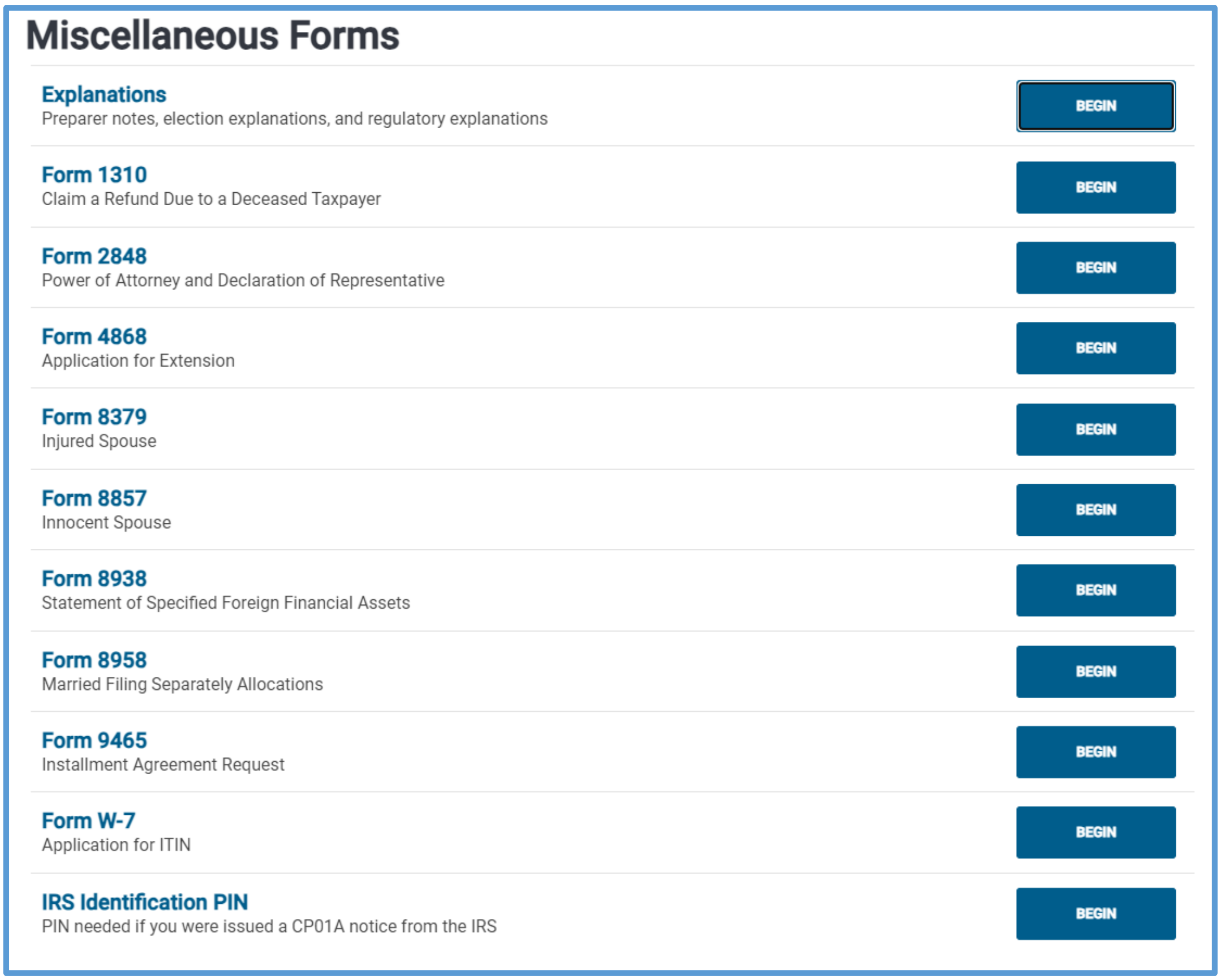
4. Click **Continue**.

Adding Miscellaneous Forms

In some cases, you need to complete other forms for a taxpayer. This can include an application for an extension, application for an ITIN, or you may need to enter an Identity Theft PIN for IRS identification. To do this, use the following steps:

1. From the Federal Section, click **Miscellaneous Forms** from the left navigation panel.

TaxSlayer Pro Online displays the **Miscellaneous Forms** page:



TIP: To complete Form W-7, Application for ITIN for Person(s) on a return, type *000-00-0000* for the taxpayer's Social Security number in Basic Information.

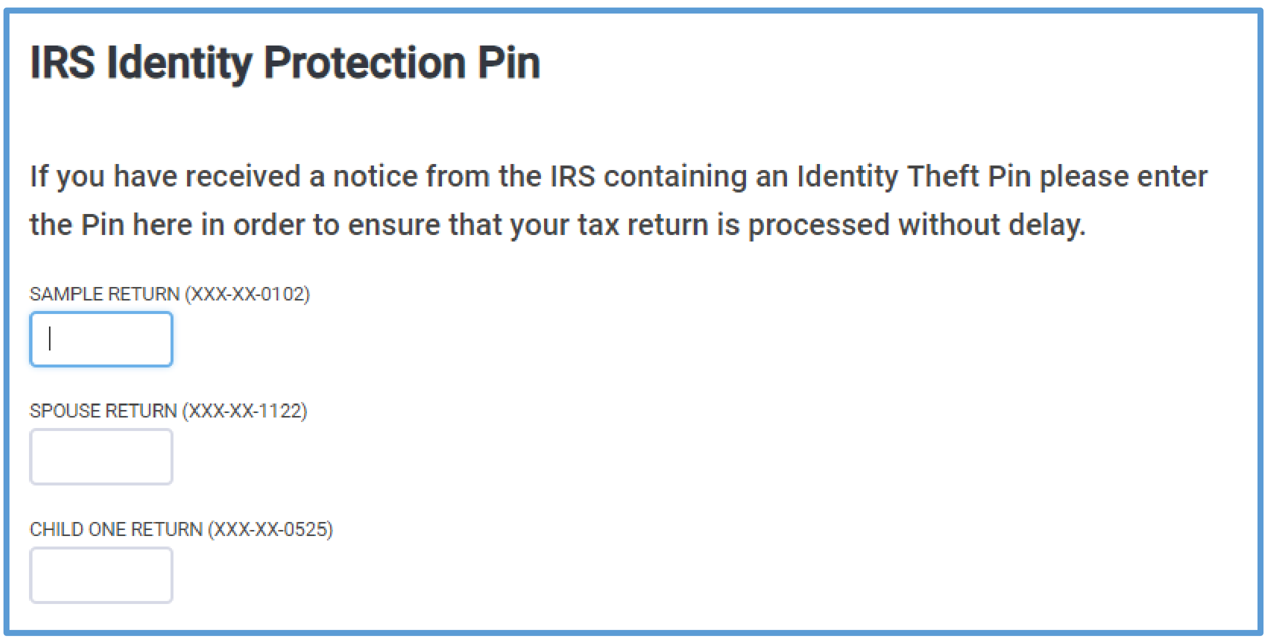
IRS Identity Protection PIN

NOTE: In this example, we cover adding IRS Identity Protection PINs. If you need to add another miscellaneous form, click the line for that form and complete the information on the new page.

TIP: You can also add IRS Identity Protection PINs in Basic Information. If you added the PINs there, you do not need to add them again in Miscellaneous Forms.

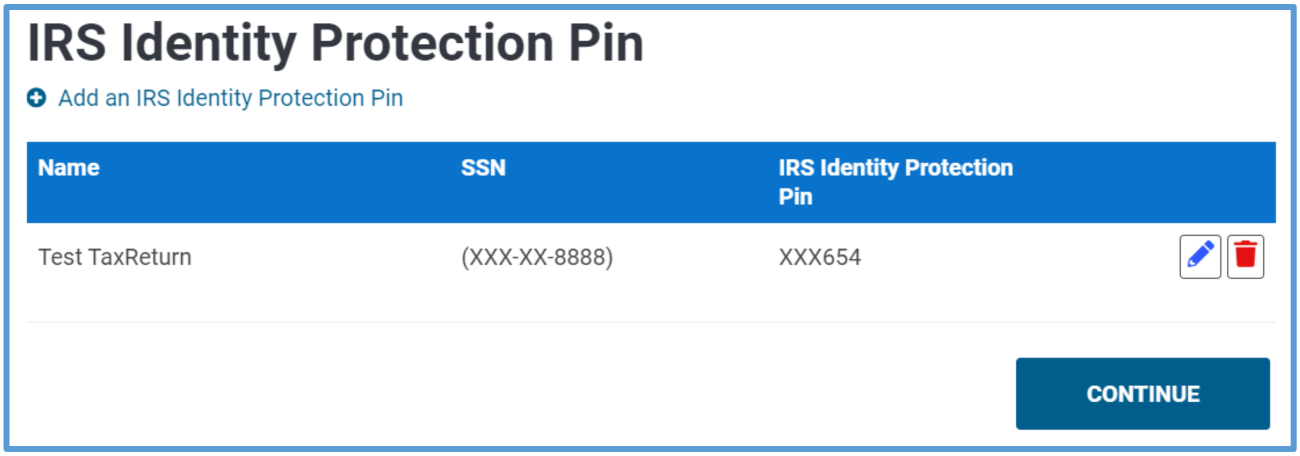
2. Click the **IRS Identification Pin** line.

TaxSlayer Pro Online displays the **IRS Identify Protection Pin** page, listing the taxpayer, spouse, and any dependents you listed in the taxpayer’s basic information:



3. Type the identity protection PINs as issued by the IRS in the appropriate boxes.
4. When you finish typing identity PINs, click **Continue**.

TaxSlayer Pro Online displays the **IRS Identity Protection Pin** summary page:



5. Review the information you entered and click **Continue**.

IRS Explanation Forms

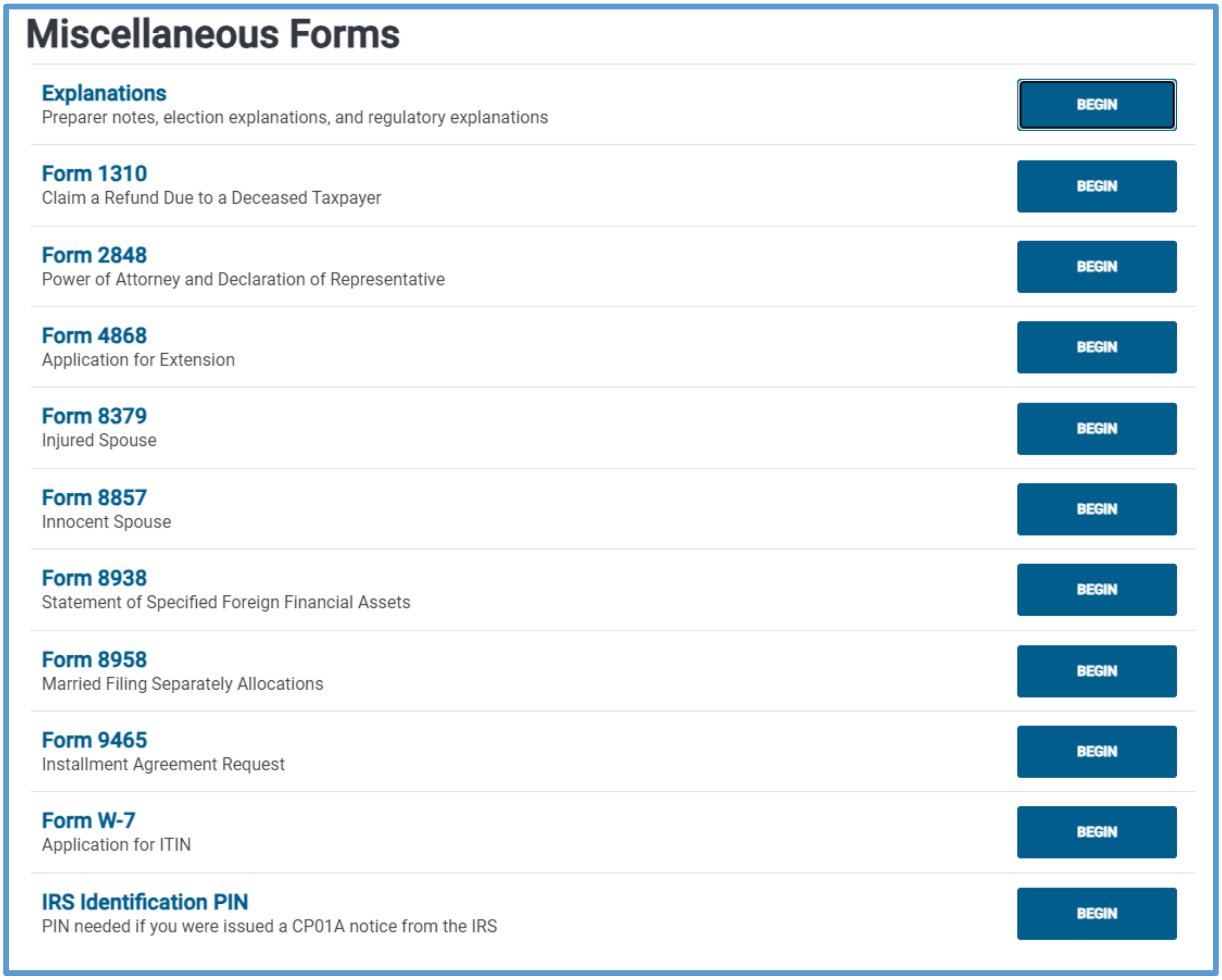
TaxSlayer offers IRS Explanation forms. If you need to provide further explanation for an item in the return, you can use these forms. TaxSlayer Pro Online prints populated IRS Explanations with the Assigned Print sets and includes them in the electronic file.

To add an IRS Explanation, use the following steps from the **Federal Section**:

1. Click **Miscellaneous Forms**.

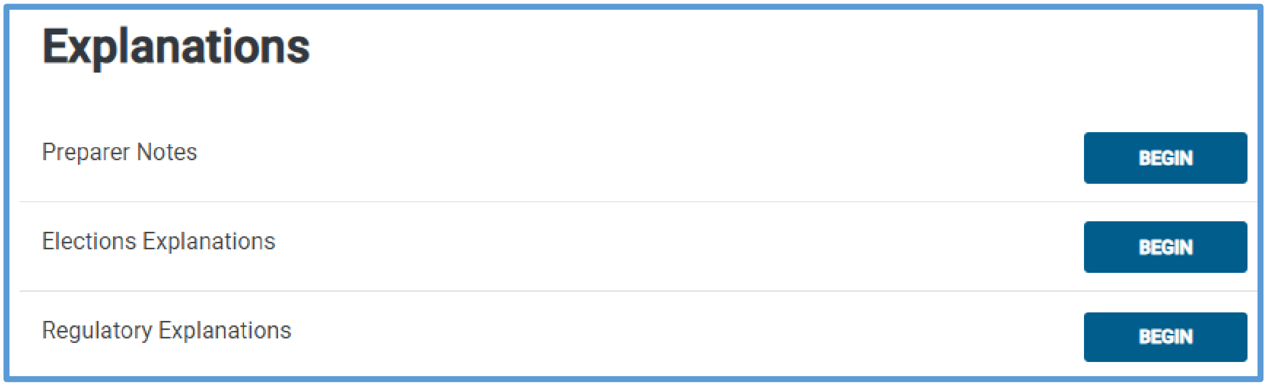
NOTE: You can also click **Miscellaneous Forms** in the left navigation panel.

TaxSlayer Pro Online displays the **Miscellaneous Forms** page:



2. Click the **Explanations** line.

TaxSlayer Pro Online displays the **Explanations** page:



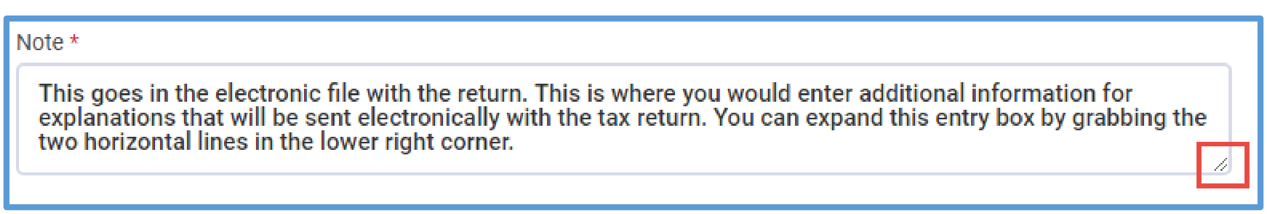
3. Select the appropriate explanation. For this example, click **Preparer Notes**.

TIP: At VITA/TCE sites, you will use **Preparer Notes** more often than other explanations.

TaxSlayer Pro Online displays the **Preparer Note** page:

4. Type a description of the note in the **Title** box.
5. Type the note in the **Note** box.

TIP: You can expand the box to view the entire note. To do this, drag the two lines at the lower right corner of the box, as shown below:



6. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Preparer Notes** summary page:

7. If you need to add another preparer note, click **Add a Preparer Note** and follow the same steps to add the new note.
8. When you finish adding notes, click **CONTINUE** to return to the **Explanations** page.

Summary

You should now be able to:

- Enter federal estimated tax payments.
- Enter state estimated tax payments.
- Enter other federal withholding.
- Figure an underpayment of estimated tax.
- Complete estimated tax vouchers.
- Complete any miscellaneous forms.

To see a video of what you just learned, go to Entering Payments and Estimates. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Health Insurance Credits

After completing this topic, you will be able to:

- Complete the health insurance questionnaire.
- Add Form 1095-A, *Health Insurance Marketplace Statement*.
- Figure any net premium tax credit.
- Figure any repayment of advanced premium tax credit.

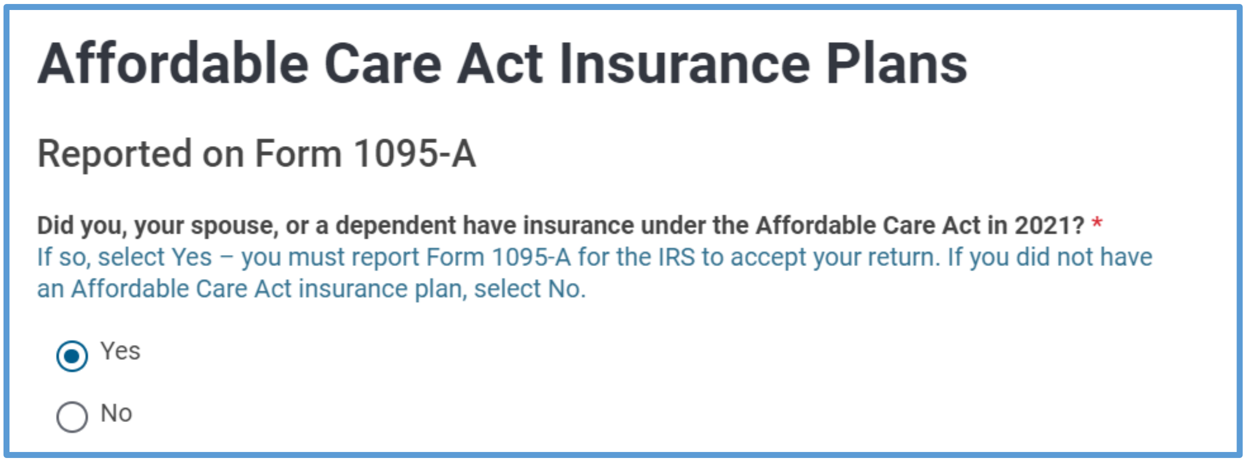
With health insurance from the Marketplace or State Exchange, taxpayers must include certain information with the tax return to figure any credit or repayment related to health insurance.

NOTE: The Tax Cuts and Jobs Act (TCJA) made changes to the individual health insurance mandate. These changes apply beginning with Tax Year 2019. See the tax form instructions for more information.

Completing the Health Insurance Questionnaire

The first step in completing the Health Insurance section is to complete a questionnaire to determine whether the taxpayer had coverage from the Marketplace or State Exchange, household members, and other applicable information.

When you complete the Federal Section, TaxSlayer Pro Online displays the **Health Insurance Questionnaire**:

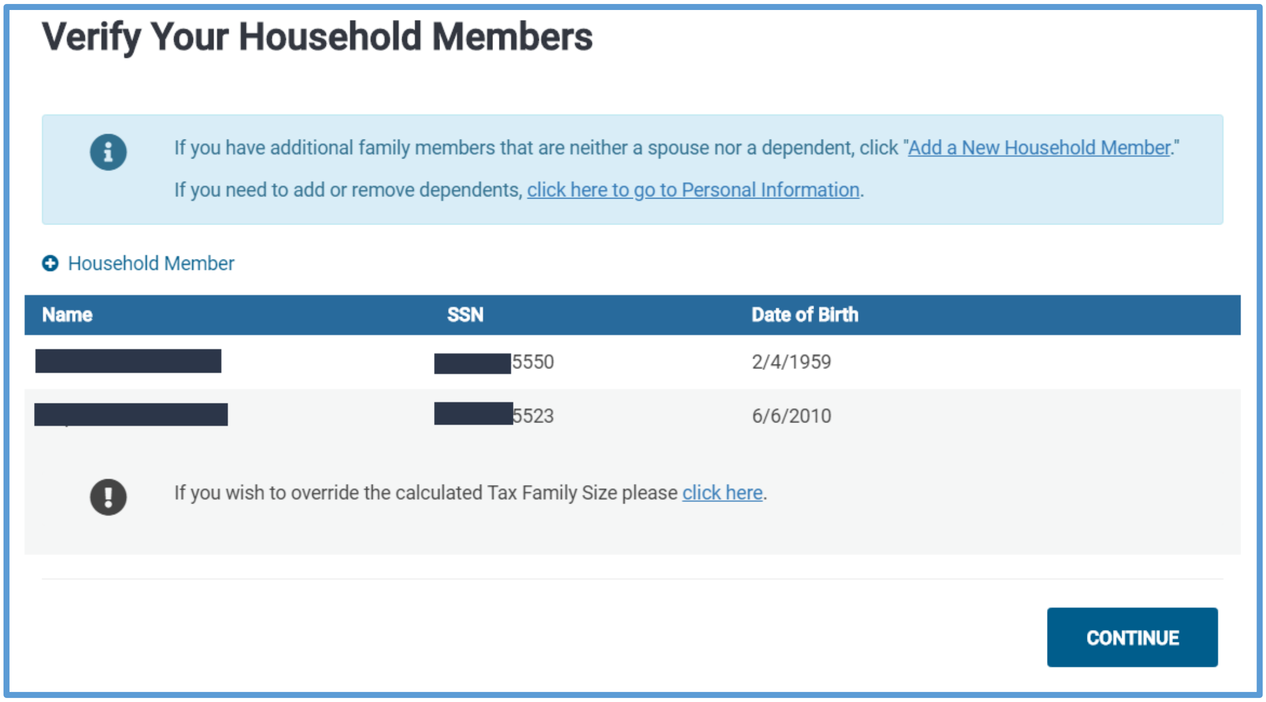


To complete the questionnaire, use the following steps:

1. Determine whether the taxpayer purchased health insurance from a marketplace (whether federal or state) and select the appropriate answer.
2. Click **Continue**.

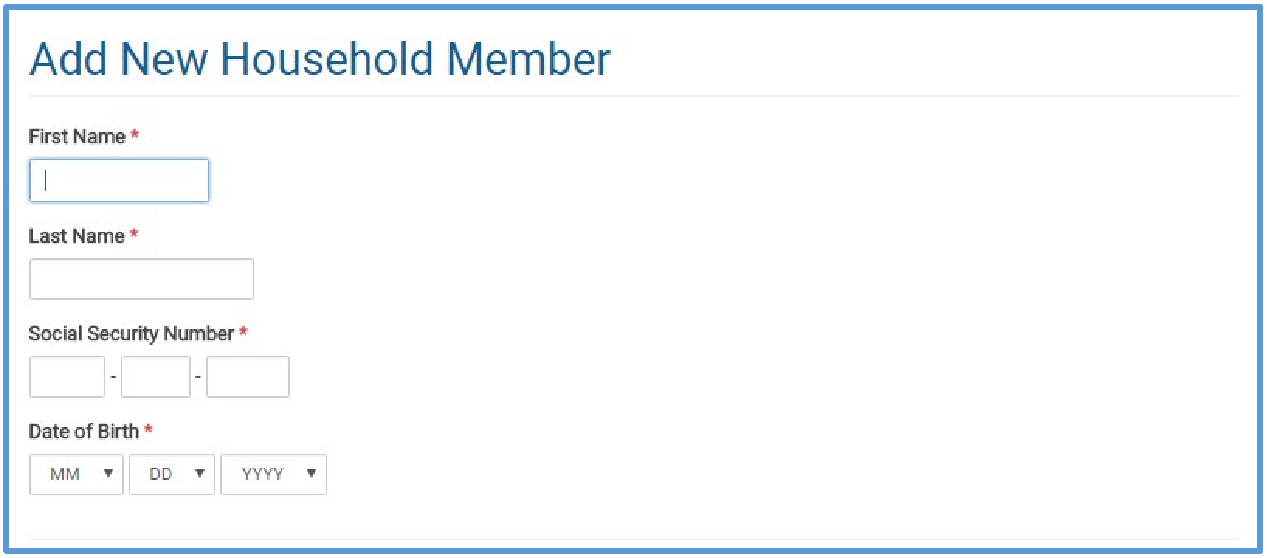
Note: If you select **No**, TaxSlayer Pro Online exits the Health Insurance Questionnaire. You do not need to complete additional health insurance information for the client.

TaxSlayer Pro Online displays the **Verify Your Household Members** page:



3. Review the information on the page to verify that every member of your household is listed. If you need to add dependents, add the dependent in Basic Information as covered in the *Starting a Tax Return* section.
4. If the taxpayer has a household member who is not listed on the tax return, click **Add a New Household Member**. Refer to your reference materials to see household members you must add to this section.

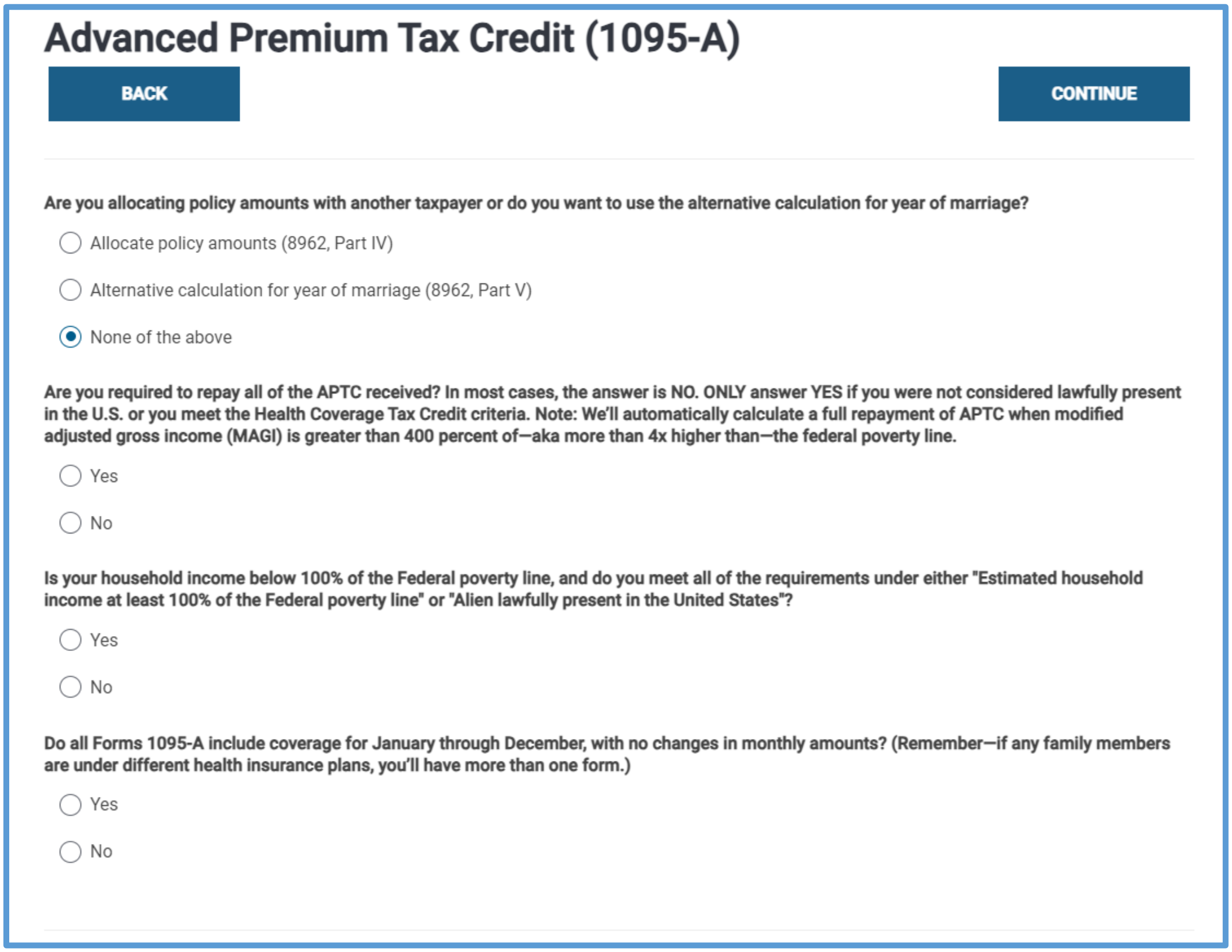
TaxSlayer Pro Online displays the **Add New Household Member** page:



5. Type the household member's name, Social Security number, and date of birth.
6. Click **Continue**.
7. When you finish reviewing household members, click **Continue**.

Advanced Premium Credit

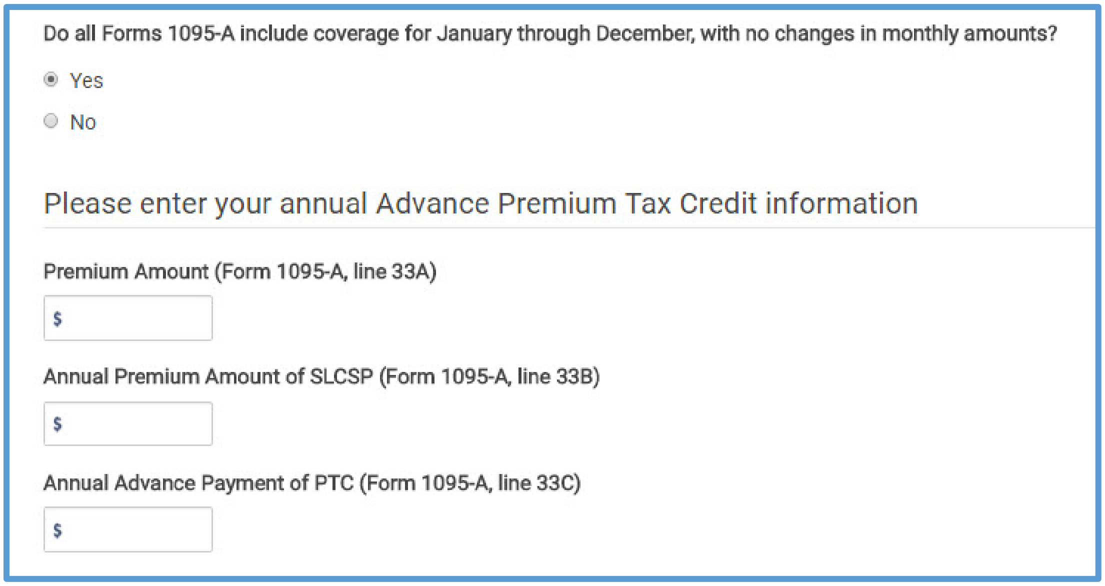
TaxSlayer Pro Online displays additional questions concerning coverage on Form 1095-A:



1. Read each question carefully and select the appropriate answers.

NOTE: TaxSlayer automatically calculates the answer to the question concerning the Federal poverty line from the income on the tax return.

2. Do one of the following:
    a. If all forms 1095-A include coverage for January through December, with no changes in monthly amounts, select **Yes** for the last question and type the full year information from Form(s) 1095-A, as shown below:



Do all Forms 1095-A include coverage for January through December, with no changes in monthly amounts?

- (•) Yes
- ( ) No

Please enter your annual Advance Premium Tax Credit information

Premium Amount (Form 1095-A, line 33A)

$

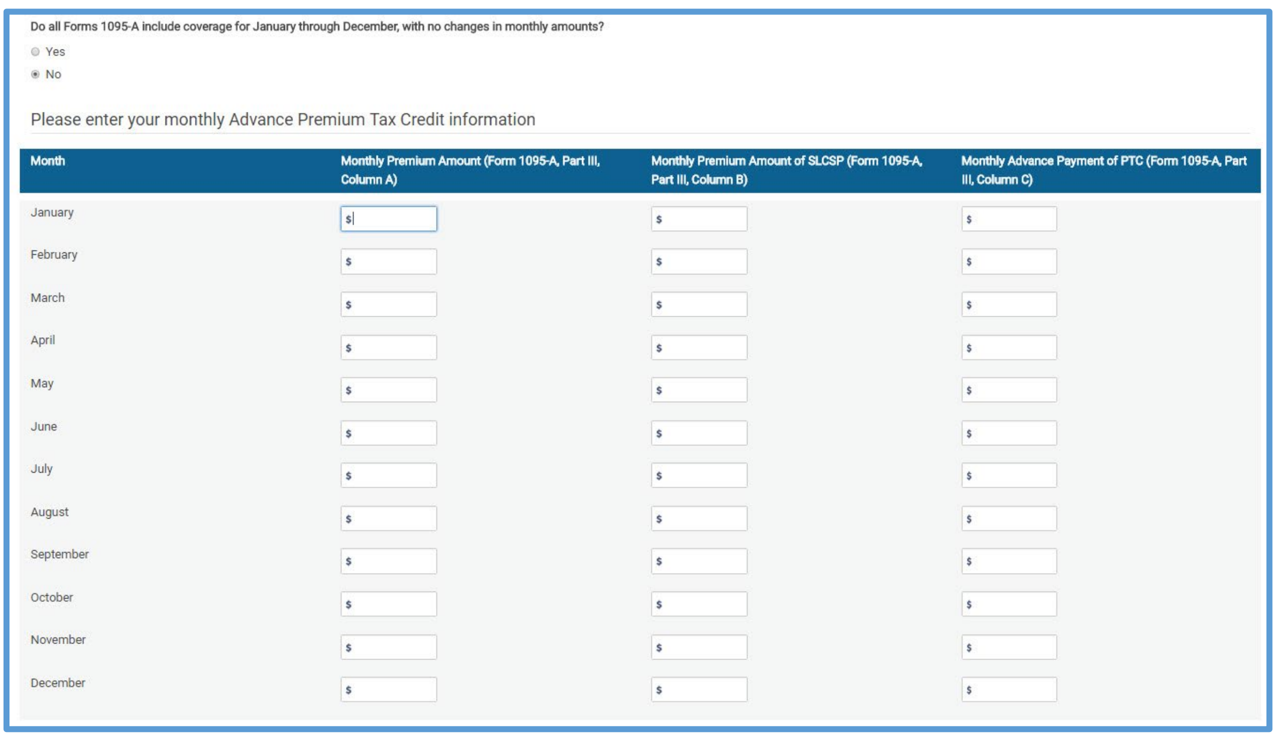
Annual Premium Amount of SLCSP (Form 1095-A, line 33B)

$

Annual Advance Payment of PTC (Form 1095-A, line 33C)

$

    b. If you select **No** on the above line, type the monthly information from Form 1095-A, as shown below:



Do all Forms 1095-A include coverage for January through December, with no changes in monthly amounts?

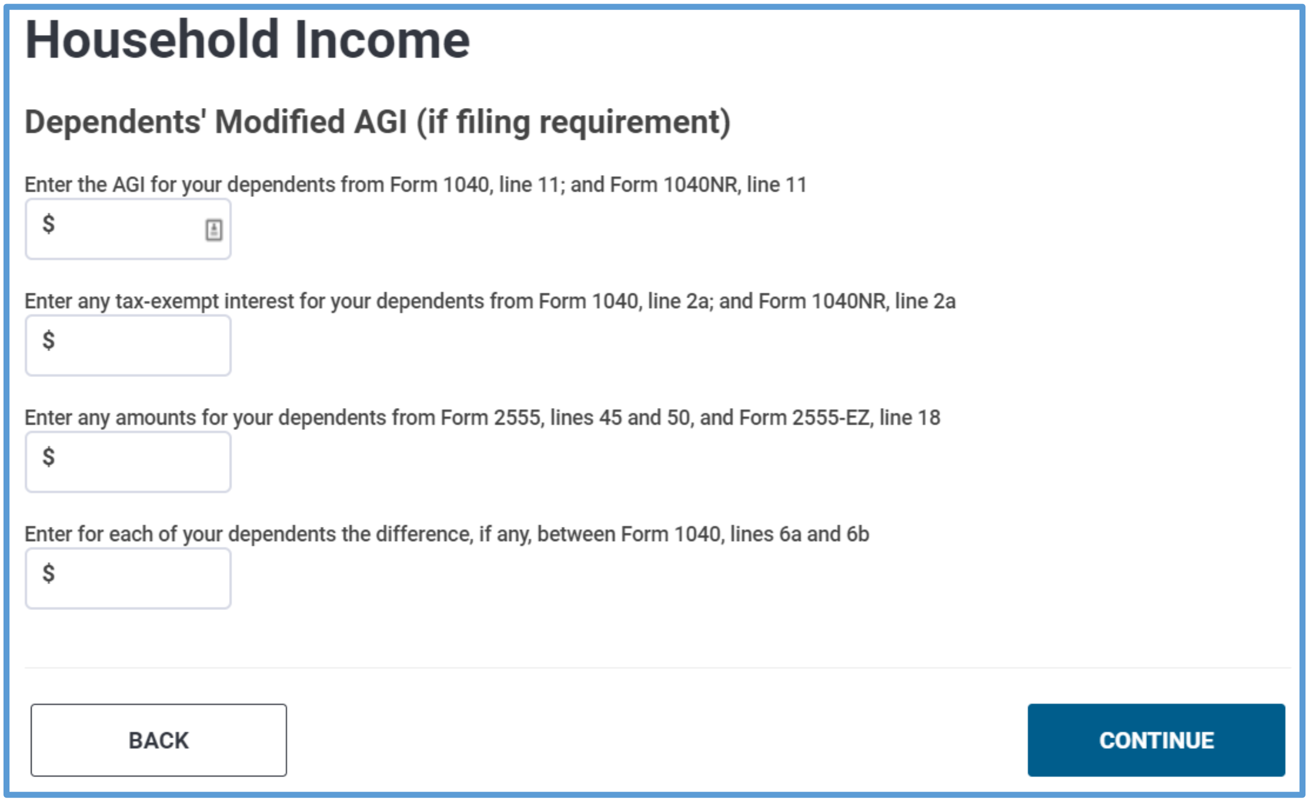
- ( ) Yes
- (•) No

Please enter your monthly Advance Premium Tax Credit information

Month	Monthly Premium Amount (Form 1095-A, Part III, Column A)	Monthly Premium Amount of SLCSP (Form 1095-A, Part III, Column B)	Monthly Advance Payment of PTC (Form 1095-A, Part III, Column C)
January	$	$	$
February	$	$	$
March	$	$	$
April	$	$	$
May	$	$	$
June	$	$	$
July	$	$	$
August	$	$	$
September	$	$	$
October	$	$	$
November	$	$	$
December	$	$	$

3. Click **Continue**.

TaxSlayer Pro Online displays the **Dependents’ Modified AGI** page:



4. Read each line carefully and type the appropriate amount in the box.

Note: TaxSlayer Pro Online only displays the **Dependents’ Modified AGI** page if you included a dependent or additional household member to the return.

5. Click **Continue**.

TaxSlayer Pro Online automatically calculates any Net Premium Tax Credit or Repayment of Advanced Premium Tax Credit and displays the **State Return** page.

Summary

You should now be able to:

- Complete the health insurance questionnaire.
- Add Form 1095-A, *Health Insurance Marketplace Statement*.
- Figure any net premium tax credit.
- Figure any repayment of advanced premium tax credit.

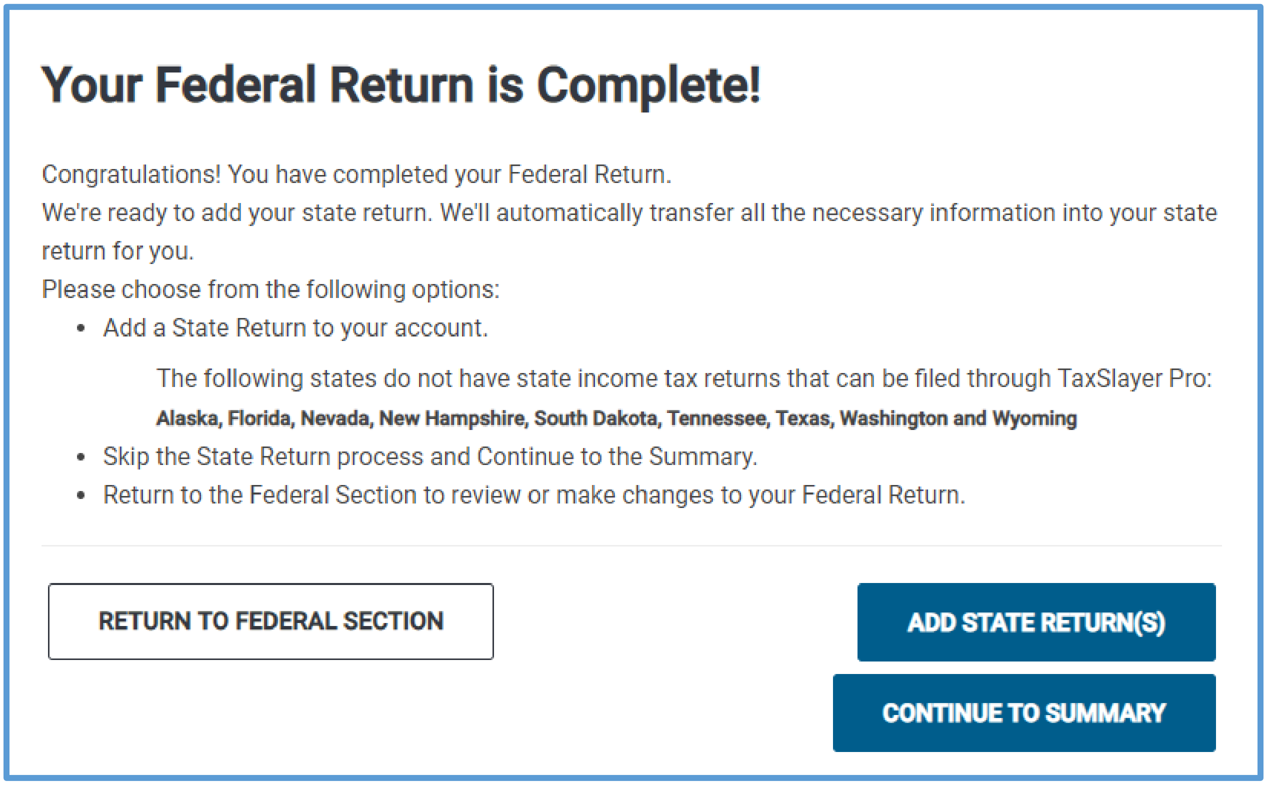
To see a video of what you just learned, go to Working with the Affordable Care Act. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Completing a State Return

After completing this topic, you will be able to:

- Add states to a return.
- Add information to a state return.
- Delete a state from the return.
- Print the state return.

If you did not select a resident state in Basic Information, TaxSlayer Pro Online displays the **Your Federal Return is Complete!** landing page:



TIP: You can also click **State Section** in the left navigation bar to access this page.

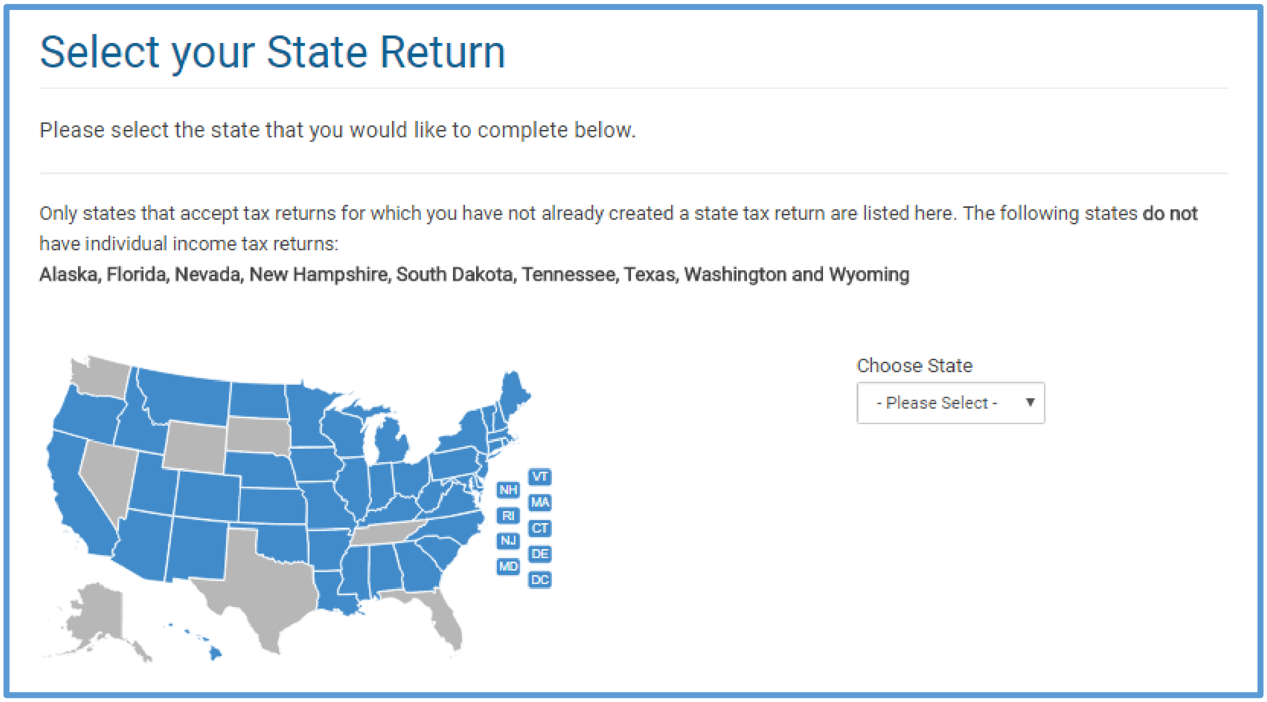
If the taxpayer does not need to add a state, click **Continue to Summary**. Otherwise, use the information in this lesson to complete the state return.

Adding States to a Return

You can add as many states as needed to the taxpayer's return. To add a state, use the following steps:

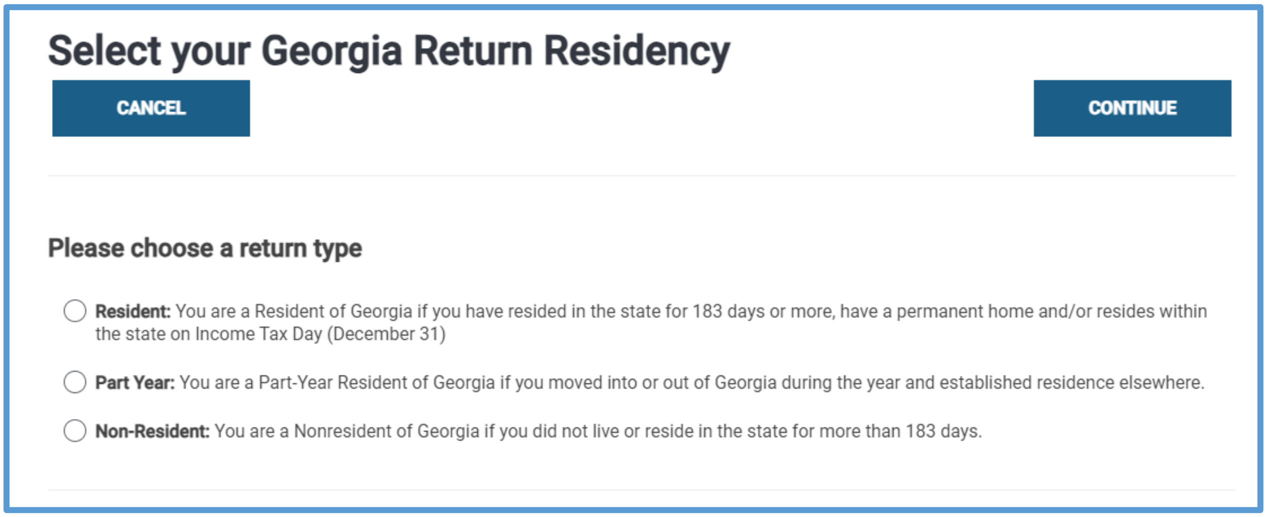
1. Click **Add State Return(s)**.

TaxSlayer Pro Online displays the **Select your State Return** page:



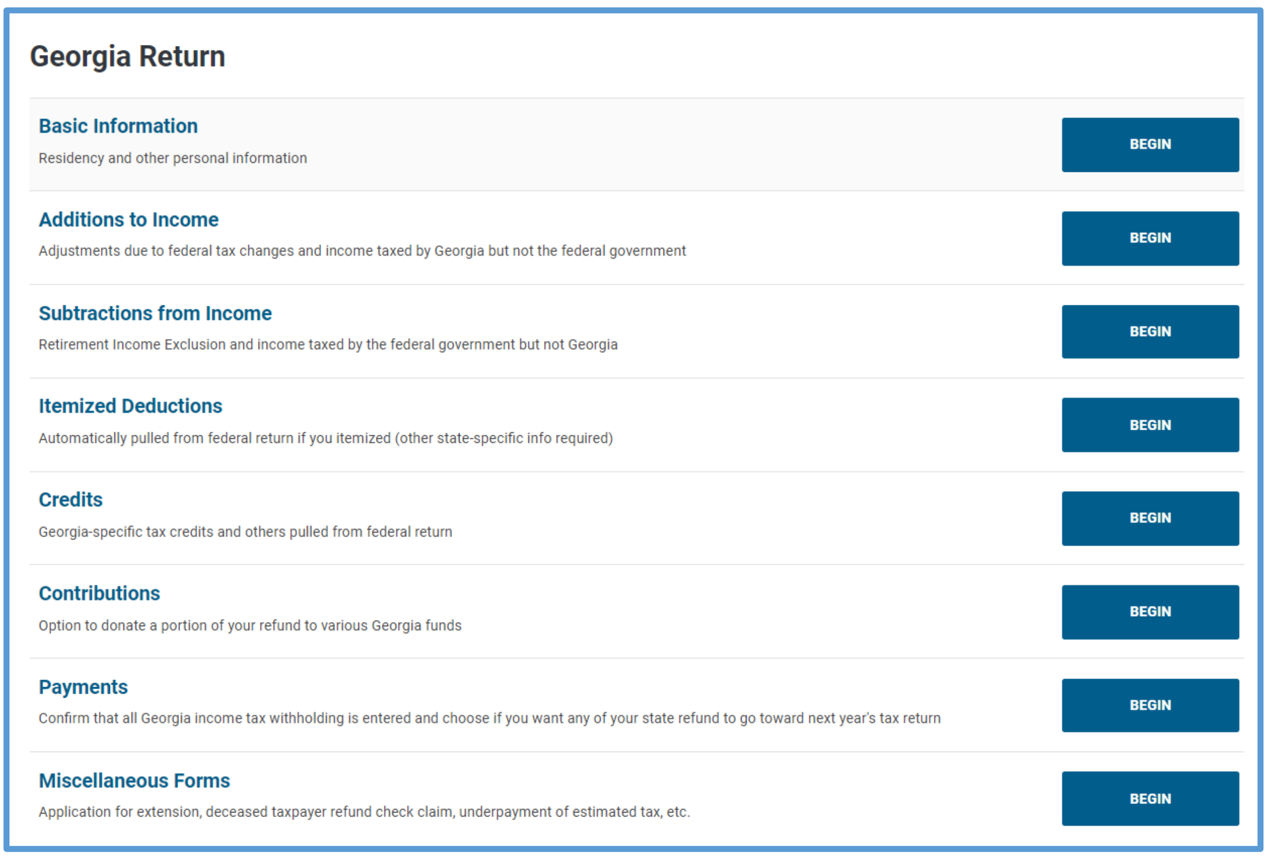
2. Select the state from the drop-down list or click your state in the map.
3. Click **Continue**.

TaxSlayer Pro Online displays the **Select Your Return Residency** page:



4. Select whether the taxpayer is a resident, part-year resident, or non-resident of the state.
5. Click **Continue**.

TaxSlayer Pro Online displays the **State Return** menu:

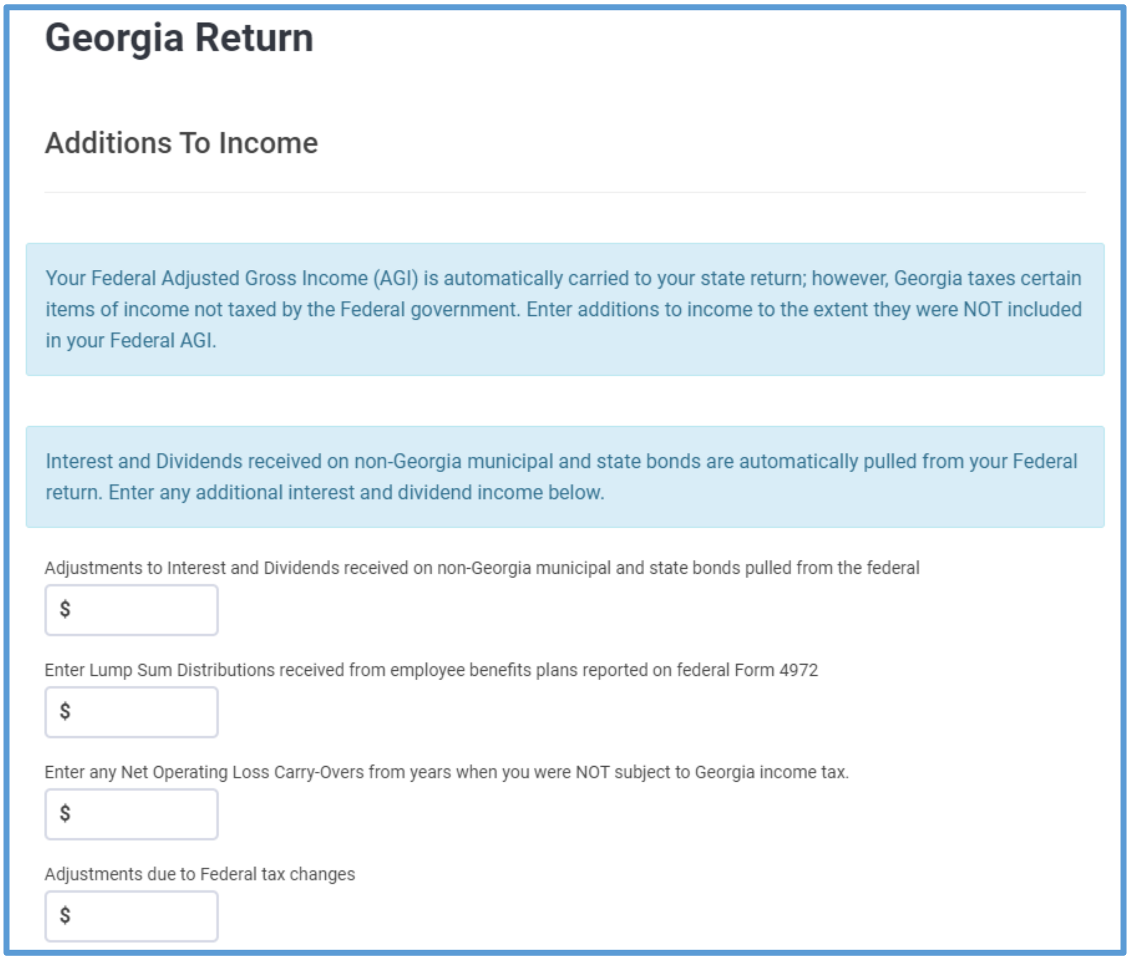


1. Click **BEGIN** on the line for the information you need to add. For this example, we will click **Additions to Income**.

NOTE: TaxSlayer Pro Online automatically transfers state-sourced income from the Federal Section.

Support Tip: Many states have exclusions to vested retirement income. This means a portion or all government (Federal, state, local, or military) retirement income is not taxable. If so, select the **Retirement Exclusion Worksheet** to allocate the nontaxable income based on your state laws.

TaxSlayer Pro Online displays the detail page for the line you selected:



Georgia Return

Additions To Income

Your Federal Adjusted Gross Income (AGI) is automatically carried to your state return; however, Georgia taxes certain items of income not taxed by the Federal government. Enter additions to income to the extent they were NOT included in your Federal AGI.

Interest and Dividends received on non-Georgia municipal and state bonds are automatically pulled from your Federal return. Enter any additional interest and dividend income below.

Adjustments to Interest and Dividends received on non-Georgia municipal and state bonds pulled from the federal

$

Enter Lump Sum Distributions received from employee benefits plans reported on federal Form 4972

$

Enter any Net Operating Loss Carry-Overs from years when you were NOT subject to Georgia income tax.

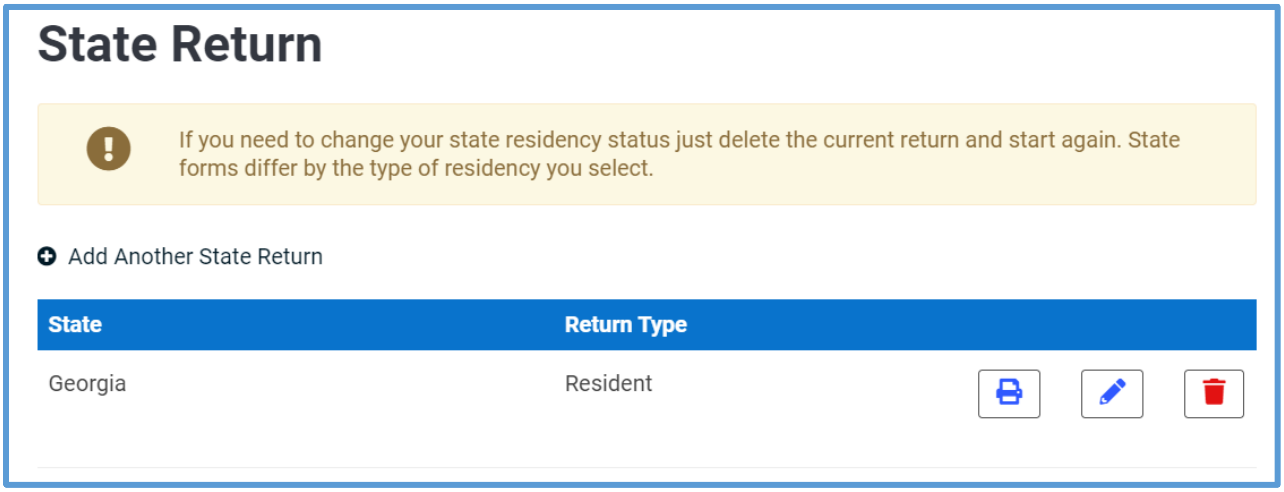
$

Adjustments due to Federal tax changes

$

2. Follow the instructions for each line on the page.
3. Continue adding information to the state return as needed based on the taxpayer's circumstances.

When you finish adding the first state, TaxSlayer Pro Online displays the **State Return** summary page:



5. If you need to add another state for the taxpayer, click **Add** and use the same steps to add the new state.

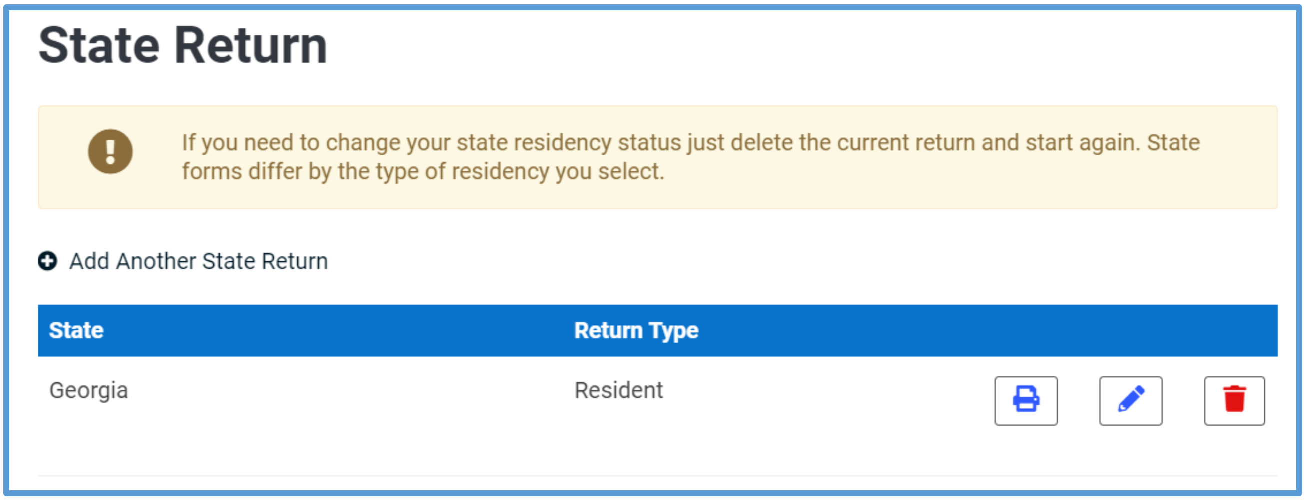
TIP: You can add an unlimited number of states to the return.

Deleting States

If you add a state and later find that you need to delete it from the return, use the following steps:

1. Click **State Section**.

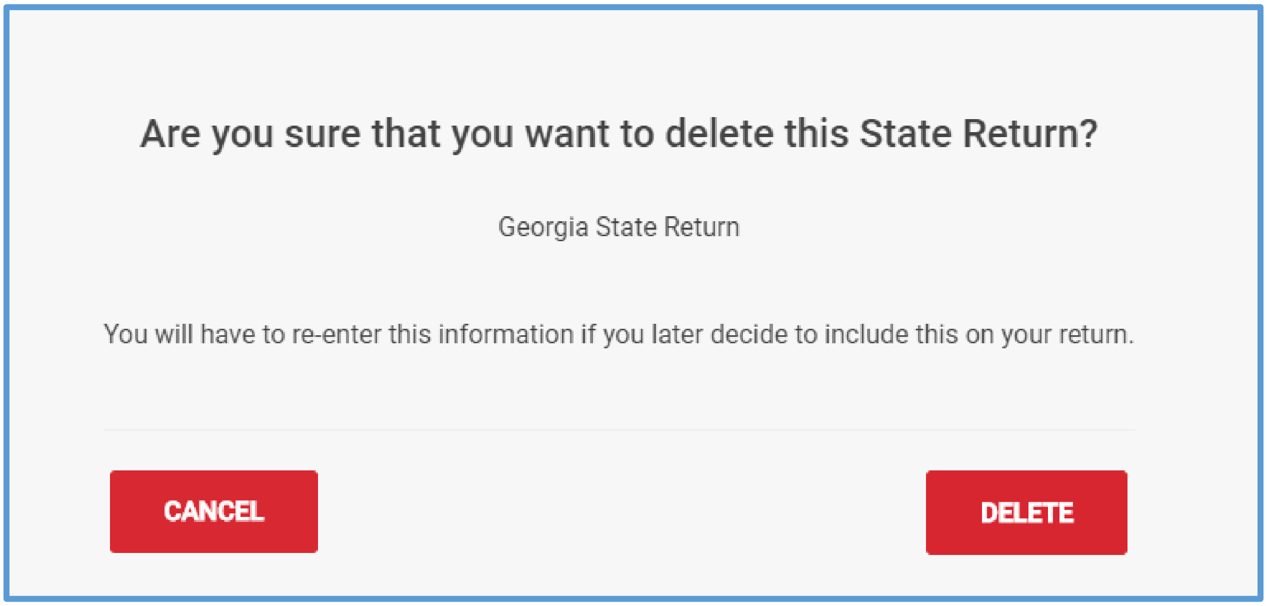
TaxSlayer Pro Online displays the **State Return** page:



2. Click **Delete** for the state you need to delete.

NOTE: When you click **Delete**, you only delete the state portion of the return.

TaxSlayer Pro Online displays a warning confirmation:

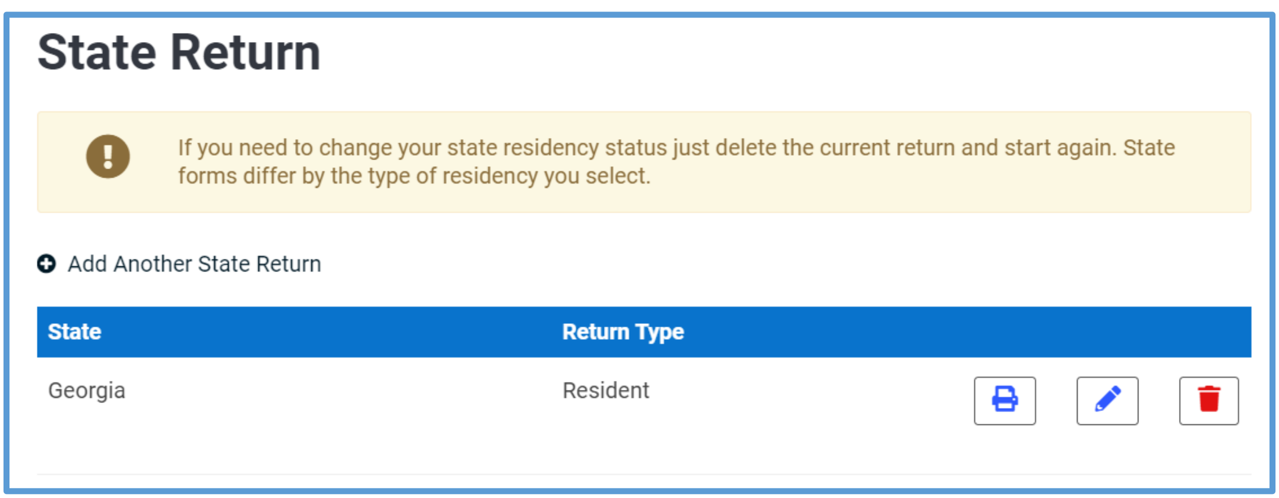


3. Confirm that you selected the correct state and click **Delete**.

TaxSlayer Pro Online deletes the state return. If you need to add the state again later, you will need to add any information you entered in the state return again.

Printing the State

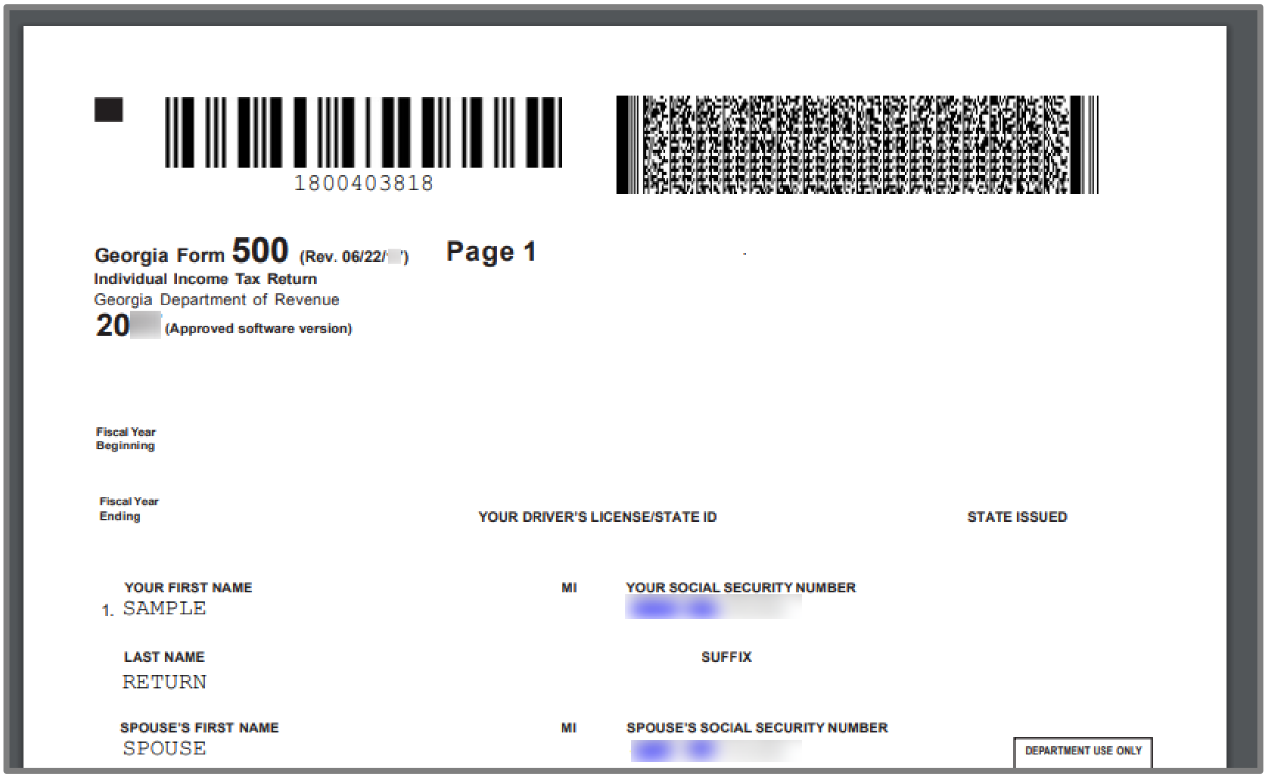
TaxSlayer Pro Online displays a printer icon once you exit the state return:



To generate a PDF to review the state portion of the return based on any additional data you entered and TaxSlayer calculations, use the following steps:

1. Click the Printer icon.

TaxSlayer Pro Online generates a PDF of the state portion of the return in a new window:



1800403818

Georgia Form **500** (Rev. 06/22/) **Page 1**

Individual Income Tax Return

Georgia Department of Revenue

20 (Approved software version)

Fiscal Year Beginning

Fiscal Year Ending

YOUR DRIVER'S LICENSE/STATE ID

STATE ISSUED

YOUR FIRST NAME MI YOUR SOCIAL SECURITY NUMBER

1. SAMPLE

LAST NAME SUFFIX

RETURN

SPOUSE'S FIRST NAME MI SPOUSE'S SOCIAL SECURITY NUMBER

SPOUSE

DEPARTMENT USE ONLY

Summary

You should now be able to:

- Add states to a return.
- Add information to a state return.
- Delete a state from the return.
- Print the state return.

To see a video of what you just learned, go to Completing a State Return. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Advanced Tax Topics

After completing this topic, you will be able to:

- Enter Form 1099-NEC income.
- Enter a profit or loss from a business.
- Enter rents and royalties.
- Enter military rental property.
- Enter capital gains and losses.
- Enter an exclusion on the sale of a home.
- Enter Schedule K-1 income items.
- Enter Form 2555
- Enter an IRA deduction.
- Enter the residential energy credit.
- Enter the credit for the elderly or the disabled.

TIP: Remember that you should only prepare returns containing the income, deductions, and credits in this section if it is within your scope of certification. You do not need to take this lesson unless you can prepare these returns.

Advanced Income

You can enter the following six types of advanced income in a tax return:

- Form 1099-NEC
- Profit or loss from a business
- Schedule K-1 income items that are within the scope of the VITA/TCE Programs
- Rental income
- Capital gains and losses
- Other income

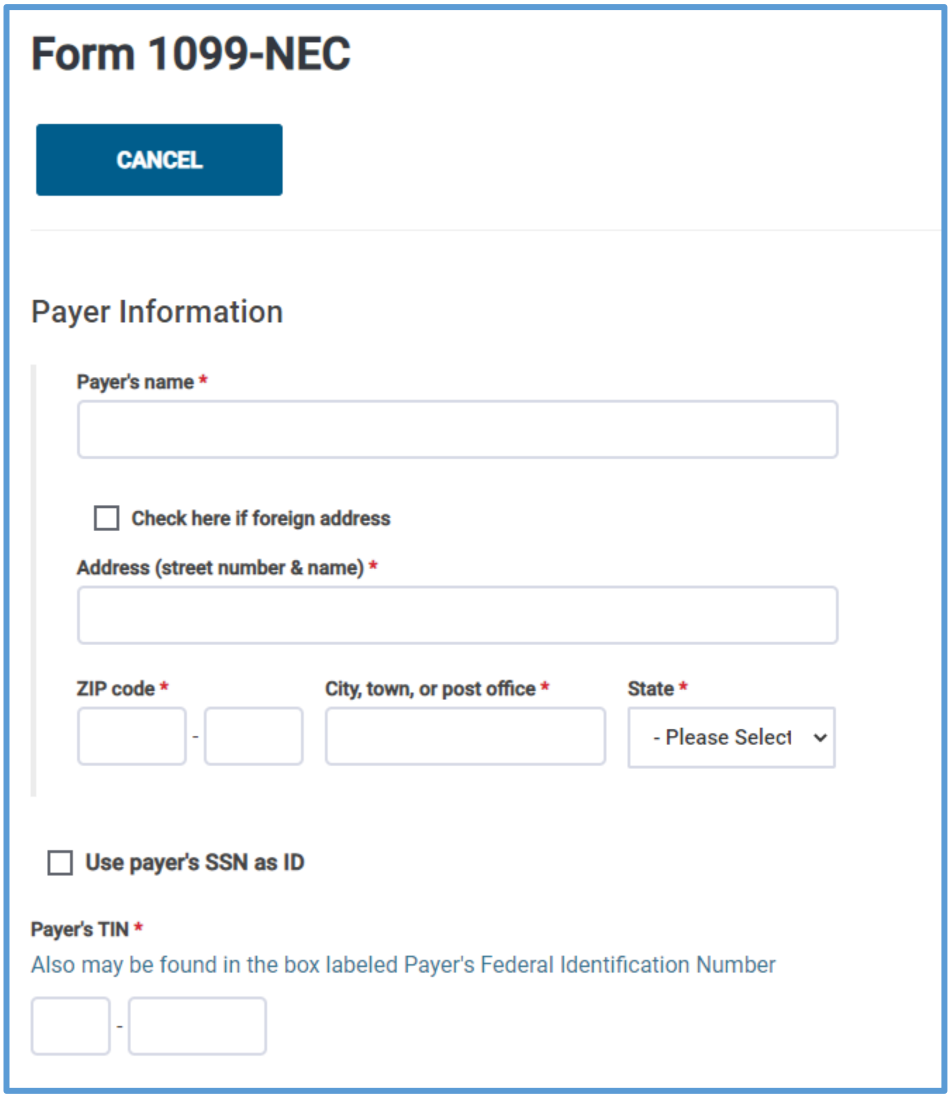
This section covers entering those types of income in TaxSlayer Pro Online.

Entering Form 1099-NEC

If a taxpayer received a Form 1099-NEC, *Non-Employee Compensation*, you need to enter that information in the tax return. To do so, use the following steps from the **Income** page:

1. Click the **1099-NEC** line.

TaxSlayer Pro Online displays the **Form 1099-NEC** page:

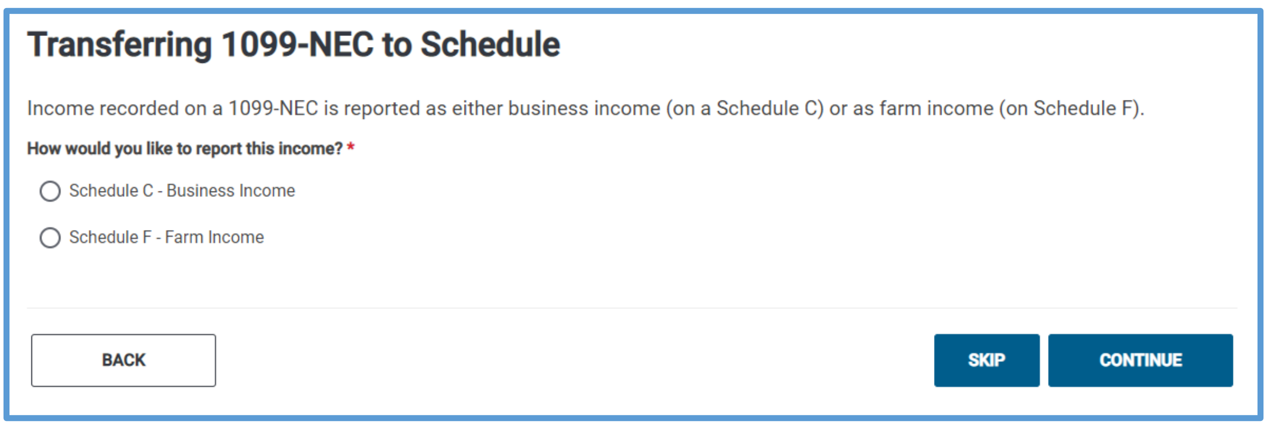


2. Type the information on this form as it appears on the paper copy of the taxpayer's Form 1099-NEC.
3. Use the following tips for completing Form 1099-NEC in TaxSlayer Pro Online:

a. If the payer used a Social Security number instead of an EIN, select the **Use Payer's SSN as ID** check box. TaxSlayer Pro Online displays a Social Security number box instead of the EIN box.
b. If the payer is a business, and you entered that payer previously, TaxSlayer Pro Online automatically completes the payer's name and address when you type the EIN.
c. If the taxpayer's address on the paper Form 1099-NEC is different from the one on the tax return, make changes to the taxpayer's address on this page.
d. TaxSlayer Pro Online disables boxes on this form that are not used for e-filing the tax return. You can leave these boxes blank.

4. When you finish typing information on the form, click **Continue**.

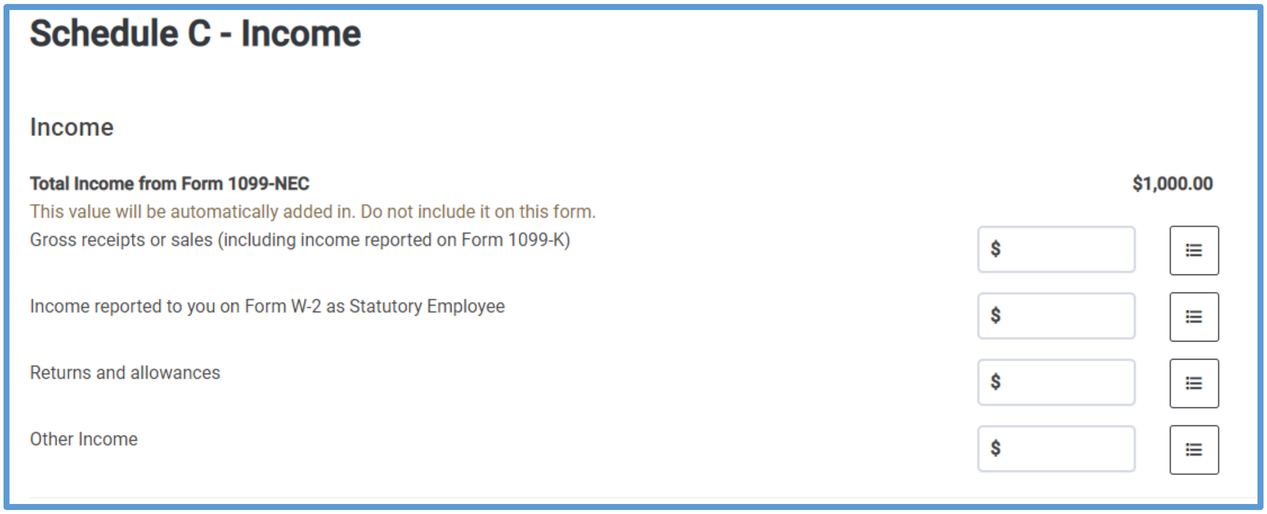
TaxSlayer Pro Online needs direction on where to report the income and displays a page similar to the following:



In this example, we will create a Schedule C. For other needed forms, follow the instructions on-screen.

5. Select **Schedule C – Business Income** and click **Continue** to add a new form to the return, or you can choose an existing form.

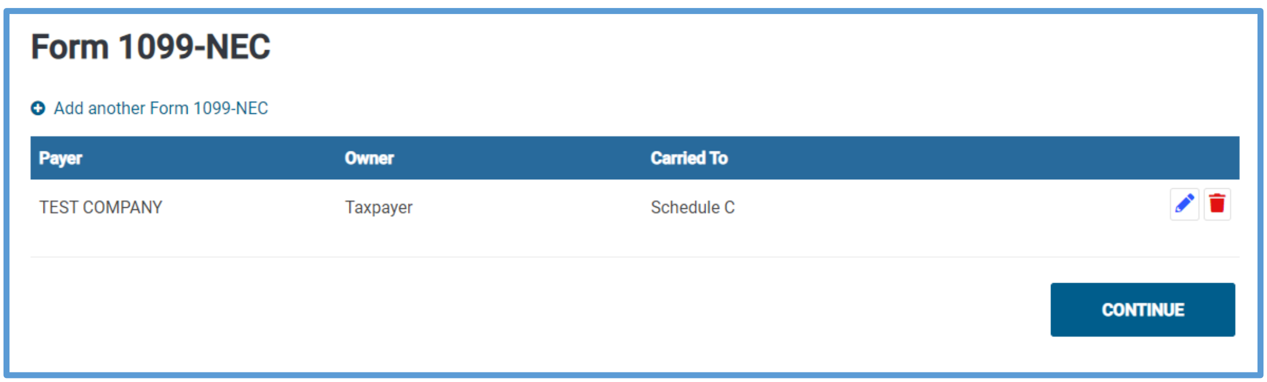
TaxSlayer Pro Online displays the Schedule C you added and includes the Form 1099-NEC income on the appropriate page:



6. Complete the form. When you finish, click **Continue**.

This lesson covers completing Schedules C and E later.

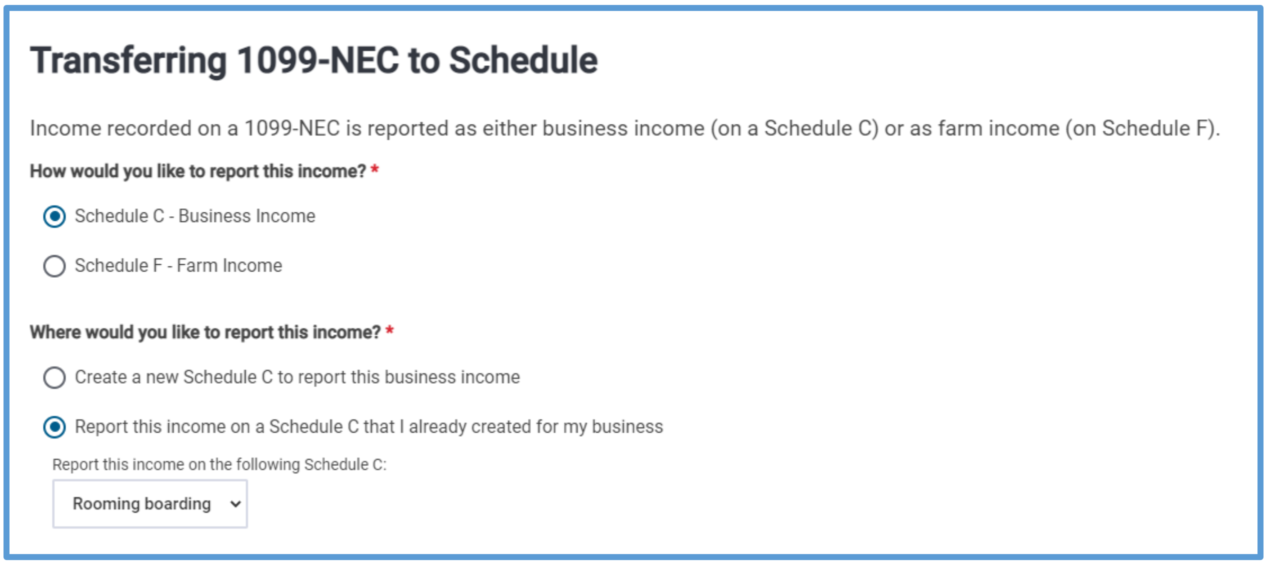
TaxSlayer Pro Online displays the **Form 1099-NEC** summary page with the payer you entered listed:



7. If the taxpayer received multiple Forms 1099-NEC, click **Add another Form 1099-NEC** and follow the same steps to add them.
8. When you finish adding forms, click **Continue**.

TIP: If the payer entered the income in Box 1, Nonemployee compensation, and you have determined this to be hobby income or reported as other income incorrectly, you can enter the description and amount as **Other Inc. Not Reported Elsewhere** on the **Other Income** page. Do **not** complete the 1099-NEC in this circumstance.

Note: To add a Form 1099-NEC to an existing schedule, select the **Report this income on a Schedule C that I already created for my business**.



Profit or Loss from a Business

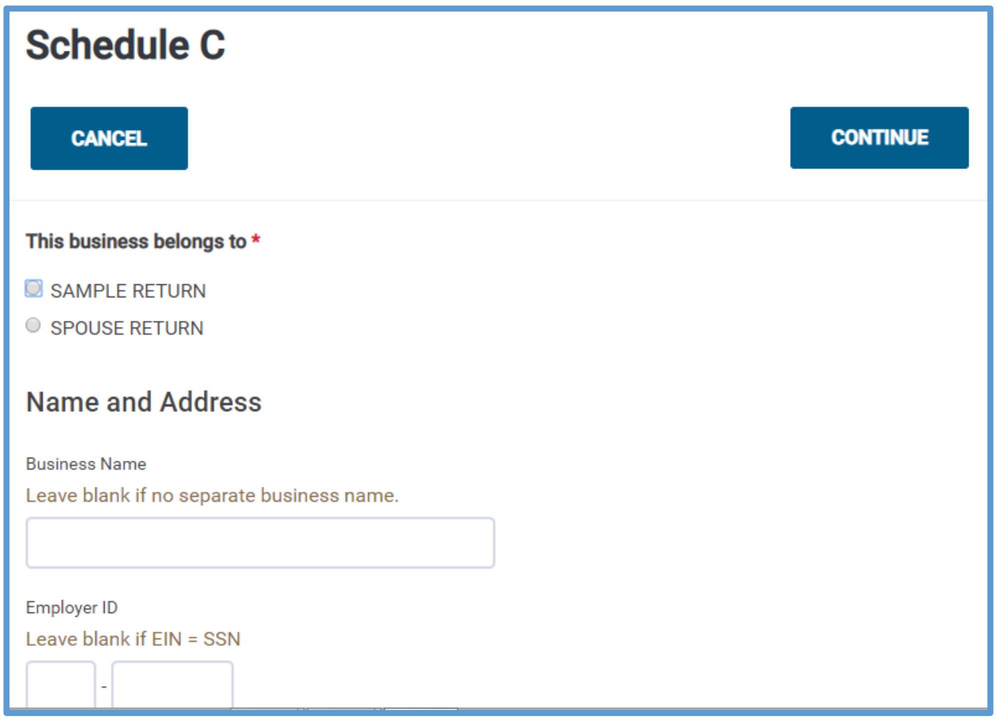
If a taxpayer is self-employed, you need to complete Schedule C for that taxpayer.

TIP: We covered adding a Form 1099-NEC earlier in this lesson. If the taxpayer received a Form 1099-NEC, and you added it using that method, you may have created a Schedule C. Use that form. This section of the lesson covers adding a Schedule C without Form 1099-NEC.

To complete a Schedule C, use the following steps from the **Income** page:

1. Click the **Profit or Loss From A Business** line.

TaxSlayer Pro Online displays the **Schedule C** page:

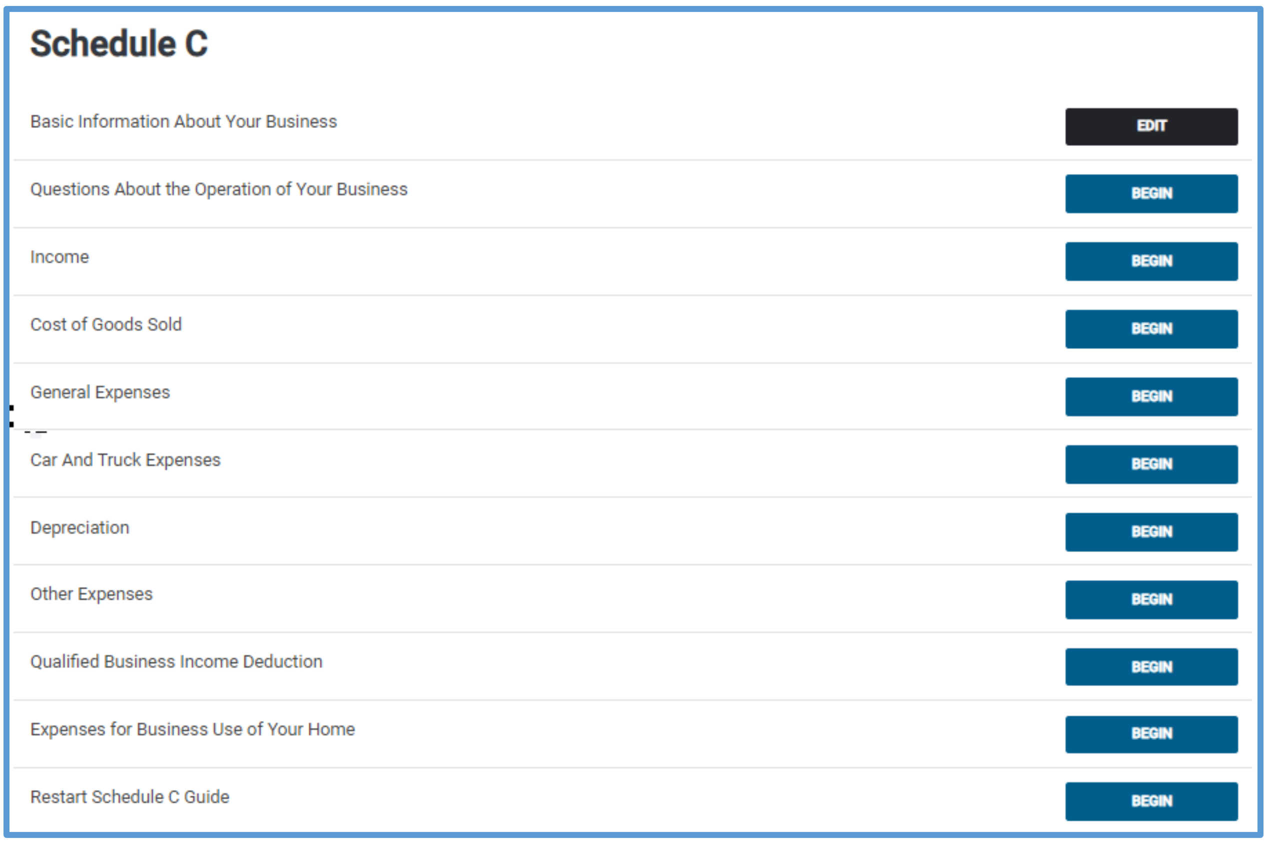


2. On the first page of the Schedule C, complete general information about the business using the following tips:
    a. Select whether this Schedule C is for the taxpayer or spouse. Remember that if the taxpayer is not married, TaxSlayer Pro Online assigns the Schedule C to the **Taxpayer** in this section.
    b. If the business has a name, type it in the appropriate box; otherwise, leave this box blank.

c. If the taxpayer obtained an EIN for the business, type it in the **Employer ID** box; otherwise, leave this box blank.
d. Type the address for the business. If it is the same as the taxpayer's home address, leave it blank.
e. If you do not know the business code, click the link under the **Business Code** box. Click the appropriate code. TaxSlayer Pro Online automatically populates both the business code and description boxes.

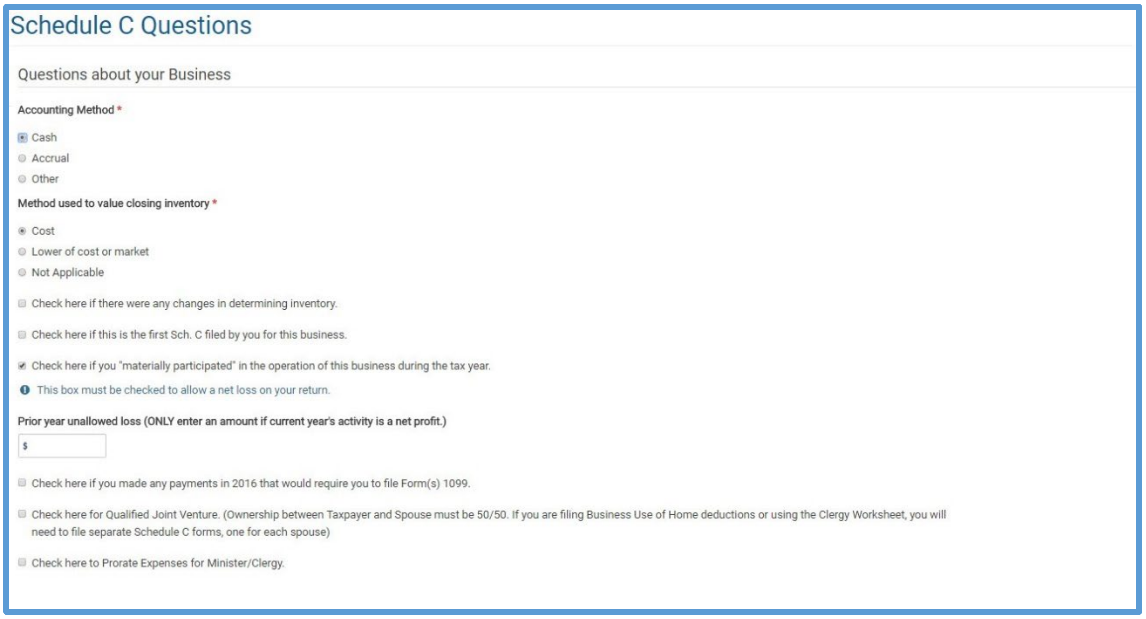
3. When you finish typing the general information, click **Continue.**

TaxSlayer Pro Online displays the Schedule C landing page:



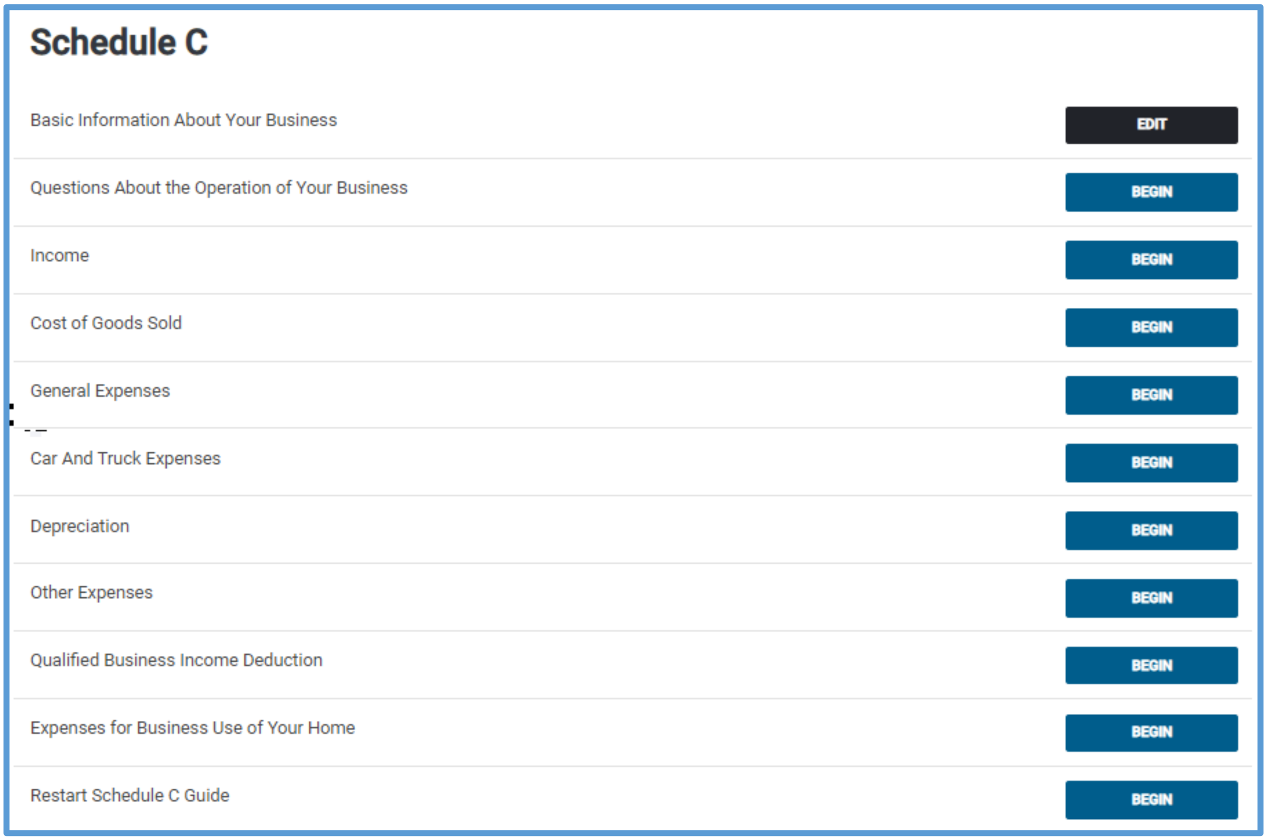
4. Click the **Questions About the Operation of Your Business** line.

TaxSlayer Pro Online displays the **Schedule C Questions** page:



5. Carefully read each question on this page and answer it based on the information you receive from the taxpayer.
6. When you finish answering questions on this page, click **Continue**.

TaxSlayer Pro Online displays the Schedule C landing page:

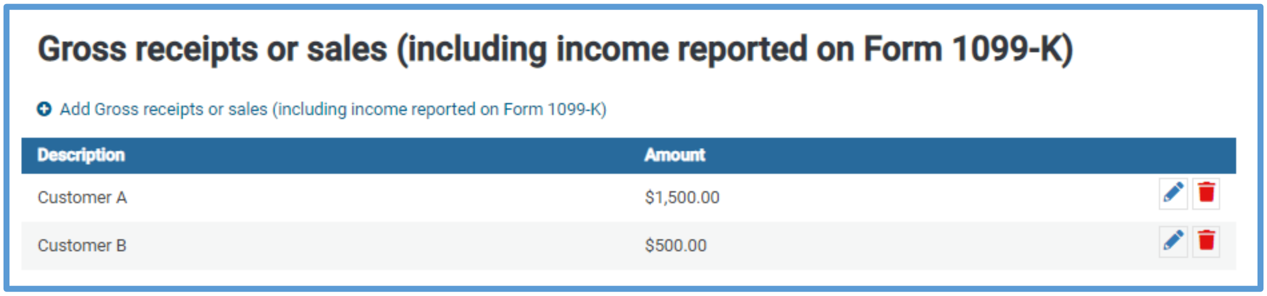


7. Click the **Income** line.

TaxSlayer Pro Online displays the **Schedule C – Income** page:

8. Read each line carefully and type the amount of income the taxpayer received in the appropriate box.

Tip: If the taxpayer has multiple sources, you can use the supporting statement feature to track the individual sources. TaxSlayer Pro Online carries the total to the appropriate line.

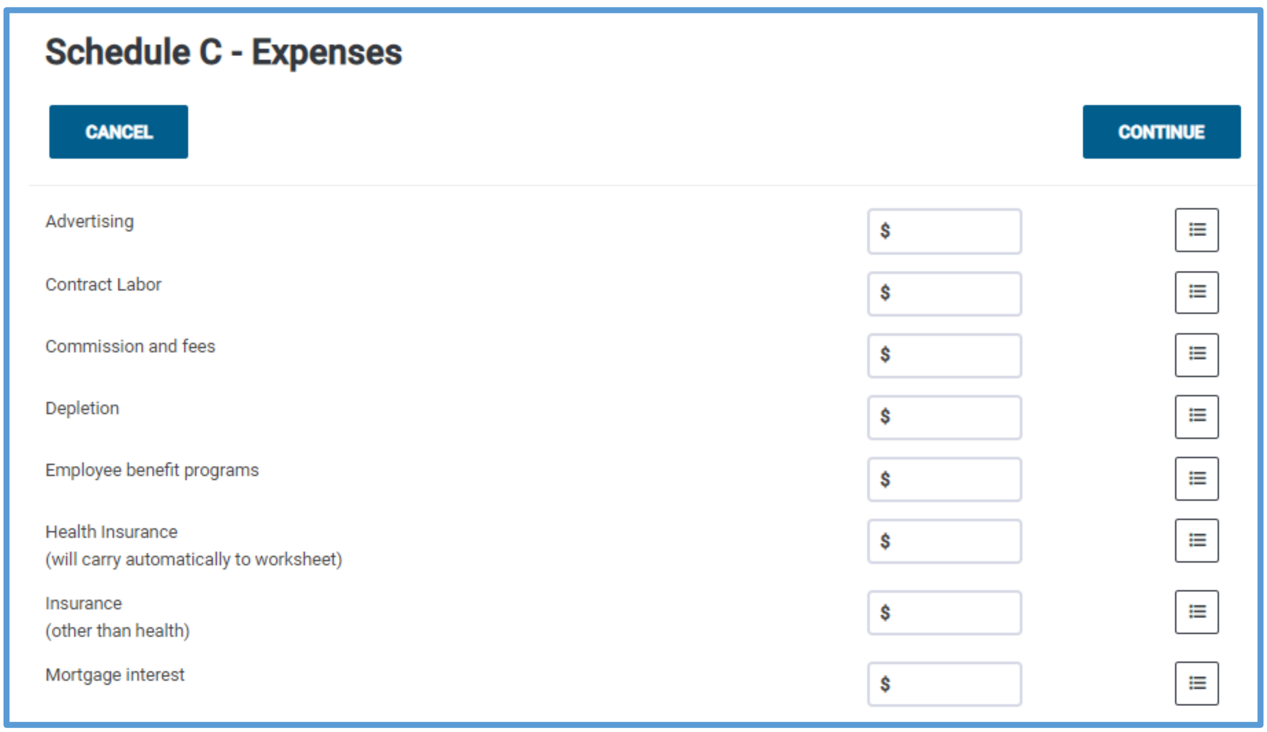


9. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule C** landing page.

10. Click the **General Expenses** line.

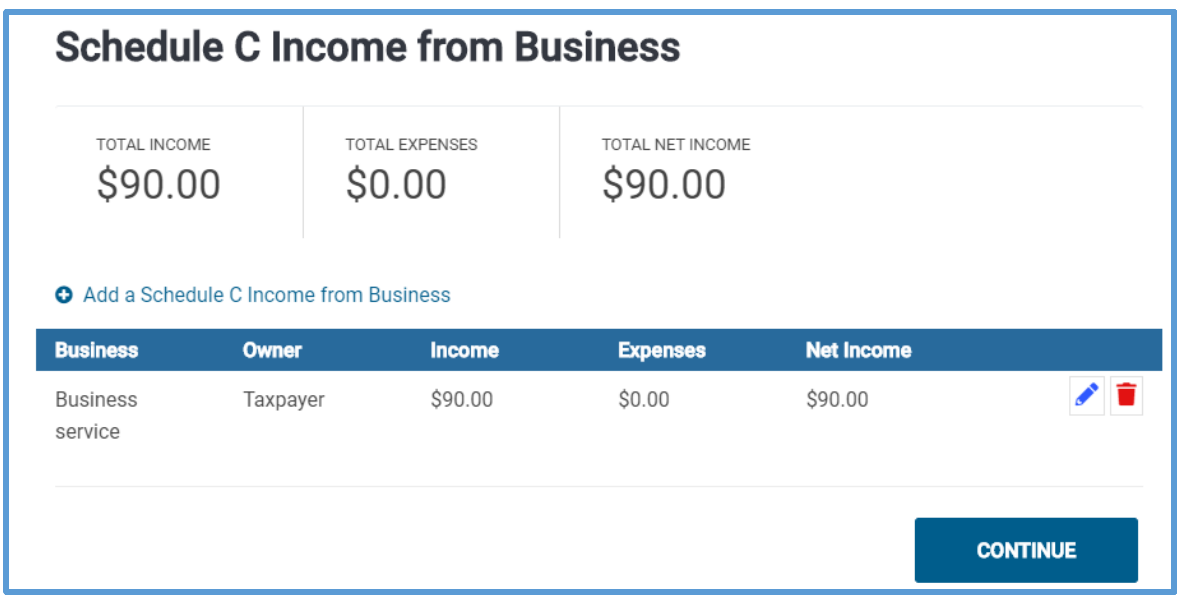
TaxSlayer Pro Online displays the **Schedule C – Expenses** page:



11. Complete the information based on answers from the taxpayer, using the following tips:
    a. When you type the amount of health insurance expense, TaxSlayer Pro Online carries this amount to the worksheet.

   b. When you type the amount of meals and entertainment expense, make sure you type it in the box for either 50% or 80%, as appropriate. Type the full amount of meals and entertainment expense. TaxSlayer Pro Online only deducts the correct amount.
   c. If the taxpayer has vehicle expenses, make sure you complete all of the in-scope boxes for the expense. Select the appropriate check boxes.
   d. If the taxpayer has other expenses, type one expense and click **Continue**. If the taxpayer has more than one “Other Expense”, click **Add** on the **Schedule C Other Expense** page for each additional expense.
   e. Use a supporting statement to enter detailed sources for each expense item.
12. To review information for each section, click **EDIT**.
13. If the taxpayer has additional items within the scope of the VITA/TCE Programs, click the appropriate line to add information to that section.
14. When you finish adding information for Schedule C, click **Continue**.

TaxSlayer Pro Online displays the **Schedule C Income from Business** page with the business you entered listed:



15. If the taxpayer (or spouse) has another business, click **Add a Schedule C Income from Business** and follow the same steps for each business.

16. When you finish adding Schedules C, click **Continue**.

TIP: TaxSlayer Pro Online automatically calculates self-employment tax based on the information you enter for Schedule C.

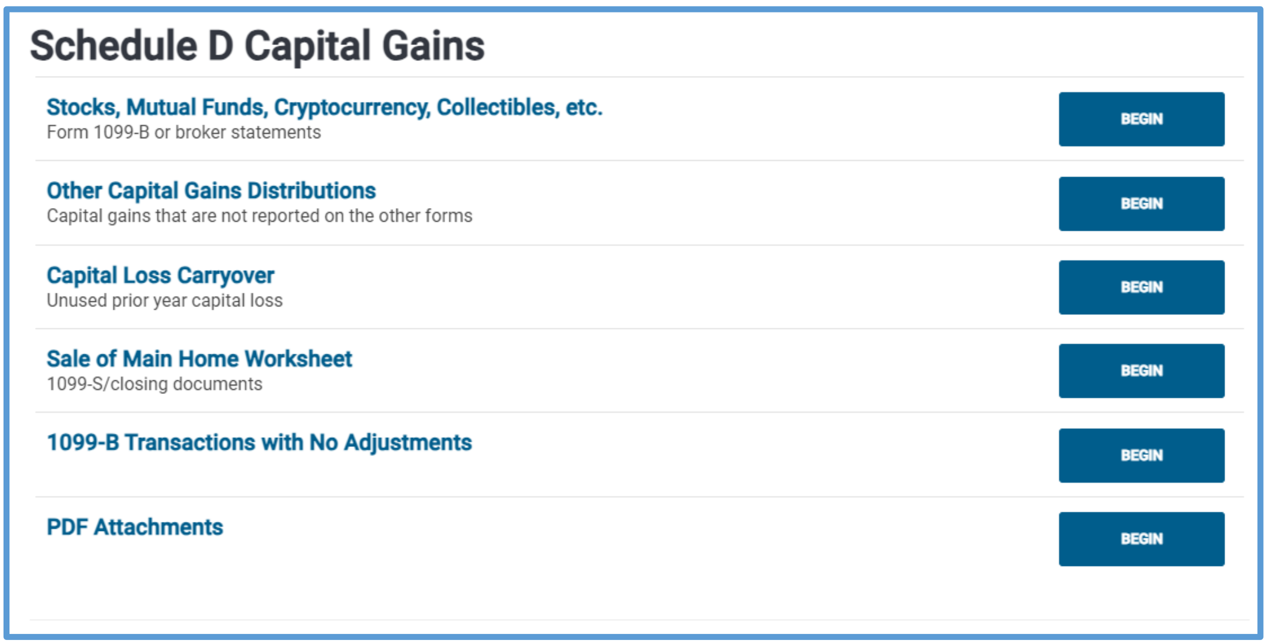
Capital Gains and Losses

Stock Transactions

Some taxpayers have sales of stocks or other personal property. If so, you should add those to the return. To add capital gains and losses, use the following steps from the **Income** landing page:

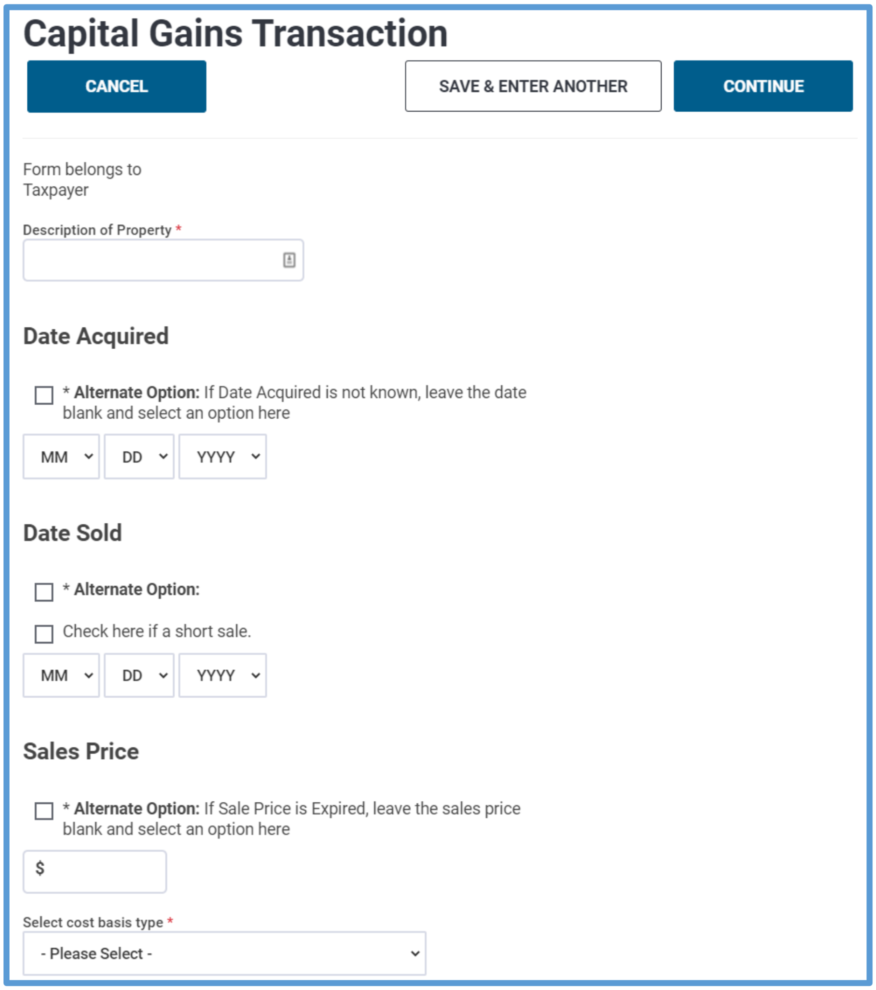
1. Click the **Schedule D/Form 8949** line.

TaxSlayer Pro Online displays the **Schedule D Capital Gains** page:



2. Click the **Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc.** line.

TaxSlayer Pro Online displays the **Capital Gains Transaction** page:



Note: For Married Filing Joint returns, you can designate whether the transaction belongs to the taxpayer, spouse or both.

3. Type the information for each line for *one* of the taxpayer's capital gain transactions, using the following tips:
    a. If the taxpayer sold stock from the same company on the same date, you can group those transactions on one page. Otherwise, enter each transaction separately.
    b. If the taxpayer does not know the date acquired or date sold, select the **Alternate Option** check box for that line and select the explanation from the drop-down list.
    c. If the sales price is expired or worthless, select the **Alternate Option** check box for that line and select the explanation from the drop-down list.

d. Select the source of the cost basis from the **Select cost basis type** drop-down list.
e. If the cost is expired, select the **Alternate Option** check box and select the explanation from the drop-down list.
f. If you need to add a negative adjustment to gain or loss, type a negative sign. For any adjustment, select the applicable adjustment explanation(s) from the provided list.

Adjustments

Enter any necessary adjustments to Gain or Loss

NOTE: If this entry is to be shown as a loss, please enter a negative sign before the number.

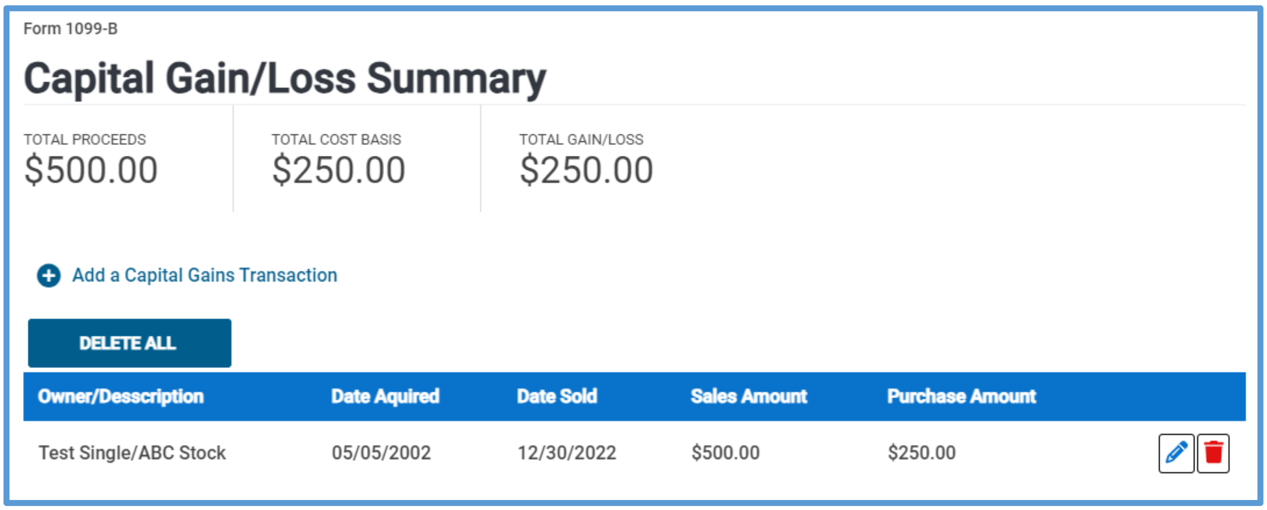
$

If you entered an adjustment amount above, please select all adjustment explanations that apply.

- ☐ B - Form 1099-B with Basis shown in Box 3 is Incorrect
- ☐ C - Disposed of Collectibles
- ☐ D - Form 1099-B showing accrued market discount in box 1f
- ☐ E - Form 1099-B or 1099-S with Selling Expenses or Options not Reflected on Form
- ☐ H - Exclude Some/All of the Gain from the Sale of Your Main Home
- ☐ L - Nondeductible Loss other than a Wash Sale
- ☐ M - Reporting Multiple Transactions on a Single Row
- ☐ N - Received 1099-B/1099-S as a Nominee for the Actual Owner of the Property
- ☐ O - Other Adjustment Not Explained Above
- ☐ Q - Exclude Part of the Gain from the Sale of Qualified Small Business Stock
- ☐ R - Rollover of Gain from QSB Stock, Empowerment Zone, Publicly Traded Securities
- ☐ S - Loss from the Sale of Small Business Stock more than Allowable Ordinary Loss
- ☐ T - Form 1099-B & Type of Gain/Loss shown in Box 1c is Incorrect
- ☐ W - Nondeductible Loss from a Wash Sale
- ☐ X - Exclude Gain from DC Zone Assets or Qualified Community Assets
- ☐ Y - Reporting Gain from QOF Investment in Prior Tax Year
- ☐ Z - Postpone Gain for Investments in QOFs

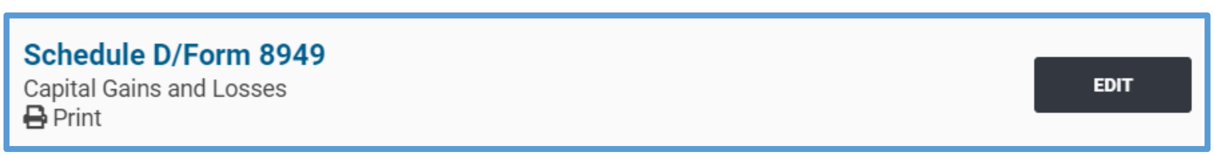
4. When you finish typing the information for the transaction, do one of the following:
    a. If the taxpayer has more capital gain transactions, click **Save & Enter Another**, and then follow the same tips to add each transaction.
    b. When you finish adding transactions, click **Continue**.

TaxSlayer Pro Online displays the **Capital Gain/Loss Summary** page with the transactions listed:



5. When you finish adding transactions, click **Continue**.

TaxSlayer Pro Online displays a printer icon on the **Schedule D/Form 8949** line. Click this icon to generate a PDF for Schedule D based on the information entered.

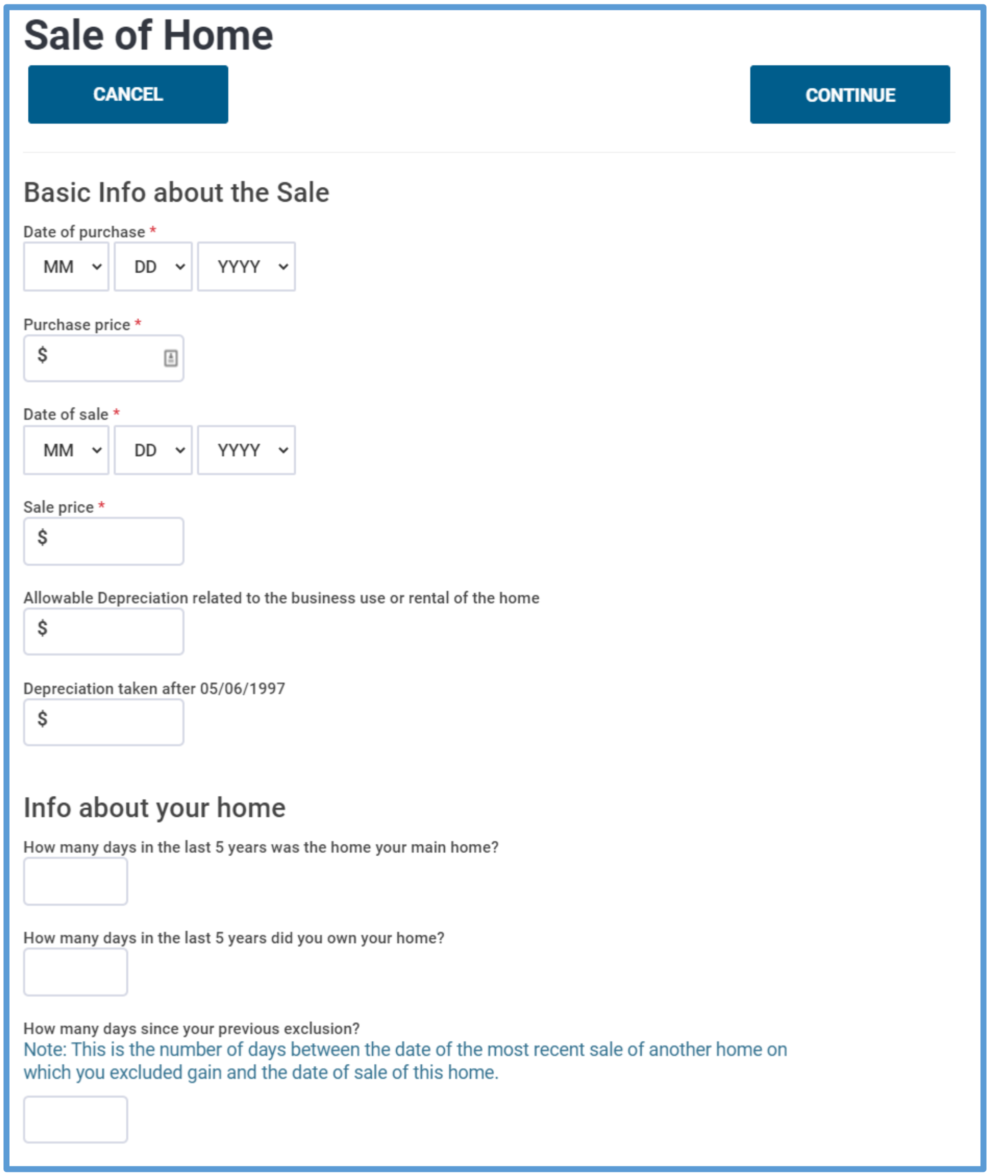


Sale of a Main Home

When a taxpayer sells a main home during the year, he or she may be able to exclude part or all of the gain. You still need to report the sale on the return, but you can add an adjustment to exclude the gain. To enter the sale of a main home and the exclusion, use the following steps:

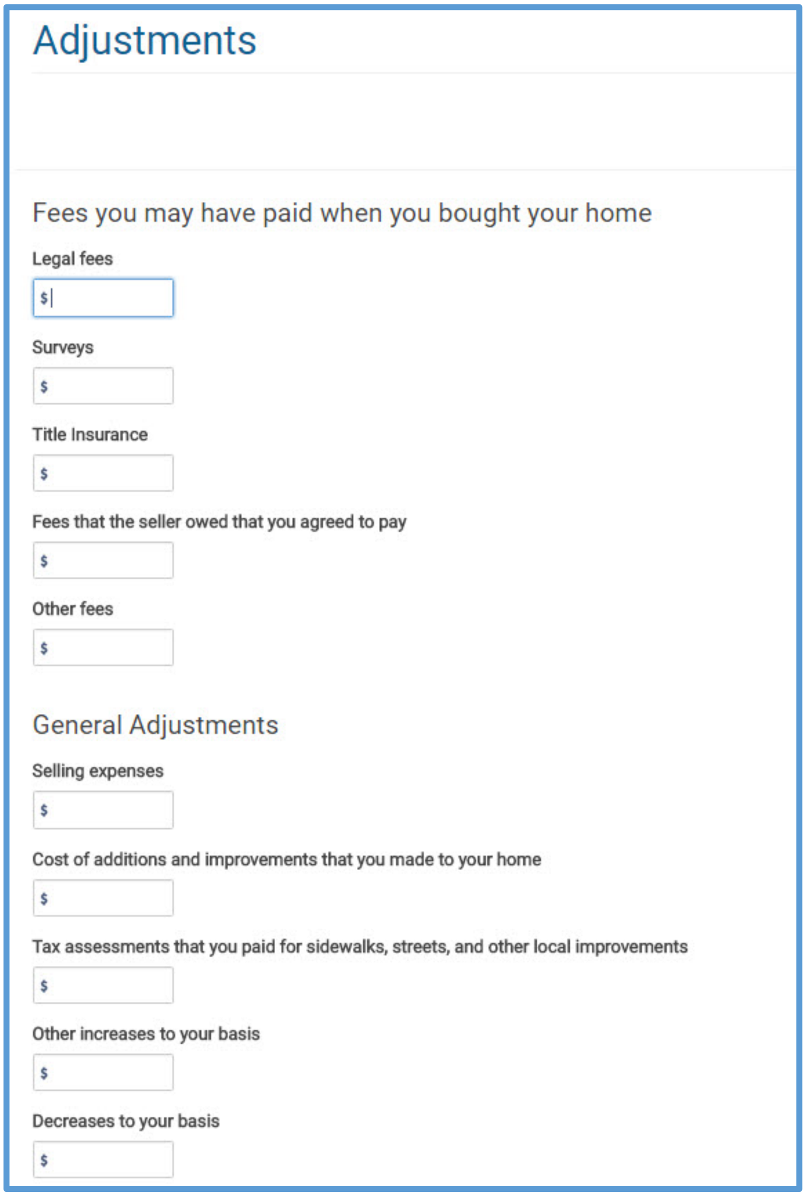
1. On the **Schedule D Capital Gains** page, click the line for the **Sale of Main Home Worksheet** line.

TaxSlayer Pro Online displays the **Sale of Home** page:



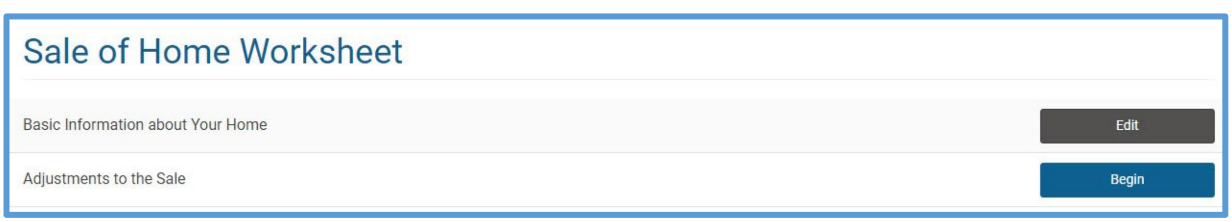
2. Read each line carefully and type the information as received from the taxpayer.
3. If the taxpayer qualifies for the maximum exclusion, select the **Check here if you qualify for the Maximum Exclusion…** check box.
4. Click **Continue**.

TaxSlayer Pro Online displays the **Adjustments** page:



5. Read each line carefully and type the adjustments the taxpayer needs to make as appropriate.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Sale of Home Worksheet** page:



7. Review any information as needed and click **Continue**.

TaxSlayer Pro Online displays the **Sale of Home Worksheet** summary page:

Sale of Home Worksheet

Purchase Date	Sold Date	Purchase price	Sales price
1/1/2010	5/5/2016	$250,000.00	$300,000.00

8. Click **Continue**.

Prior Year Loss Carryovers

If the taxpayer has a prior year loss carried forward from the previous year and you did not carry forward the return, you need to add that to the return so TaxSlayer Pro Online can deduct the loss. To add the prior year loss carryover, use the following steps:

1. On the **Schedule D Capital Gains** page, click the **Capital Loss Carryover** line.

TaxSlayer Pro Online displays the **Other Capital Gains Data** page:

Other Capital Gains Data

Adjust Section 1250 Amounts

$

Adjust 28% Gain

$

Short Term Loss Carryover from 20 (enter as a **positive** number)

$

Long Term Loss Carryover from 20 (enter as a **positive** number)

$

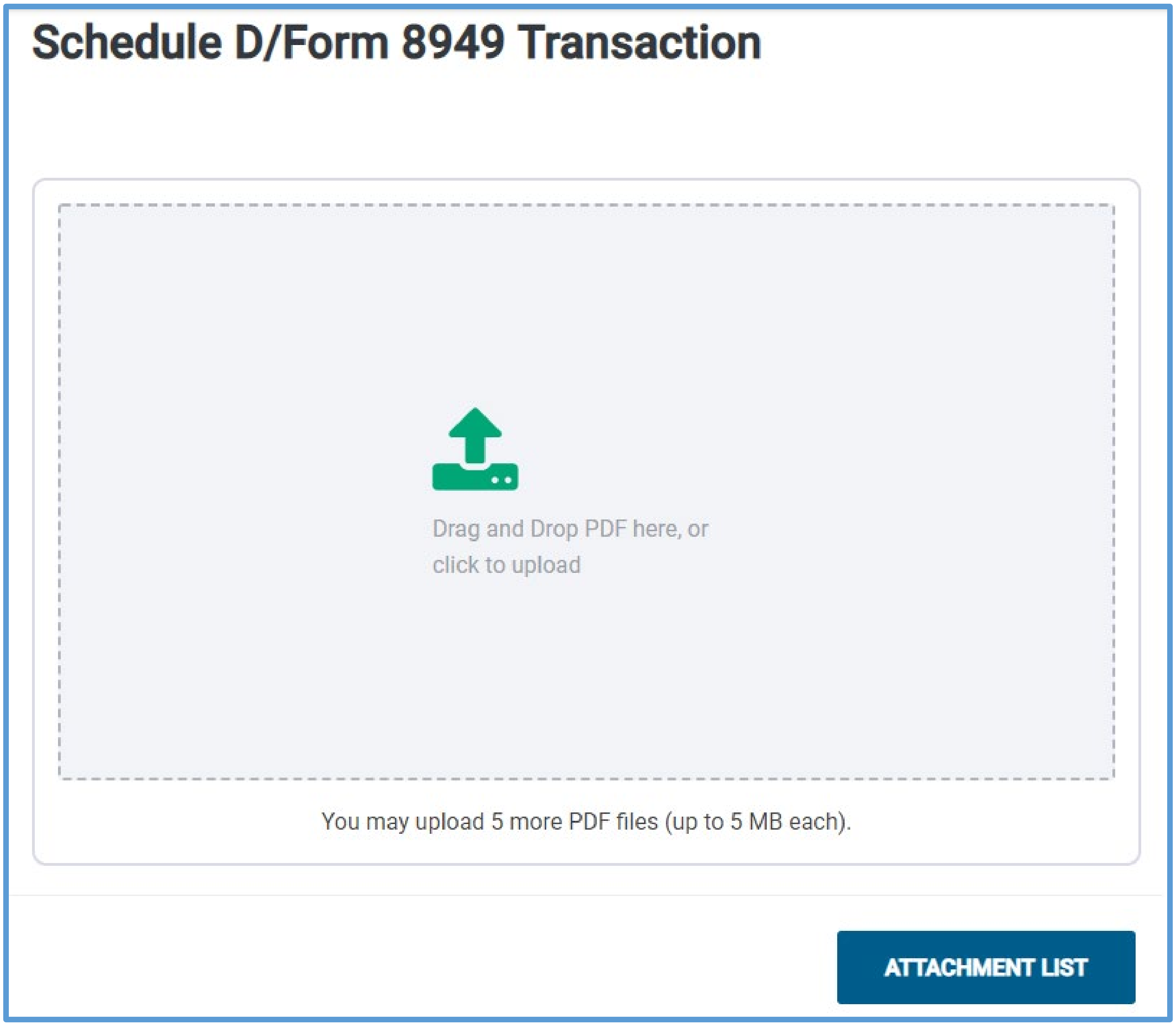
2. Type the amount of prior year loss carryover in the appropriate box: either short term or long term. Do **not** type these amounts as a negative number.
3. Click **Continue**.

Attaching a Brokerage Statement

If you need to add PDF attachments for a taxpayer's capital gains and losses, you can add up to five attachments. To add the attachments to the return, use the following steps:

1. On the **Schedule D Capital Gains** page, click the **PDF Attachments** line.

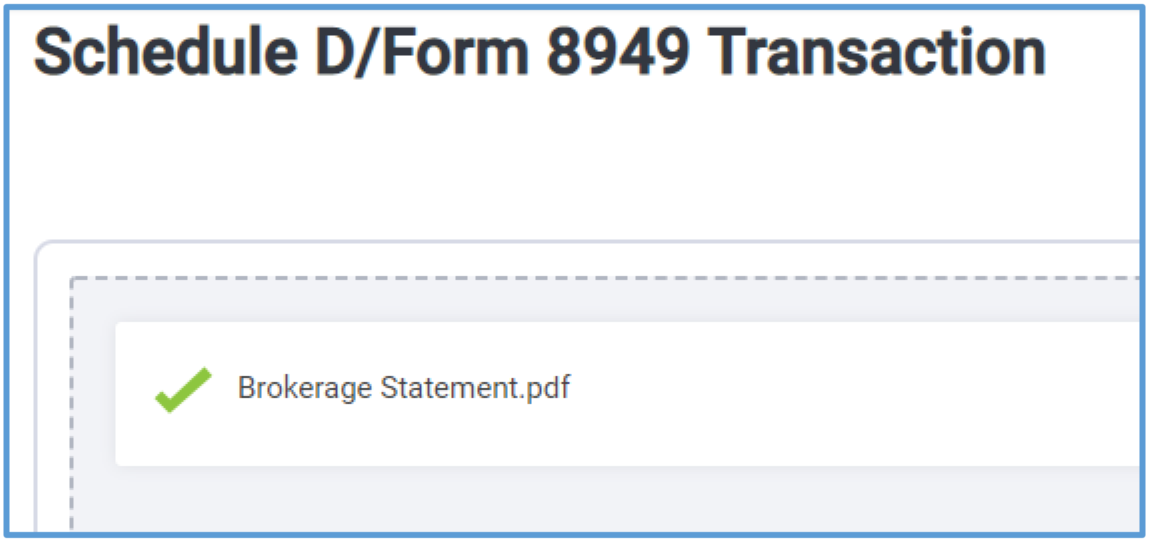
TaxSlayer Pro Online displays the **Schedule D/Form 8949 Transaction** page:



2. Do one of the following:
    a. Drag files from your computer to the **Drop files to upload** box.
    b. Click the **Drop files to upload** box, and then navigate to the appropriate files.

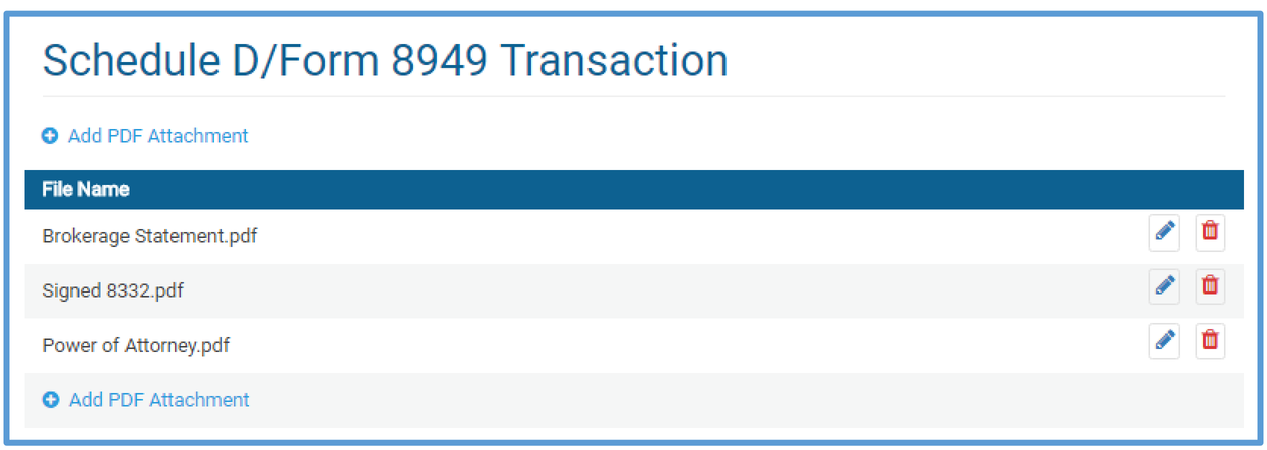
Note: There is a 5 MB limitation for each PDF attachment.

TaxSlayer Pro Online displays the files in the box with a check mark:



3. Click the box again to add more files.
4. Click **Attachment List** when complete.

TaxSlayer Pro Online displays the **Schedule D/Form 8949 Transaction** page:



5. Click **Add PDF Attachment** to add more files if needed.
6. If you need to delete an attachment, click **Delete** on the line for that attachment.

TIP: You can use this feature to attach a signed Form 8332 or Form 2848 Power of Attorney to the return.

Support TIP: Attachments are submitted with the electronic file to the IRS.

Rents and Royalties

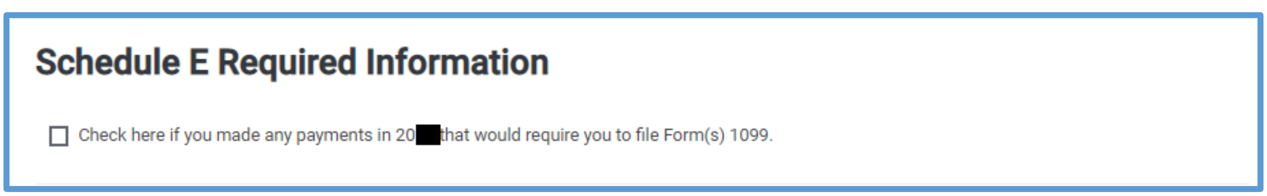
NOTE:

- **Certain income from Schedules K-1 (Forms 1065, 1120S, and 1041)**: only volunteers who certify at the Advanced level are permitted to prepare a Schedule E with Schedule K-1 income items identified in this lesson or Form 1099-MISC, Box 2, Royalties, with no associated expenses.
- **Rental income and expenses for the Military course**: Volunteers must certify at Military level to prepare a Schedule E for rental income.

Some taxpayers rent property or receive royalties. If the taxpayer has rent or royalties to report, use the following steps from the **Income** page:

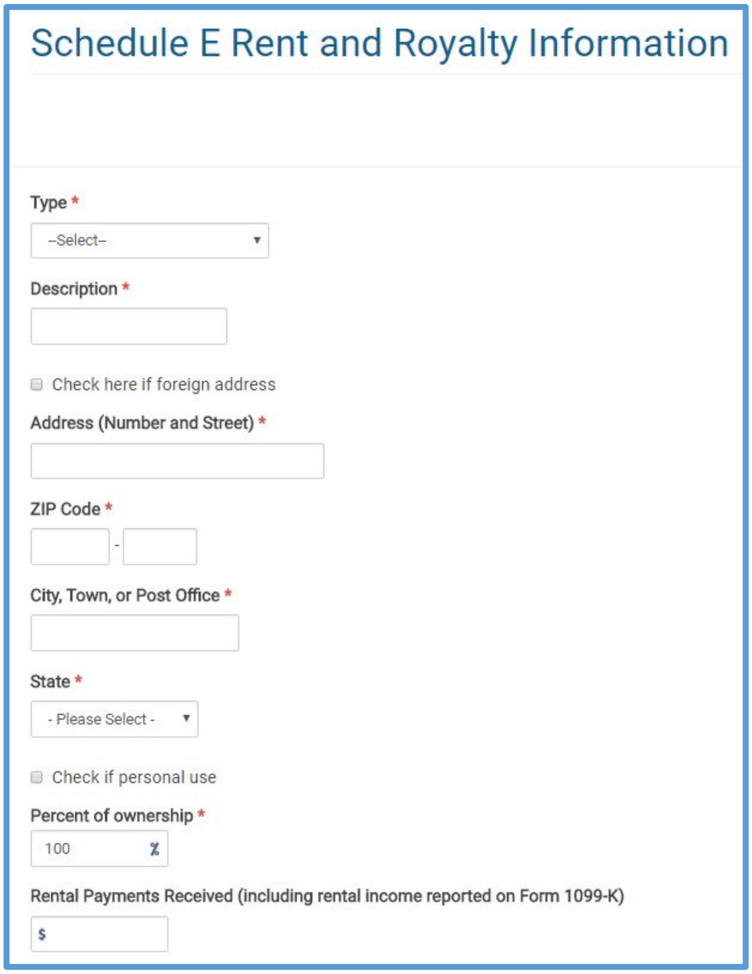
1. Click the **Schedule E** line.

TaxSlayer Pro Online displays the **Schedule E Required Information** page:



2. Read the question carefully and select the check box only if required. Taxpayers who filed or need to file Form(s) 1099 are out of scope of the VITA/TCE Programs.
3. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rent and Royalty Information** page:


Schedule E Rent and Royalty Information

Type *

--Select--

Description *

Check here if foreign address

Address (Number and Street) *

ZIP Code *

City, Town, or Post Office *

State *

- Please Select -

Check if personal use

Percent of ownership *

100 %

Rental Payments Received (including rental income reported on Form 1099-K)

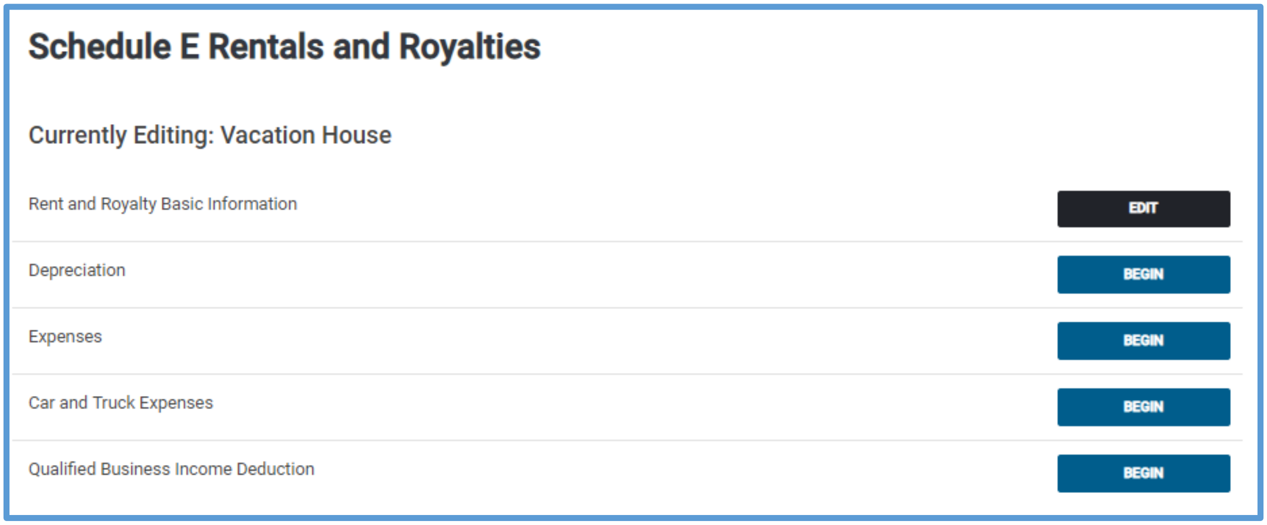
$

Note: For Married Filing Joint returns, you can designate whether the transaction belongs to the taxpayer, spouse, or both.

4. Select the type from the drop-down list. This section of the lesson covers rental properties.
5. Type the description of the property and type the address.
6. Select the **Check if personal use** box if the property has both personal and rental use. Make sure that you type the number of days the property was used for rental and the number of days the taxpayer used the property for personal use if you select this check box.
7. Type the percent of ownership, rents received, and other information.
8. Click **Continue**.

TIP: Enter 100% of the rents received and expenses paid. TaxSlayer Pro Online allocates the appropriate amount based on the **Percent of Ownership** you enter.

TaxSlayer Pro Online displays the **Schedule E Rentals and Royalties** page:

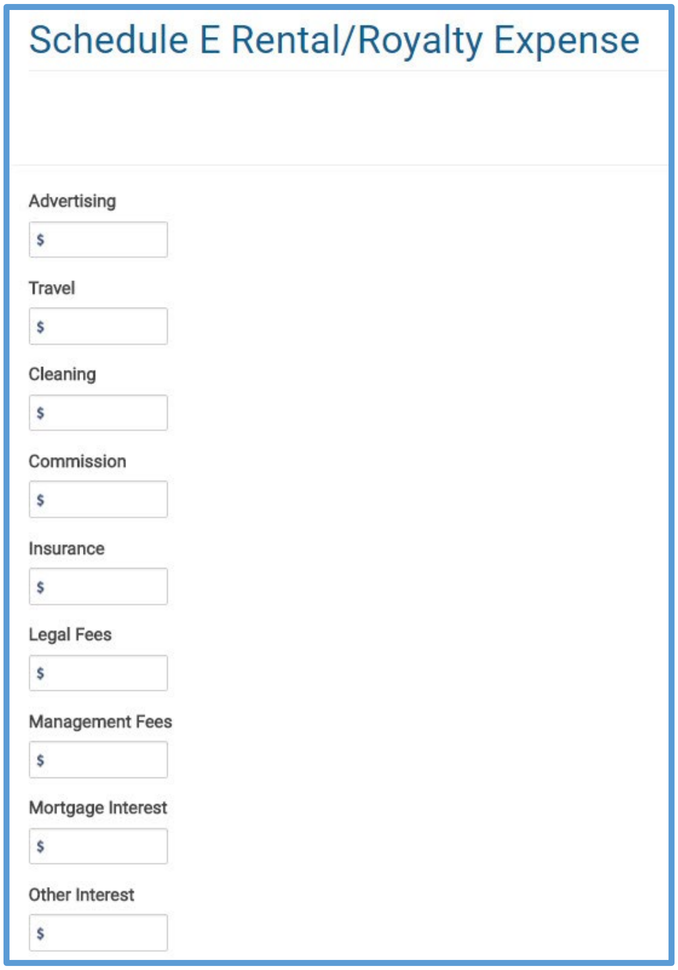


Expenses

To add Schedule E expenses, use the following steps:

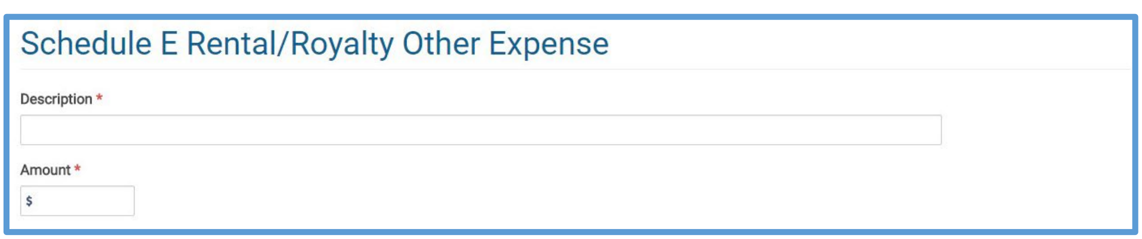
1. Click the **Expenses** line.

TaxSlayer Pro Online displays the **Schedule E Rental/Royalty Expense** page:



2. Type the taxpayer’s expenses for rental on the appropriate line of the page.
3. If the taxpayer has expenses for the rental that are not listed on this page, click **Add** on the **Additional Expenses** line.

TaxSlayer Pro Online displays the **Schedule E Rental/Royalty Other Expense** page:



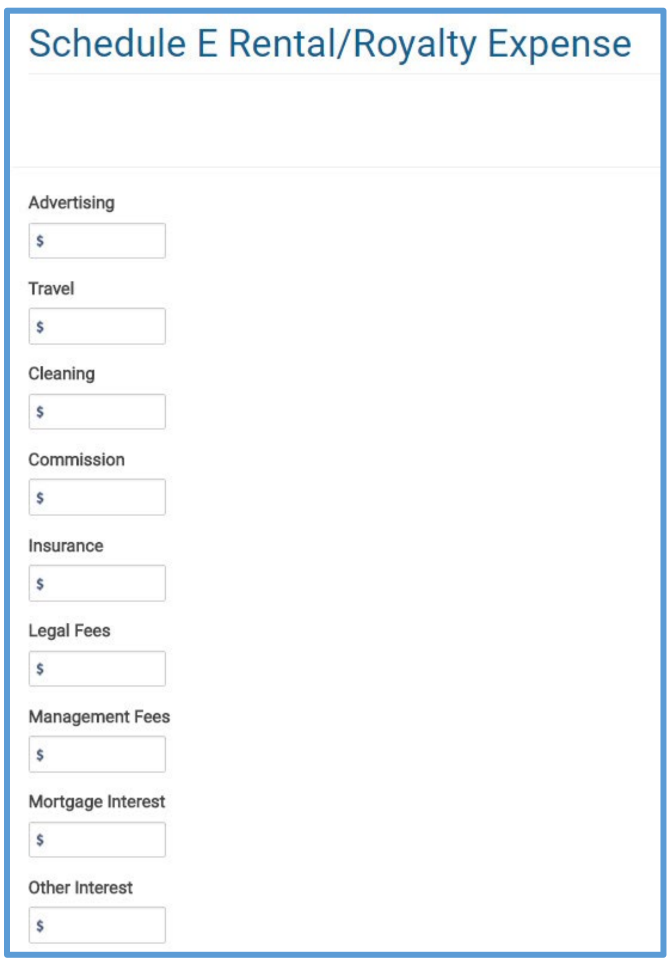
4. Type the description and amount of the other expense.

5. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rental/Royalty Other Expense** page with the new expense listed:

6. If the taxpayer has additional other expenses, click **Add Another** to enter the information for each expense.
7. When you finish adding other expenses, click **Continue**.

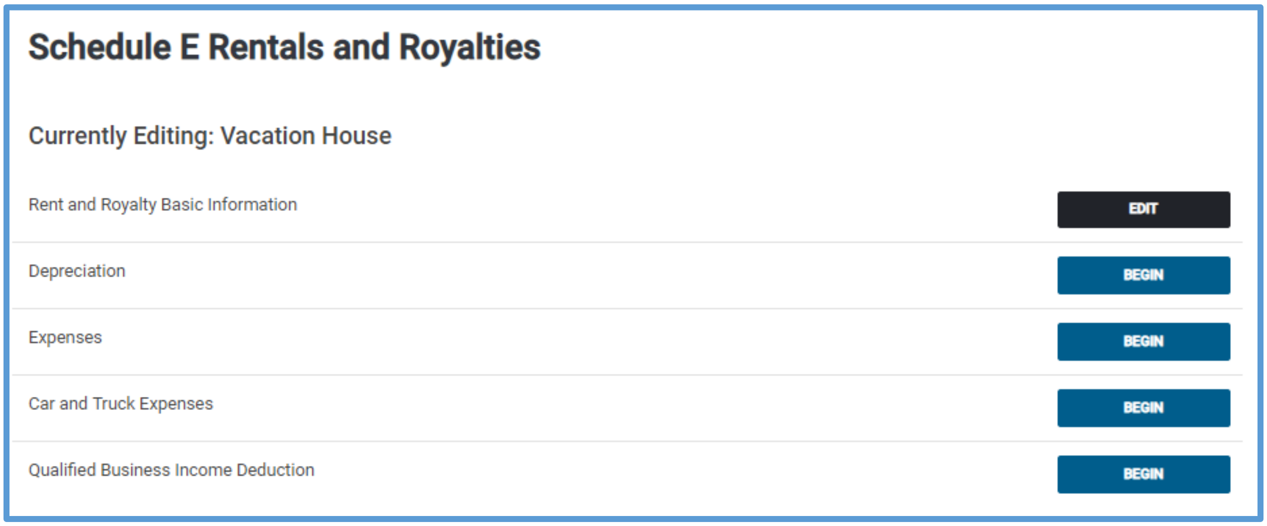
TaxSlayer Pro Online displays the **Schedule E Rental/Royalty Expense** page:



TIP: If the taxpayer has depreciation, add your calculation on this page.

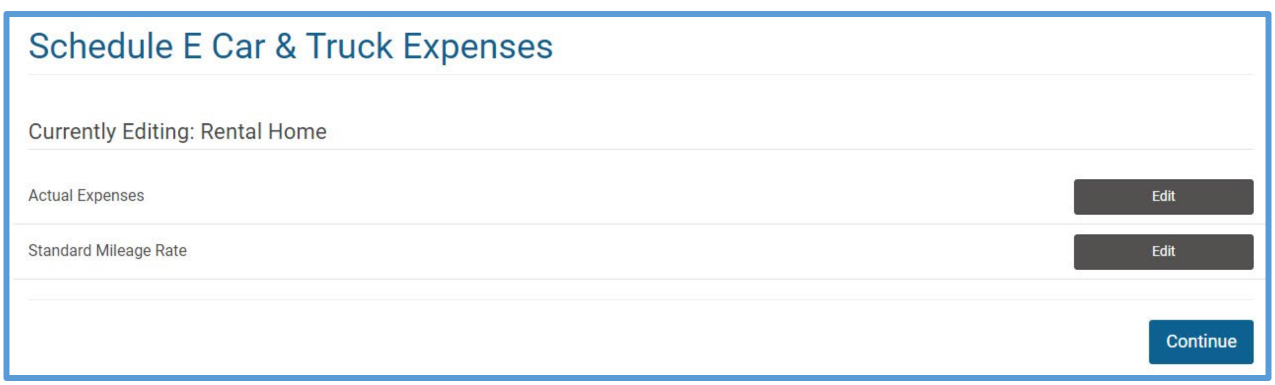
8. When you finish adding expenses, click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rentals and Royalties** landing page:



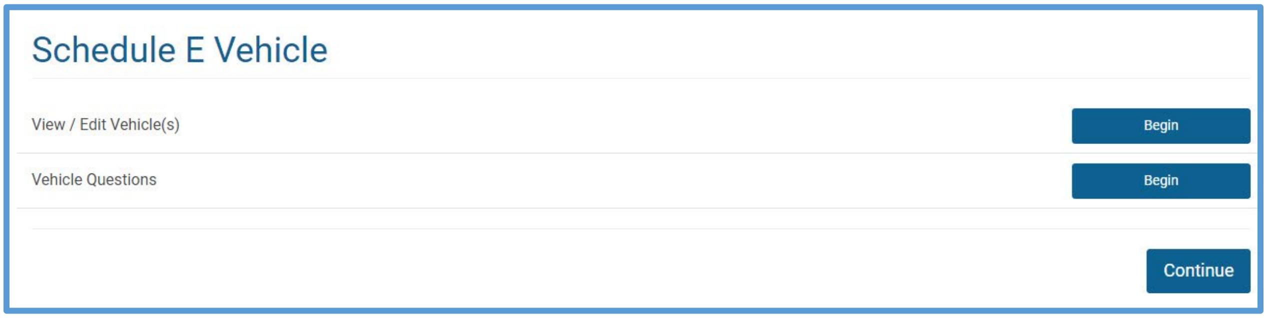
9. If the taxpayer has standard mileage for a vehicle, click the **Car and Truck Expenses** line**.**

TaxSlayer Pro Online displays the **Schedule E Car & Truck Expenses** page:



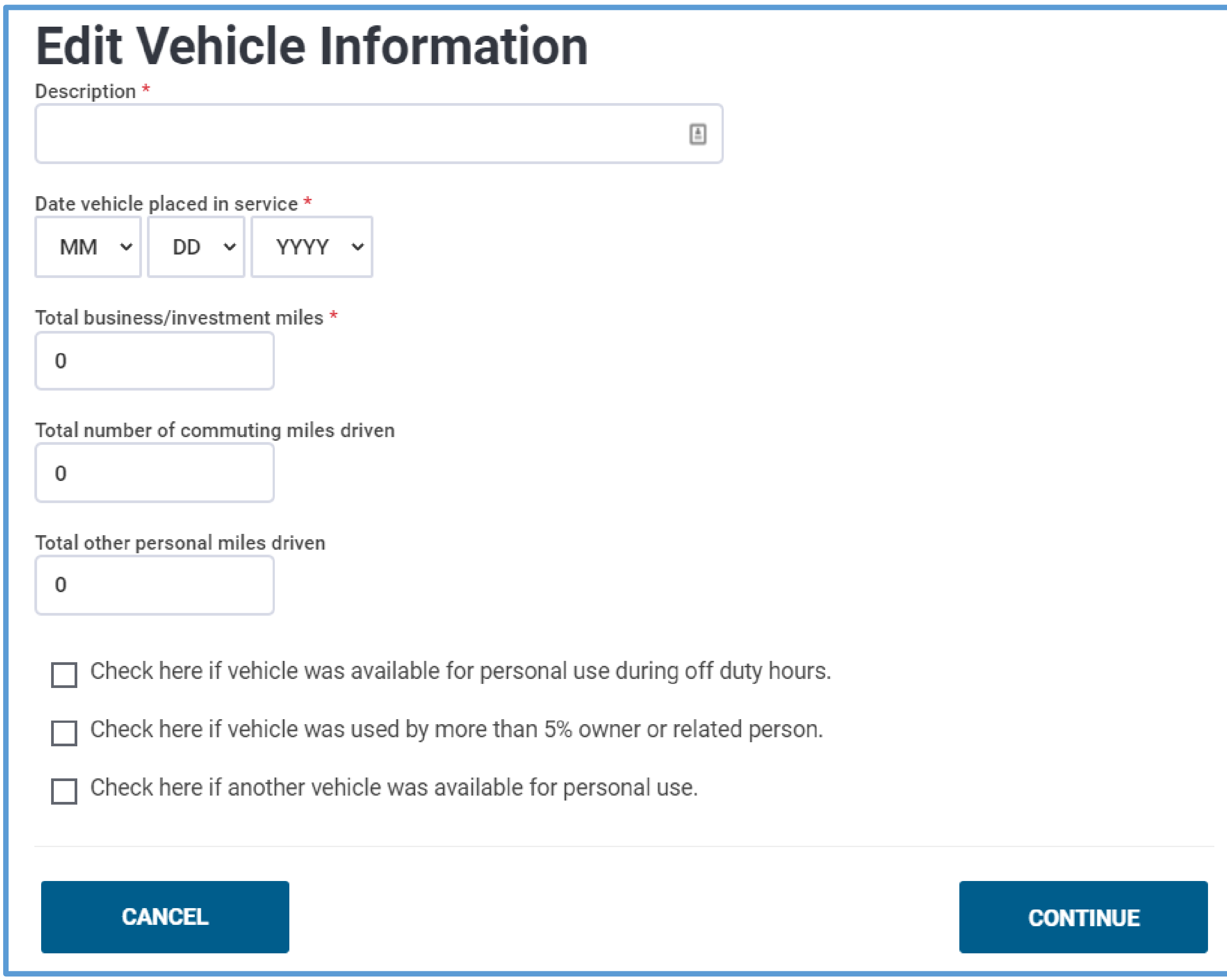
10. Click the **Standard Mileage Rate** line.

TaxSlayer Pro Online displays the **Schedule E Vehicle** page:



11. Click the **View/Edit Vehicle(s)** line.

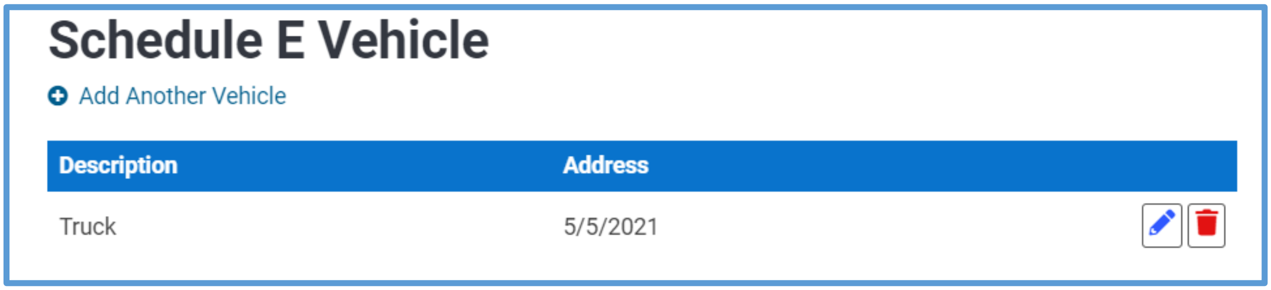
TaxSlayer Pro Online displays the **Edit Vehicle Information** page:



12. Type all of the information for the vehicle.

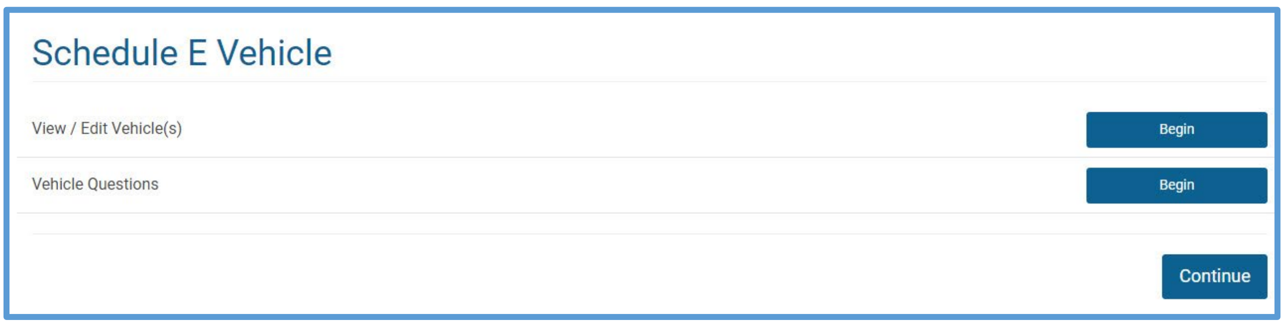
13. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Vehicle** page with the vehicle listed:



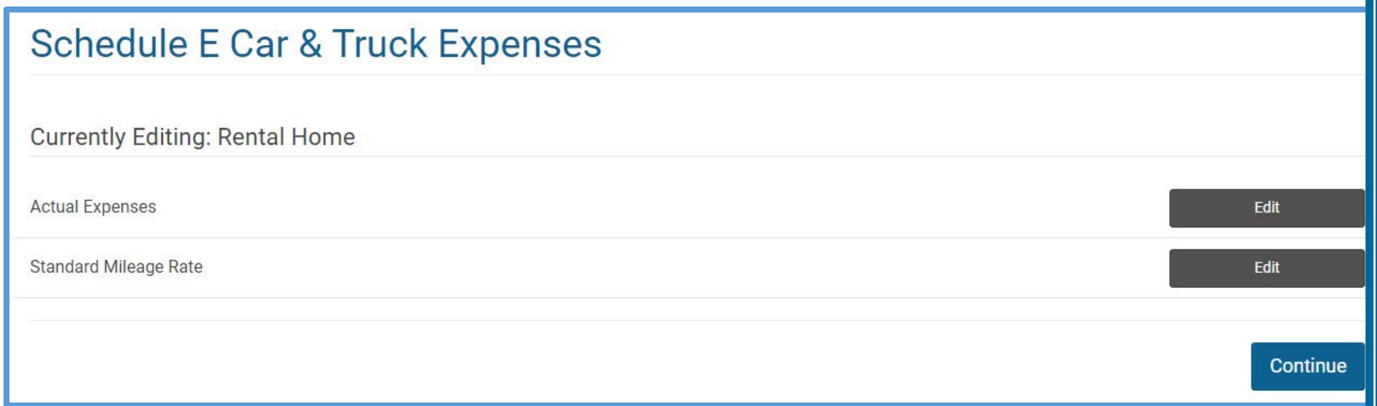
14. If the taxpayer has more vehicles to add, click **Add** and follow the same steps to add each vehicle.
15. When you finish adding vehicles, click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Vehicle** page:



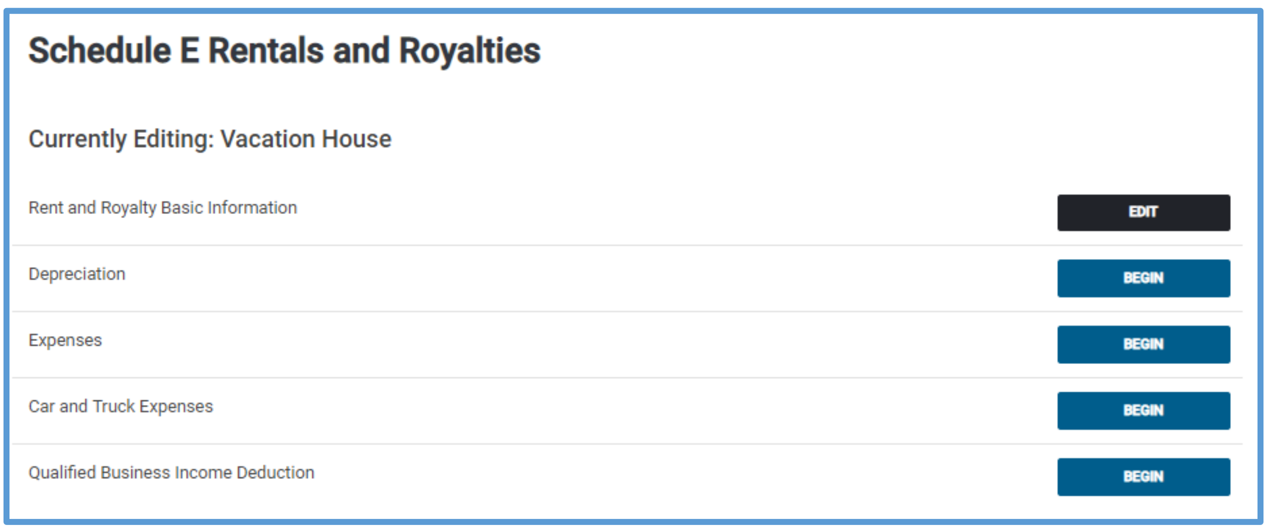
16. Because you should have completed vehicle questions when you completed the **Form 4562 Questions** page, earlier, click **Continue**. If not, answer the questions here.

TaxSlayer Pro Online displays the **Schedule E Car & Truck Expenses** page:



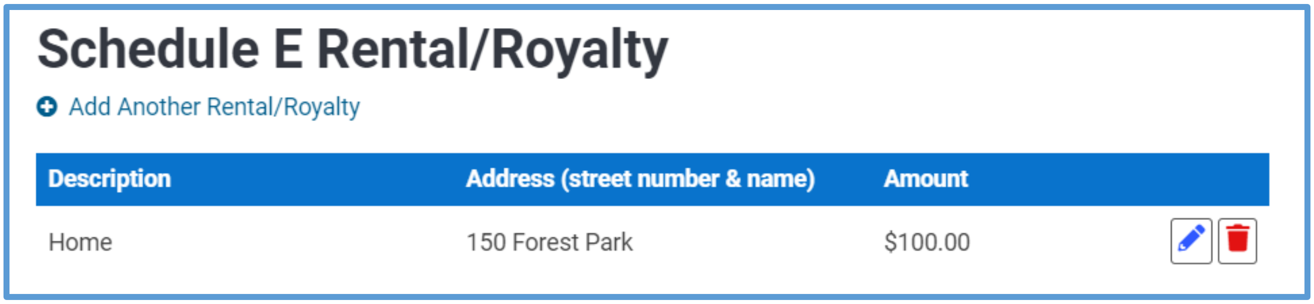
17. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rentals and Royalties** landing page:



18. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rental/Royalty** page with the property you entered listed:



19. If the taxpayer has multiple rental or royalty properties, click **Add Another** and use the same steps to enter each one.
20. When you finish adding rental and royalty properties, click **Continue**.

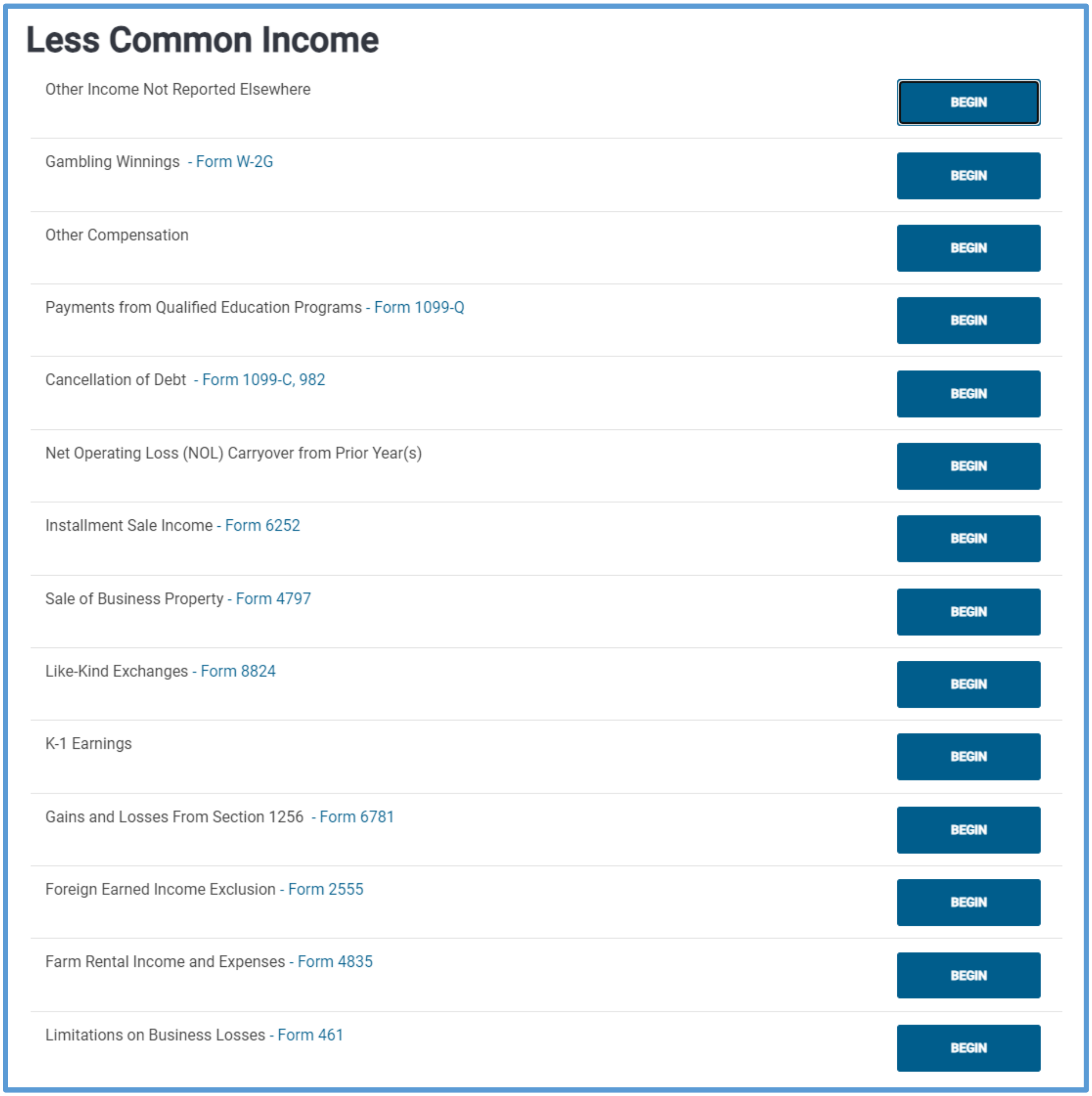
Schedules K-1

If the taxpayer received a Schedule K-1 from a partnership, S corporation, estate, or trust, you need to report the income. To report a Schedule K-1, use the following steps from the **Income** landing page:

NOTE: Certain income from Schedules K-1 (Forms 1065, 1120S, and 1041): only volunteers who certify at the Advanced level are permitted to prepare a Schedule E with Schedule K-1 income items identified in this lesson or Form 1099-MISC, Box 2, Royalties, with no associated expenses.

1. Click the **Other Income** line.

TaxSlayer Pro Online displays the **Less Common Income** page:



Less Common Income

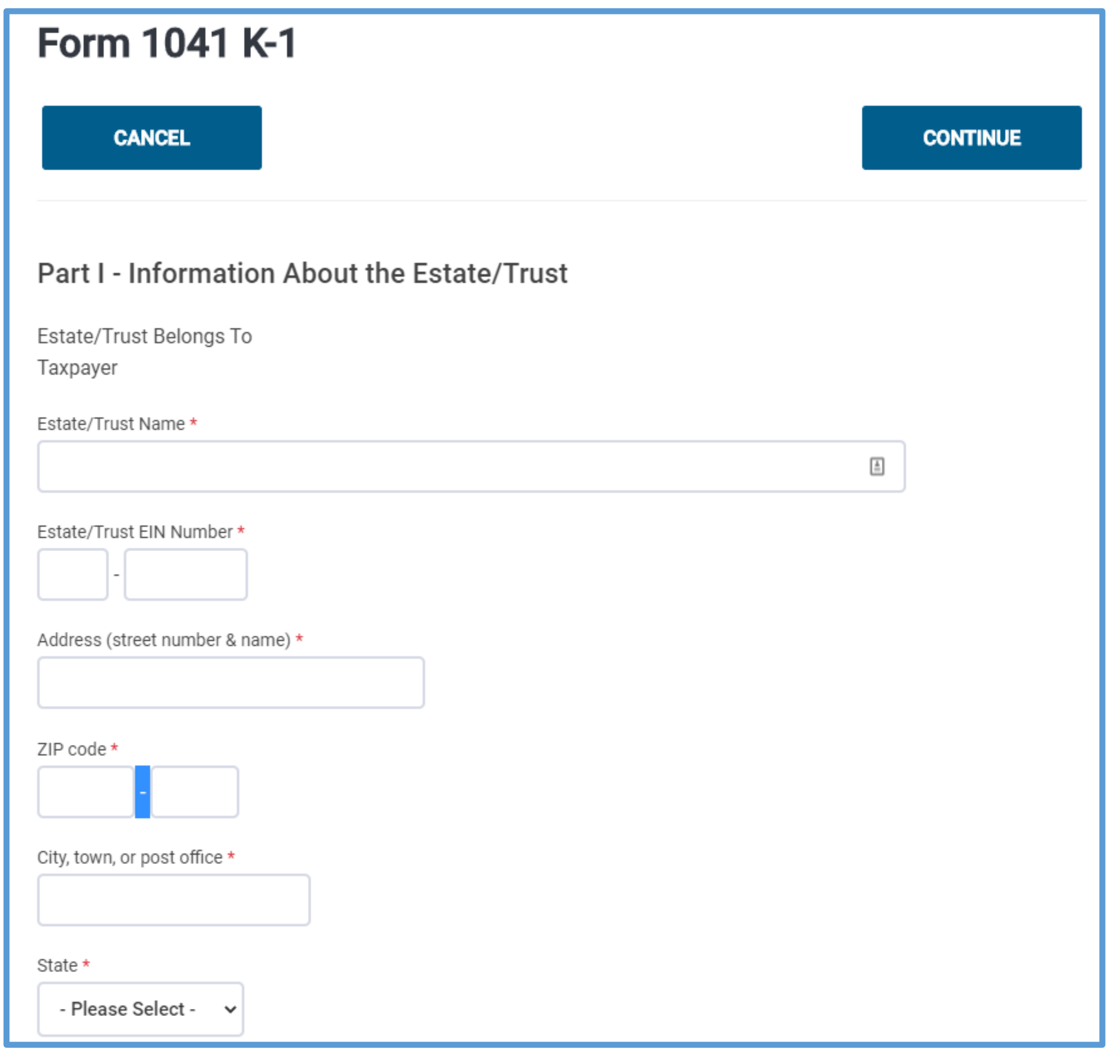
Other Income Not Reported Elsewhere	BEGIN
Gambling Winnings - Form W-2G	BEGIN
Other Compensation	BEGIN
Payments from Qualified Education Programs - Form 1099-Q	BEGIN
Cancellation of Debt - Form 1099-C, 982	BEGIN
Net Operating Loss (NOL) Carryover from Prior Year(s)	BEGIN
Installment Sale Income - Form 6252	BEGIN
Sale of Business Property - Form 4797	BEGIN
Like-Kind Exchanges - Form 8824	BEGIN
K-1 Earnings	BEGIN
Gains and Losses From Section 1256 - Form 6781	BEGIN
Foreign Earned Income Exclusion - Form 2555	BEGIN
Farm Rental Income and Expenses - Form 4835	BEGIN
Limitations on Business Losses - Form 461	BEGIN

2. Click the **K-1 Earnings** line.

TaxSlayer Pro Online displays the **Schedule K-1** page:

3. Read the lines to find the correct Schedule K-1 for the form the taxpayer received. Click that line. For purposes of this lesson, we cover Schedule K-1 from an estate or trust.

TaxSlayer Pro Online displays the **Form 1041 K-1** page:

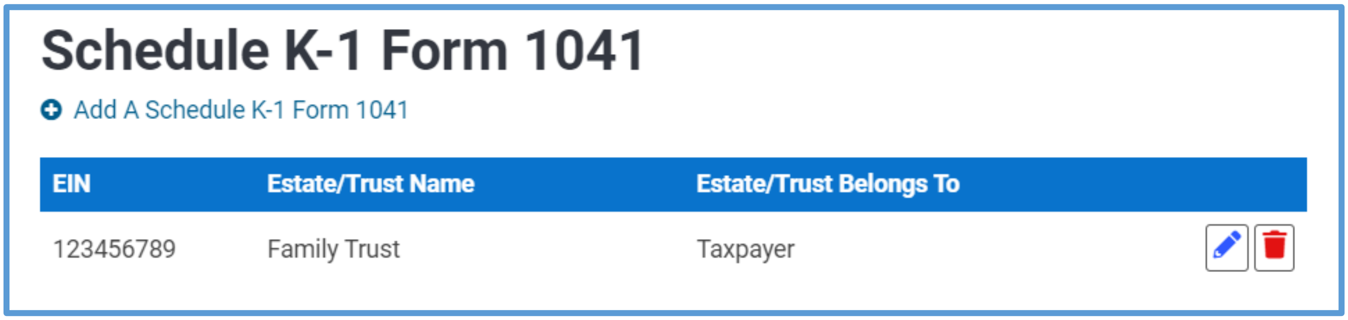


4. Type the information on the page exactly as shown on the paper Schedule K-1 the taxpayer received.

TIP: If the taxpayer is married, select whether the Schedule K-1 belongs to the taxpayer or the spouse.

5. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule K-1 Form 1041** summary page with the Schedule K-1 listed:



6. If the taxpayer has additional Schedules K-1 from the same type of entity to report, click **Add** and follow the same steps to enter the information for the Schedule K-1.
7. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule K-1** page:

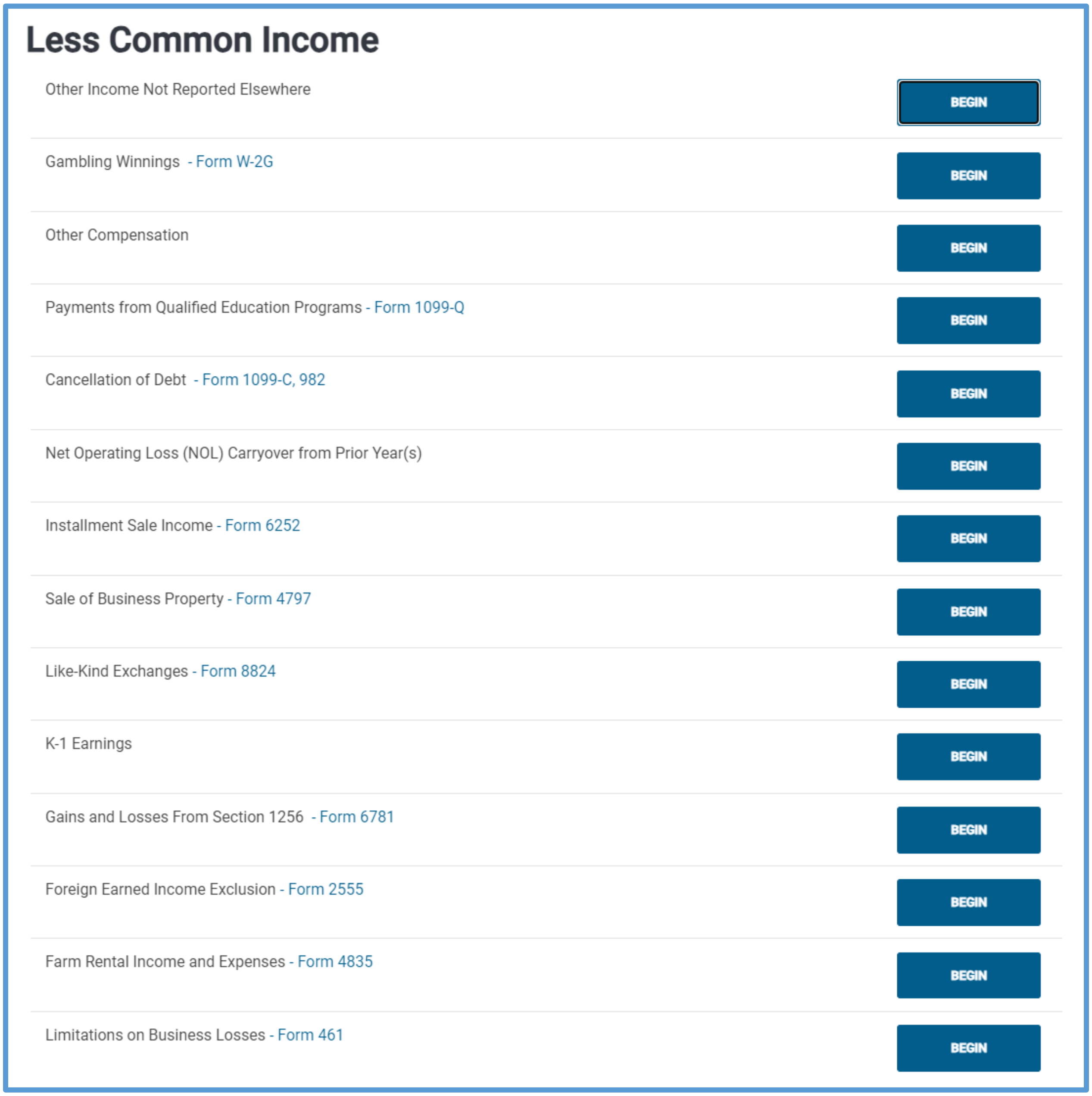
8. If the taxpayer has additional Schedules K-1, click the line for the form the taxpayer received and follow the same steps to enter the income.

Foreign Earned Income Exclusion

Some taxpayers may qualify for an exclusion of income they earned in another country. If so, you can add that exclusion to the return. To enter a foreign earned income exclusion, use the following steps from the **Income** page:

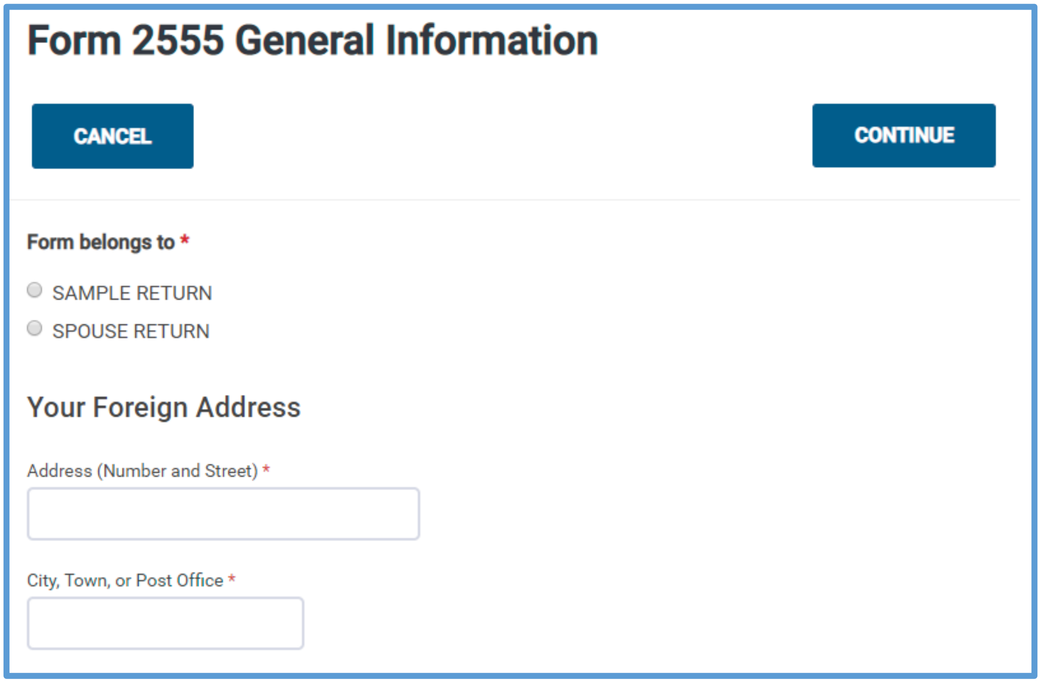
1. Click the **Other Income** line.

TaxSlayer Pro Online displays the **Less Common Income** page:



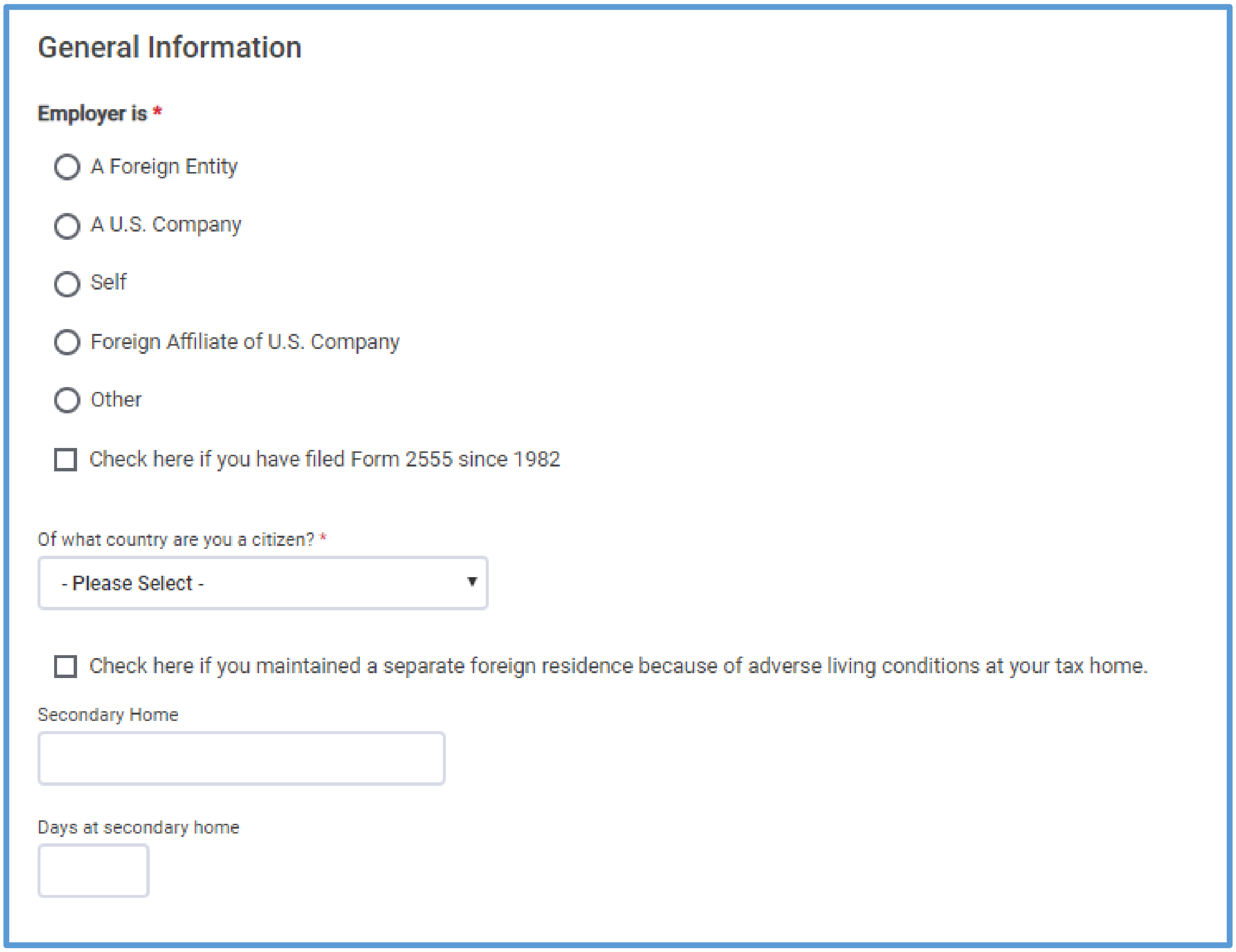
2. Click the **Foreign Earned Income Exclusion** line.

TaxSlayer Pro Online displays the **Form 2555 General Information** page:



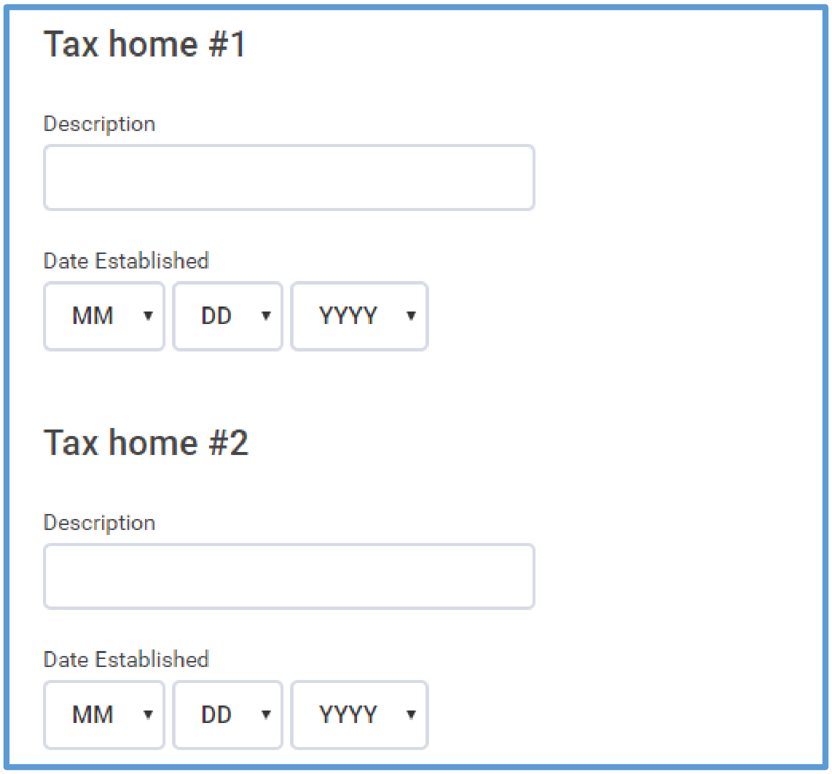
3. Select whether the Form 2555 belongs to the taxpayer or spouse (if applicable).
4. Type the taxpayer's foreign address.
5. Type the occupation.
6. Type the employer's information, including name, United States address, and foreign address.

Scroll to the **General Information** section:



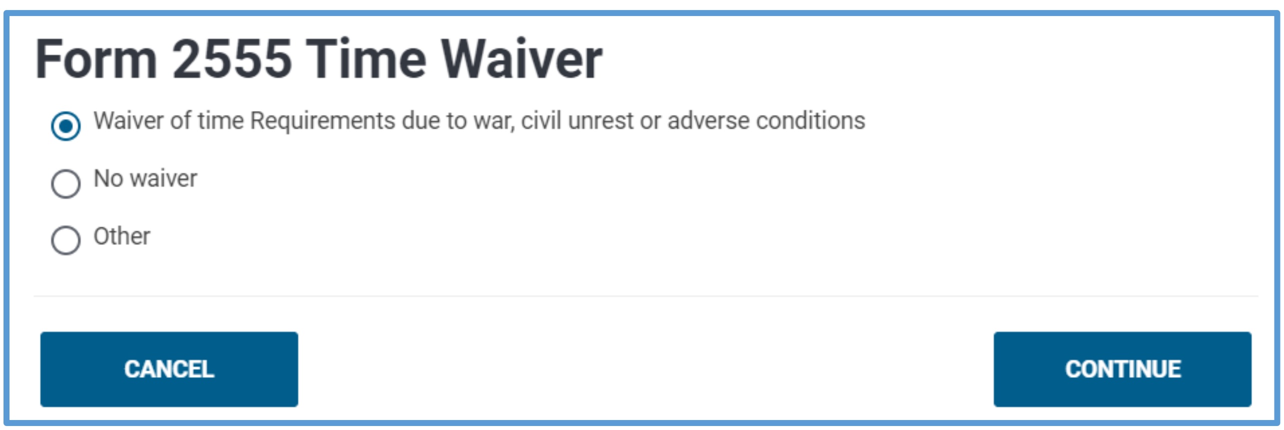
7. Read each question in the **General Information** section carefully and select or type the correct answer.
8. If the taxpayer maintained a separate foreign residence because of adverse living conditions at his or her tax home, select the appropriate check box and type the address of and days at the secondary home in the appropriate boxes.

Scroll to the **Tax home** section:



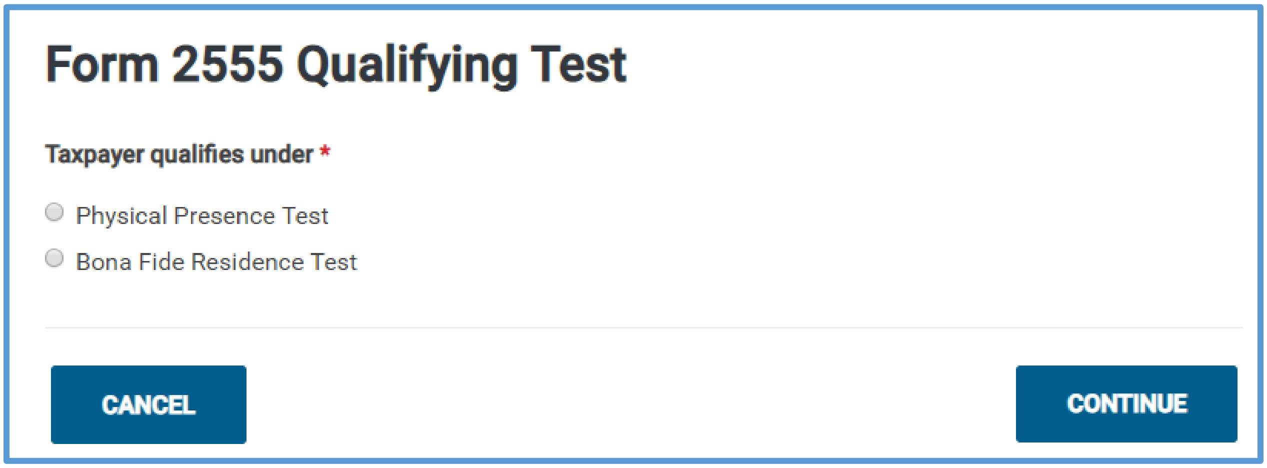
9. Type a description and the date established for each tax home.
10. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Form 2555 Time Waiver** page:



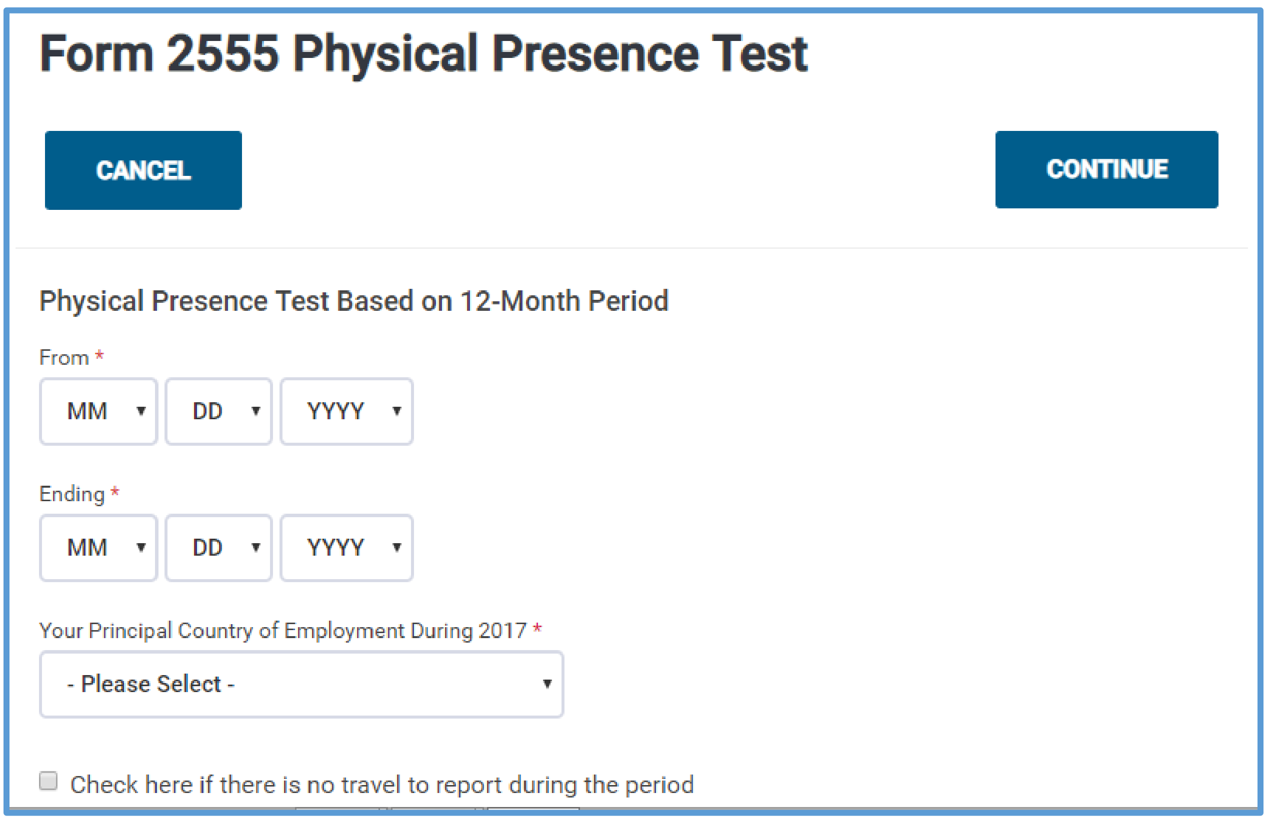
11. Select the radio button to show whether the taxpayer qualifies for a time waiver.
12. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Form 2555 Qualifying Test** page:



11. Select the test under which the taxpayer qualifies.
12. Click **CONTINUE**.

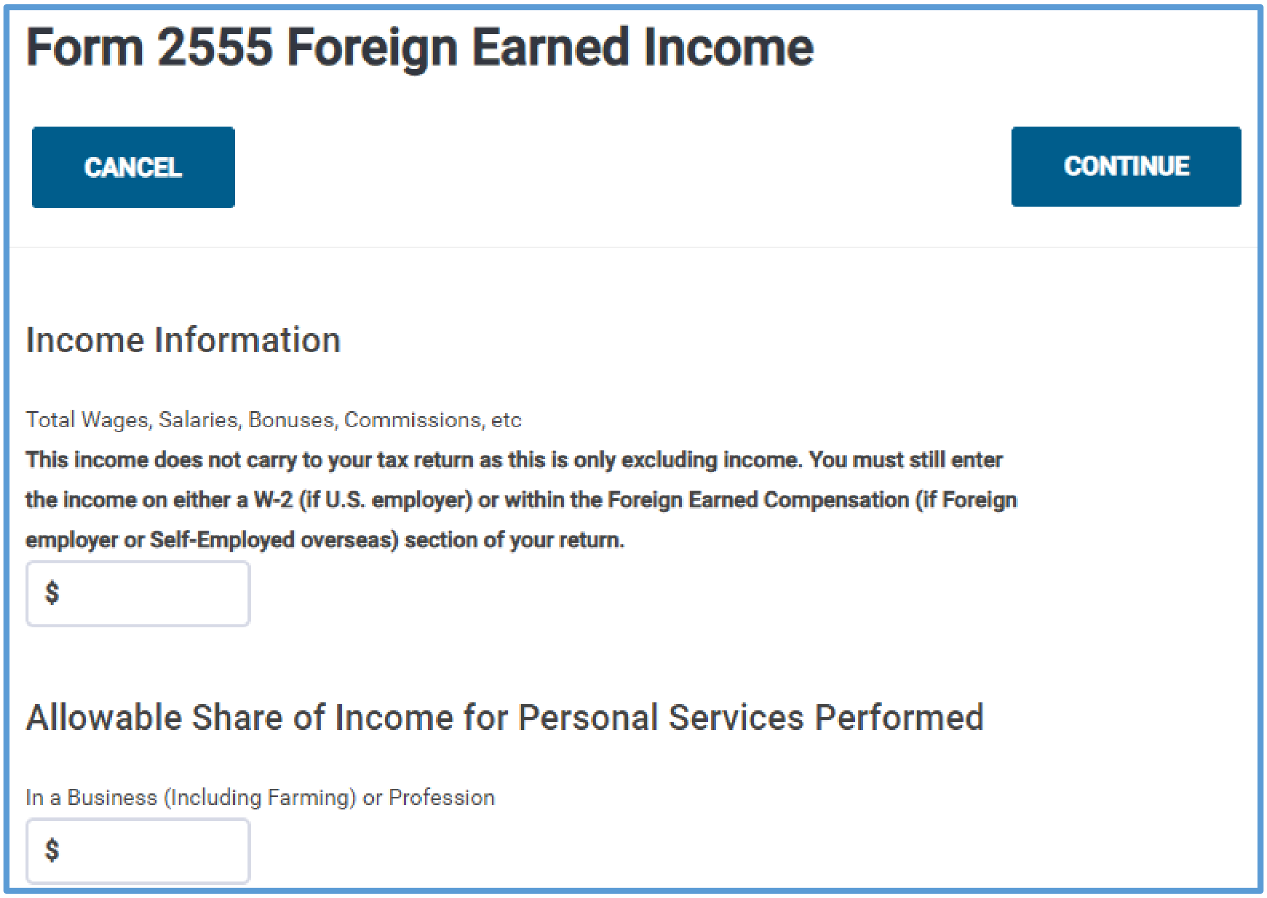
TaxSlayer Pro Online displays the appropriate information for the test you select:



13. Read each question carefully and select the correct answer based on information from the taxpayer.

14. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Form 2555 Foreign Earned Income** page:

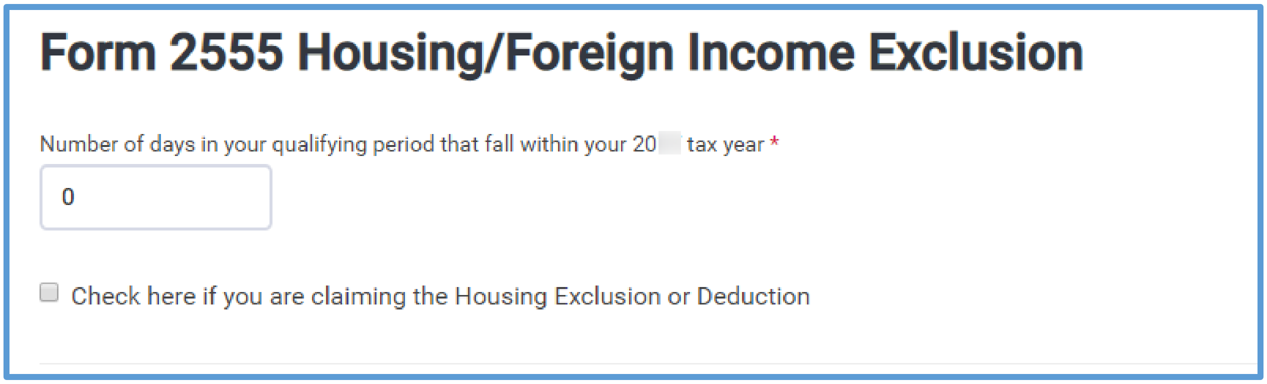


15. Read each question carefully and type or select the appropriate answer based on information from the taxpayer.

NOTE: TaxSlayer Pro Online does not carry this income information to the tax return. You still need to complete Form W-2 or other income forms in the appropriate section of the return.

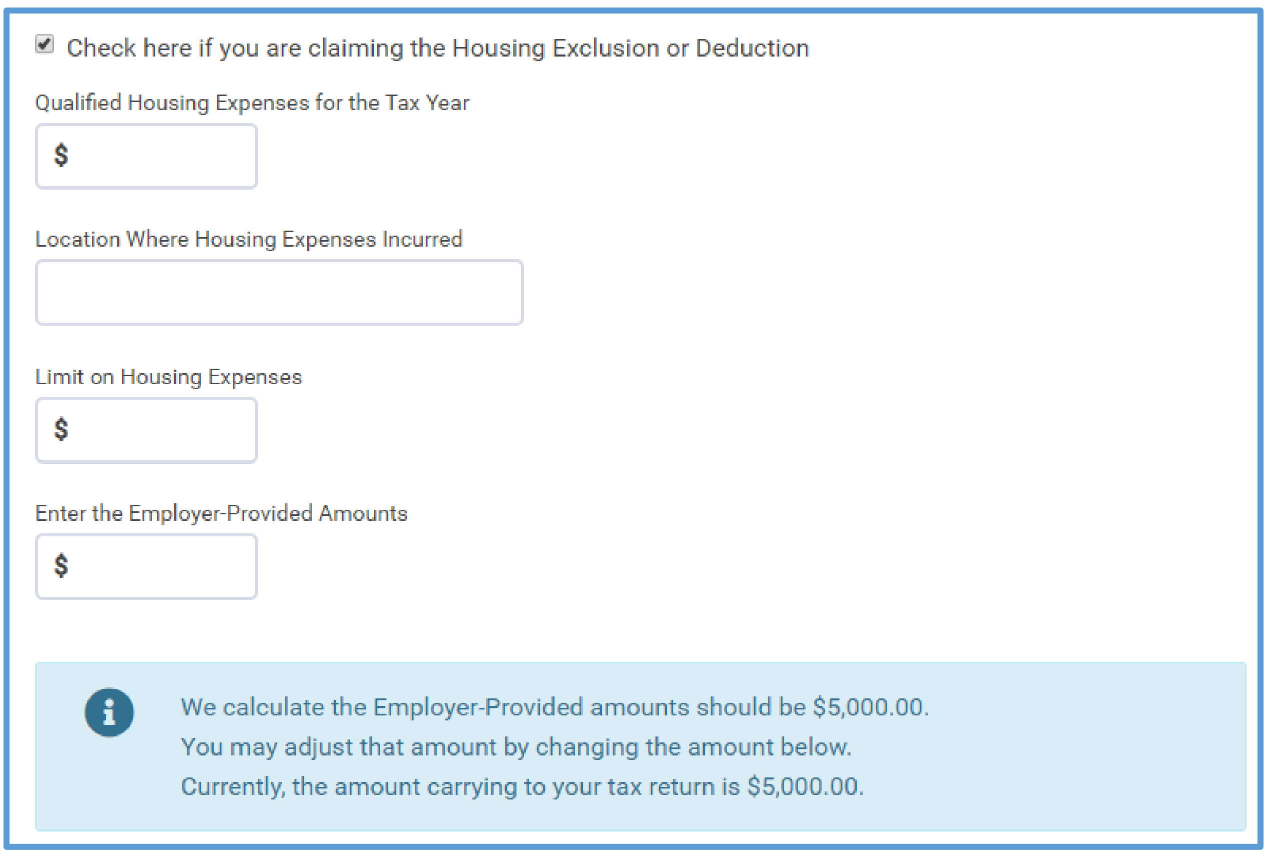
16. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Form 2555 Housing/Foreign Income Exclusion** page, if the taxpayer appears to qualify for this exclusion:



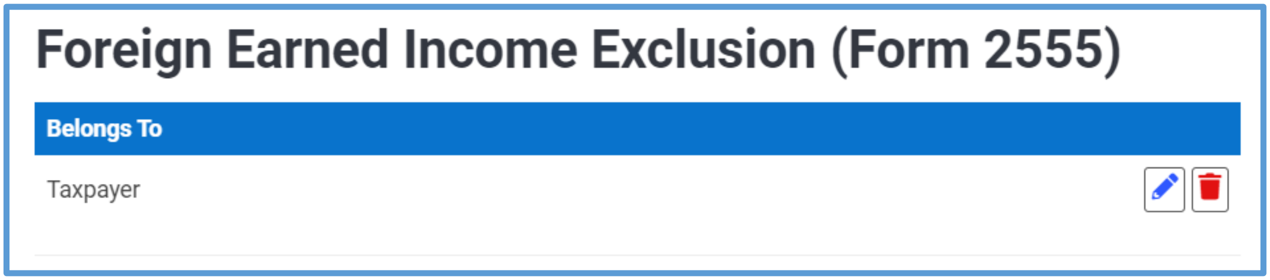
17. Type the number of days in the qualifying period that fall within the current tax year.
18. If the taxpayer is claiming the housing exclusion or deduction, select the check box.

TaxSlayer Pro Online displays the housing information questions:



19. Read each question carefully and type the amount based on information from the taxpayer.
20. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Foreign Earned Income Exclusion (Form 2555)** page:

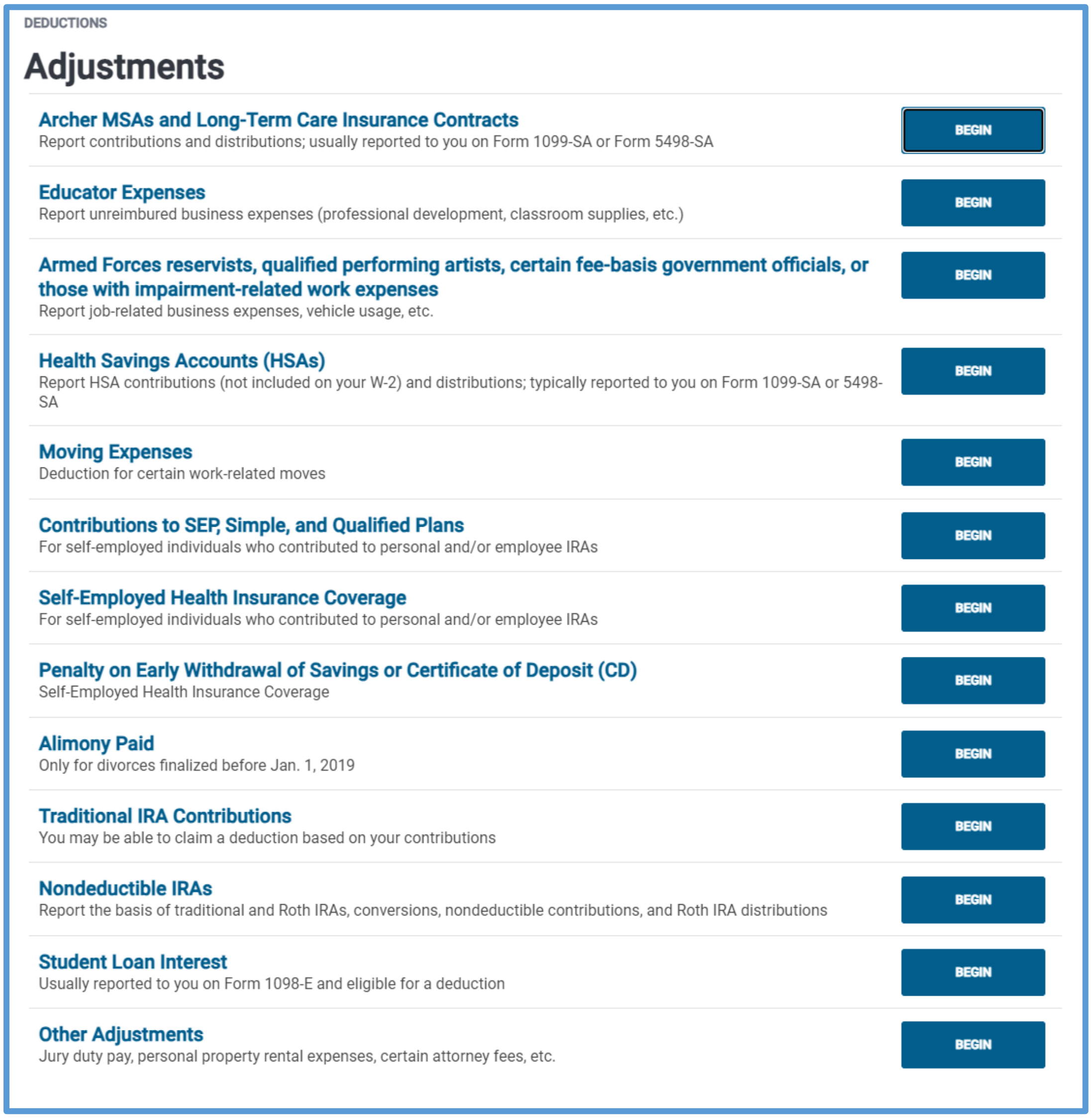


IRA Deduction

Some taxpayers make contributions to an IRA during the year. If the taxpayer did so, you can add those to the return to figure whether the taxpayer is eligible for a deduction for those contributions. To add IRA contributions, use the following steps from the **Deductions** page:

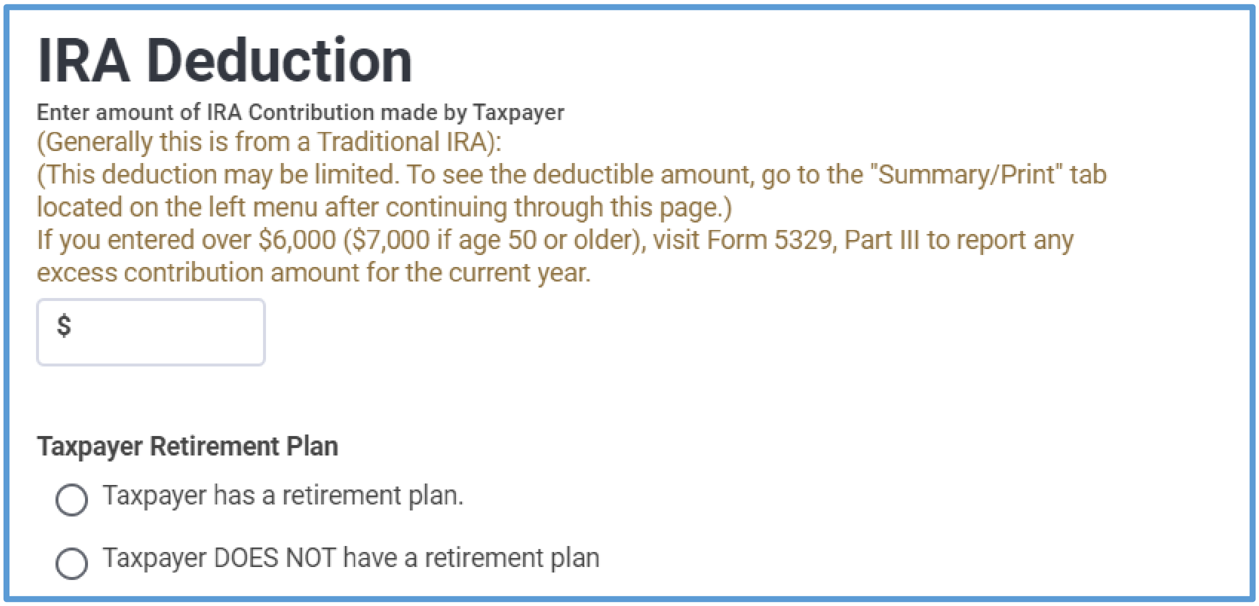
12. Click the **Adjustments** line.

TaxSlayer Pro Online displays the **Adjustments** page:



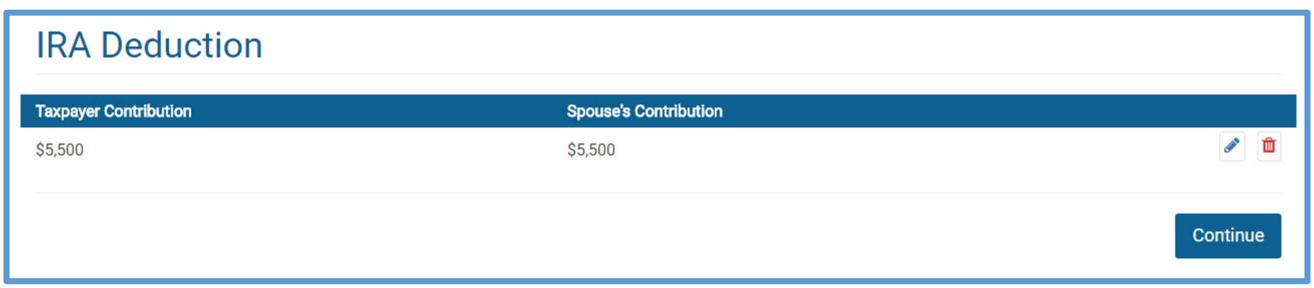
13. Click the **Traditional IRA Deduction** line.

TaxSlayer Pro Online displays the **IRA Deduction** page:



14. Type the amount of IRA contributions.
15. Select the appropriate choice to show whether the taxpayer or spouse has a retirement plan.
16. Click **Continue**.

TaxSlayer Pro Online displays the **IRA Deduction** summary page:



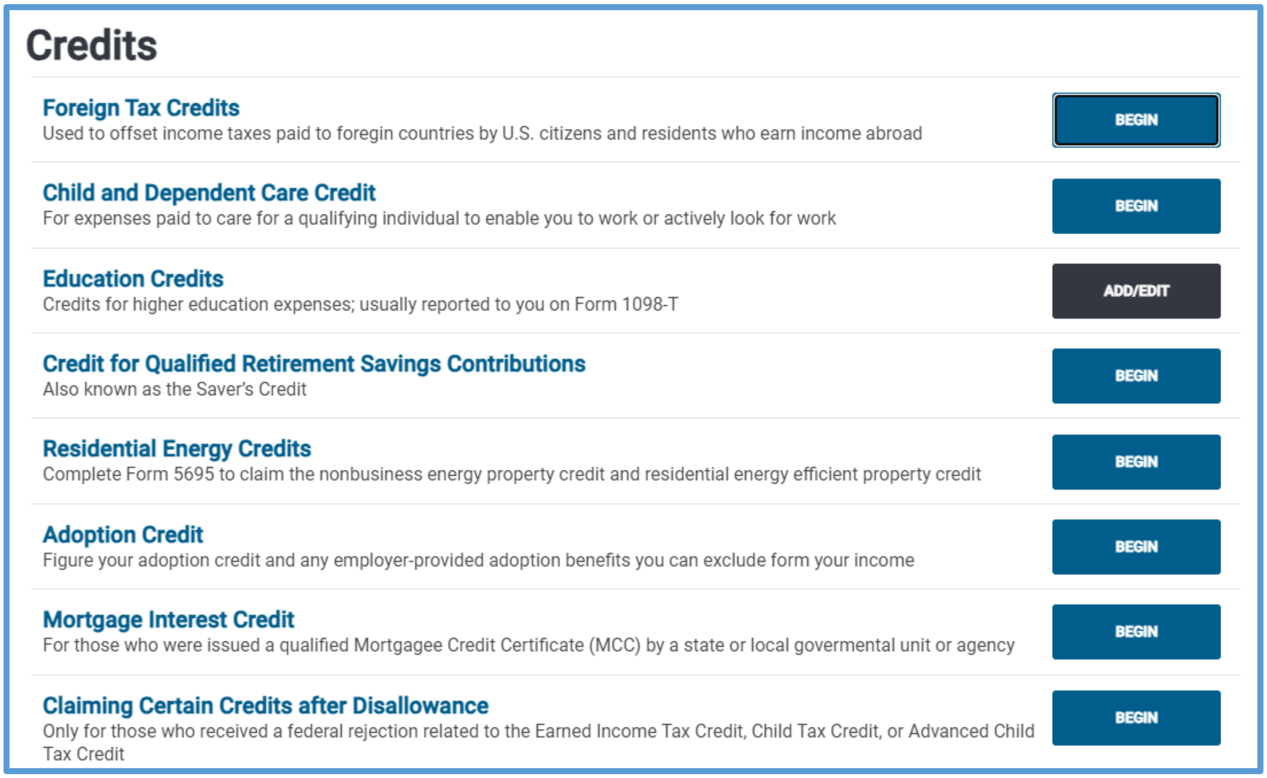
17. Click **Continue**.

Residential Energy Credit

If the taxpayer owned a home and purchased energy-efficient items during the year, he or she may be able to take a credit based on the amount of those items. To figure the residential energy credit, use the following steps from the **Deductions** page:

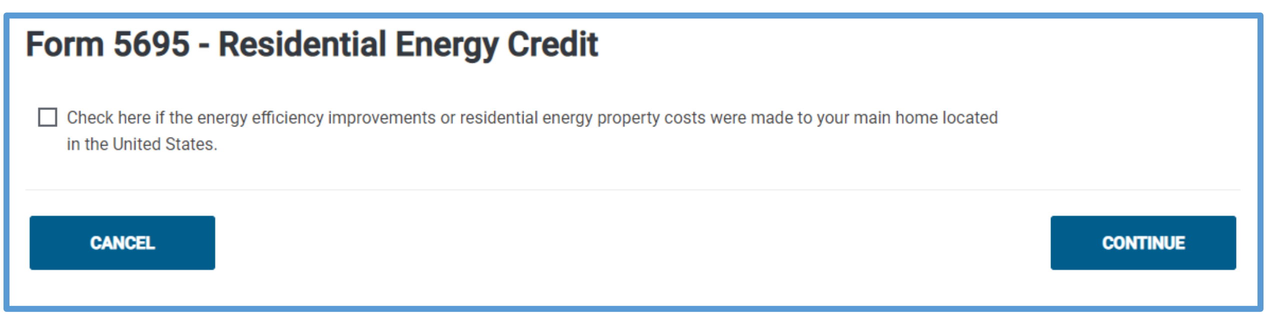
2. Click the **Credits** line.

TaxSlayer Pro Online displays the **Credits** landing page:



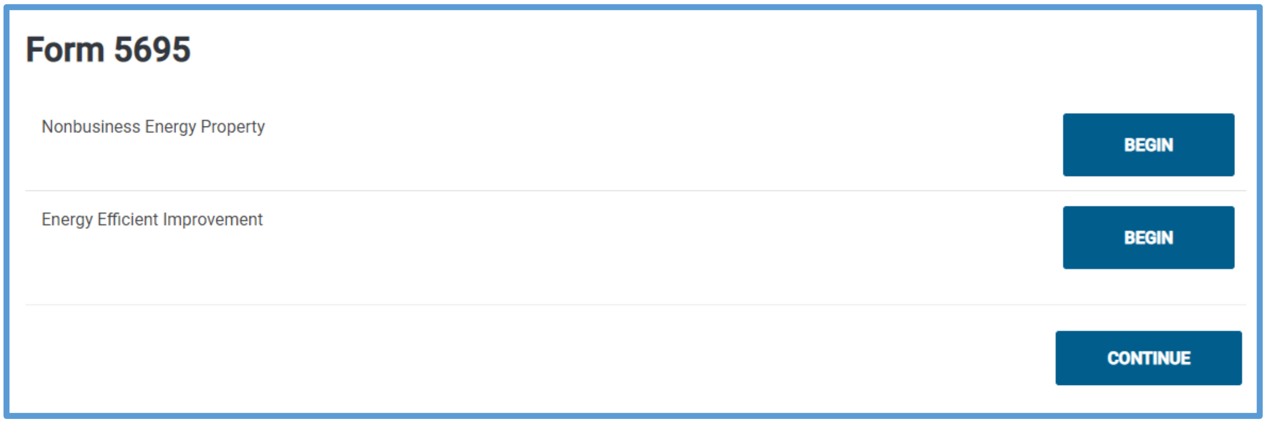
3. Click the **Residential Energy Credit** line.

TaxSlayer Pro Online displays the **Form 5695 – Energy Efficient Improvements** page:



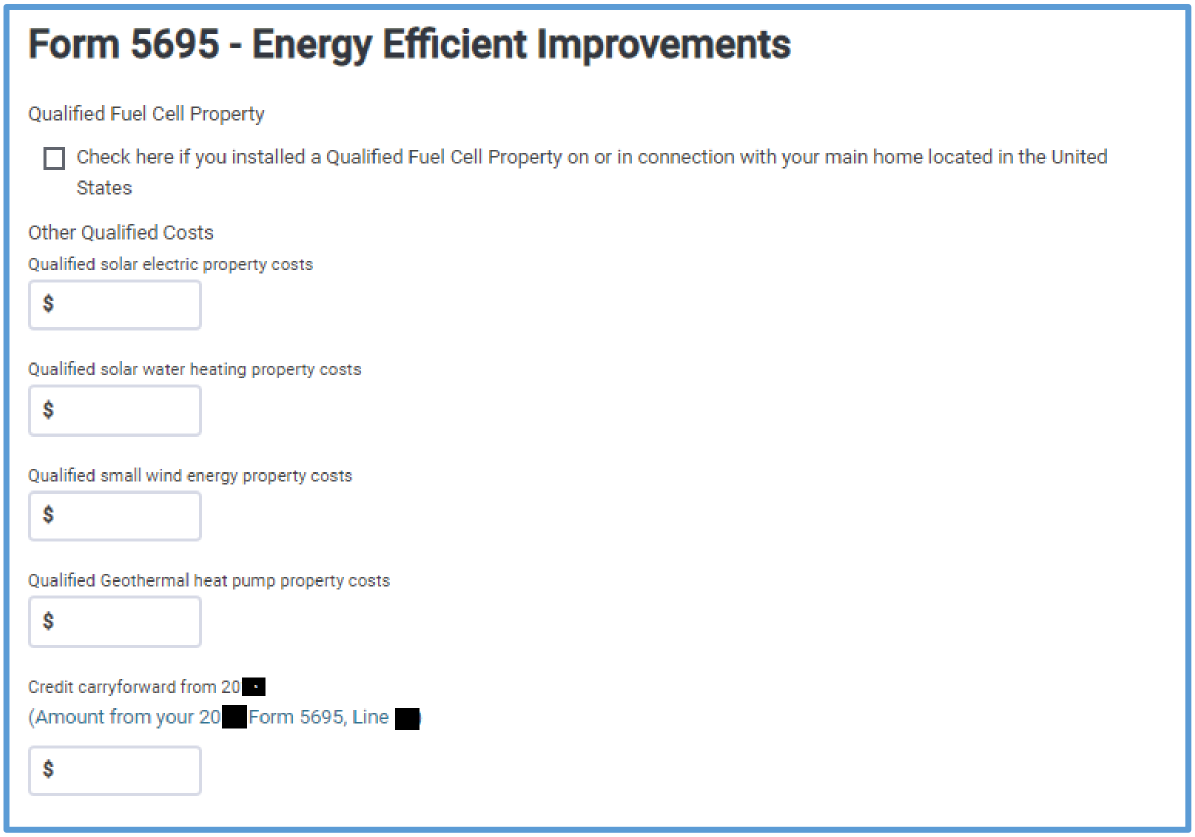
4. Select the appropriate check boxes on this page.
5. Click Continue.

TaxSlayer Pro Online displays the **Form 5695** page:



6. Click **BEGIN** on the appropriate line. For this lesson, we will cover energy efficient improvements, so click that line. Use the same steps if the taxpayer has nonbusiness energy property.

TaxSlayer Pro Online displays the **Form 5695 – Energy Efficient Improvements** page:



7. Read each line on the page carefully and type the information based on information you receive from the taxpayer.
8. Click **Continue**.

TaxSlayer Pro Online displays the **Residential Energy Credit** page, listing the amount of residential improvements:

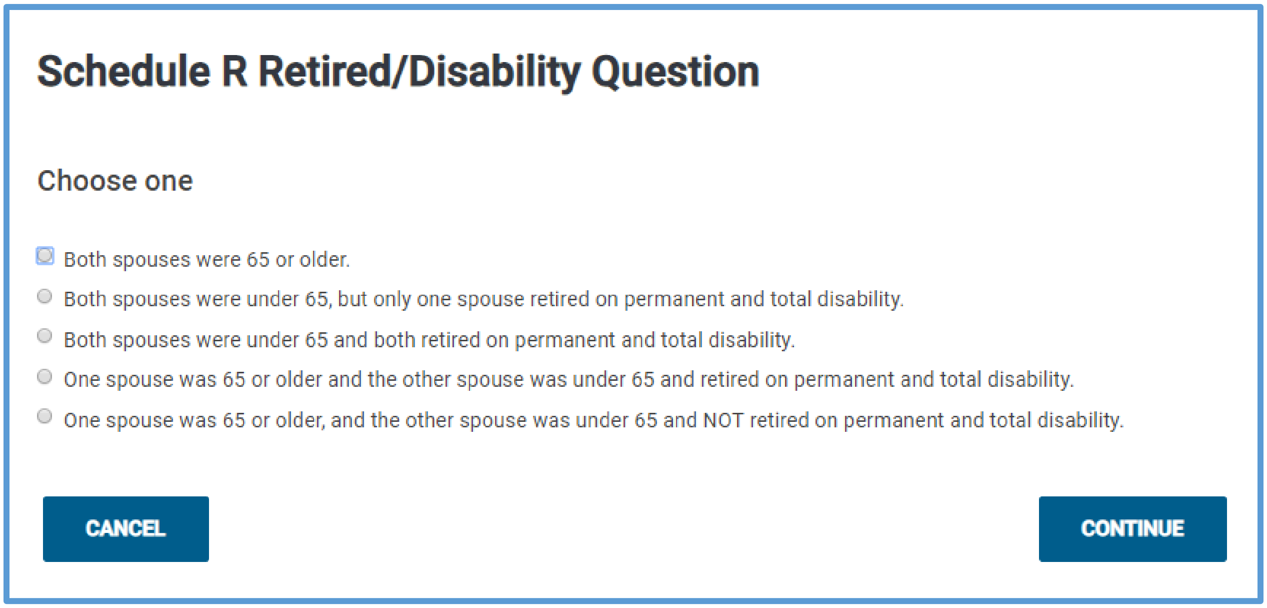
9. Click **Continue**.

Credit for the Elderly or Disabled

Some taxpayers qualify for a credit for the elderly or the disabled. If the taxpayer does, you can add that to the return. To add the credit for the elderly or disabled to the return, use the following steps from the **Credits** page:

1. Click the **Credit for the Elderly or the Disabled** line.

TaxSlayer Pro Online displays the **Schedule R Retired/Disability Question** page:



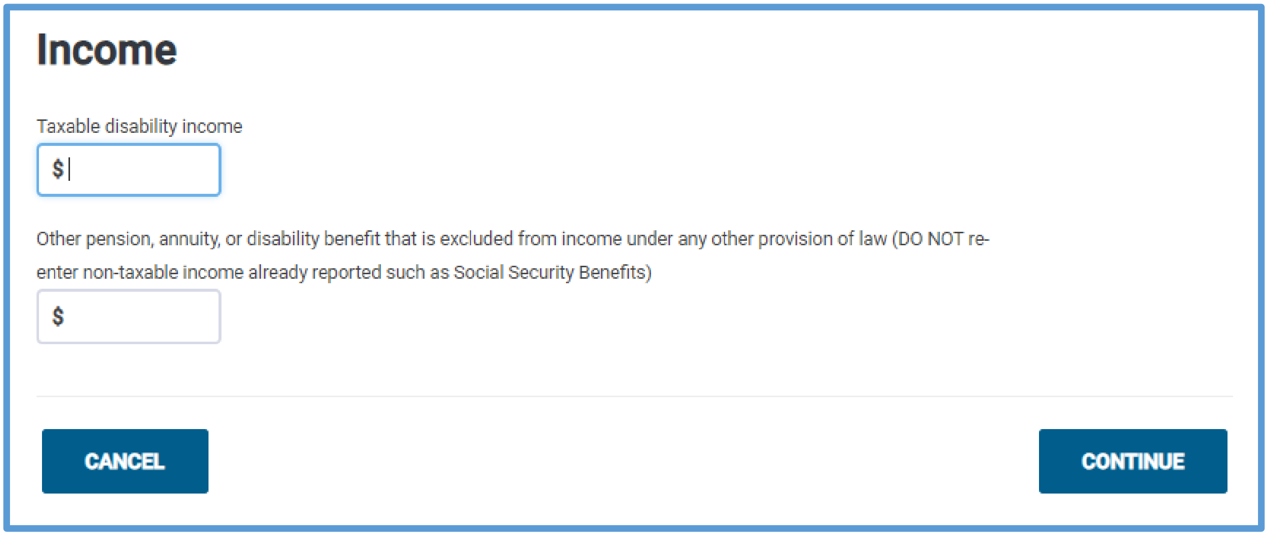
2. Select the appropriate radio button.

TIP: TaxSlayer Pro Online dynamically displays questions based on the filing status and the question you answer on this page. The following two sections (*65 or Older* and *Disabled*), reflect the difference in the two qualifications for this credit.

3. Click **Continue**.

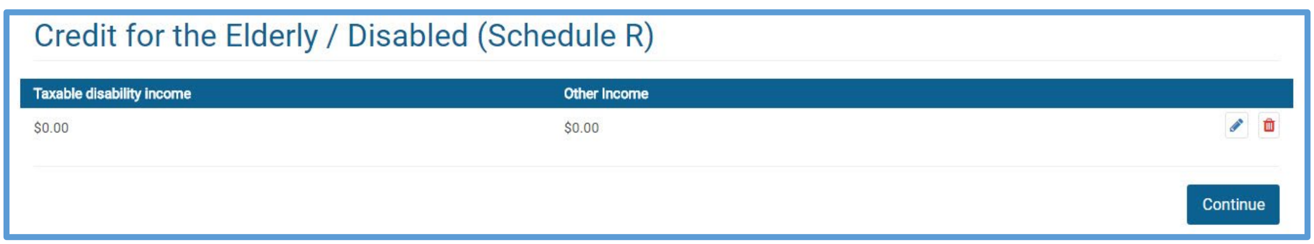
65 or Older

If you selected that the taxpayer is 65 or older on the previous page, TaxSlayer Pro Online displays the **Income** page:



4. Read both questions carefully and type the appropriate amount(s) in the boxes. Do not re-enter disability income entered elsewhere in the return.
5. Click **Continue**.

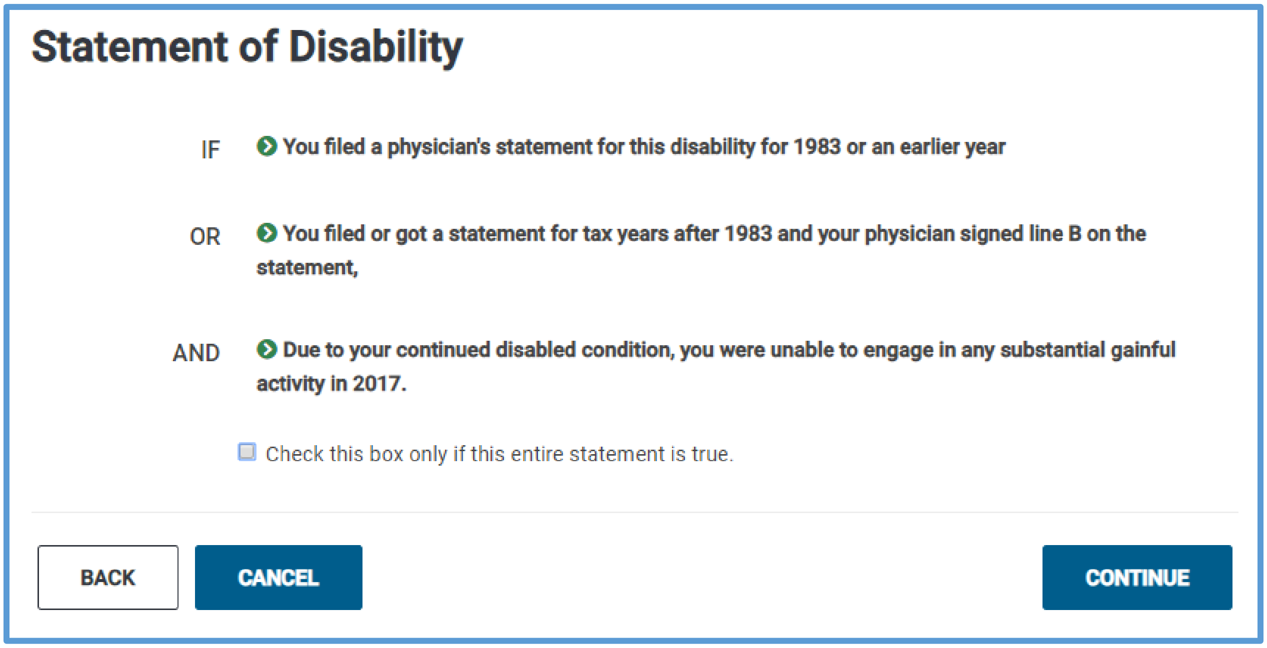
TaxSlayer Pro Online displays the **Credit for the Elderly/Disabled (Schedule R)** page:



6. Click **Continue**.

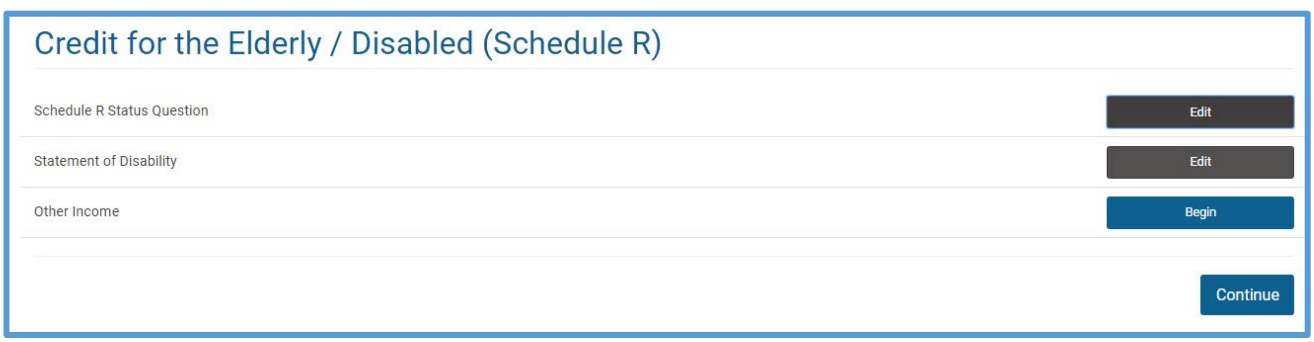
Disabled

If you selected that the taxpayer is disabled on the previous page, TaxSlayer Pro Online displays the **Statement of Disability** page:



4. Read the entire statement carefully. If it is true, select the check box.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Credit for the Elderly/Disabled (Schedule R)** page:



6. Click **Continue**.

Summary

You should now be able to:

- Enter Form 1099-NEC income.
- Enter a profit or loss from a business.
- Enter rents and royalties.
- Enter military rental property.
- Enter capital gains and losses.
- Enter an exclusion on the sale of a home.
- Enter Schedule K-1 income items.
- Enter Form 2555.
- Enter an IRA deduction.
- Enter the residential energy credit.
- Enter the credit for the elderly or the disabled.

To see a video of what you just learned, go to Advanced Tax Topics Part 1 and Advanced Tax Topics Part 2. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Completing a Form 1040NR

After completing this lesson, you should be able to:

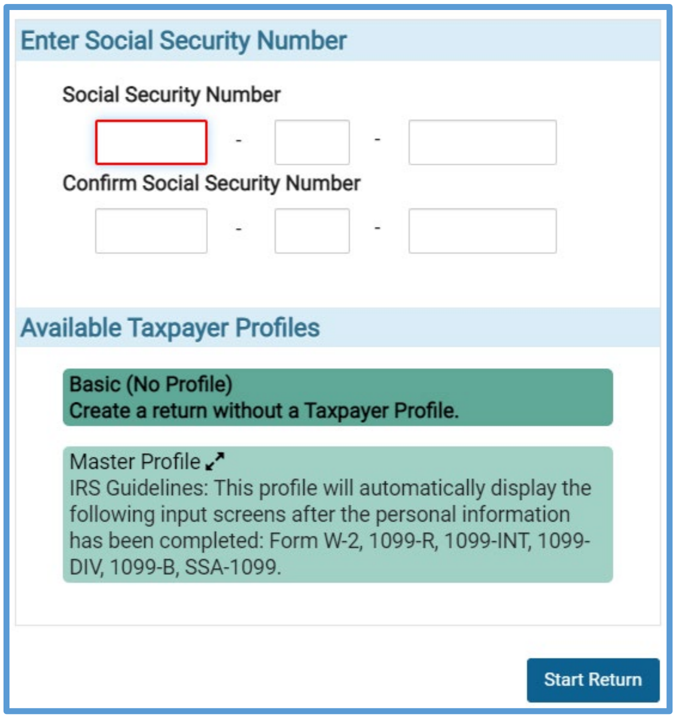
- Start a Form 1040NR return.
- Enter the taxpayer's personal information.
- Complete Schedule OI.
- Enter income.
- Enter adjustments, itemized deductions, and credits.
- Enter other taxes, including those on Schedule NEC and from Transportation tax.
- Enter payments and estimates.
- Add a state to Form 1040NR.
- Begin the e-filing process.

Starting a Form 1040NR

Sometimes, you may need to file a Form 1040NR. Remember, you should only do so if you have the appropriate certifications. Start a Form 1040NR return just as you would any other return. To do so from the **Welcome** page, use the following steps:

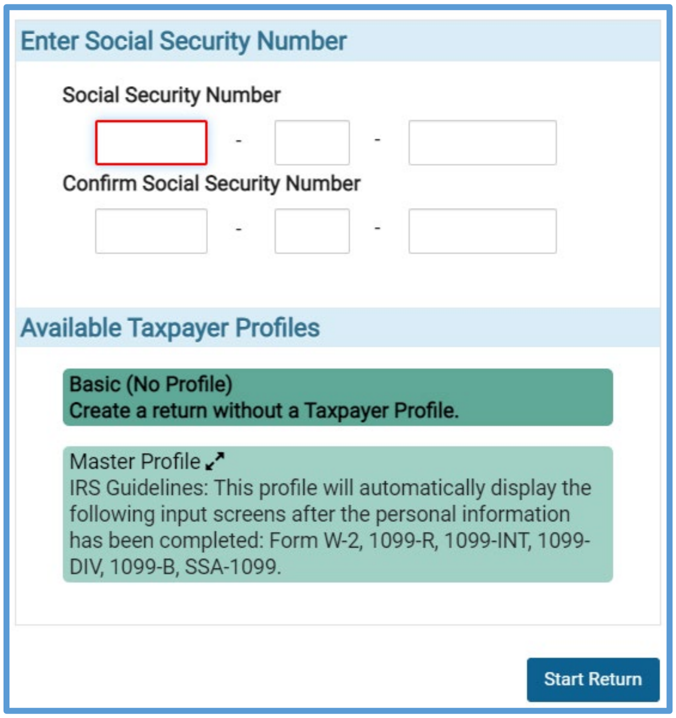
1. Click **Select** on the **Start New Tax Return** line.

TaxSlayer Pro Online displays the **Start New Return** box with the **Enter Social Security Number** section displayed:



2. Type the taxpayer’s Social Security number or ITIN twice for verification.

TaxSlayer Pro Online displays the **Available Taxpayer Profiles** section:

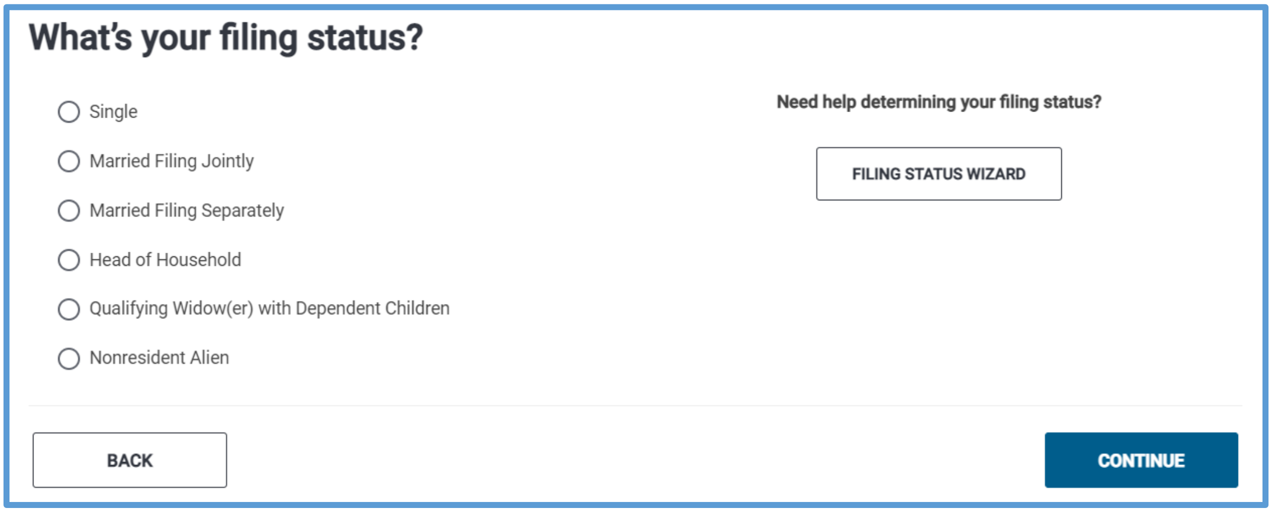


3. Select the taxpayer profile you want to use.
4. Click **Start Return**.

NOTE: If you prepared the taxpayer's return in the previous year, TaxSlayer Pro Online displays the **Pull Data to Current Return** page. Review the information, selecting data to pull forward. When you finish, click **YES, IMPORT MY DATA.**

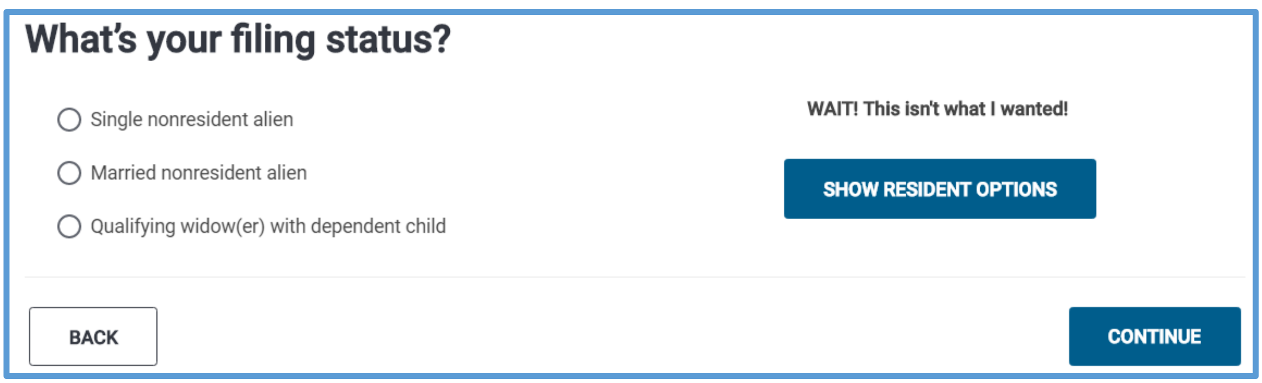
5. Click **CONTINUE**.

TaxSlayer Pro Online displays the **What’s your filing status?** page:



6. Select **Nonresident Alien**.

TaxSlayer Pro Online displays the **What’s your filing status?** page for nonresident aliens:

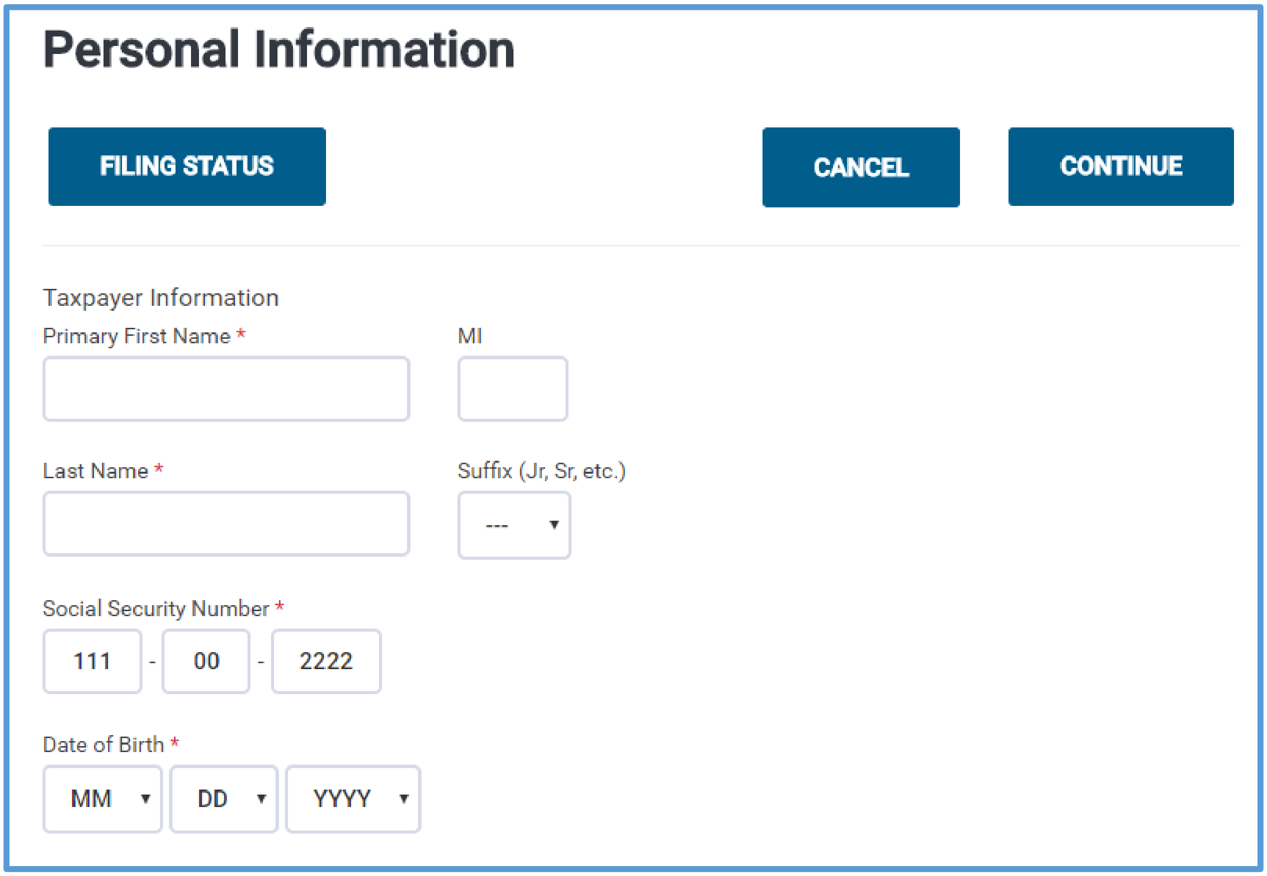


7. Select the filing status for the Form 1040NR return.

TaxSlayer Pro Tip: The filing statuses on Form 1040NR are different than those on Form 1040. See the Form 1040NR instructions for information on these filing statuses.

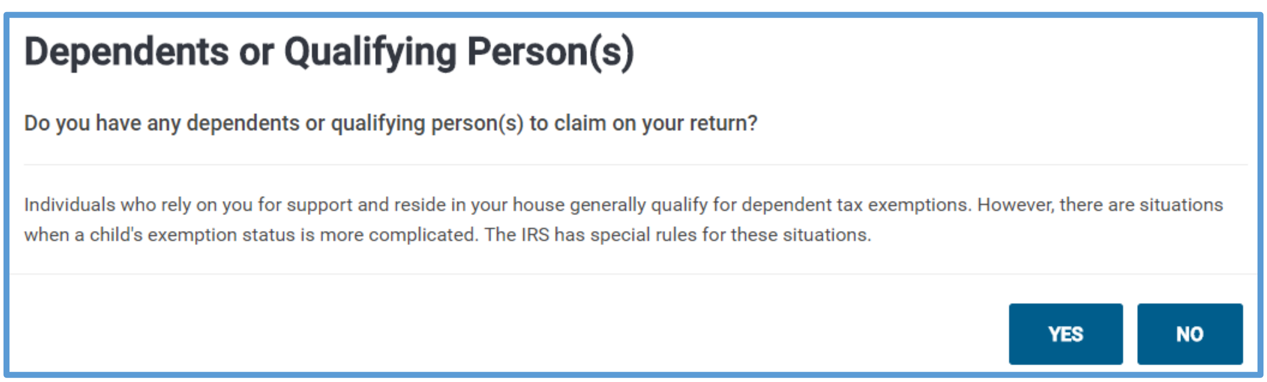
8. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Personal Information** page:



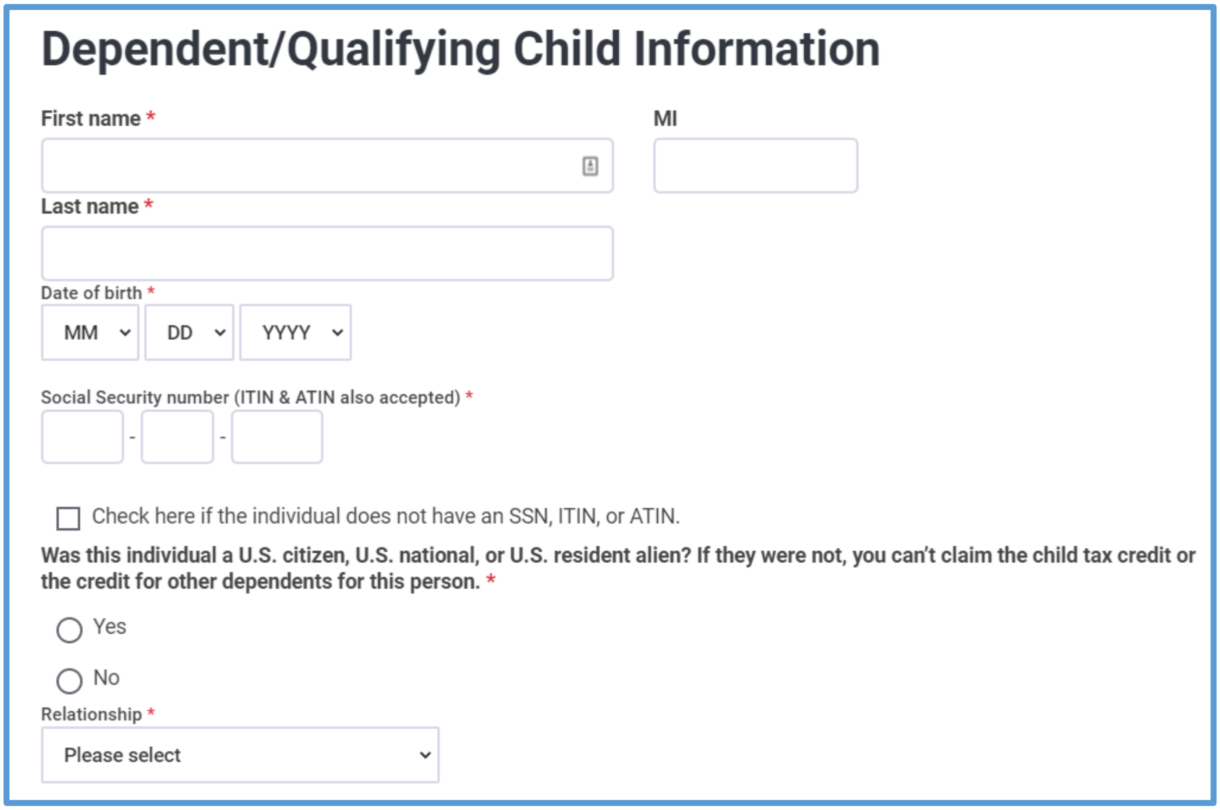
9. Complete the **Personal Information** page just as you would for any other taxpayer.

TaxSlayer Pro Online displays the **Dependents or Qualifying Person(s)** page:



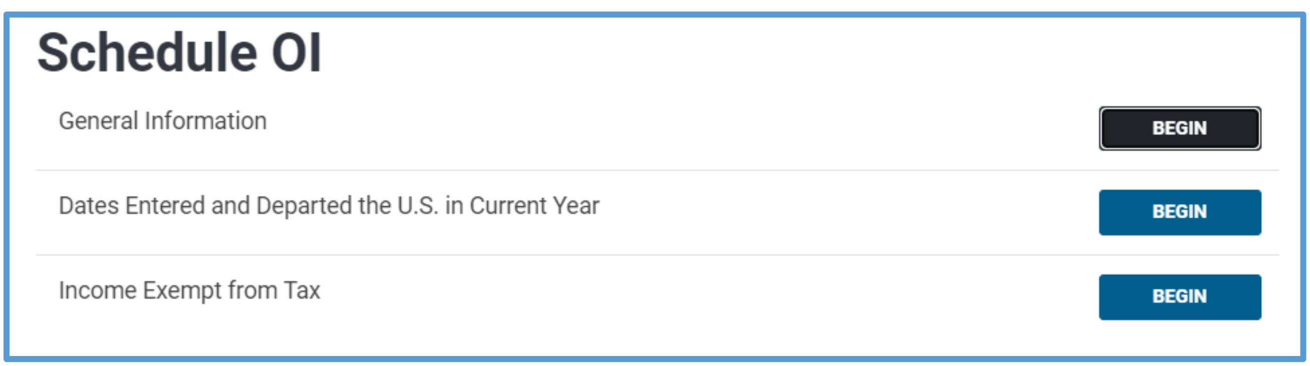
10. Select **YES** or **NO** to show whether the taxpayer had dependents or qualifying persons during the tax year. For this topic, select **YES**.

TaxSlayer Pro Online displays the **Dependent/Qualifying Child Information** page:



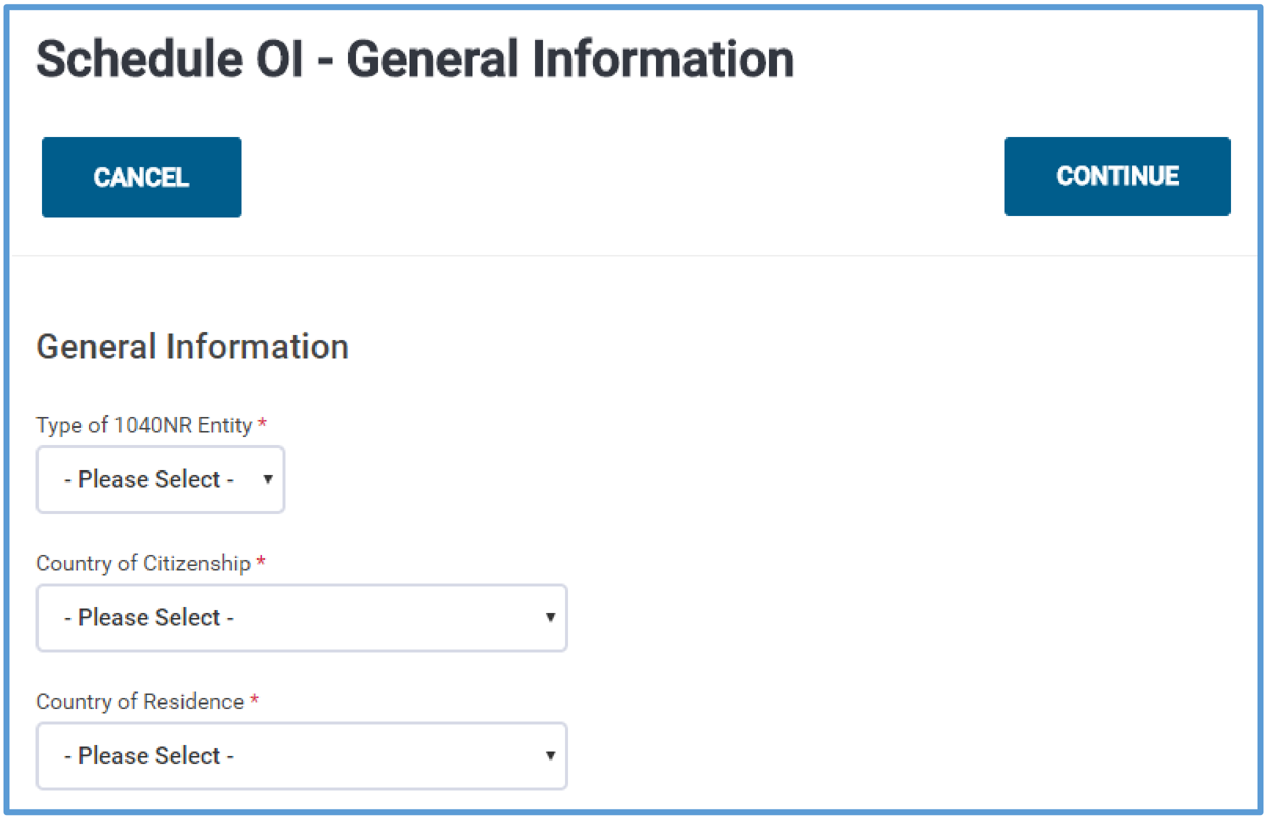
11. Complete the dependent or qualifying child information just as you would for any other taxpayer, and then click **CONTINUE**.
12. If necessary, click **CONTINUE** after reviewing the **Dependent or Qualifying Child** summary page.

TaxSlayer Pro Online displays the **Schedule OI** page:



1. Click **Begin** on the **General Information** line.

TaxSlayer Pro Online displays the **Schedule OI – General Information** page:

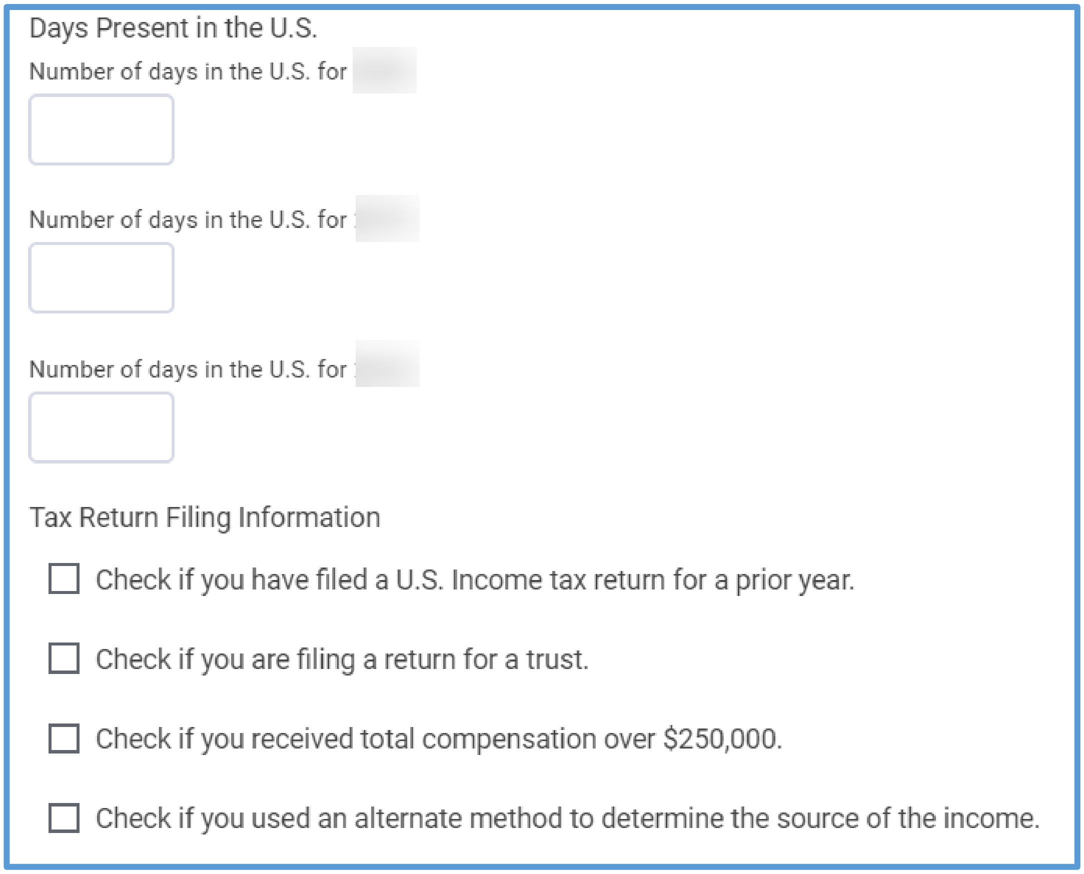


2. Select the type of entity filing the Form 1040NR. For IRS VITA, you will usually select **Individual**.
3. Select the country of citizenship, country of residence, U.S. travel information, and the type of visa from the drop-down lists.

NOTE: TaxSlayer Pro Online dynamically adds questions as necessary, depending on the answers you select. Read each question carefully and select or type the appropriate answer.

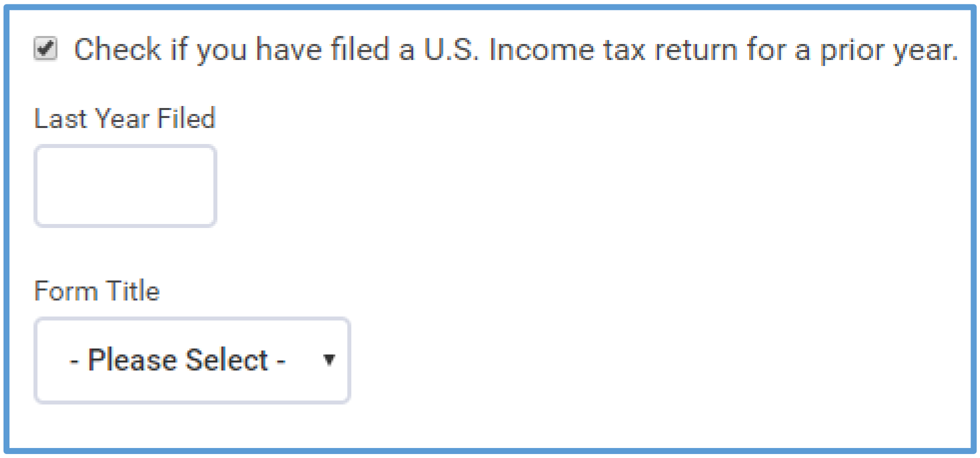
4. Select one of the check boxes if the taxpayer has ever applied for a green card, been a U.S. citizen, had a green card, or changed the Visa type.
5. Scroll to the **Days Present in the U.S.** section.

TaxSlayer Pro Online displays the **Days Present in the U.S.** and **Tax Return Filing Information** sections:



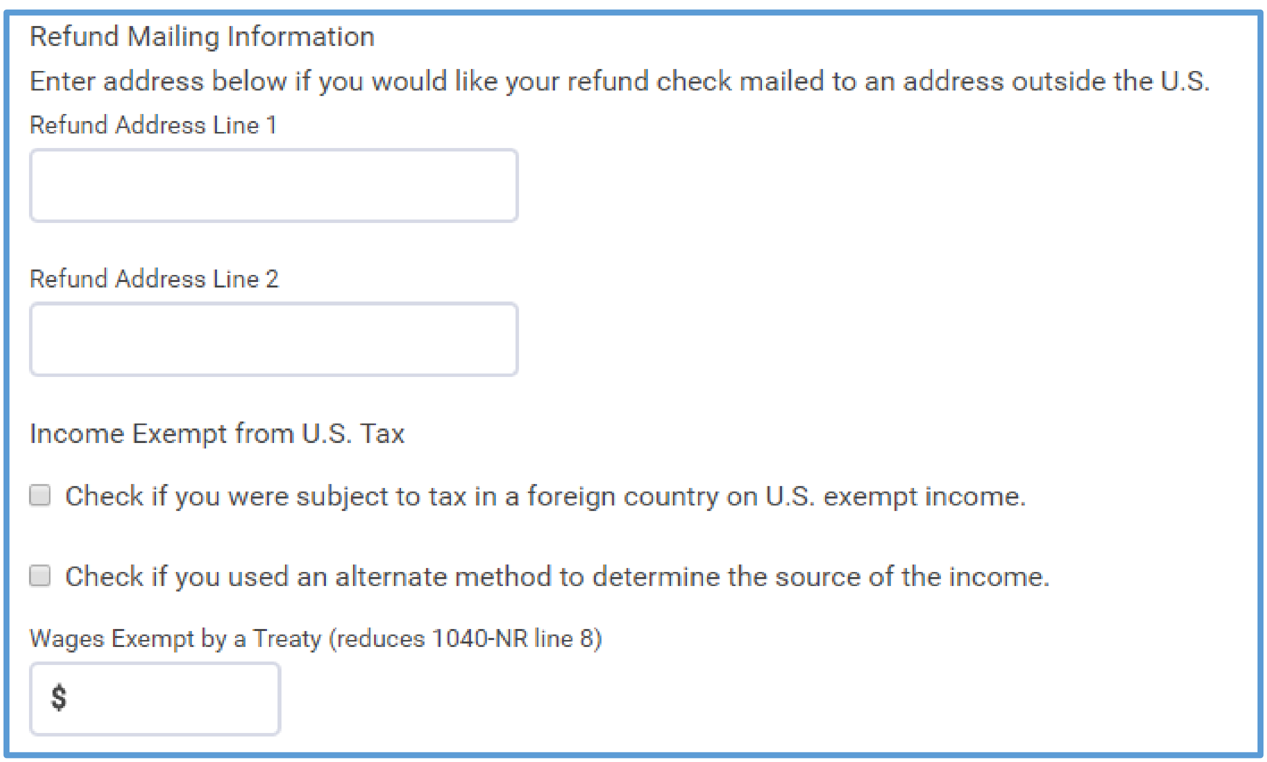
6. Type the number of days the taxpayer was present in the United States for the three previous tax years.
7. In the **Tax Return Filing Information** section, read each line and select any check box(es) as appropriate.

TaxSlayer Pro Tip: For some check boxes, TaxSlayer Pro Online displays additional information necessary for the return. For example, if the taxpayer has filed a United States Income Tax Return for a prior year, type the last year filed and the form filed, as shown below:



8. Scroll to the **Refund Mailing Information** section.

TaxSlayer Pro Online displays the **Refund Mailing Information** and **Income Exempt from U.S. Tax** sections:

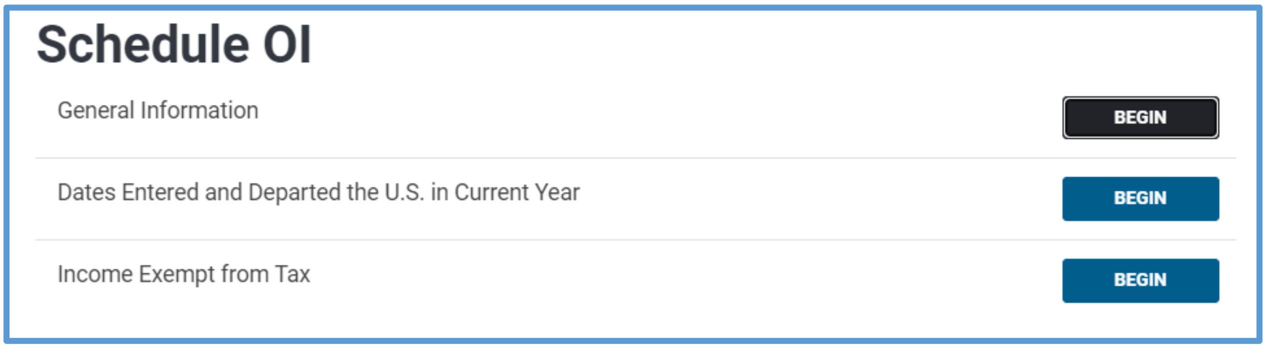


9. If the taxpayer wants the refund mailed to an address outside of the United States, type the address in the appropriate boxes.
10. In the **Income Exempt from U.S. Tax** section, select the appropriate check box if the taxpayer was subject to tax in a foreign country on U.S. exempt income or used an alternate method to determine the source of the income.

NOTE: Taxpayers filing Form 1040-NR for the current year and prior two years can e-file the return when they claim a tax treaty exemption.

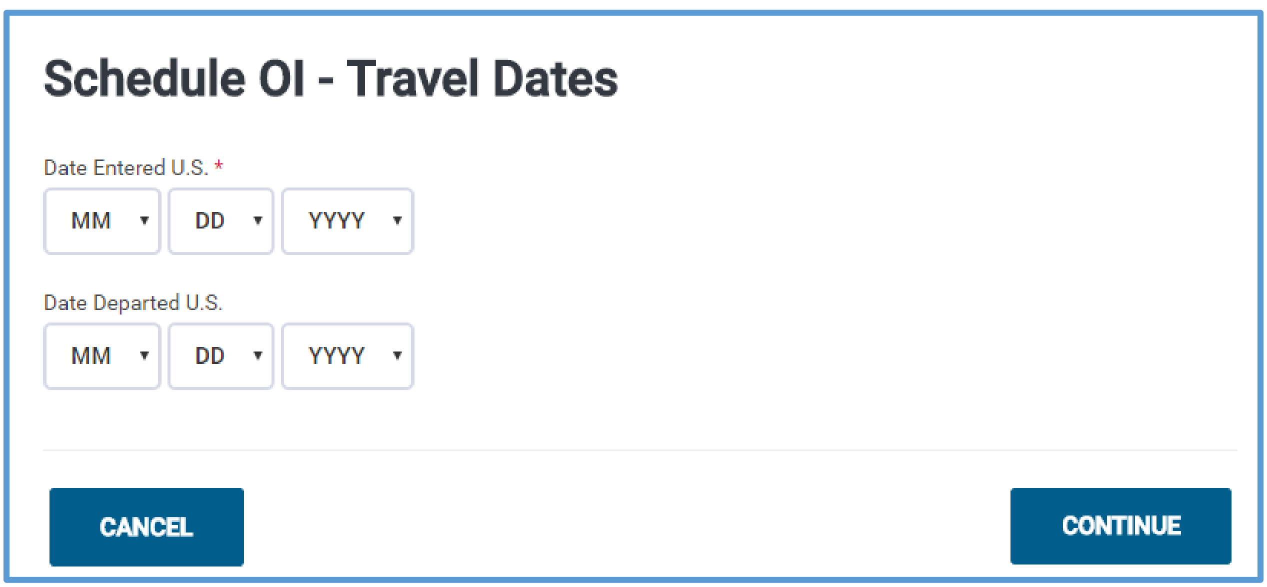
11. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Schedule OI** page:



12. Click **BEGIN** on the **Dates Entered and Departed the U.S. in Current Year** line.

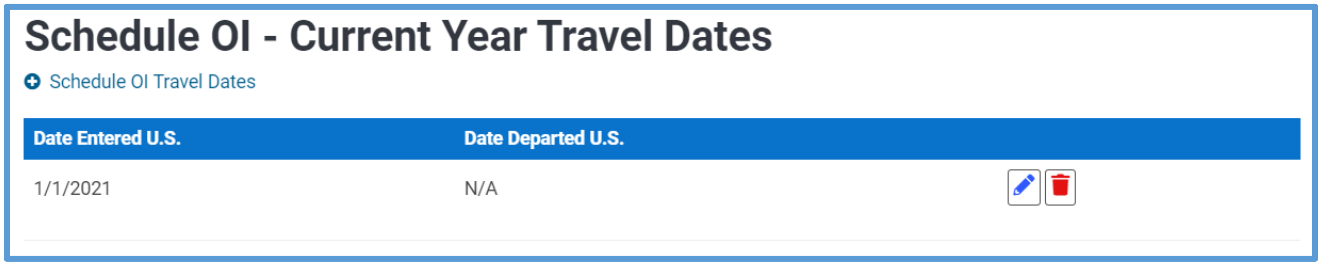
TaxSlayer Pro Online displays the **Schedule OI – Current Year Travel Dates** page:



13. Select the dates the taxpayer entered and left the United States.
14. Click **CONTINUE**.

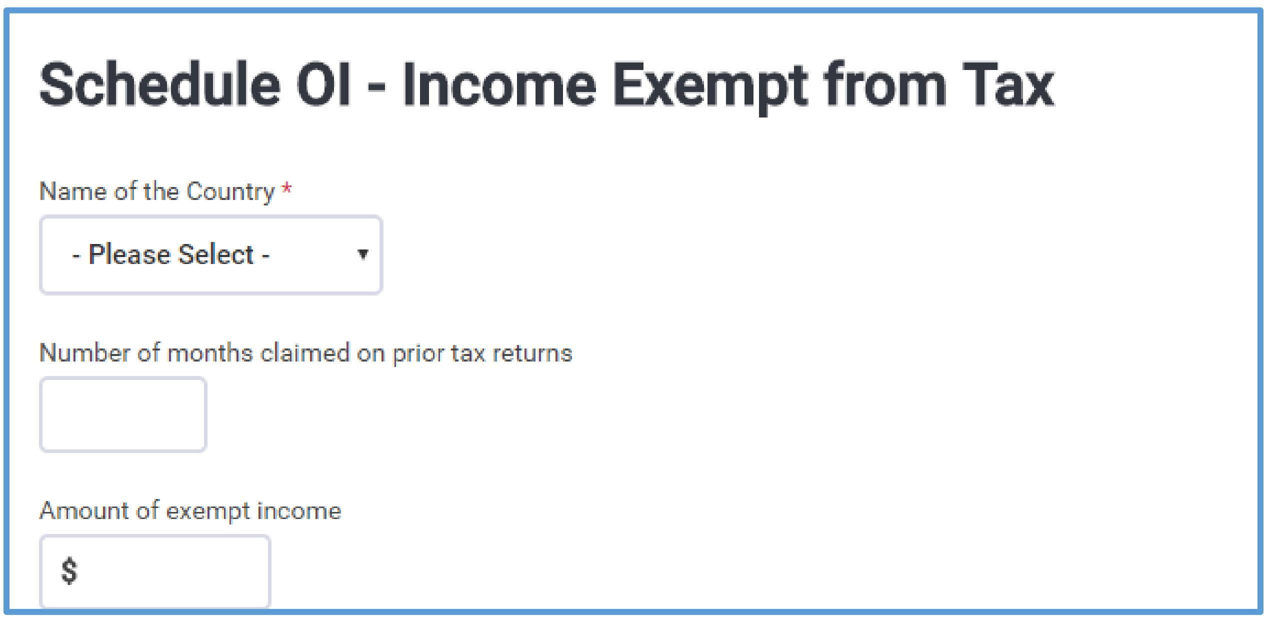
Note: If the taxpayer did not leave the United States, leave the **Date Departed U.S.** box blank.

TaxSlayer Pro Online displays the **Schedule OI – Current Year Travel Dates** summary page:



15. If the taxpayer left the United States again during the year, click the **Schedule OI Travel Dates** link to enter additional dates.
16. When you finish, click **CONTINUE**.
17. Click **BEGIN** on the **Income Exempt from Tax** line.

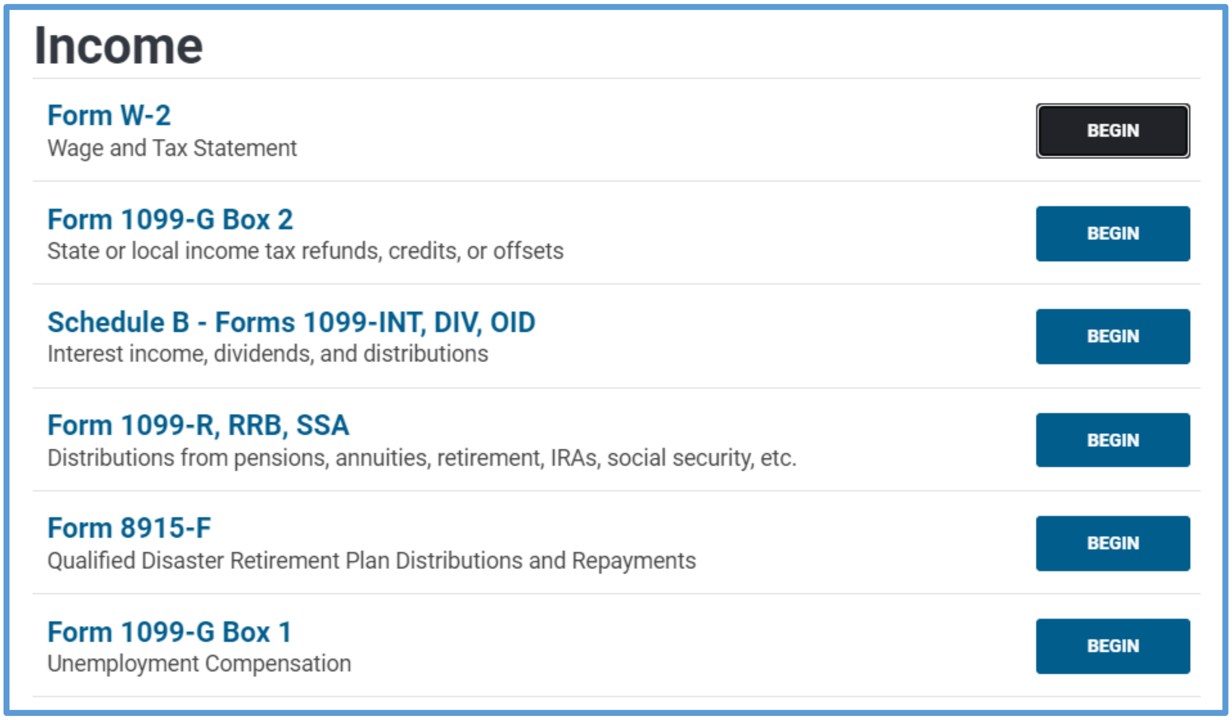
TaxSlayer Pro Online displays the **Schedule OI – Income Exempt from Tax** page:



18. Type the name of country, tax treaty article number, number of months, and amount of exempt income.
19. Click **CONTINUE**.

20. If the taxpayer has more than one item of exempt income, click the **Schedule OI Exempt Income** link to add more items.
21. When you finish, click **CONTINUE**.
22. When you finish entering all information for Schedule OI, click **Continue** to return to the **Basic Information** page.
23. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Income** page:



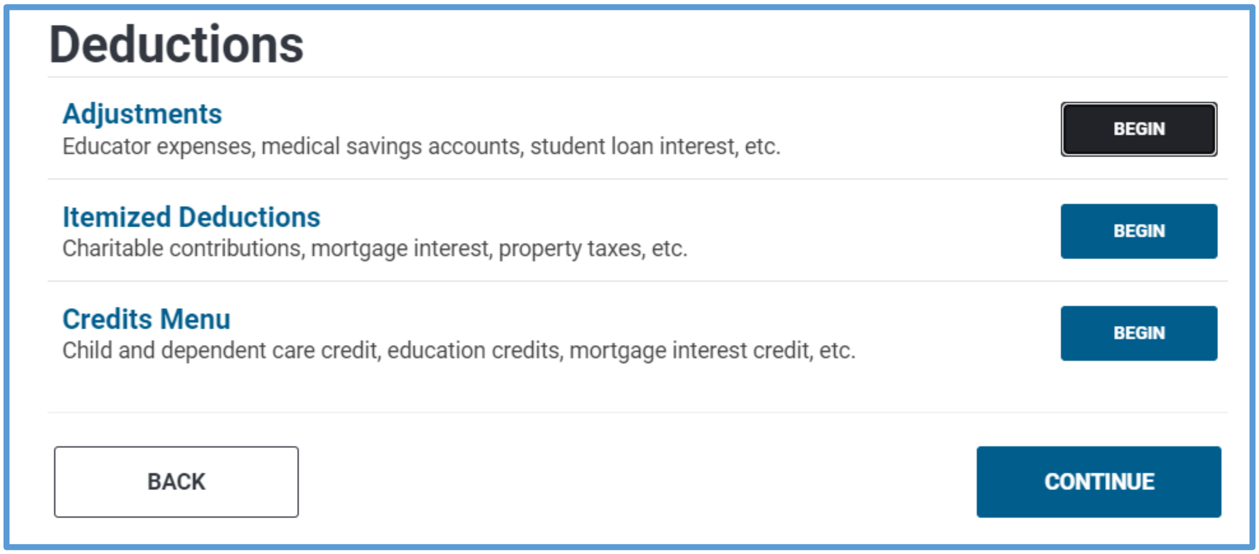
Entering Income

When you finish entering all the taxpayer’s basic information, you should add income to the return. Note that you cannot select from the multiple methods of entering a Form 1040NR return. You cannot use Guide Me or 1040 View to enter information. You can only use the Enter Myself method of entering income, deductions, etc., on Form 1040NR.

To add the taxpayer’s income to the return, use the following steps from the **Income** page:

1. Click **BEGIN** on the line for which you need to enter income.
2. Type the information on the page just as you would for any other taxpayer.
3. When you finish adding all income items, click **Continue**.

TaxSlayer Pro Online displays the **Deductions** page:



Entering Deductions

When you finish entering all the taxpayer's income, you should add deductions to the return. To do so, use the following steps from the **Deductions** page:

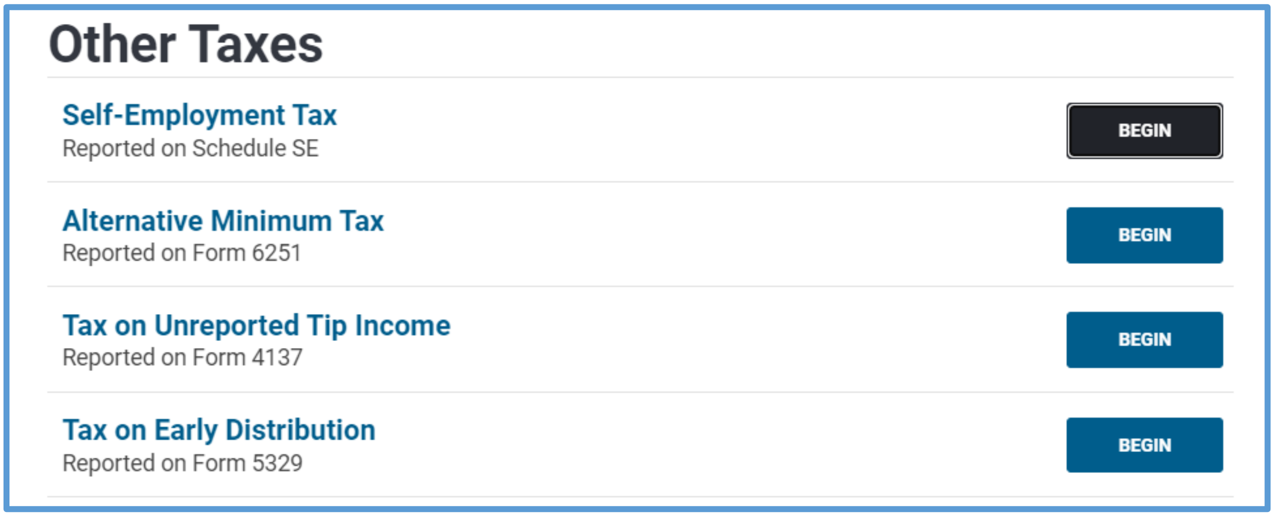
1. Click **BEGIN** on the line for which you need to enter a deduction. You should add adjustments, itemized deductions, and credits from this page.
2. Type the information on the page just as you would for any other taxpayer.

TaxSlayer Pro Tip: Remember that nonresident aliens do not have all of the same available deductions and credits. For example, home mortgage interest is not an allowed itemized deduction on Form 1040NR Schedule A. TaxSlayer Pro Online does not display entry pages for the deductions that are not available on Form 1040NR.

Note: A special rule applies to students and business apprentices from India who have a Tax Treaty. This rule allows those taxpayers to claim the standard deduction under Article 21(2). If this rule applies, click **BEGIN** on the **Itemized Deductions** line, and then click **BEGIN** on the **Use Standard or Itemized Deductions** line. Then, follow the on-screen instructions, beginning with the **Standard Deduction** line.

3. When you finish adding all adjustments, itemized deductions, and credits, click **CONTINUE**.

TaxSlayer Pro Online displays the **Other Taxes** page:



Entering Other Taxes

When you finish entering all the taxpayer's deductions, you should add any additional taxes to the return. To do so, use the following steps from the **Other Taxes** page:

1. Click **BEGIN** on the line for which you need to enter a tax.
2. Type the information on the page just as you would for any other taxpayer.
3. Remember that some nonresident aliens must pay tax on income not effectively connected with a United States trade or business (Schedule NEC) and some must pay a transportation tax.

Completing Schedule NEC

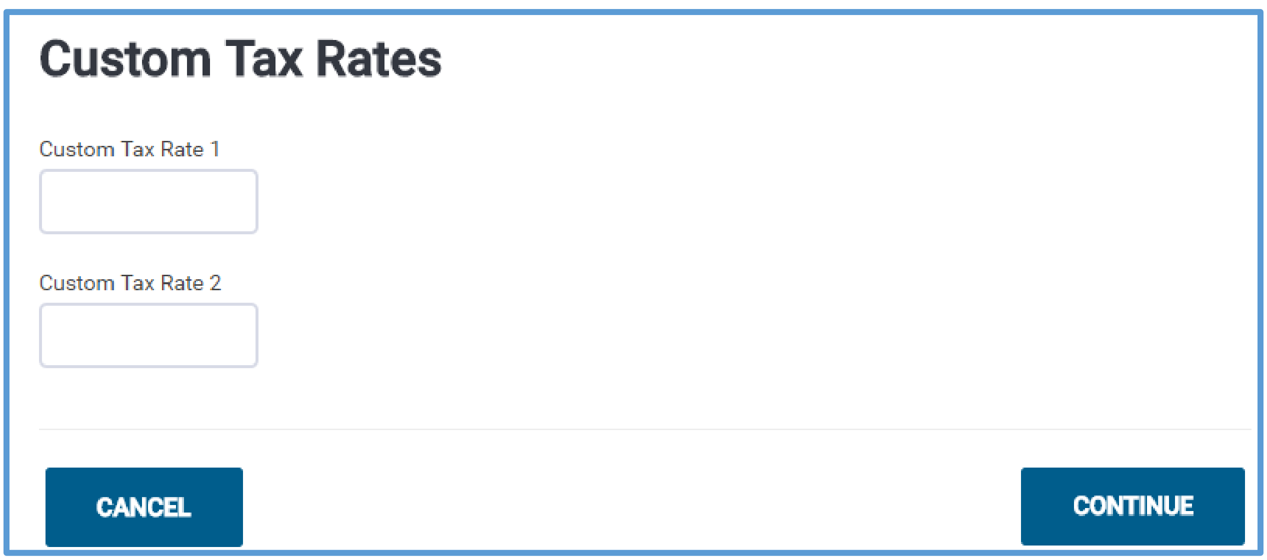
If the taxpayer is required to pay tax on income not effectively connected with a United States trade or business, you should complete Schedule NEC for that taxpayer. To do so from the **Other Taxes** page, use the following steps:

1. Click **BEGIN** on the **Tax on Income Not Effectively Connected to US Trade/Business** line.

TaxSlayer Pro Online displays the **Schedule NEC** page:

2. If the taxpayer is required to use custom tax rates for some types of income, click **BEGIN** on the **Custom Tax Rates** line.

TaxSlayer Pro Online displays the **Custom Tax Rates** page:



3. Type the appropriate percentage in the **Custom Tax Rate 1**, **Custom Tax Rate 2**, or both boxes.
4. Click **CONTINUE**.
5. Click **BEGIN** on each line for which the taxpayer has income not effectively connected to a United States trade or business.

TaxSlayer Pro Online displays the appropriate income page. For this example, you can see the **US Corps Dividends** page:

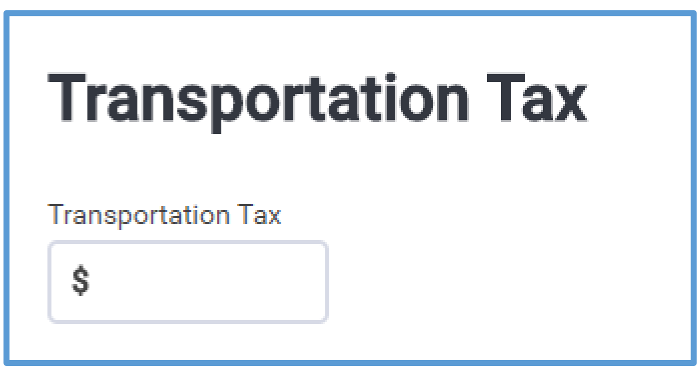
6. Type the amount(s) of income in the appropriate line for the tax rate.
7. Click **CONTINUE**.
8. When you finish typing all income to be entered on Schedule NEC, click **CONTINUE**.

Entering Transportation Tax

If the taxpayer is required to pay the transportation tax, use the following steps from the **Other Taxes** page:

1. Click **BEGIN** on the **Transportation Tax** page.

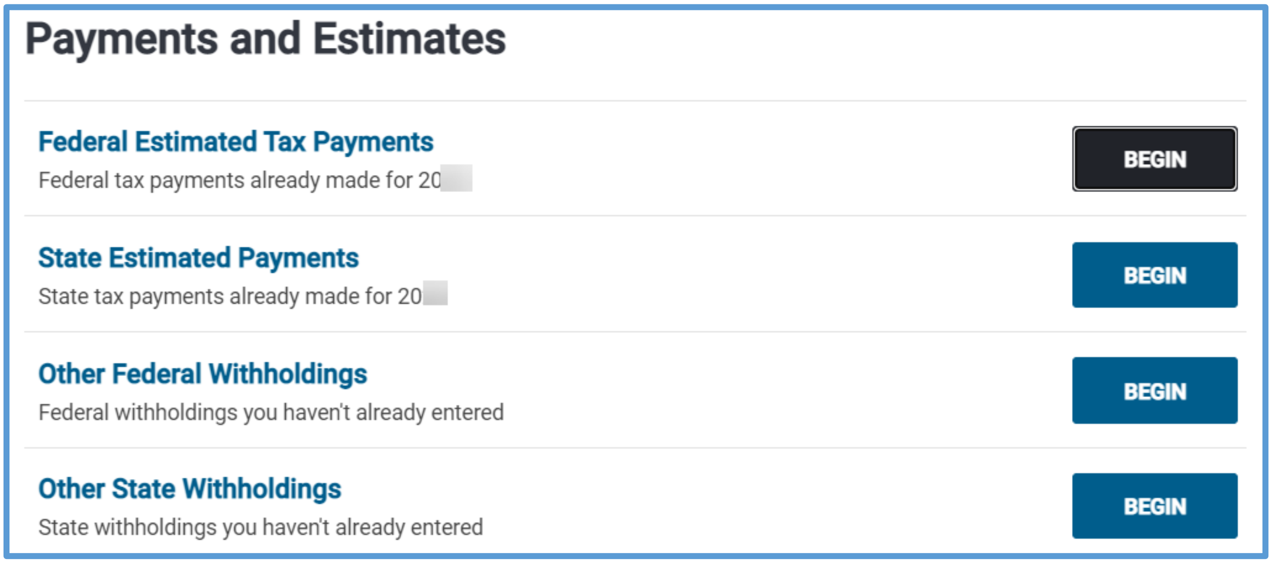
TaxSlayer Pro Online displays the **Transportation Tax** page:



2. Type the amount of transportation tax.
3. Click **CONTINUE**.

When you finish entering all other taxes, click **Continue**.

TaxSlayer Pro Online displays the **Payments and Estimates** page:



Entering Payments and Estimates

When you finish entering all the taxpayer's other taxes, you should add any payments and estimates to the return. This page includes withholding not already entered on the return, estimated tax payments the taxpayer made during the year, and also any estimated payments to be calculated for the new year. Enter any information from Form 1042-S on this page as well.

To enter payments and estimates, use the following steps from the **Payments and Estimates** page:

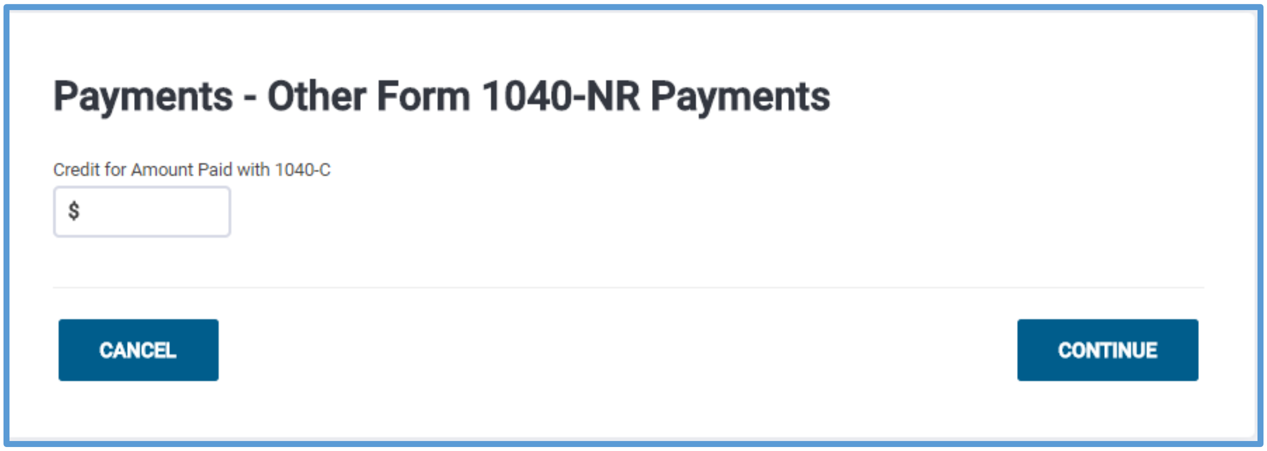
1. Click **BEGIN** on the line for which you need to enter a payment or estimate.
2. Type the information on the page just as you would for any other taxpayer.
3. When you finish entering all payments and estimates, click **CONTINUE**.

Entering Other Form 1040-NR Payments

If the taxpayer needs to enter credit from Form 1040-C, use the following steps:

1. Click **BEGIN** on the **Other Form 1040-NR Payments** line.

TaxSlayer Pro Online displays the **Payments – Other Form 1040-NR Payments** page:



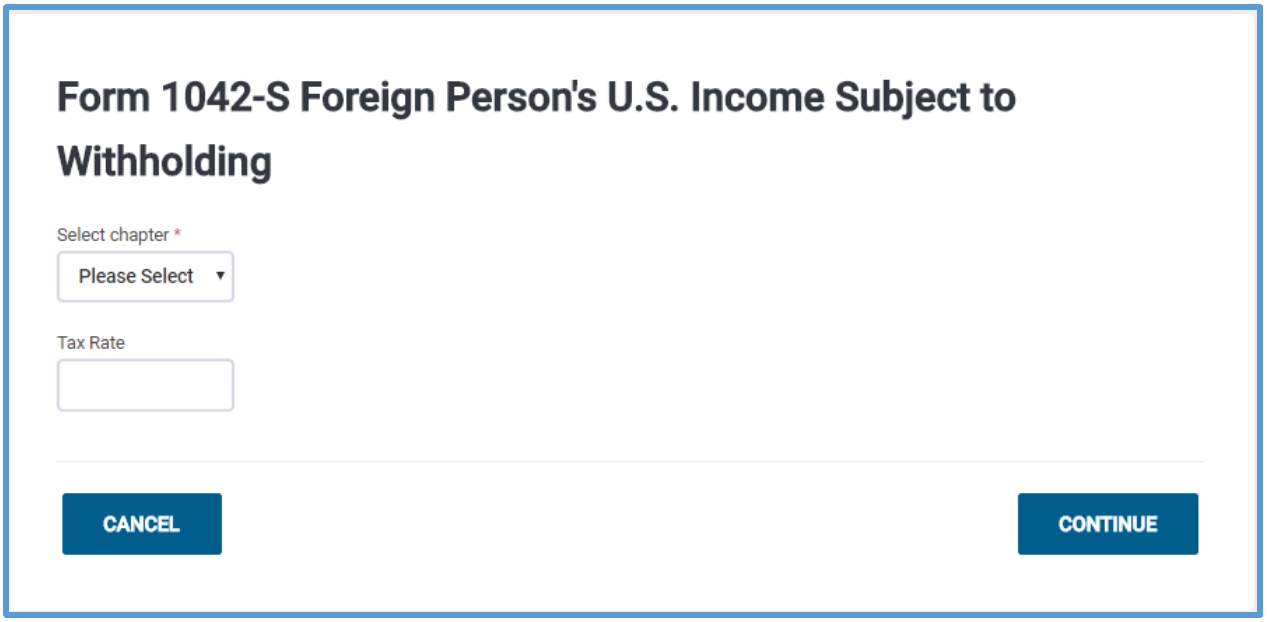
2. Type the amount of the credit for the amount paid with Form1040-C.
3. Click **CONTINUE**.

Entering Form 1042-S

If the taxpayer received a Form 1042-S, you should complete that information for the taxpayer. To do so from the **Payments and Estimates** page, use the following steps:

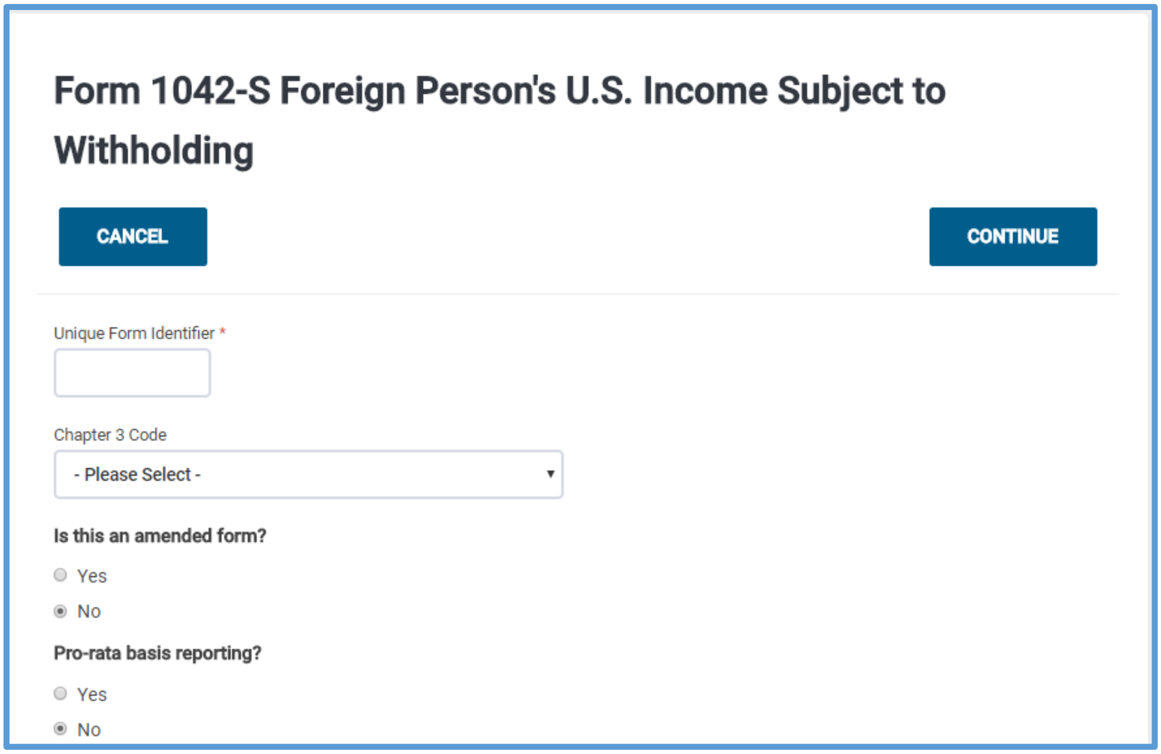
1. Click **BEGIN** on the **Foreign Person's U.S. Source Income Subject to Withholding Form 1042-S** line.

TaxSlayer Pro Online displays the **Form 1042-S Foreign Person’s U.S. Income Subject to Withholding** page:



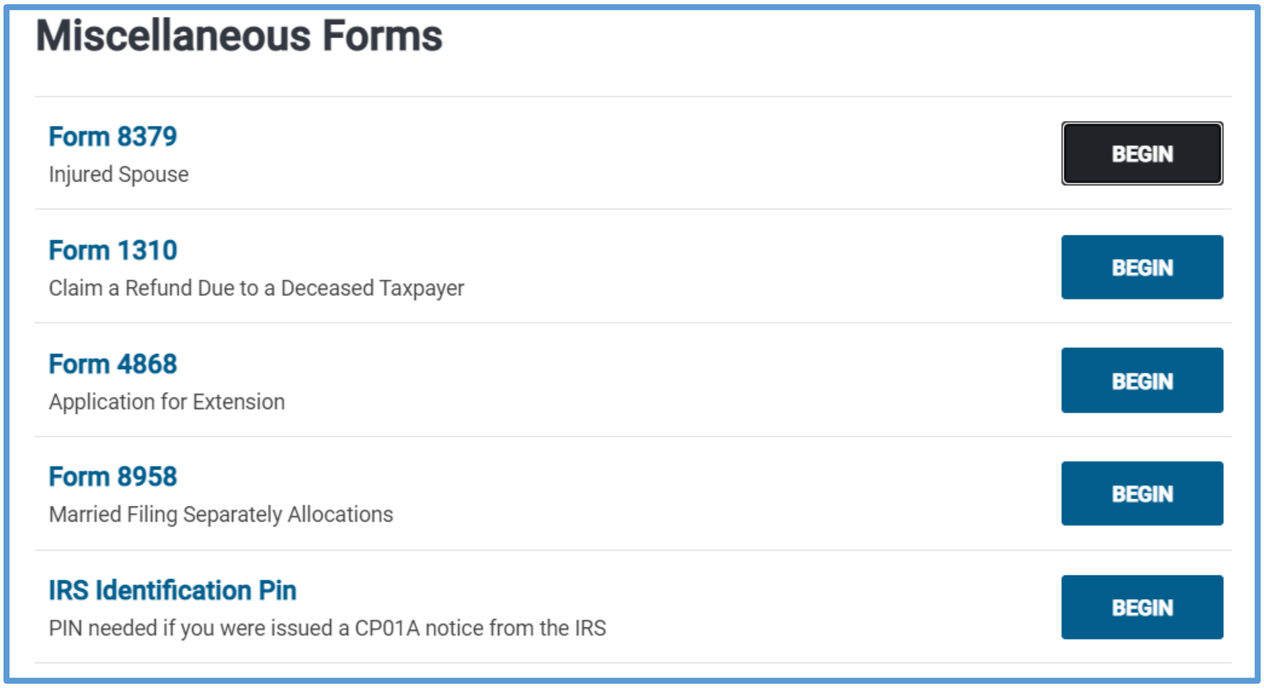
2. Select the appropriate chapter from the drop-down list.
3. Type the applicable tax rate.
4. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Form 1042-S Foreign Person's U.S. Income Subject to Withholding** page:



5. Reach each line carefully and complete the applicable information.
6. Click **CONTINUE**.
7. Click **Add** to add another Form 1042-S.
8. When you finish adding forms, click **CONTINUE**.

TaxSlayer Pro Online displays the **Miscellaneous Forms** page:



Entering Miscellaneous Forms

When you finish entering all the taxpayer’s payments and estimates, you should add any required miscellaneous forms to the return. This page includes the following forms. Bold forms are those that are specific to a Form 1040NR return:

- Injured Spouse Form
- Claim a Refund Due to a Deceased Taxpayer
- Application for Extension
- Married Filing Separately Allocations
- IRS Identification PIN
- Installment Agreement
- Application for ITIN
- **Exempt and Individuals with a Medical Condition**
- **Closer Connection Exception Statement for Aliens**
- **Initial and Annual Expatriation Statement**
- Power of Attorney and Declaration of Representative

To add miscellaneous forms, use the following steps from the **Miscellaneous Forms** page:

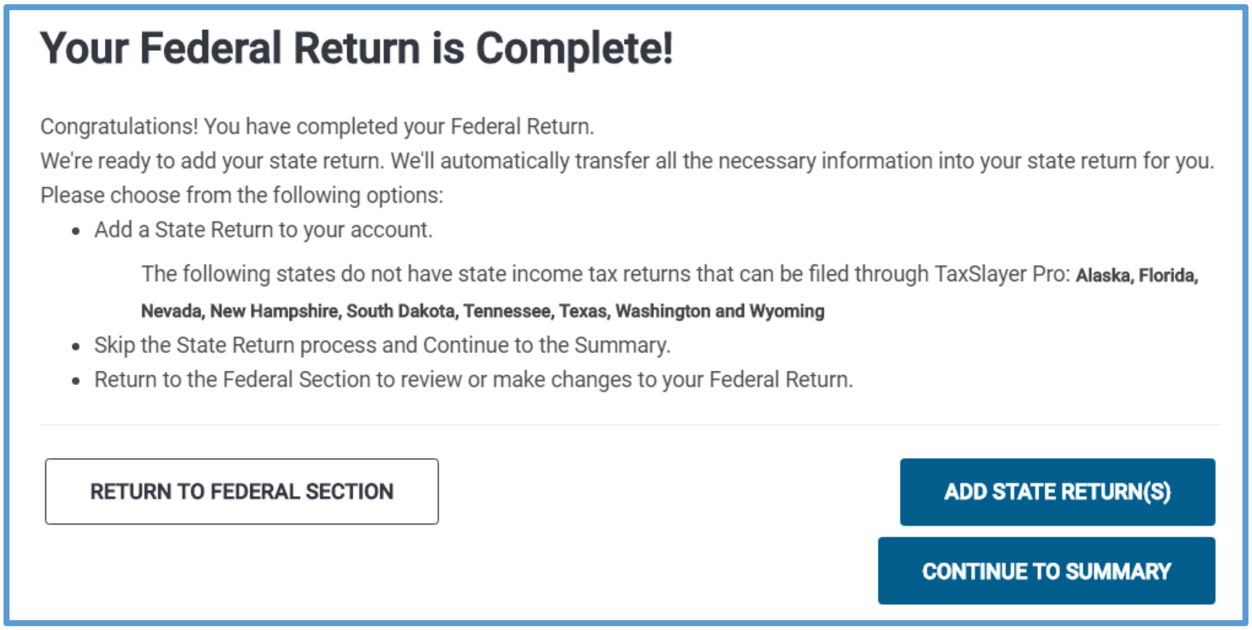
1. Click **BEGIN** on the line for which you need to add a form.
2. Type the information on the page just as you would for any other taxpayer.
3. When you finish entering all miscellaneous forms, click **CONTINUE**.

TaxSlayer Pro Online displays the **Health Insurance Questionnaire** page:

Completing the Health Insurance Questionnaire

Complete the health insurance questionnaire pages just as you would for other taxpayers, if applicable. Read each question carefully and answer it based on information and/or forms the taxpayer provides. When you finish each page, click **CONTINUE**.

When you complete all Health Insurance Questionnaire pages, TaxSlayer Pro Online calculates the information for the return and displays the **Your Federal Return is Complete!** page:



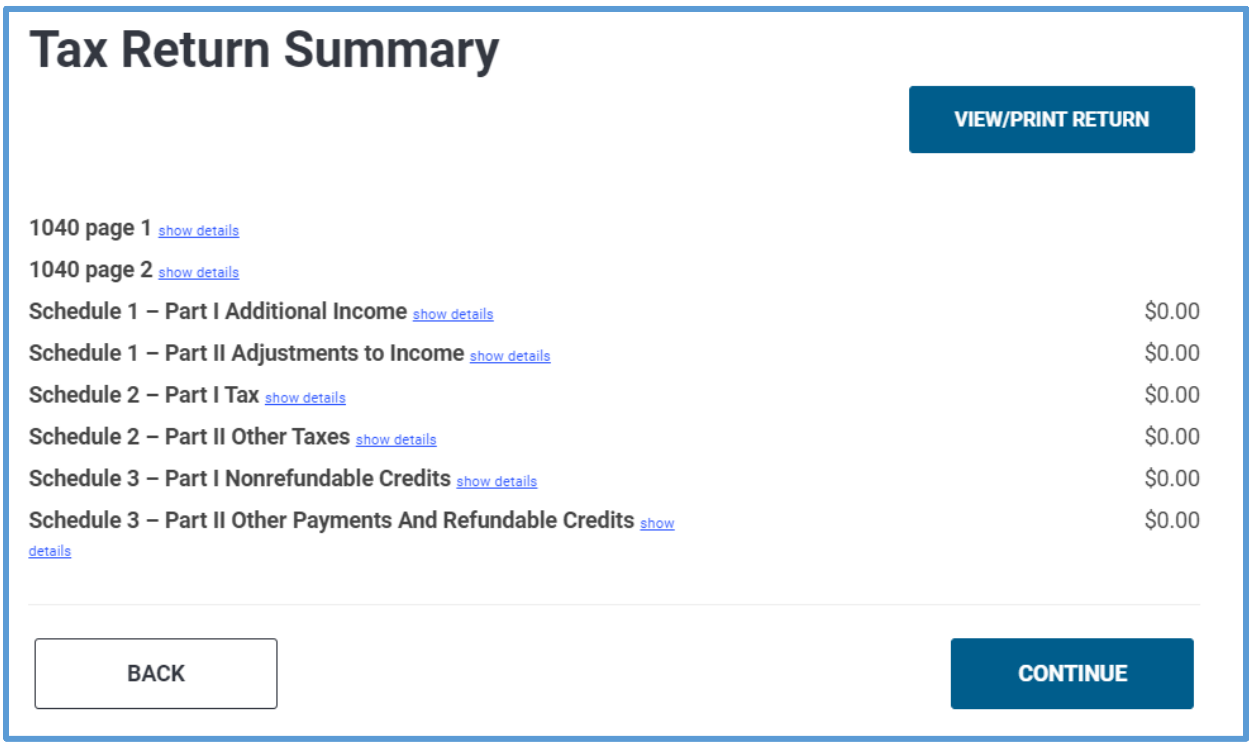
Note: TaxSlayer Pro Online does not require completion of the Health Care section for Form 1040NR and 1040NR EZ returns in order to electronically file the return.

Adding a State Return

If you need to add a state return for the taxpayer, add the state just as you would for any other taxpayer. Most state returns associated with a Form 1040NR or 1040NR EZ return can be electronically filed. TaxSlayer Pro Online displays a State validation page indicating that the electronic filing of certain state returns is not supported with Federal Form 1040NR returns for state returns that do not allow electronic filing when attached to Federal Form 1040NR or 1040NR EZ.

Completing the Return

When you finish adding state returns, TaxSlayer Pro Online displays the **Calculation Summary**:



To begin e-filing your return, use the following steps:

1. Click **CONTINUE**.

Work through the warnings, electronic filing errors, and other information just as you would for any other return.

Summary

You should now be able to:

- Start a Form 1040NR return.
- Enter the taxpayer's personal information.
- Complete Schedule OI.
- Enter income.
- Enter adjustments, itemized deductions, and credits.
- Enter other taxes, including those on Schedule NEC and from Transportation tax.
- Enter payments and estimates.
- Add a state to Form 1040NR.
- Begin the e-filing process.

To see a video of what you just learned, go to Completing a Form 1040NR. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Working with Amended Returns

After completing this lesson, you should be able to:

- Create Form 1040X after receiving an accepted IRS acknowledgement.
- Create Form 1040X when you did not prepare the taxpayer's original return.
- Make changes to the original return.
- Review or enter information from the original return.
- Complete a state amended return.
- Provide an explanation for the changes in the return.
- Print the amended return.
- Electronically file the federal amended return.

Sometimes, taxpayers need to file an amended return after they have already filed the original return. In that case, you should file Form 1040X for that taxpayer. If necessary, you should also amend the state tax return. If your site prepared the taxpayer's original tax return, you can search for and make changes to the original return from TaxSlayer Pro Online. If the original return was prepared elsewhere, you need to enter the taxpayer's information, and then prepare the amendment.

Creating Form 1040X from Accepted Return

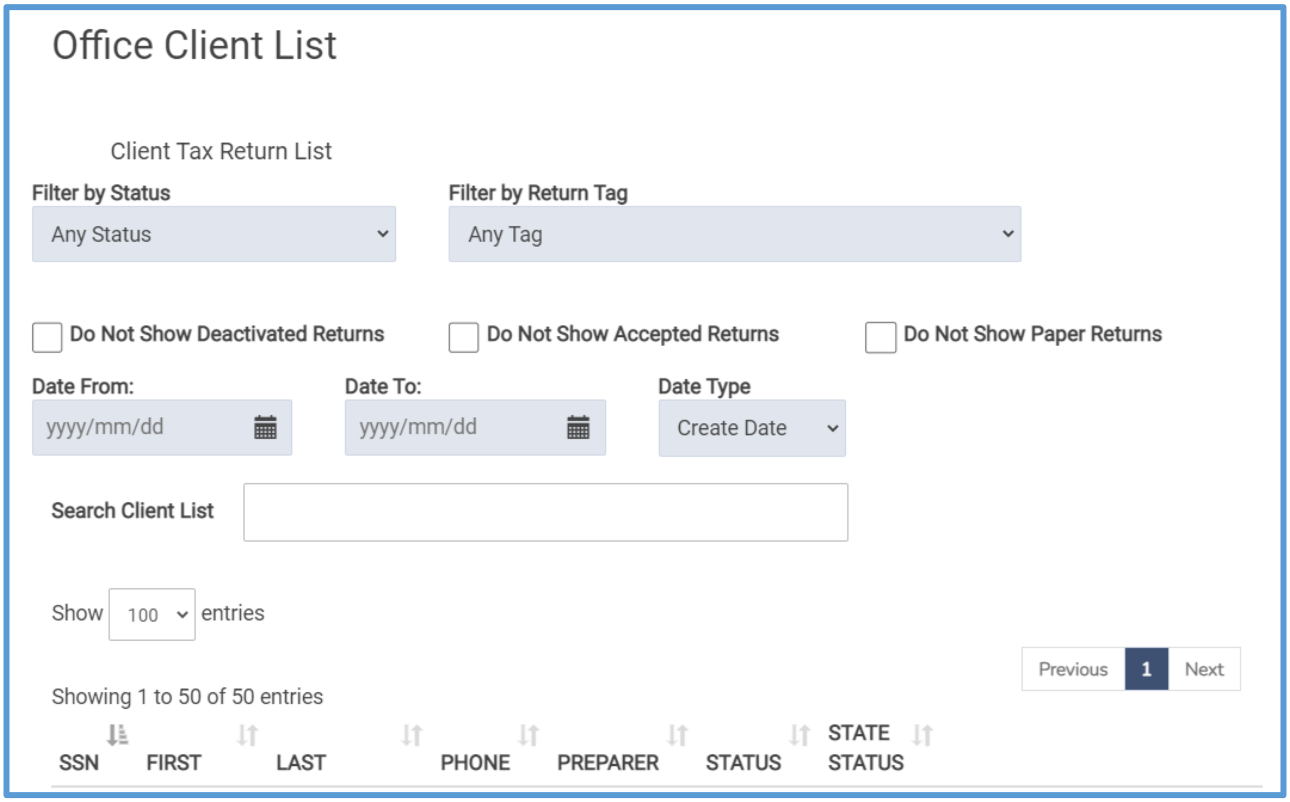
If your site created and e-filed the original return, you should take slightly different steps than if your site did not prepare the return or if the taxpayer mailed the return. This section discusses preparing the amendment when you have an IRS acceptance in the system.

Finding the Original Return

If your site prepared the original tax return, you should first find that tax return. To do so, use the following steps from the TaxSlayer Pro Online Home page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:

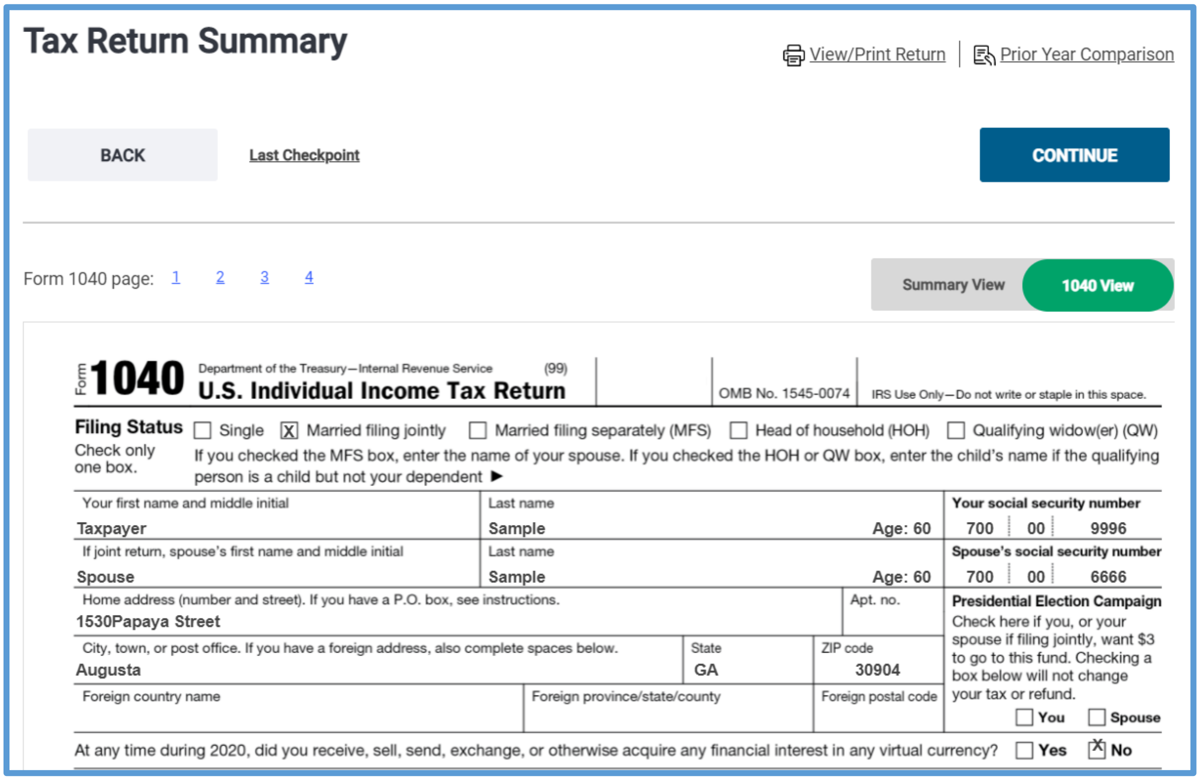


2. From the **Filter by Status** drop-down list, select **Accepted**.

TaxSlayer Pro Online displays the Office Client List, showing only returns with the status **Accepted**.

3. Find the return you need to amend and click **Select** for that return.

TaxSlayer Pro Online displays the return in 1040 View:



Making Changes to the Return

After you find and open the return, you need to add or change the information previously entered. To do so, use the following steps from the open return:

1. Print a copy of the original return. You will need this later.

Note: You can print a copy of the accepted return from the Client Status page located in the **Tools** menu.

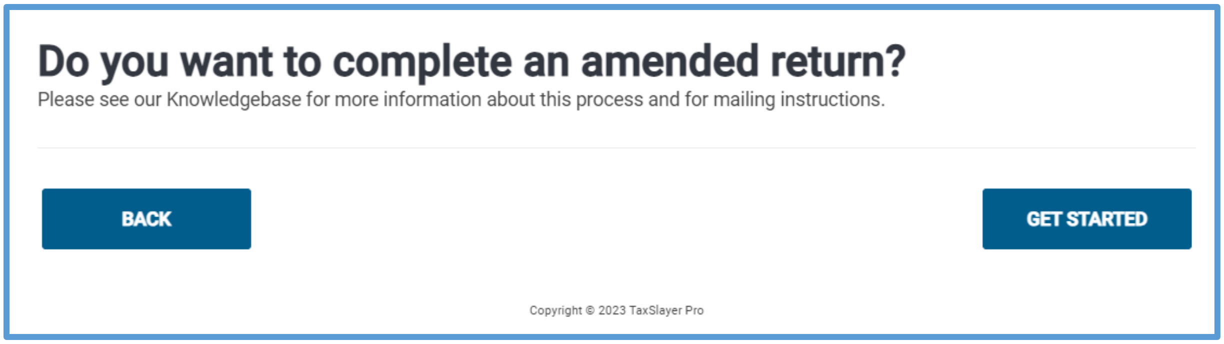
2. Make all necessary changes to the return based on the new information from the taxpayer. For example, if the taxpayer needs to add a Form W-2, click the amount in the **Wages, salaries, tips, etc.** line to navigate to the **W-2 Wage Statement** page. Then, add the new Form W-2 just as you would when preparing the original return.

Note: If you need help adding information to the return, review the appropriate lesson in the *Preparing a Return* section on Practice Lab.

Adding Form 1040X

3. When you finish making changes, click **20XX Amended Return**.

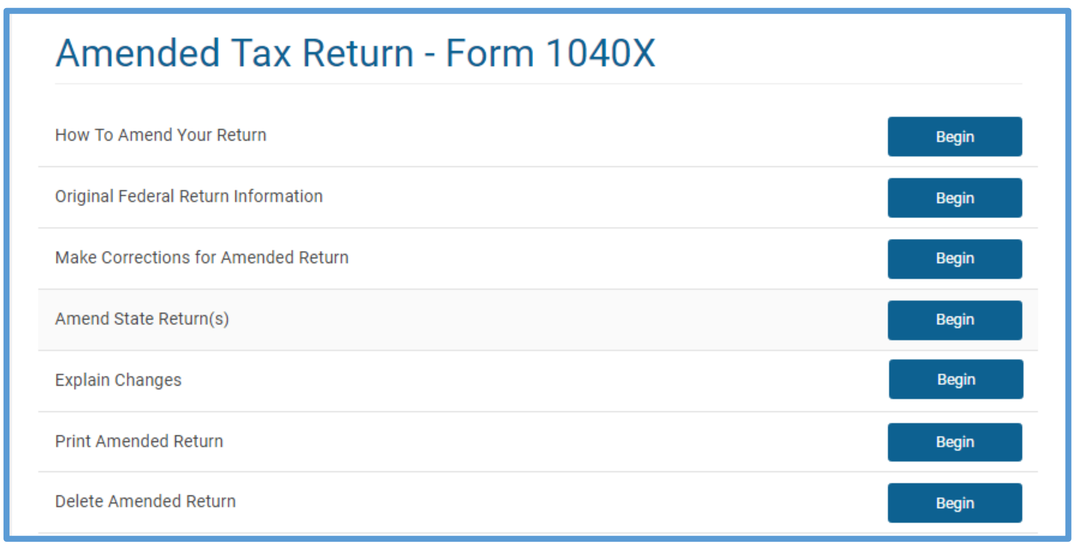
TaxSlayer Pro Online displays the **Do you want to complete an amended return?** page:



4. Click **GET STARTED**.

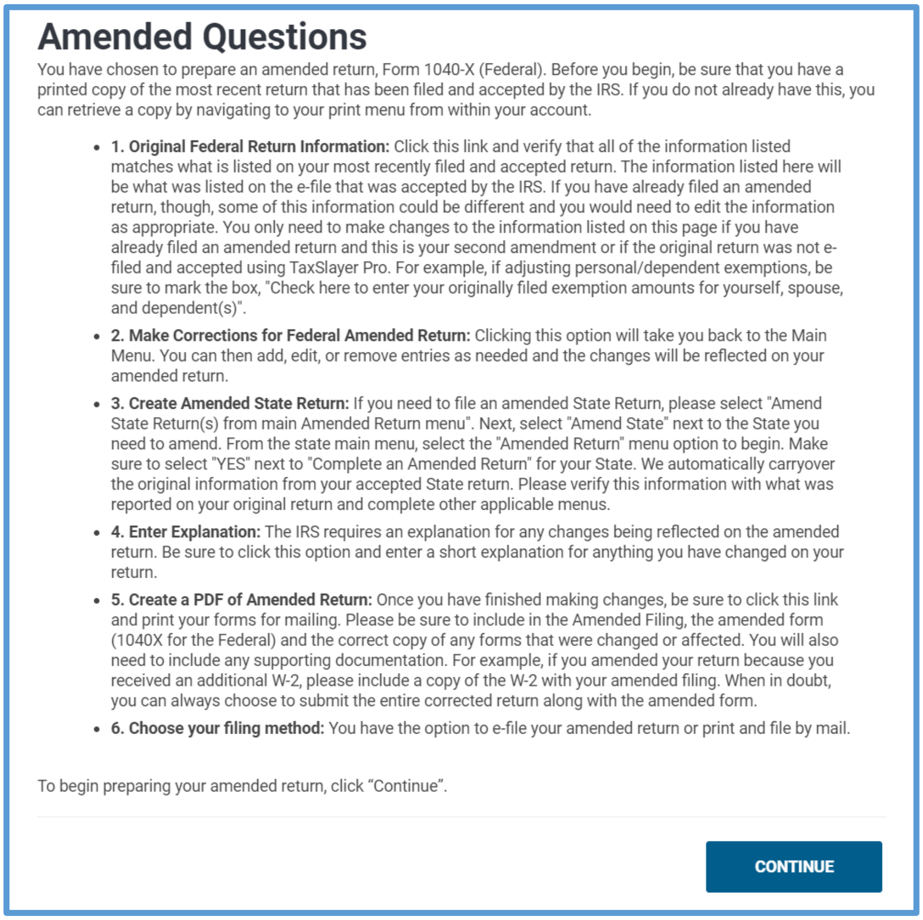
NOTE: Click **BACK** to navigate to the Tax Return Summary. This will not load Form 1040X in the return.

TaxSlayer Pro Online displays the **Amended Tax Return – Form 1040X** page:



5. Click **BEGIN** on the **How To Amend Your Return** line.

TaxSlayer Pro displays the **Amended Questions** page:



Amended Questions

You have chosen to prepare an amended return, Form 1040-X (Federal). Before you begin, be sure that you have a printed copy of the most recent return that has been filed and accepted by the IRS. If you do not already have this, you can retrieve a copy by navigating to your print menu from within your account.

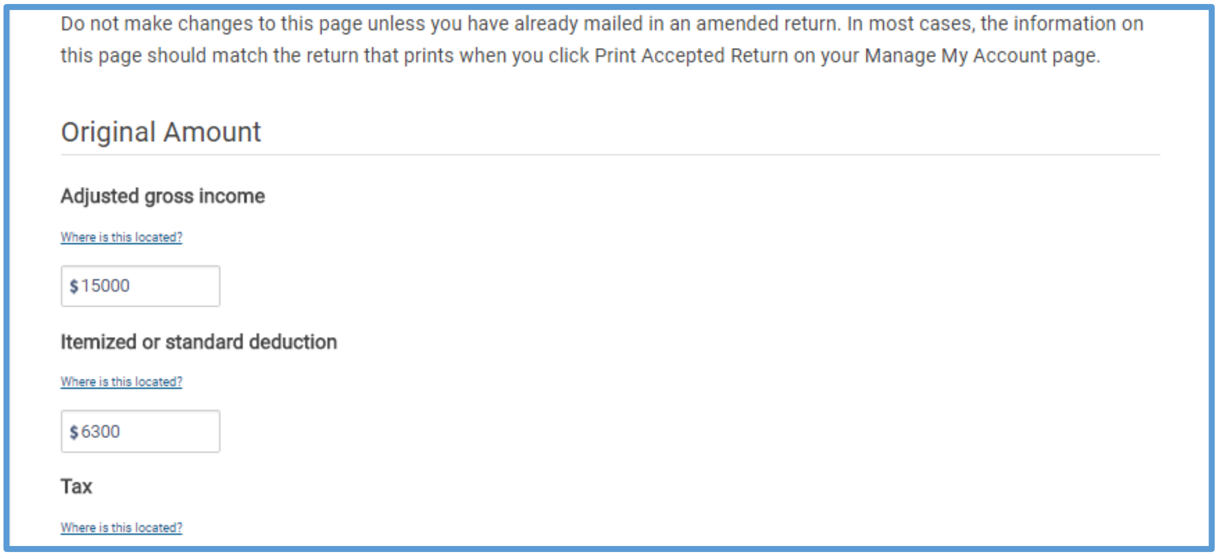
- **1. Original Federal Return Information:** Click this link and verify that all of the information listed matches what is listed on your most recently filed and accepted return. The information listed here will be what was listed on the e-file that was accepted by the IRS. If you have already filed an amended return, though, some of this information could be different and you would need to edit the information as appropriate. You only need to make changes to the information listed on this page if you have already filed an amended return and this is your second amendment or if the original return was not e-filed and accepted using TaxSlayer Pro. For example, if adjusting personal/dependent exemptions, be sure to mark the box, "Check here to enter your originally filed exemption amounts for yourself, spouse, and dependent(s)".
- **2. Make Corrections for Federal Amended Return:** Clicking this option will take you back to the Main Menu. You can then add, edit, or remove entries as needed and the changes will be reflected on your amended return.
- **3. Create Amended State Return:** If you need to file an amended State Return, please select "Amend State Return(s) from main Amended Return menu". Next, select "Amend State" next to the State you need to amend. From the state main menu, select the "Amended Return" menu option to begin. Make sure to select "YES" next to "Complete an Amended Return" for your State. We automatically carryover the original information from your accepted State return. Please verify this information with what was reported on your original return and complete other applicable menus.
- **4. Enter Explanation:** The IRS requires an explanation for any changes being reflected on the amended return. Be sure to click this option and enter a short explanation for anything you have changed on your return.
- **5. Create a PDF of Amended Return:** Once you have finished making changes, be sure to click this link and print your forms for mailing. Please be sure to include in the Amended Filing, the amended form (1040X for the Federal) and the correct copy of any forms that were changed or affected. You will also need to include any supporting documentation. For example, if you amended your return because you received an additional W-2, please include a copy of the W-2 with your amended filing. When in doubt, you can always choose to submit the entire corrected return along with the amended form.
- **6. Choose your filing method:** You have the option to e-file your amended return or print and file by mail.

To begin preparing your amended return, click “Continue”.

CONTINUE

6. Read the information on this page. This gives you information on how to complete an amended return.
7. Click **Continue**.
8. Click **BEGIN** on the **Original Federal Return Information** line.

TaxSlayer Pro Online displays the **Form 1040X Amended Tax Return** page:



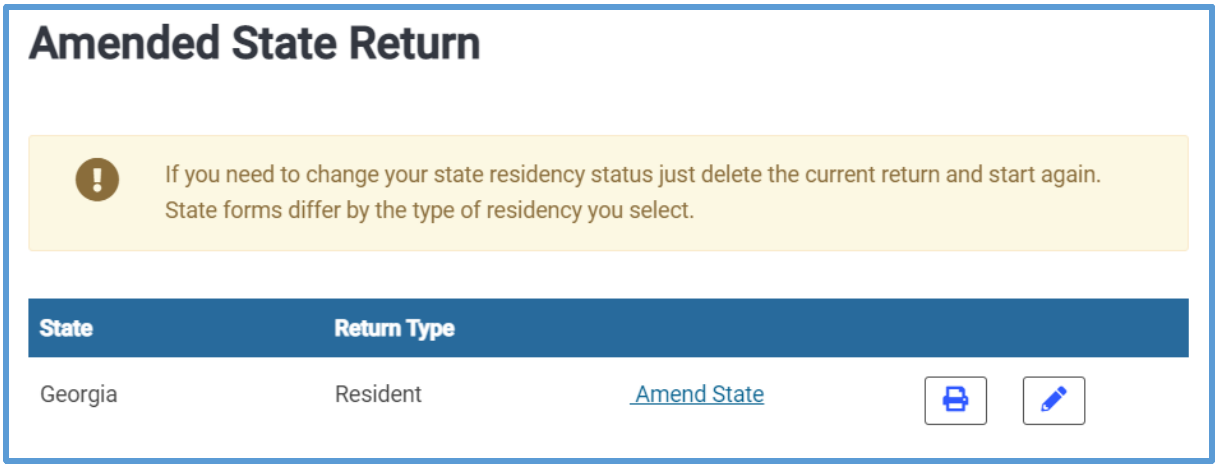
9. Because the IRS accepted the return through TaxSlayer, TaxSlayer Pro Online populates the original accepted return information on this page. Review the information using the printed original return. If any information needs to be changed, change it here.
10. If the taxpayer is changing personal exemptions, has changed addresses, or wants to change an election for the Presidential Election Campaign Fund, select the appropriate check box(es) at the bottom of the page.
11. When you finish, click **Continue**.

Creating the State Amendment

When you finish reviewing the information from the federal return, you may also need to create the amended return for the taxpayer's state. You only need to do this if the adjustments affect the state. To create the state amendment from the **Amended Tax Return – Form 1040X** page, use the following steps:

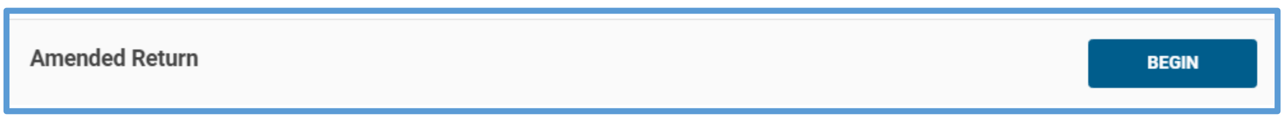
1. Click **BEGIN** on the **Amended State Return(s)** line.

TaxSlayer Pro Online displays the **Amended State Return** page:



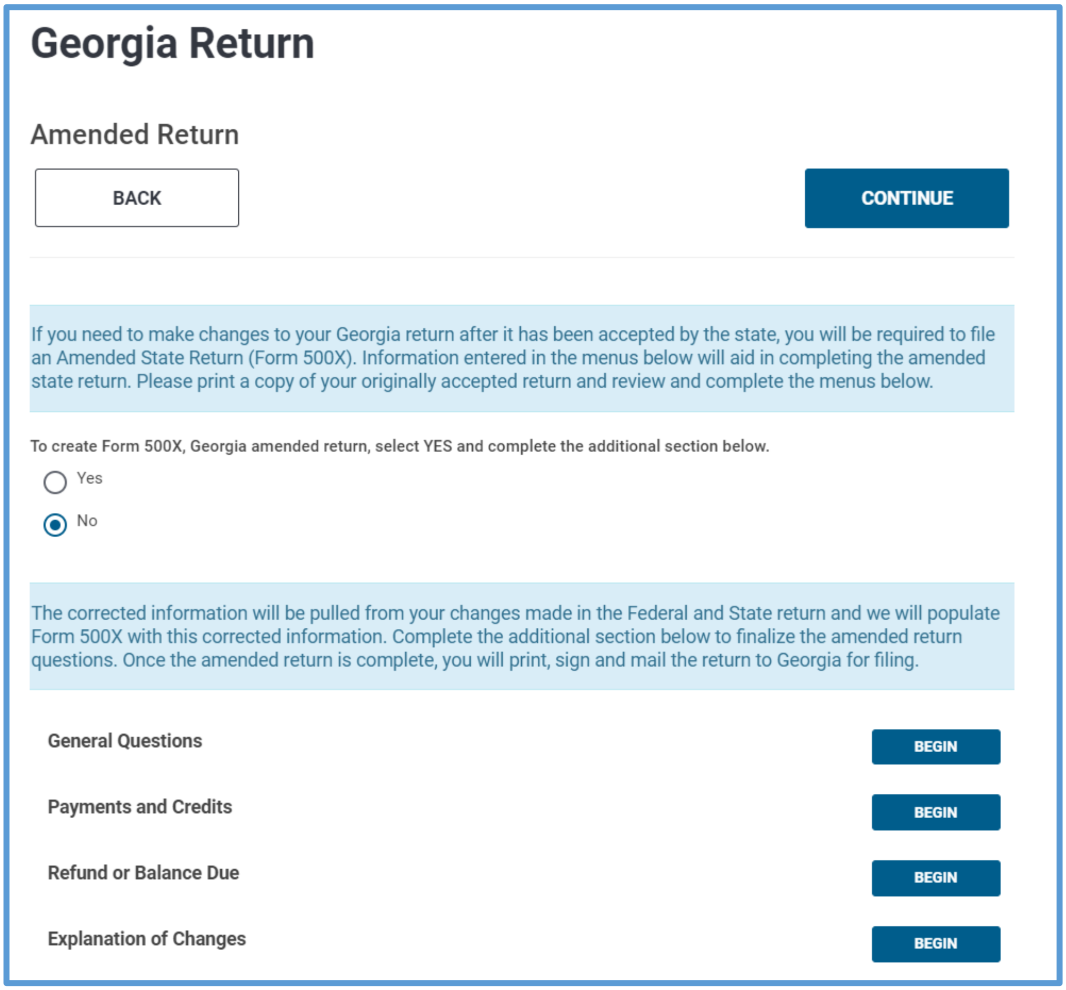
2. Click **Amend State** for the state you need to amend.

TaxSlayer Pro Online displays the **State Return** page:



3. Click **BEGIN** on the **Amended Return** line, found at the bottom of your state menu.

TaxSlayer Pro Online displays the **State Return: Amended Return** page:

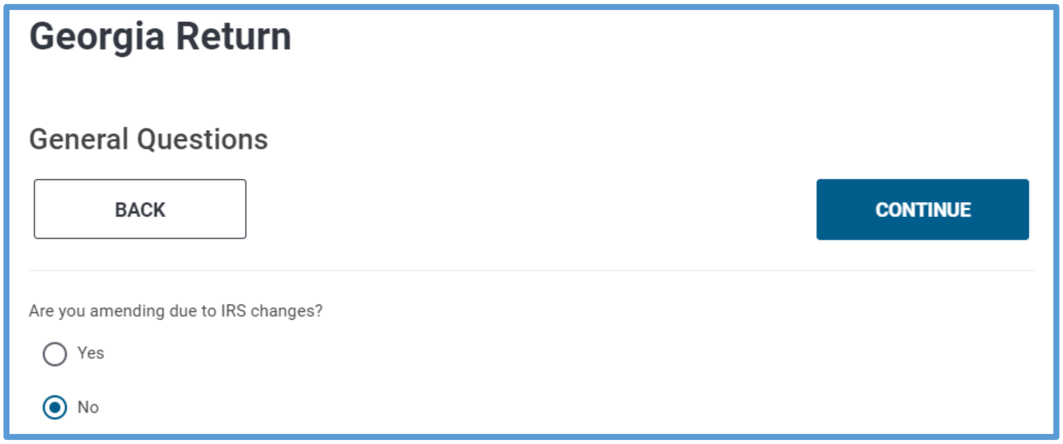


4. Read the information in blue at the top of the page.
5. Select **Yes**.

Note: TaxSlayer Pro Online displays questions and entry pages based on information required by each state. In this lesson, we review a Georgia amended return. However, the state you amend may have different required information.

6. Click **BEGIN** on the **General Questions** line.

TaxSlayer Pro Online displays the **State Return: General Questions** page:



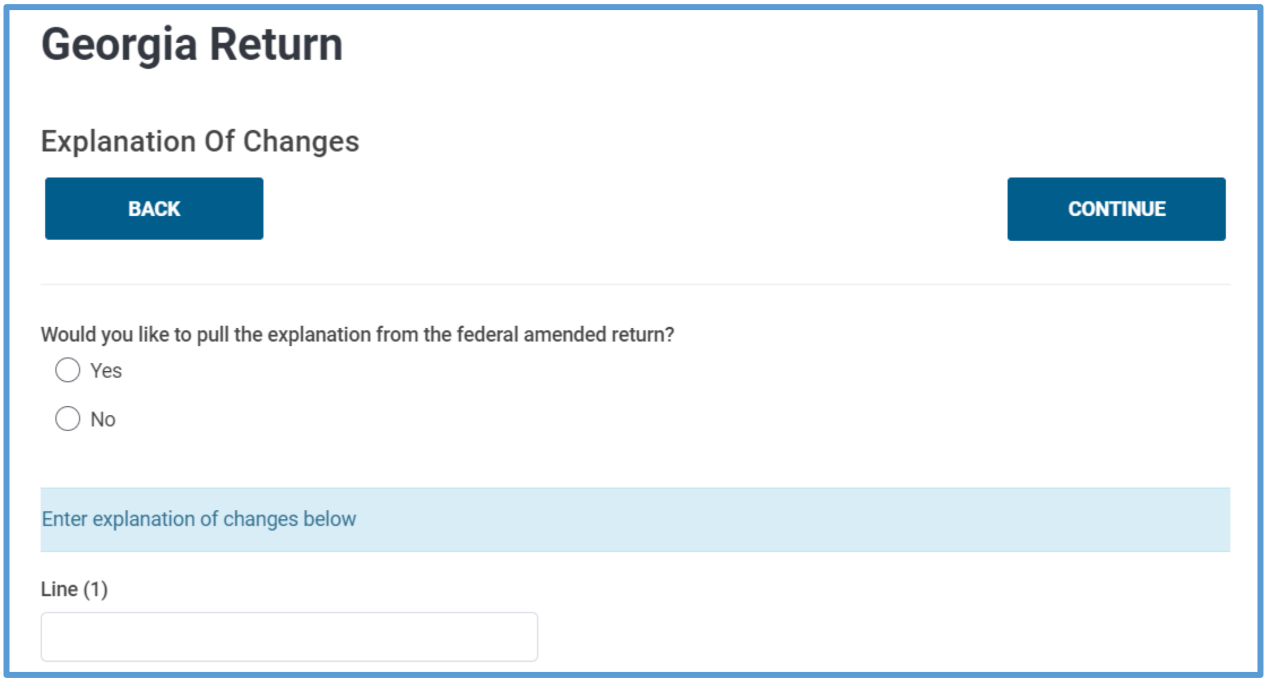
7. Answer all the questions on this page.
8. Click **CONTINUE**.
9. Click **BEGIN** on each line of the **State Return: Amended Return** page. Use the printed original return to review all information pulled from the original accepted return.
10. When you finish entering all information for the amended return, click **Continue**.
11. Click **Exit Return** to leave this state's pages.
12. Repeat the steps for any additional state(s) you need to amend.

Explaining the Changes

After you make changes and review the information from the original return, you need to provide an explanation for the changes. To do so from the **Amended Tax Return – Form 1040X** page, use the following steps:

1. Click **BEGIN** on the **Explain Changes** line.

TaxSlayer Pro Online displays the **Explanations** page:



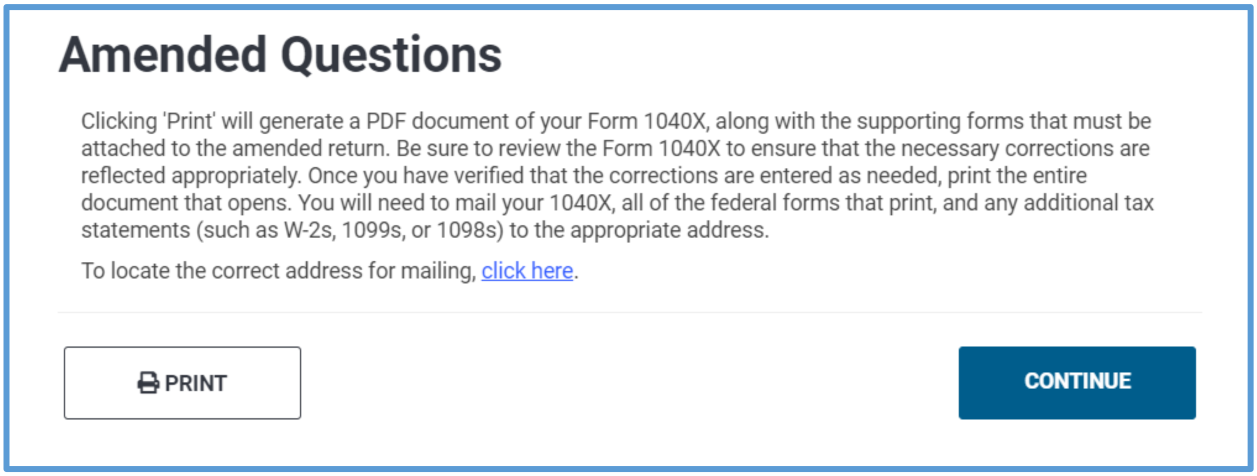
2. Type an explanation for each change in the box provided. Remember to type the line number and reason you changed the information. Follow all IRS instructions for the explanation.
3. When you finish typing the explanation, click **Continue**.

Printing the Amended Return

After you complete all the information for the amended return, you need to print it. To do so, use the following steps from the **Amended Tax Return – Form 1040X** page:

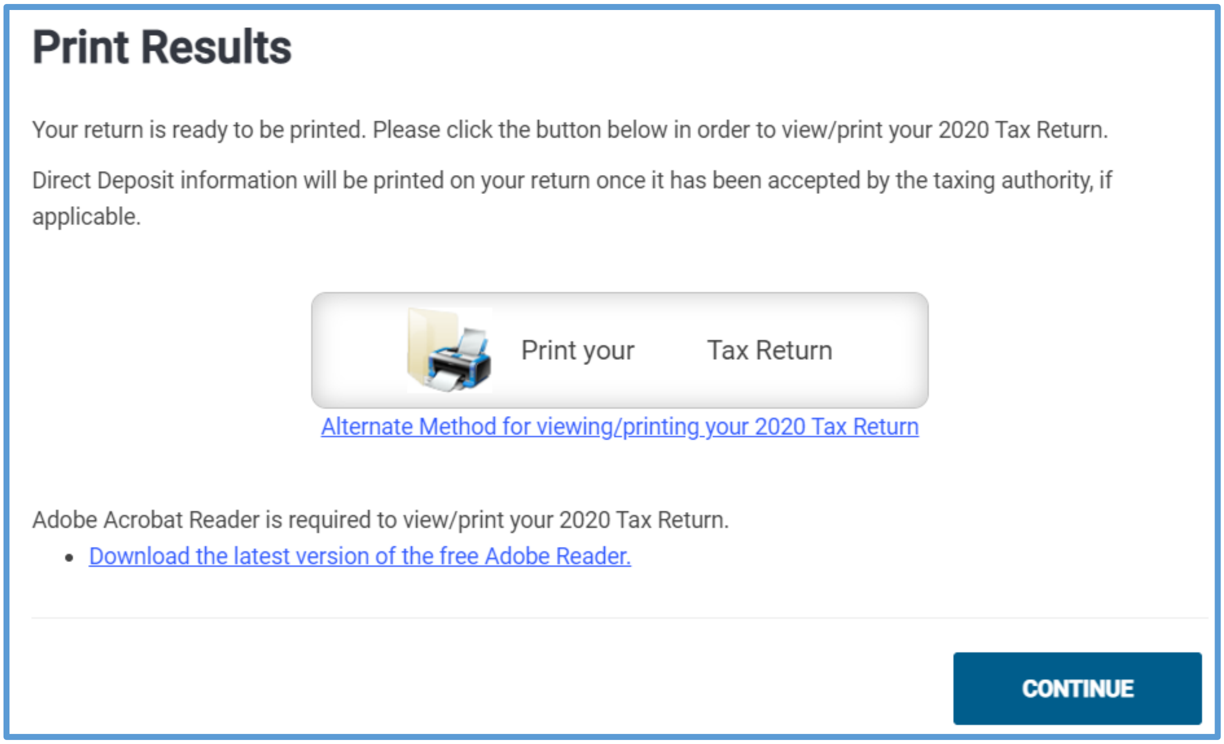
1. Click **BEGIN** on the **Print Amended Return** line.

TaxSlayer Pro Online displays the **Amended Questions** page:



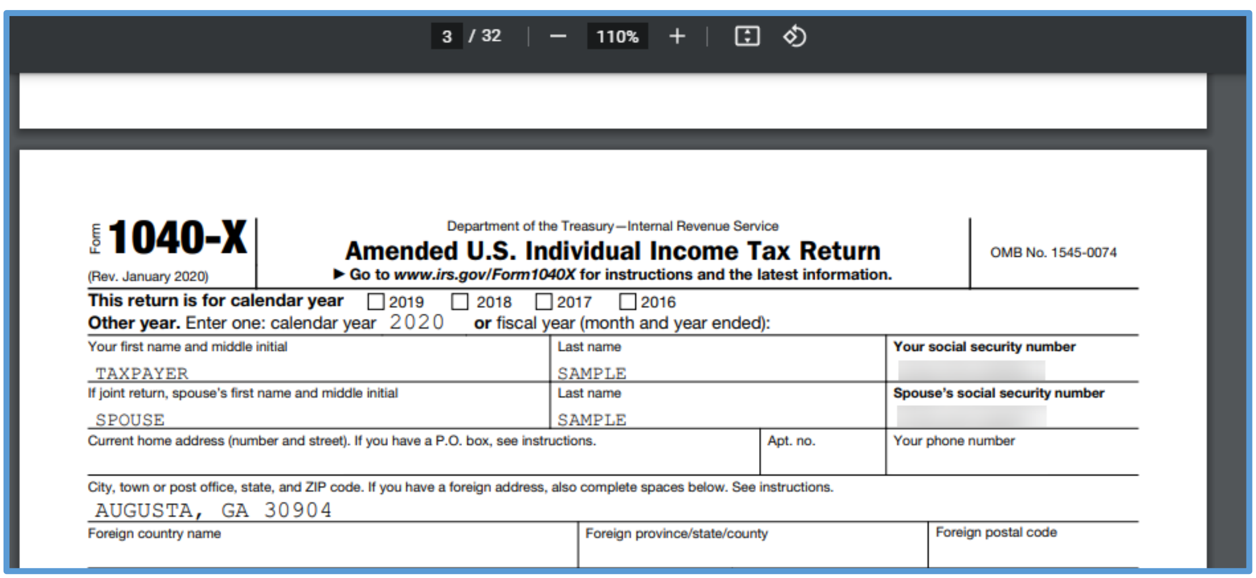
2. Read the information on the page carefully.
3. Click **Print**.

TaxSlayer Pro Online calculates the return and displays the **Print Results** page in a new window:



4. Click **Print your 20XX Tax Return**.

TaxSlayer Pro Online displays a pdf of the tax return in a new window:



5. Review the information on the return to ensure that you entered all changes.

6. Print the return using Adobe Reader's print feature or default PDF Viewer utilized in the Internet browser.
7. Do one of the following:
    a. Mail the amended return(s) using the instructions from the IRS and state.
    b. Electronically file the return. Refer to the *Electronically Filing an Amended Return* section later for instruction on e-filing Form 1040X.

Creating Form 1040X without Accepted Return

If your site did not create and e-file the original return, you should take slightly different steps than we just discussed. While many of the steps are the same, this section covers the process in detail to avoid confusion.

Note: Make sure that you have a printed copy of the original return as filed to the IRS. If you do not have this information, you cannot amend the taxpayer’s return.

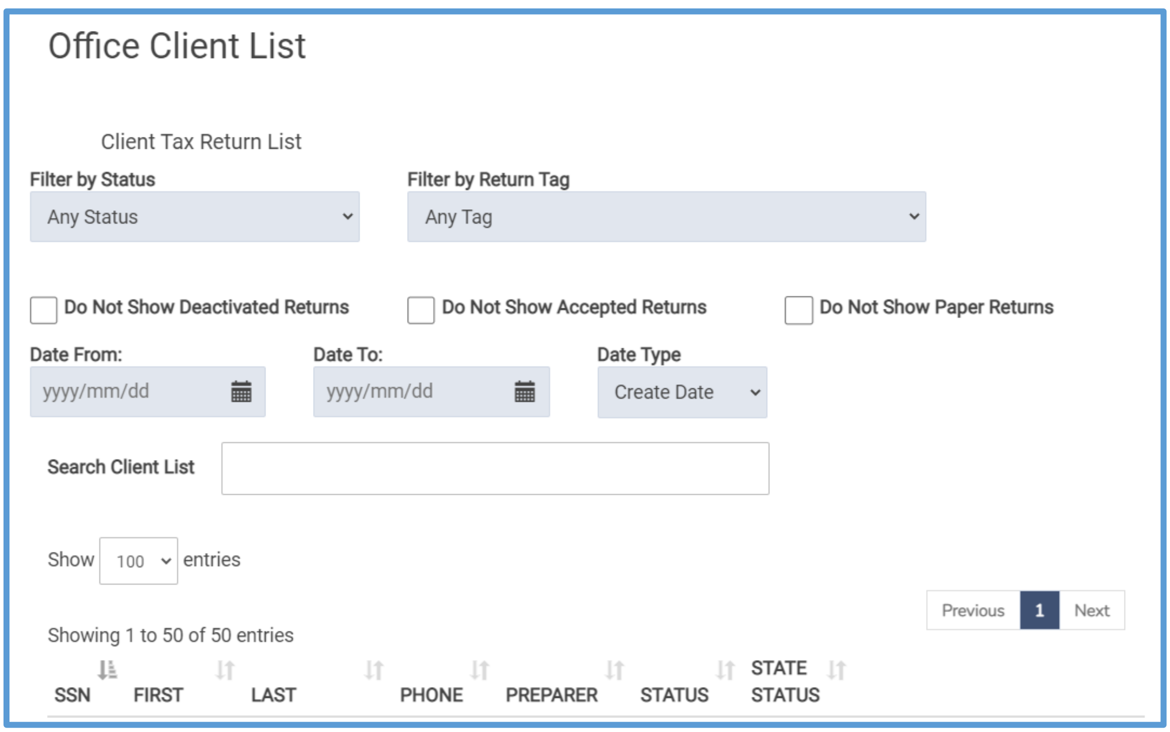
Starting the Return

Finding an Existing Return

If your site prepared the original tax return, but did not e-file it, you should first find that tax return. To do so, use the following steps from the TaxSlayer Pro Online Home page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:

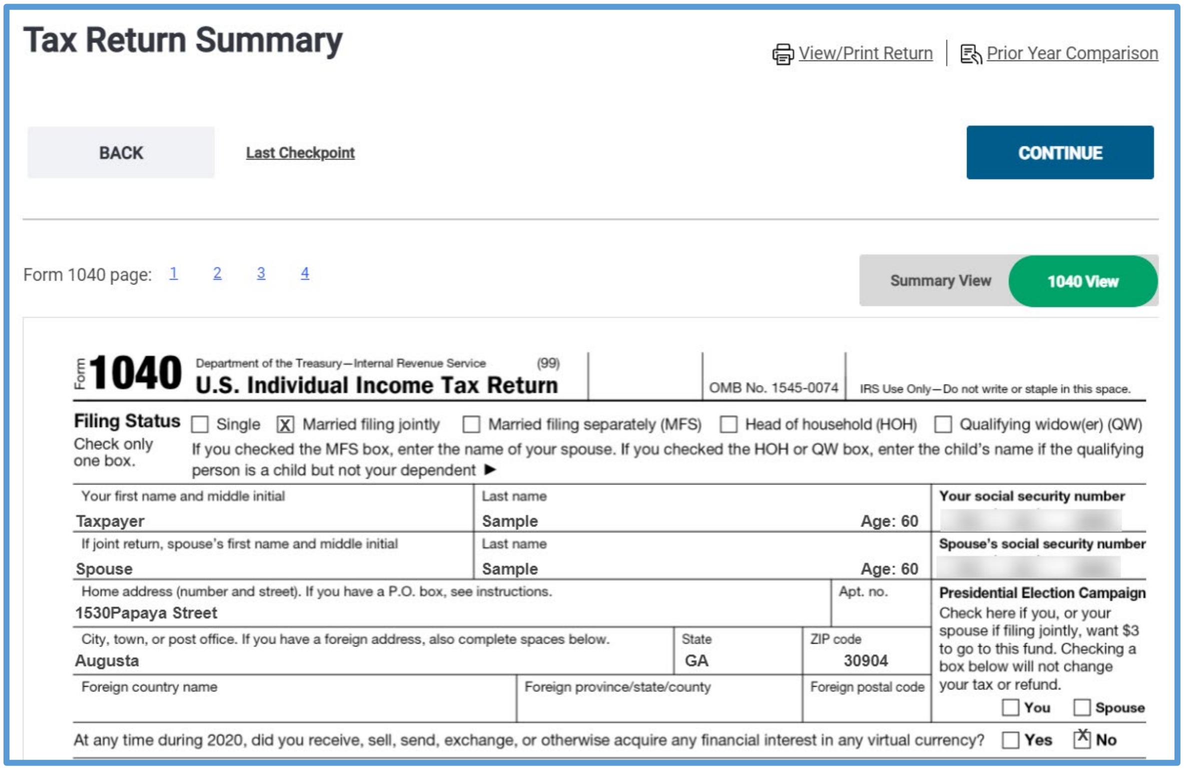


2. In the **Search Client List** box, type the taxpayer’s Social Security number.

TaxSlayer Pro Online displays the Office Client List, showing only returns with that Social Security number.

3. Find the return you need to amend and click **Select** for that return.

TaxSlayer Pro Online displays the return in 1040 View:



From this point, make changes to the return and then use the same steps we cover later to enter the original return information.

Creating a New Return

If your site did not file a return for the taxpayer, use the following steps:

1. Create a new return for the taxpayer.

Note: If you need help starting a new return, review the *Starting a Tax Return* lesson on Practice Lab.

2. Prepare the return as you normally would, using the current (not original) information.

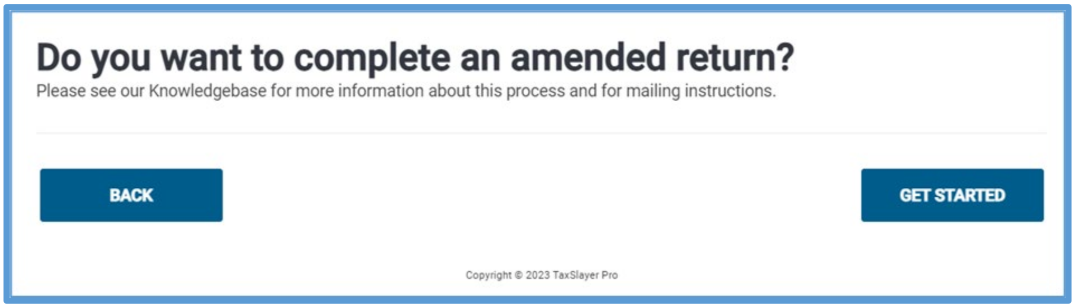
Note: If you need help adding information to the return, review the appropriate lessons in the *Preparing a Return* section on Practice Lab.

Adding Form 1040X

After you make changes or enter the return information, you need to create the amendment. To do so, use the following steps:

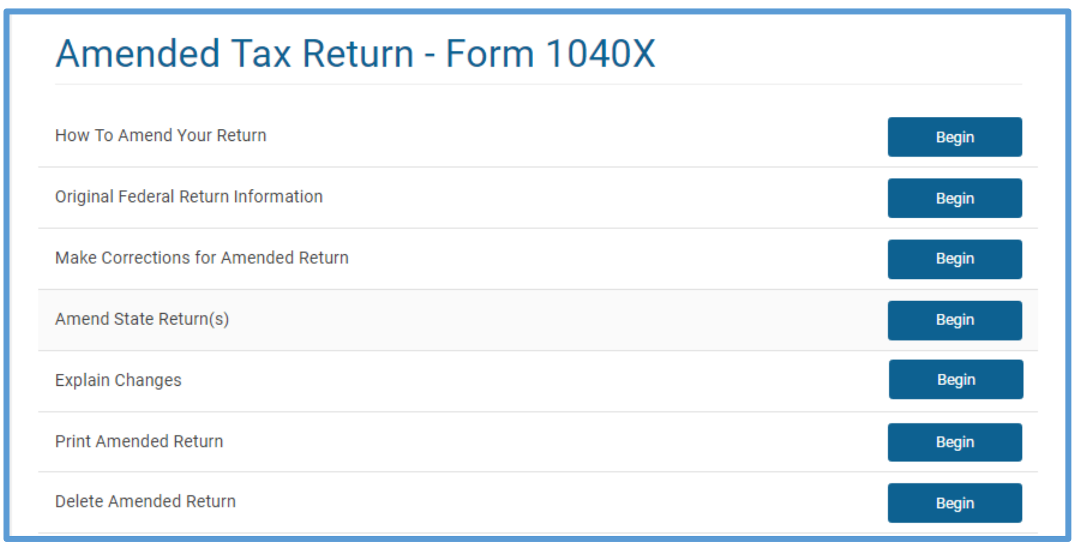
1. Click **20XX Amended Return**.

TaxSlayer Pro Online displays the **Do you want to complete an amended return** page:



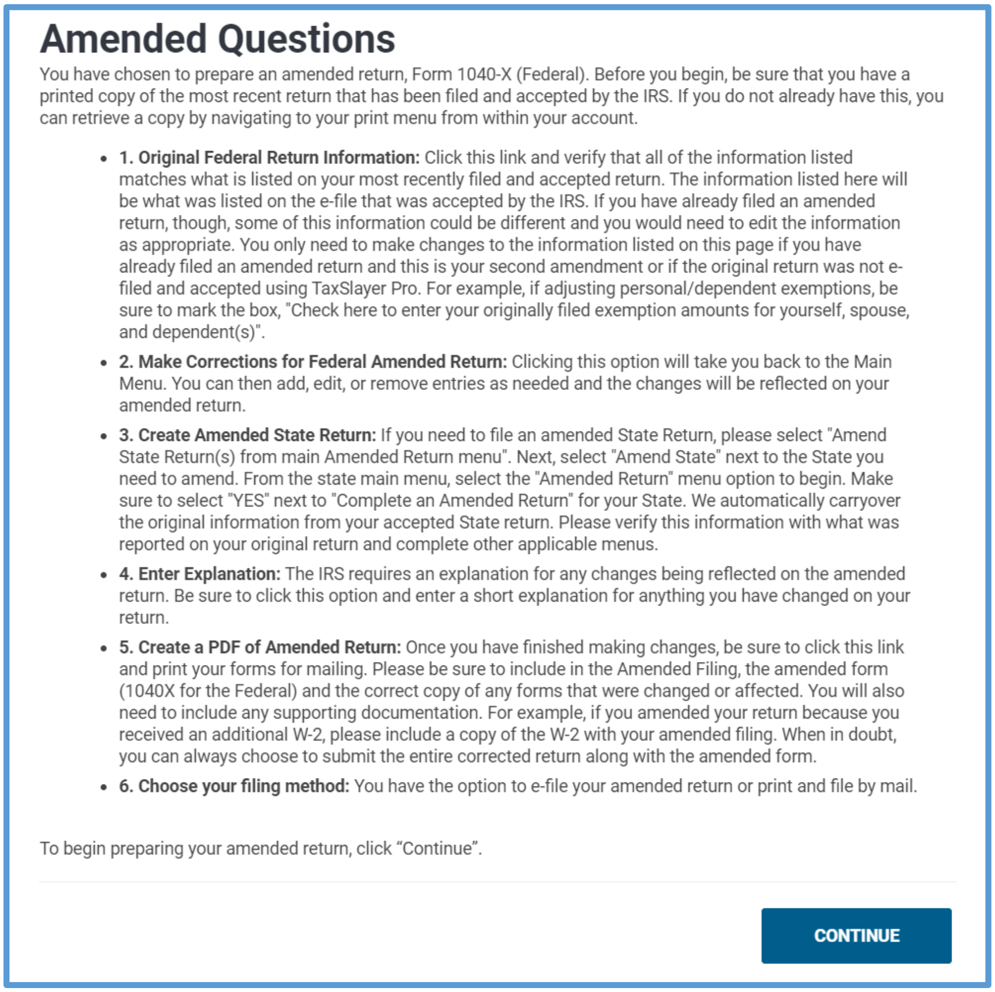
2. Click **GET STARTED**.

TaxSlayer Pro Online displays the **Amended Tax Return – Form 1040X** page:



3. Click **BEGIN** on the **How To Amend Your Return** line.

TaxSlayer Pro displays the **Amended Questions** page:



Amended Questions

You have chosen to prepare an amended return, Form 1040-X (Federal). Before you begin, be sure that you have a printed copy of the most recent return that has been filed and accepted by the IRS. If you do not already have this, you can retrieve a copy by navigating to your print menu from within your account.

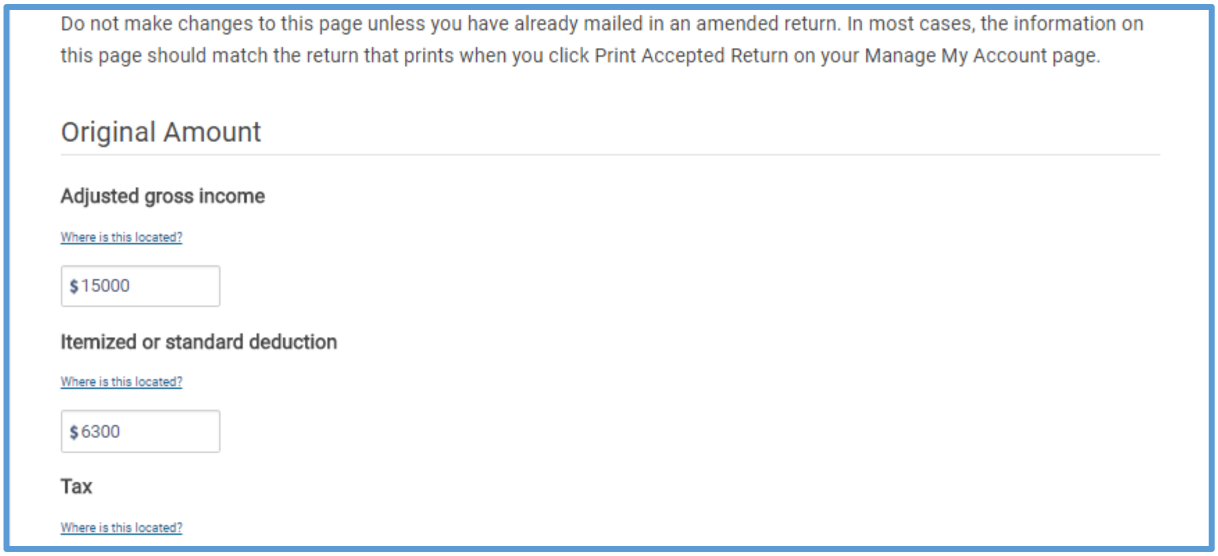
- **1. Original Federal Return Information:** Click this link and verify that all of the information listed matches what is listed on your most recently filed and accepted return. The information listed here will be what was listed on the e-file that was accepted by the IRS. If you have already filed an amended return, though, some of this information could be different and you would need to edit the information as appropriate. You only need to make changes to the information listed on this page if you have already filed an amended return and this is your second amendment or if the original return was not e-filed and accepted using TaxSlayer Pro. For example, if adjusting personal/dependent exemptions, be sure to mark the box, "Check here to enter your originally filed exemption amounts for yourself, spouse, and dependent(s)".
- **2. Make Corrections for Federal Amended Return:** Clicking this option will take you back to the Main Menu. You can then add, edit, or remove entries as needed and the changes will be reflected on your amended return.
- **3. Create Amended State Return:** If you need to file an amended State Return, please select "Amend State Return(s) from main Amended Return menu". Next, select "Amend State" next to the State you need to amend. From the state main menu, select the "Amended Return" menu option to begin. Make sure to select "YES" next to "Complete an Amended Return" for your State. We automatically carryover the original information from your accepted State return. Please verify this information with what was reported on your original return and complete other applicable menus.
- **4. Enter Explanation:** The IRS requires an explanation for any changes being reflected on the amended return. Be sure to click this option and enter a short explanation for anything you have changed on your return.
- **5. Create a PDF of Amended Return:** Once you have finished making changes, be sure to click this link and print your forms for mailing. Please be sure to include in the Amended Filing, the amended form (1040X for the Federal) and the correct copy of any forms that were changed or affected. You will also need to include any supporting documentation. For example, if you amended your return because you received an additional W-2, please include a copy of the W-2 with your amended filing. When in doubt, you can always choose to submit the entire corrected return along with the amended form.
- **6. Choose your filing method:** You have the option to e-file your amended return or print and file by mail.

To begin preparing your amended return, click “Continue”.

CONTINUE

4. Read the information on this page. This gives you information on how to complete an amended return.
5. Click **Continue**.
6. Click **BEGIN** on the **Original Federal Return Information** line.

TaxSlayer Pro Online displays the **Form 1040X Amended Tax Return** page:



7. Type all of the information on this page as shown on the taxpayer's original return.

Tip: If you need help locating information on the original return, click the **Where is this located?** link for that line.

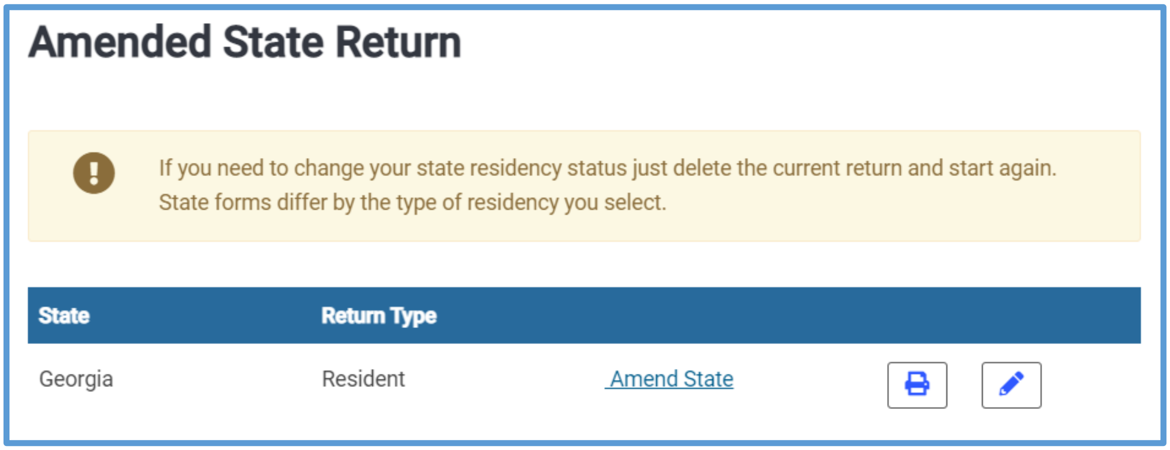
8. If the taxpayer is changing personal exemptions, has changed addresses, or wants to change an election for the Presidential Election Campaign Fund, select the appropriate check box(es) at the bottom of the page.
9. When you finish, click **Continue**.

Creating the State Amendment

When you finish adding information from the original federal return, you may also need to create the amended return for the taxpayer's state. You only need to do this if the adjustments affect the state. To create the state amendment from the **Amended Tax Return – Form 1040X** page, use the following steps:

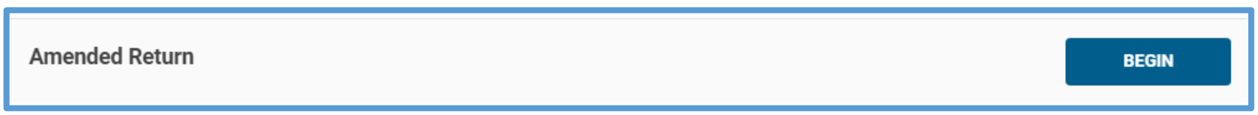
1. Click **BEGIN** on the **Create Amended State Return** line.

TaxSlayer Pro Online displays the **Amended State Return** page:



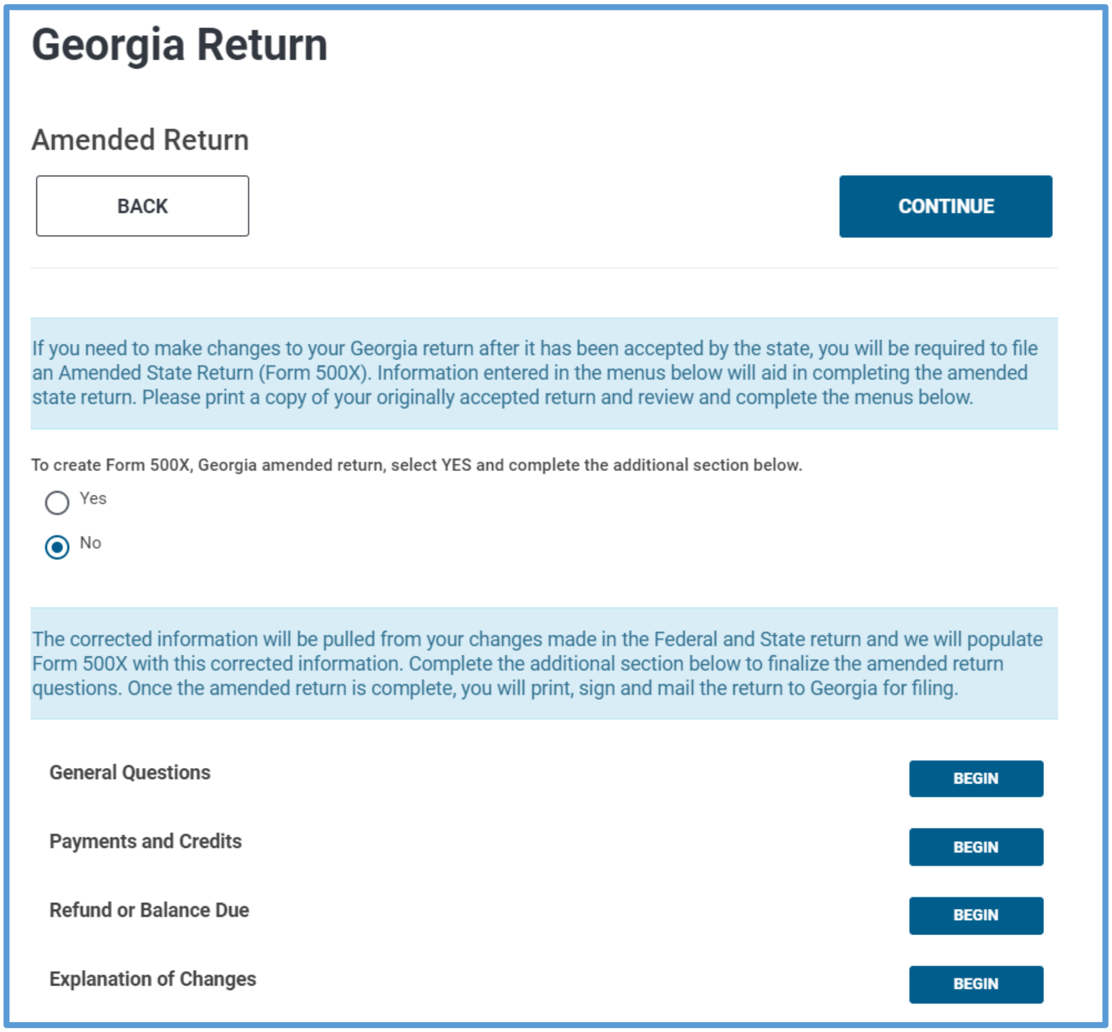
2. Click **Amend State** for the state you need to amend.

TaxSlayer Pro Online displays the **State Return** page:



3. Click **BEGIN** on the **Amended Return** line.

TaxSlayer Pro Online displays the **State Return: Amended Return** page:

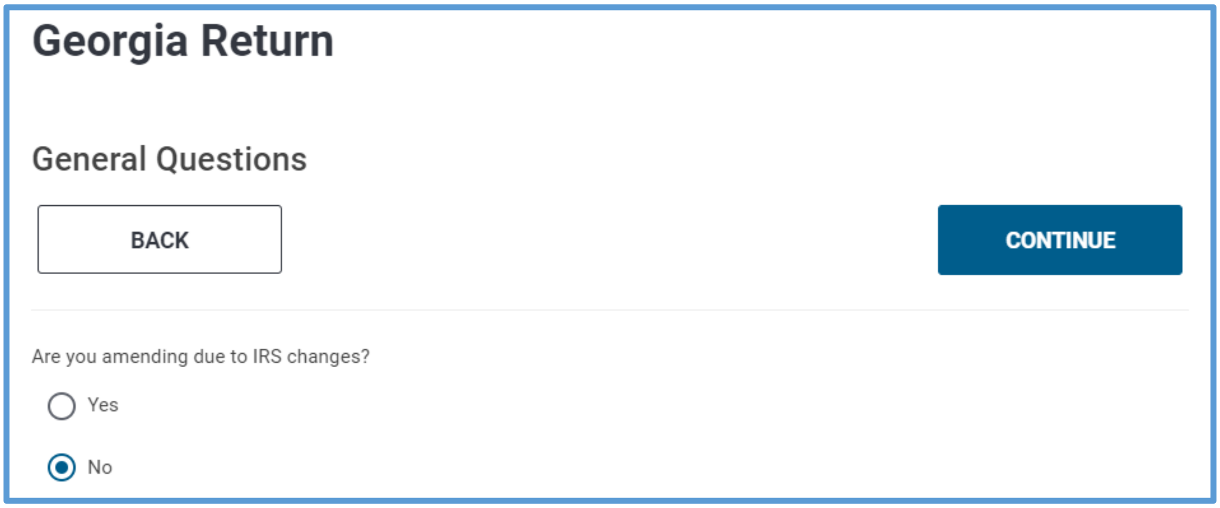


4. Read the information in blue at the top of the page.
5. Select **Yes**.

Note: TaxSlayer Pro Online displays questions and entry pages based on information required by each state. In this lesson, we review a Georgia amended return. However, the state you amend may have different required information.

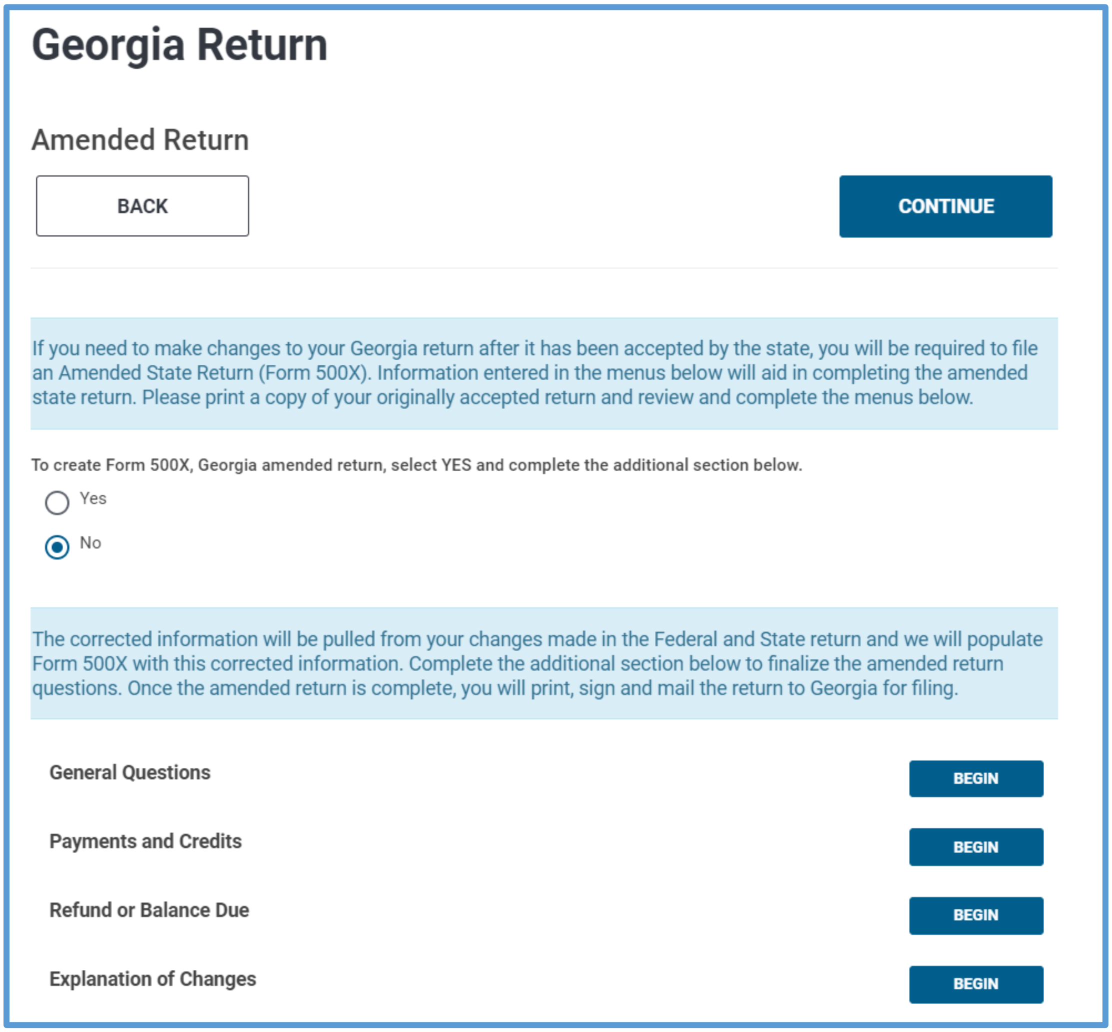
6. Click **BEGIN** on the **General Questions** line.

TaxSlayer Pro Online displays the **State Return: General Questions** page:



7. Answer all the questions on this page.
8. Click **Continue**.
9. Click **BEGIN** on each line of the **State Return: Review and Complete Amended Return** page. Use the printed original return to type all information from the original accepted return.
10. When you finish reviewing all information, click **Continue**.

TaxSlayer Pro displays the **State Return: Amended Return** page:



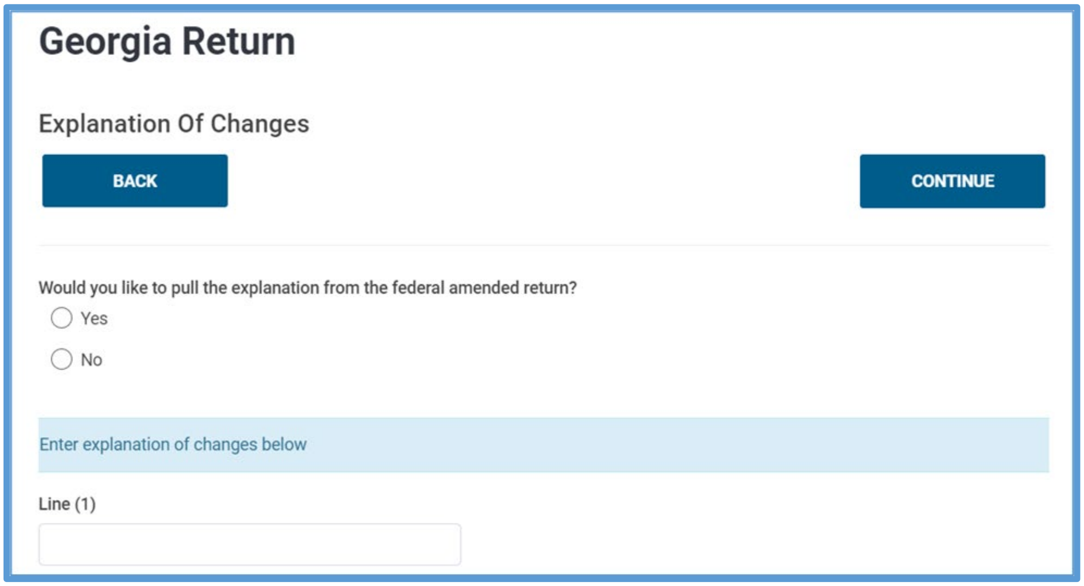
11. When you finish all information for the amended return, click **Continue**.
12. Click **Exit Return** to leave this state's pages.
13. Repeat the steps for any additional state(s) you need to amend.

Explaining the Changes

After you make changes and review the information from the original return, you need to provide an explanation for the changes. To do so from the **Amended Tax Return – Form 1040X** page, use the following steps:

1. Click **BEGIN** on the **Explain Changes** line.

TaxSlayer Pro Online displays the **Explanations** page:



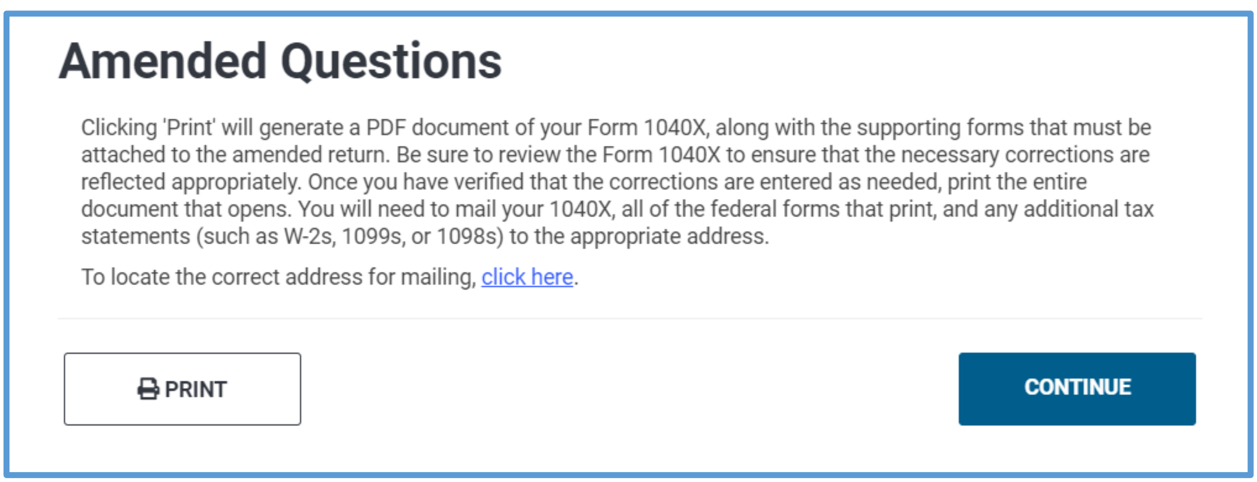
2. Type an explanation for each change in the box provided. Remember to type the line number and reason you changed the information. Follow all IRS instructions for the explanation.
3. When you finish typing the explanation, click **Continue**.

Printing the Amended Return

After you complete all the information for the amended return, you need to print it. To do so, use the following steps from the **Amended Tax Return – Form 1040X** page:

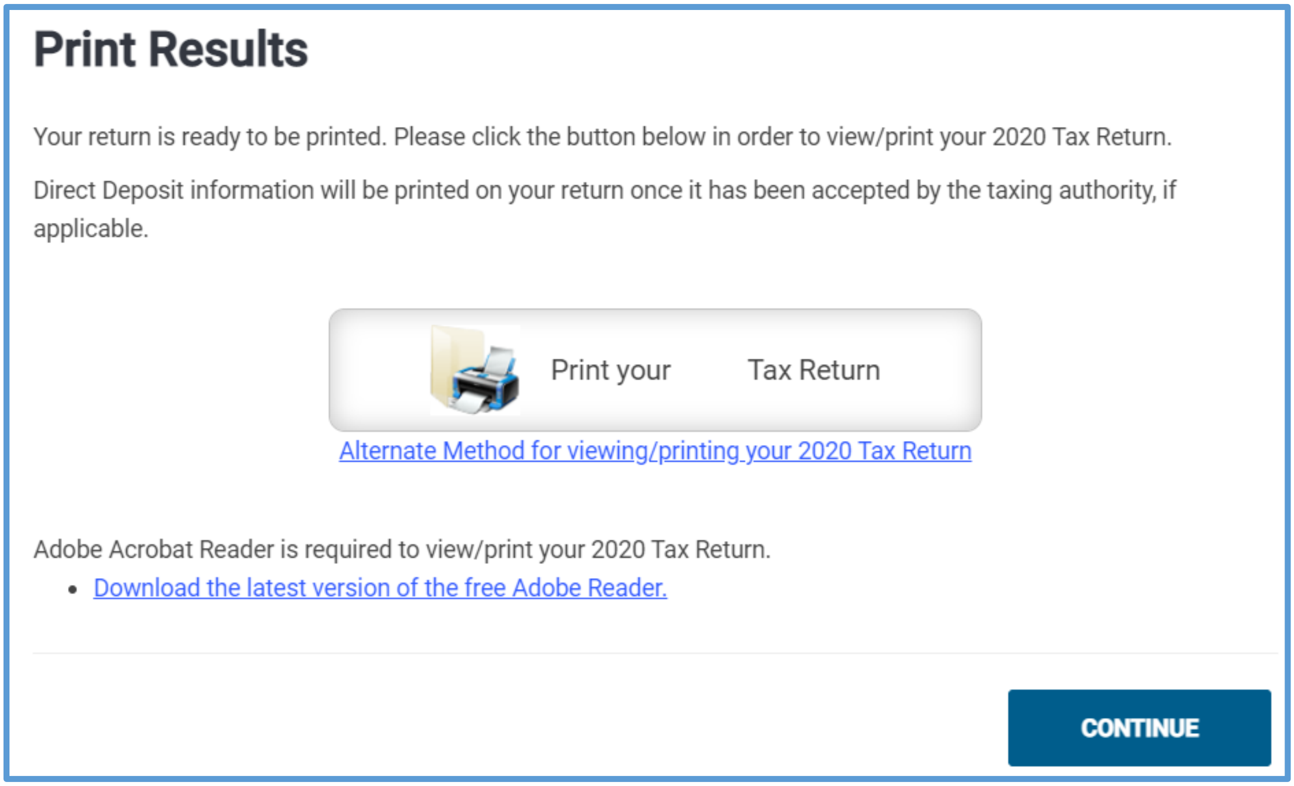
1. Click **BEGIN** on the **Print Amended Return** line.

TaxSlayer Pro Online displays the **Amended Questions** page:



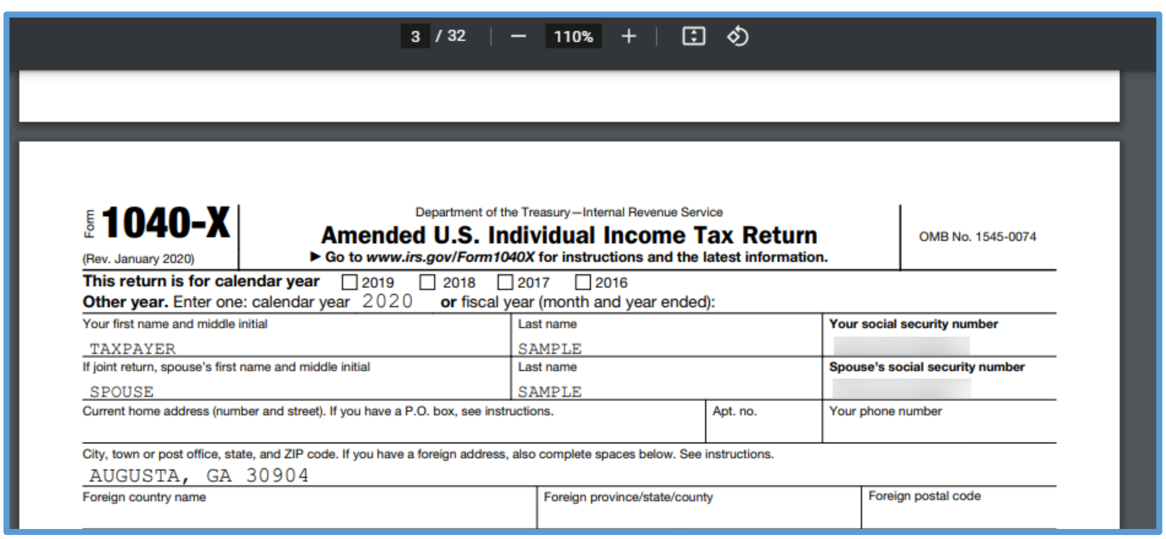
2. Read the information on the page carefully.
3. Click **Print**.

TaxSlayer Pro Online calculates the return and displays the **Print Results** page in a new window:



4. Click **Print your 20XX Tax Return**.

TaxSlayer Pro Online displays a pdf of the tax return in a new window:



5. Review the information on the return to ensure that you entered all changes.
6. Print the return using Adobe Reader's print feature or utilize the PDF Viewer tools incorporated in the Internet browser.
7. Do one of the following:
    a. Mail the amended return(s) using the instructions from the IRS and state.
    b. Electronically file the return. Refer to the *Electronically Filing an Amended Return* section later for instruction on e-filing Form 1040X.

Note: If you electronically file an amended federal return, you must still print and mail any state amended returns.

Electronically Filing an Amended Return

You can e-file Tax Year 2020 and later amended federal returns if certain conditions apply:

- All amended returns for Tax Year 2019 and earlier must be printed and mailed.
- The original return must already be accepted by the IRS. If the IRS does not have an original return on file for the year, they will reject the amendment.

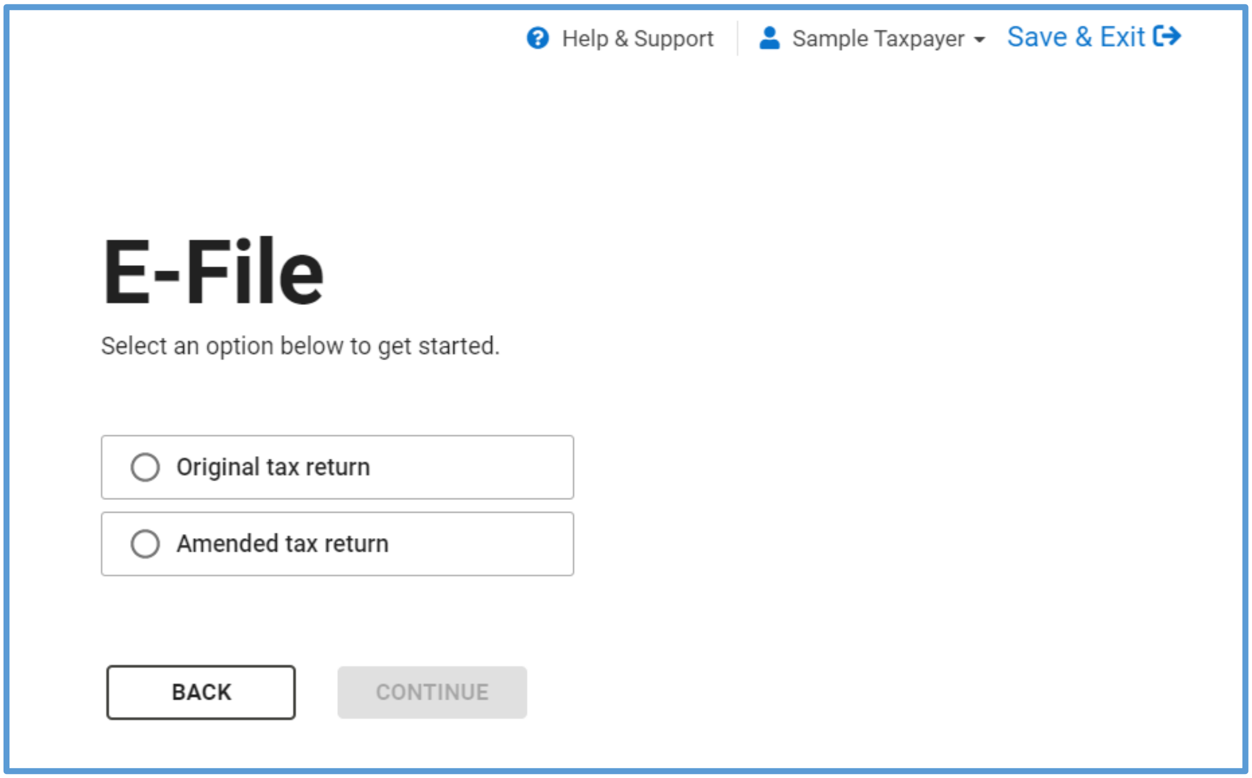
TIP: If the taxpayer is due a refund on the amended return, he or she will have a choice of receiving a mailed check or direct deposit for the refund. If taxpayer owes a balance due, the taxpayer can use direct debit, mail the payment, or use online payment on www.irs.gov.

To e-file an amended federal return, use the following steps:

1. Complete Form 1040X as discussed earlier in this guide.
2. Complete the steps for e-filing, including reviewing warnings and notes, and navigate to the **E-File** page.

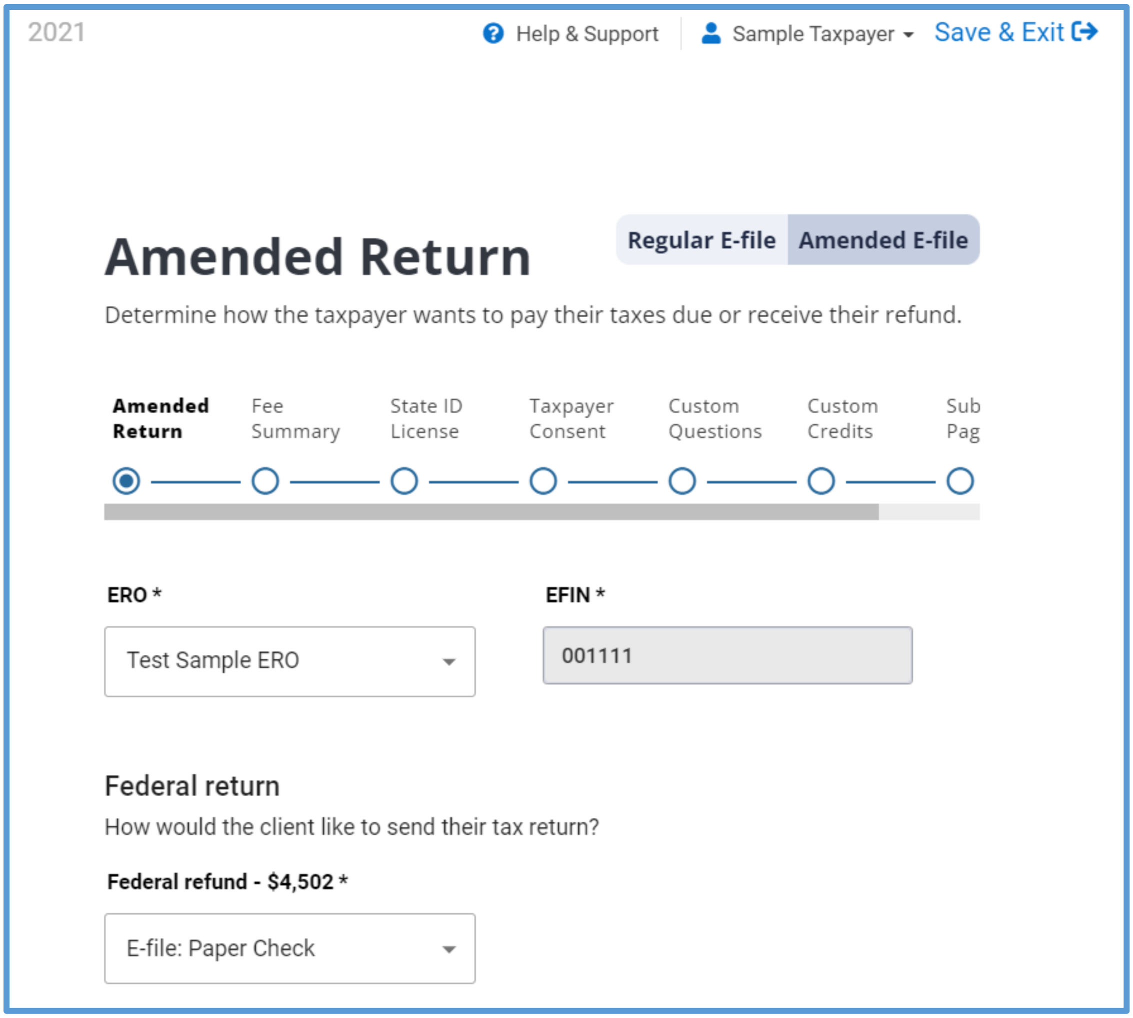
Tip: See the *Creating the e-file* lesson for more information on preparing a return for e-filing.

TaxSlayer Pro Online displays the **E-File** page:



3. Select **Amended tax return** to choose that you want to e-file Form 1040X.
4. Click **CONTINUE**.

TaxSlayer Pro Online displays the **ERO** and **Federal Return** sections, as well as the **State Return** section if a state return is included:



5. Select how the taxpayer wants to file the federal return and receive any refund or pay the balance due.
6. Select how the taxpayer wants to file the state return and receive any refund or pay the balance due.
7. Click **CONTINUE**.

8. Follow the usual process for completing all other information to e-file the return.
9. When you finish information on the **E-File** and **Submission** pages, click **TRANSMIT RETURN**.

Summary

You should now be able to:

- Create Form 1040X after receiving an accepted IRS acknowledgement.
- Create Form 1040X when you did not prepare the taxpayer's original return.
- Make changes to the original return.
- Review or enter information from the original return.
- Complete a state amended return.
- Provide an explanation for the changes in the return.
- Print the amended return.

To see a video of what you just learned, go to Working with Amended Returns. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Finishing and Electronically Filing a Return

Printing a Return

After completing this topic, you will be able to:

- Print a return from the **Submission** page.
- Print a return from the taxpayer's status page.
- Print a copy of the return at the time of IRS acceptance.
- Print a copy of the State return.
- Print a single form.
- Print a **Do Not Mail** watermark on a return.

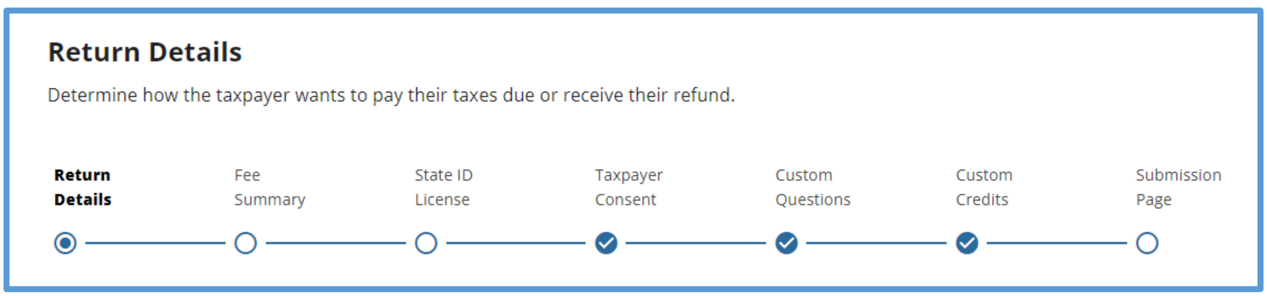
When you complete a return, you need to print a copy for the taxpayer. Depending on how your site handles printing, you can print either from within the return or from the client's status.

Printing from the e-File Page

To print from within the return, use the following steps:

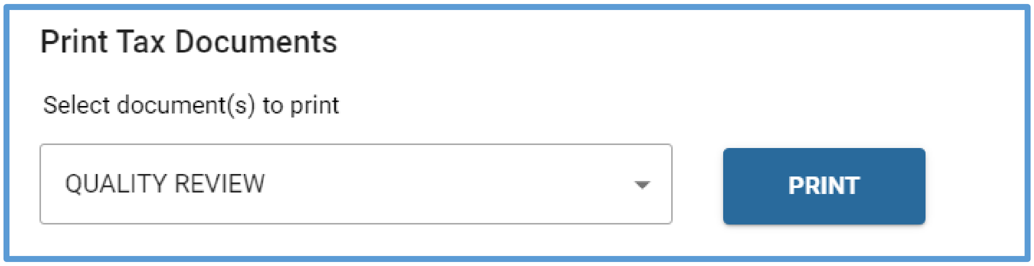
1. While within the tax return, click **e-File** in the left navigation bar.

TaxSlayer Pro Online displays the first **E-File** section:



2. Continue through the e-File section as described in *Electronic Filing >> Creating the e-File* section.

TaxSlayer Pro Online displays the **Print Tax Documents** option on the **Submission** page:

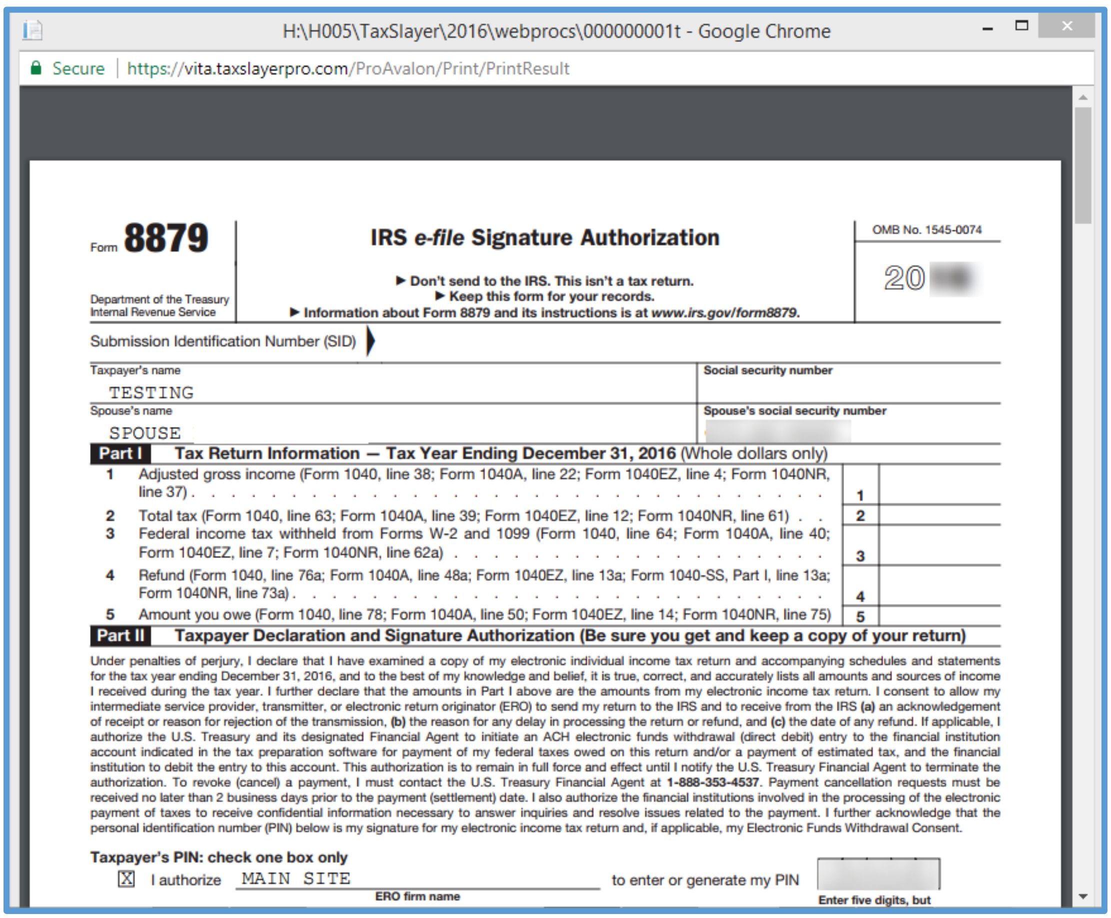


3. Select a **Print Set** from the drop-down list.

Note: You can select a default print set in Configuration that will always display at the top of the drop-down list.

4. Click **Print**.

TaxSlayer Pro Online display the **Print Results** page in a new tab:



Form **8879** Department of the Treasury Internal Revenue Service

IRS *e-file* Signature Authorization

▶ Don't send to the IRS. This isn't a tax return.
▶ Keep this form for your records.
▶ Information about Form 8879 and its instructions is at *www.irs.gov/form8879*.

OMB No. 1545-0074

20

Submission Identification Number (SID) ▶

Taxpayer's name	Social security number
TESTING	
Spouse's name	Spouse's social security number
SPOUSE	

Part I Tax Return Information — Tax Year Ending December 31, 2016 (Whole dollars only)

1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4; Form 1040NR, line 37)	1	
2	Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12; Form 1040NR, line 61)	2	
3	Federal income tax withheld from Forms W-2 and 1099 (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7; Form 1040NR, line 62a)	3	
4	Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a; Form 1040NR, line 73a)	4	
5	Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14; Form 1040NR, line 75)	5	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2016, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS **(a)** an acknowledgement of receipt or reason for rejection of the transmission, **(b)** the reason for any delay in processing the return or refund, and **(c)** the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at **1-888-353-4537**. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☒ I authorize MAIN SITE to enter or generate my PIN

ERO firm name Enter five digits, but

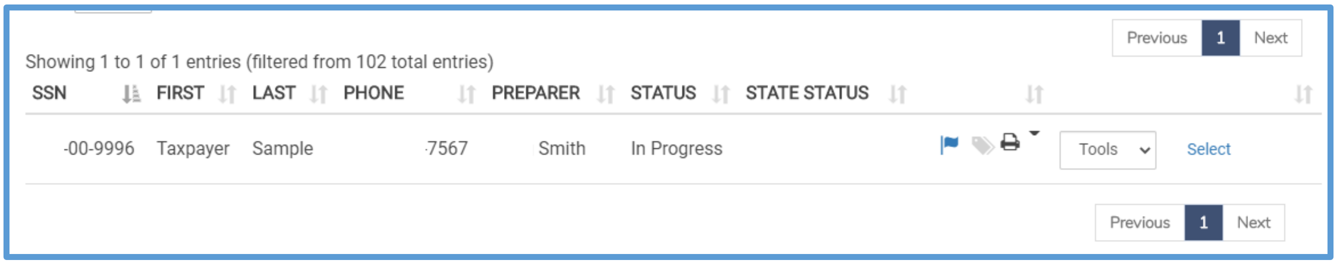
5. Click the **Print** icon in Adobe Reader to print the return.

Printing a Return from Client Status

If you need to print a return, but you are not in the return, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:



2. Find the client in the list.
3. Click the **Printer** icon.
4. Select a print set from the drop-down list.

Note: **You can select a** default print set in Configuration that will always display at the top of the drop-down list.

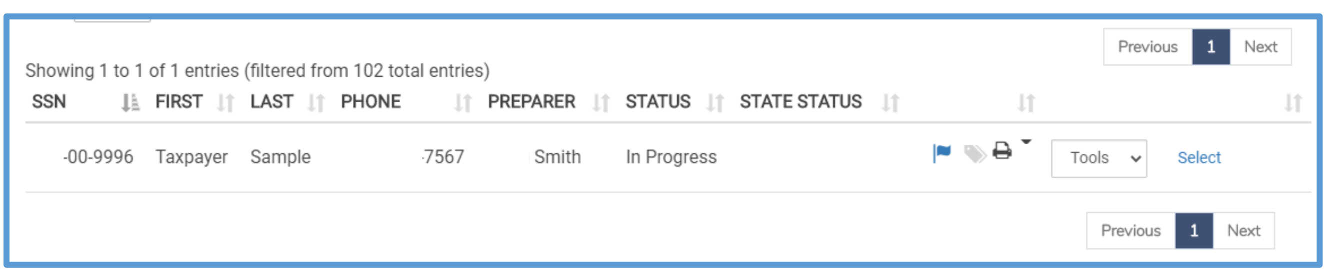
5. Click **Print Return**.

Print a Copy of an IRS Accepted Return

Sometimes, you need to print a return after it is accepted by the IRS, but the return may have been amended since the acceptance. If you need to print a return as it was sent to the IRS and accepted, use the following steps from the **Welcome** page:

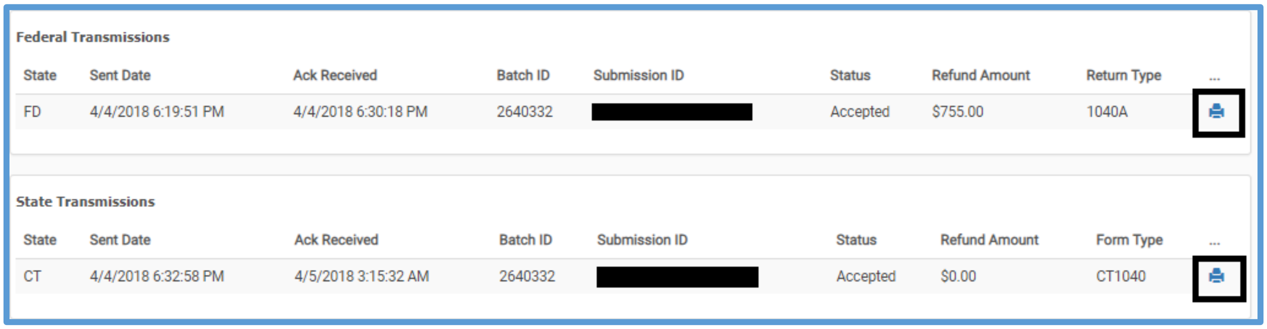
1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:



2. Find the client in the list.
3. From the **Tools** drop-down list, select **Client Status**.

TaxSlayer Pro Online displays the information for the return:



Federal Transmissions

State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Return Type	...
FD	4/4/2018 6:19:51 PM	4/4/2018 6:30:18 PM	2640332	[redacted]	Accepted	$755.00	1040A	

State Transmissions

State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Form Type	...
CT	4/4/2018 6:32:58 PM	4/5/2018 3:15:32 AM	2640332	[redacted]	Accepted	$0.00	CT1040	

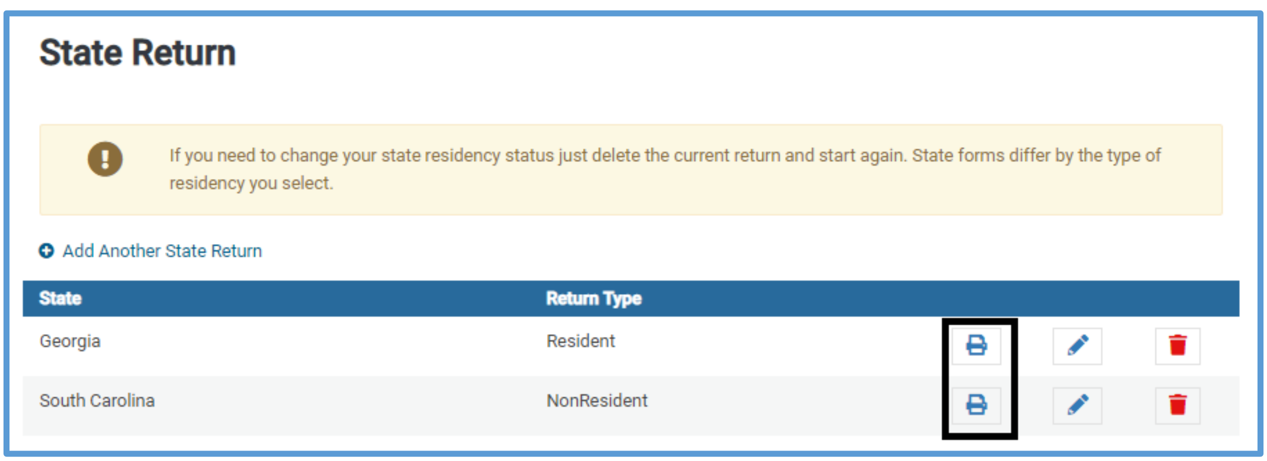
4. Select the **Print** icon next to the Federal or State accepted return.

NOTE: If an adjustment was made to a return after the site submitted it to the IRS, the preparer or quality reviewer can use this feature to view a PDF of the accepted tax return.

Print a Copy of the State Return

After you complete a state return during return preparation, TaxSlayer Pro Online displays a printer icon on the state return grid. You can use this feature to print a copy of the state return. To print the state return, complete the return, and then use the following steps:

1. Click the Printer icon next to the state return.



State Return

If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.

Add Another State Return

State	Return Type
Georgia	Resident
South Carolina	NonResident

Printing a Single Form

You can print the following forms as a single form:

- Schedule A
- Schedule B
- Schedule C
- Schedule D
- Schedule R
- Form W-2
- Form 1116
- Form 2441
- Form 5329
- Form 5405
- Form 8606
- Form 8863
- Form 8880
- Form 8962 (Health Care section)
- Form 8965 (Health Care section)

. To do so, use the following steps:

1. Navigate to the **Income** menu.

2. On the line for the form, click **Print**.

Follow the on-screen instructions to view the form in PDF and print if needed.

Adding a Watermark to a Return

Beginning in the 2023 tax year, you can add a **Do Not Mail** watermark to a printed return. The office administrator can do this for print sets from the **Configuration** page. See the *Configuring Printing* section for more instructions.

Summary

You should now be able to:

- Print a return from the **e-File Summary/Submission** page.
- Print a return from the taxpayer's status page.
- Print a copy of the return at the time of IRS acceptance.
- Print a copy of the State return.
- Print a single form.
- Print a **Do Not Mail** watermark on a return.

To see a video of what you just learned, go to Printing a Return. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Review Process

After completing this topic, you will be able to:

- Mark a return for review.
- Identify returns to review.
- View the status of reviewed returns.
- Mark a return complete.
- Mark a return as ready to e-file.

Marking a Return for Review

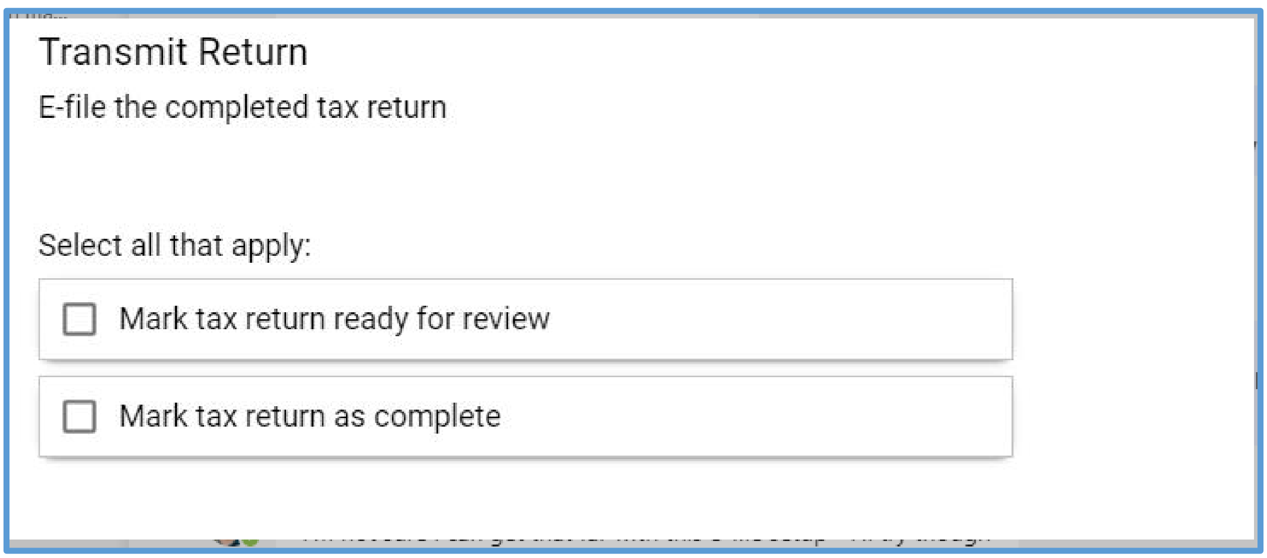
When you complete the return, you are required to have another person review the return before e-filing. Use the following steps to mark the return for review in order to use the built-in Review Returns feature:

1. From the left navigation bar, click **e-File**.

TaxSlayer Pro Online displays the **E-File** section.

2. Complete any required information in this section. See the *Electronic Filing* section for more information.
3. Verify the information on the **Submission Page** tab as covered in the *Electronic Filing* lessons and scroll to the bottom of the page.

TaxSlayer Pro Online displays the **Transmit Return** section:



4. Select the **Mark tax return ready for review** check box in the **Transmit Return** section.

5. Click **Save And Exit Return**.

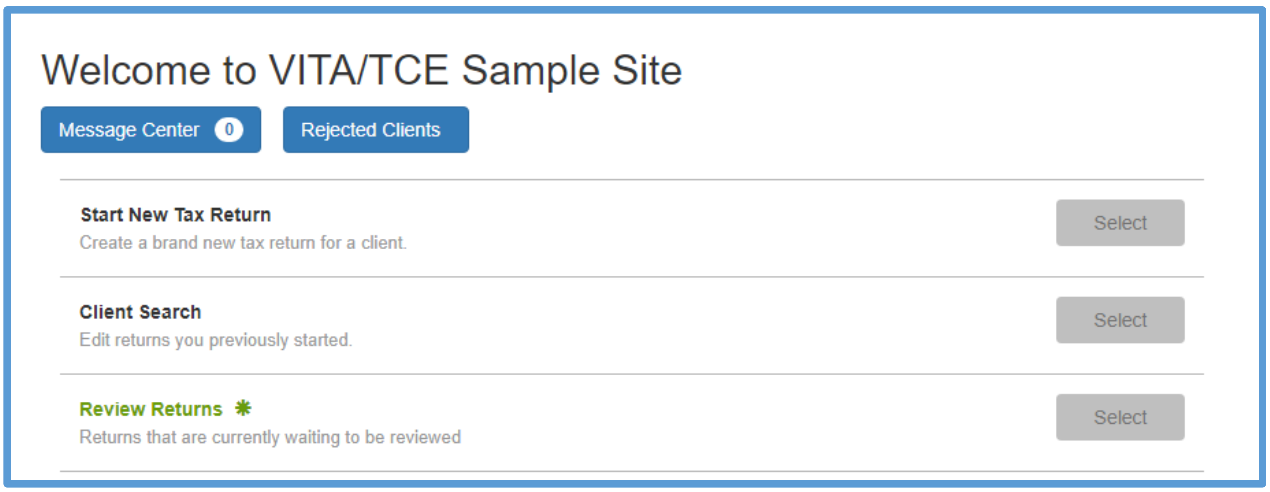
TaxSlayer Pro Online closes the return.

Identifying Returns to Review

If you are a return quality reviewer, you can quickly find returns that you need to review. To identify returns to review, use the following steps:

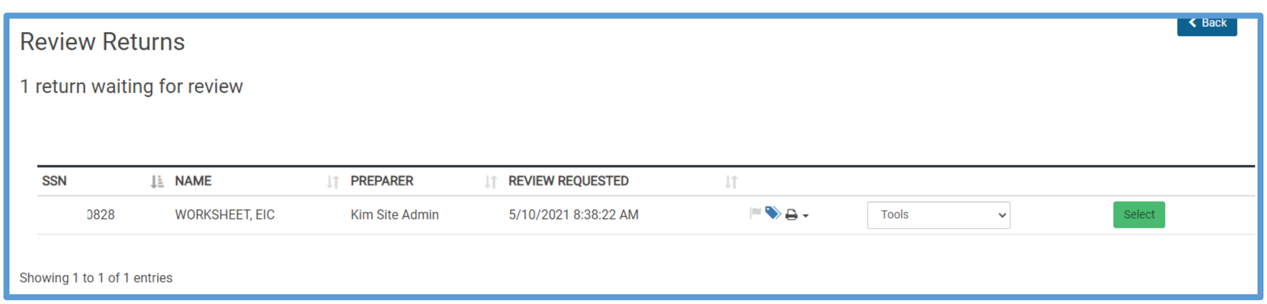
1. Open TaxSlayer Pro Online to the **Welcome** page.

TaxSlayer Pro Online display the **Welcome** page:



2. Click **Select** on the **Review Returns** line.

TaxSlayer Pro displays the **Review Returns** page, listing all returns that tax preparers have marked for review:

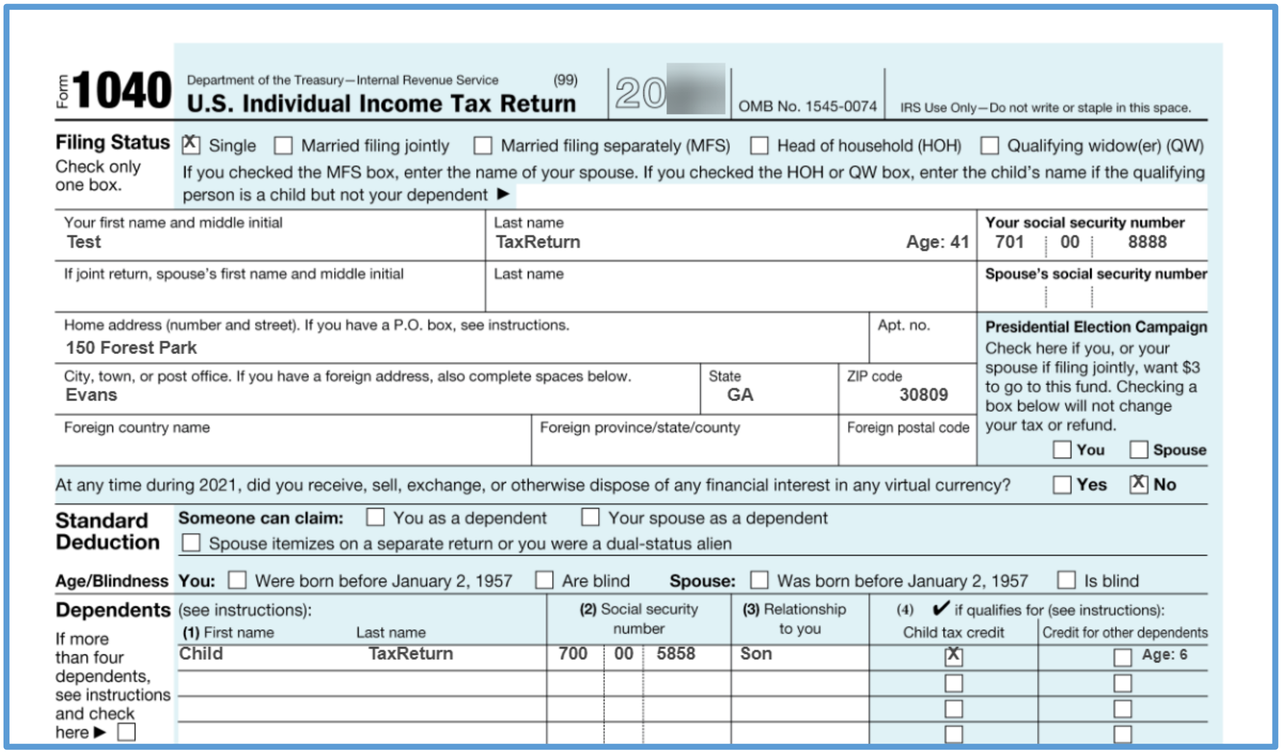


3. To review a return, click **Select** on the line for that return.

TIP: You can view Notes, Return Tags, Tools, and generate the PDF for the Quality Review Print set from the Review Returns page.

Note: Use the Quality Review print set assigned to all sites to generate a PDF containing all of the information entered into the return, including worksheets and statements.

TaxSlayer Pro Online displays the **Summary/Print** page for the selected return:



Form **1040** Department of the Treasury—Internal Revenue Service (99)
U.S. Individual Income Tax Return 20
OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box. [X] Single [ ] Married filing jointly [ ] Married filing separately (MFS) [ ] Head of household (HOH) [ ] Qualifying widow(er) (QW)
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial	Last name	Your social security number
Test	TaxReturn Age: 41	701 00 8888
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions.		Apt. no.	Presidential Election Campaign
150 Forest Park			Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. [ ] You [ ] Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. Evans	State GA	ZIP code 30809	
Foreign country name	Foreign province/state/county	Foreign postal code	

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? [ ] Yes [X] No

Standard Deduction **Someone can claim:** [ ] You as a dependent [ ] Your spouse as a dependent
[ ] Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness **You:** [ ] Were born before January 2, 1957 [ ] Are blind **Spouse:** [ ] Was born before January 2, 1957 [ ] Is blind

Dependents (see instructions): If more than four dependents, see instructions and check here ▶ [ ]

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✔ if qualifies for (see instructions): Child tax credit	Credit for other dependents
Child	TaxReturn	700 00 5858	Son	[X]	[ ] Age: 6
				[ ]	[ ]
				[ ]	[ ]
				[ ]	[ ]

Note: Work down the **Summary/Print** page to review the return using your Quality Review procedures. When you click a line, TaxSlayer Pro Online brings you back to the **Summary/Print** page. For example, when you click the **Wages** line to review Form W-2 entries, and then click **CONTINUE** after reviewing that page, TaxSlayer Pro Online displays the **Summary/Print** page.

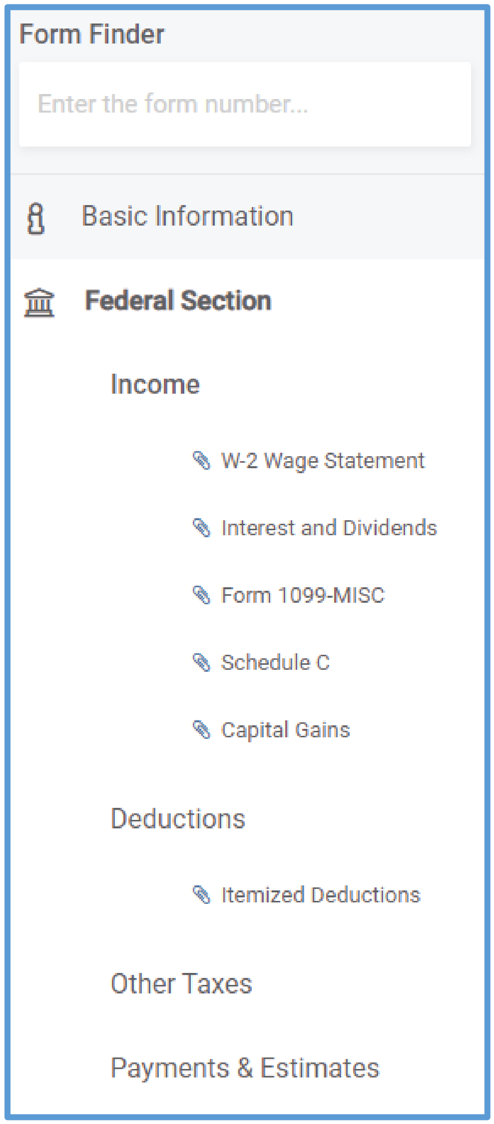
Forms Complete to Review Returns

You can use the Forms Complete feature to easily review the completed entry forms in a return. To do this, use the following steps:

1. Click **Select** on the line for that return.

TaxSlayer Pro Online displays the return.

2. Click **Federal Section** in the left navigation panel.



3. Click each entry item to review the information.

Marking a Return Complete

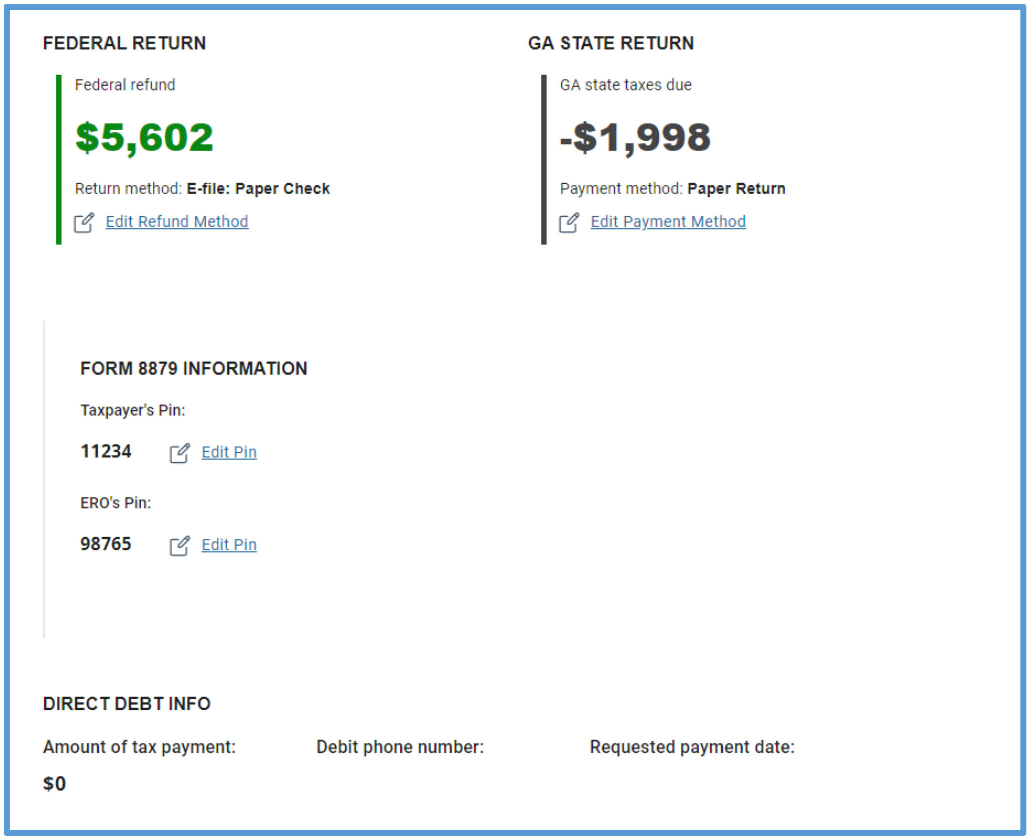
When you finish reviewing a return, use the following steps:

1. From the left navigation bar, click **e-File**.

TaxSlayer Pro Online displays the **E-File** section.

2. Review the information in this section.
3. Click the **Submission Page** tab.

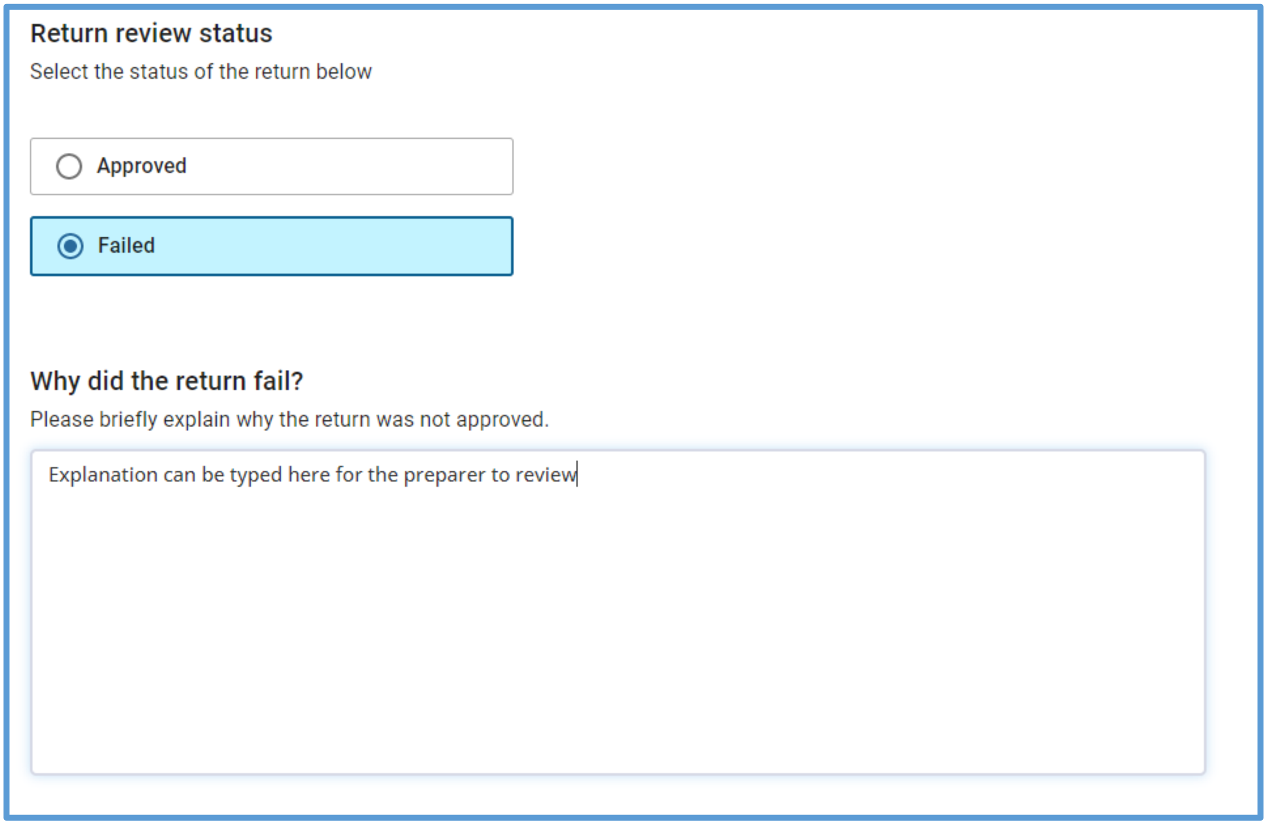
TaxSlayer Pro Online displays the **Submission Page** tab:



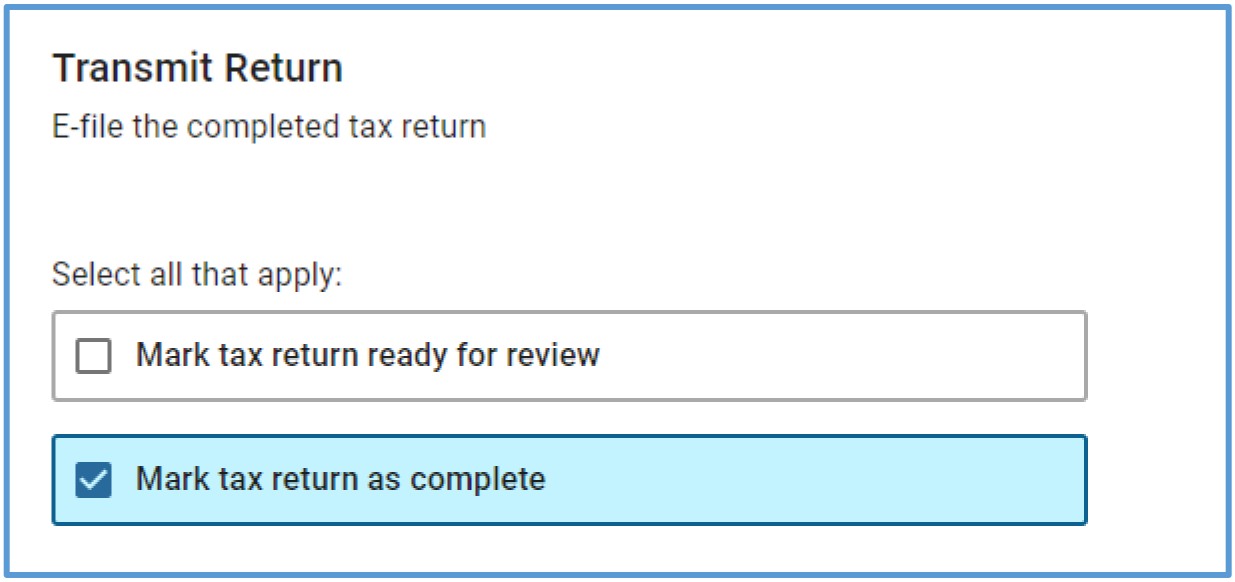
4. Verify the information on the **Submission Page** as covered in the *Electronic Filing* lessons and scroll to the bottom of the page.

TaxSlayer Pro Online displays the bottom of the **Submission Page**.

5. Click either the **Approved** or **Failed** in the **Review Status** section.
    a. If you mark the return failed, type an explanation in the text box, as shown below:



6. If you have approved the return and are ready to mark it complete, select the **Mark Complete** check box.

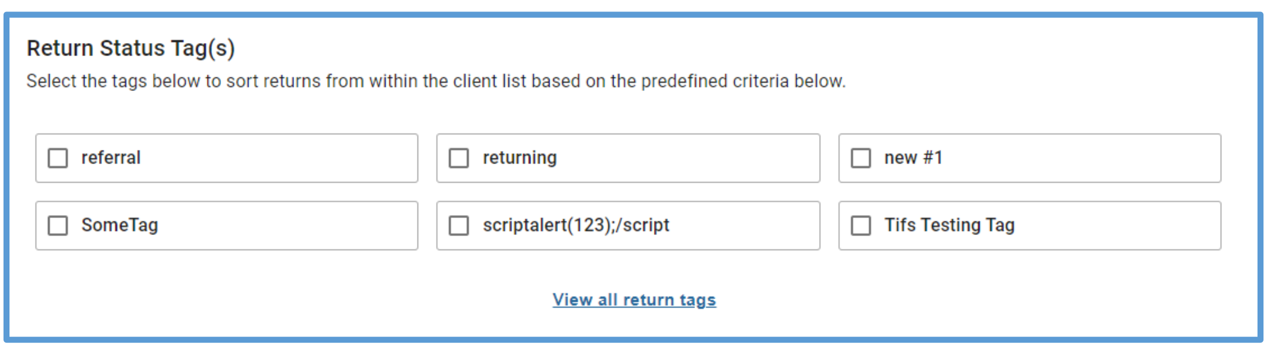


Marking a Return for e-file

If you do not have permission to e-file returns, or you do not want to e-file this return now, you can tag the return as a reminder to e-file it later. You can use Return Tags to tag the return. Use the following steps from the **Submission** page:

1. Find the **Return Tag(s)** section located above the **Transmit Return** section.

TaxSlayer Pro Online displays the **Return Tag(s)** section:



2. Select the check box for the return tag(s) you need to use.
3. Click either **Save and Exit** or **Transmit Return**.

Summary

You should now be able to:

- Mark a return for review.
- Identify returns to review.
- View the status of reviewed returns.
- Mark a return complete.
- Mark a return as ready to e-file.

To see a video of what you just learned, go to Review Process. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Creating the e-file

After completing this topic, you will be able to:

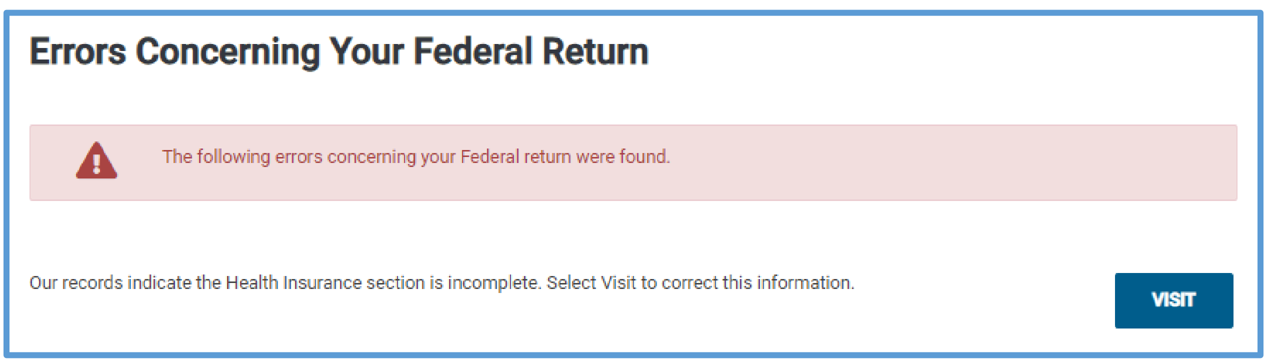
- Run e-file validation.
- Correct e-file and validation errors.
- Review notes entered by the preparer.
- Review warning messages.
- Select a federal return type.
- Enter direct deposit information or split a refund.
- Confirm ERO information.
- Verify Form 8879 information.
- Select electronic filing of an amended return.
- Save and exit the return.

Running e-file Validation

When you finish preparing the information in the return, you can prepare the return for e-file. To do so, use the following steps from the open return:

1. Click **e-File** in the left navigation bar.

TaxSlayer Pro Online displays the e-file page, with any errors concerning the return:



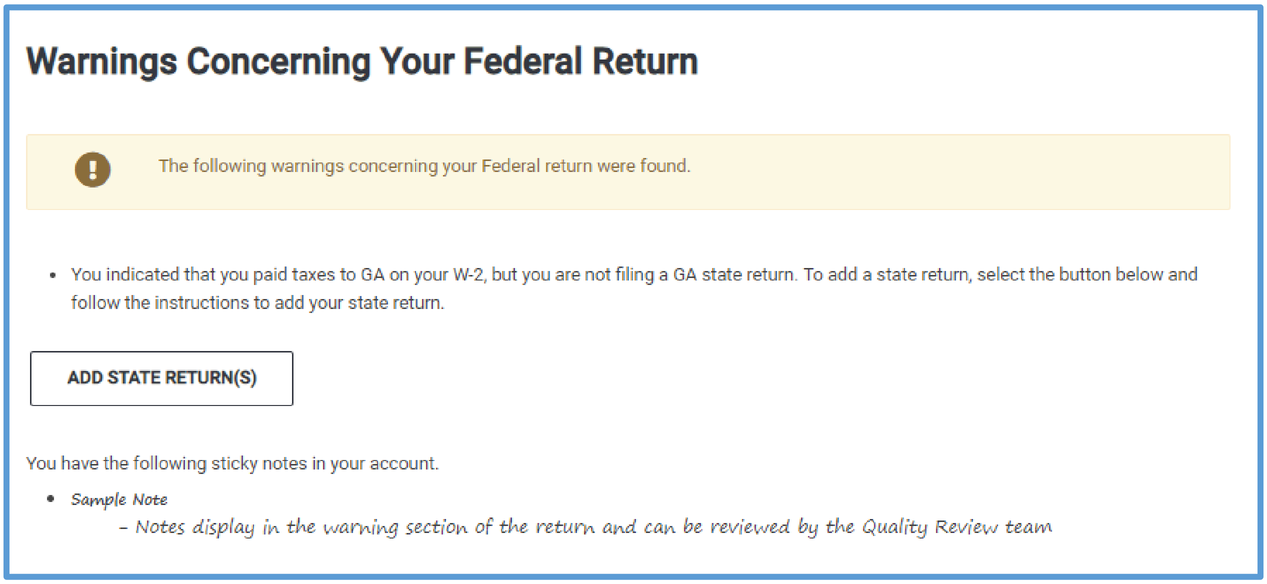
2. If TaxSlayer Pro Online displays an error on the return, read the error carefully and click **Visit** for that error.
3. Make corrections to the return to eliminate the error.
4. Click **e-File** again.
5. Click **Visit** for each e-file error until you correct all errors.

TIP: You **cannot** e-file the return until you correct all e-file errors.

Reviewing Warnings and Notes

TaxSlayer Pro Online displays the following:

- Warnings in the return.
- Notes you added to the return:

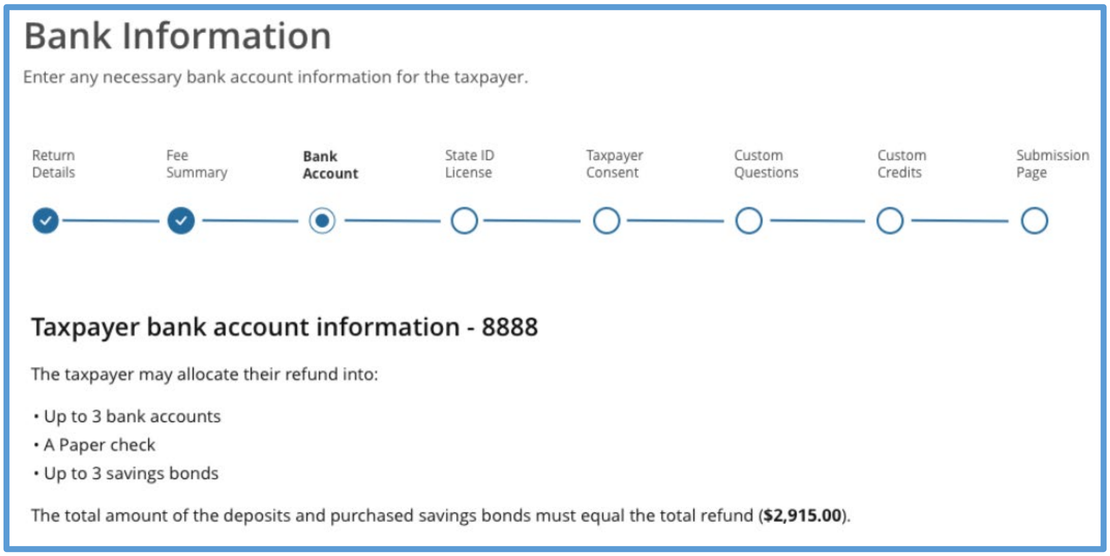


6. Review any warnings.
7. If you need to change any information to eliminate a warning, click **Federal Section** in the left navigation bar and make corrections to that section of the return.
8. Review your notes. If you need to change something in the return, click the appropriate section in the left navigation bar and make changes.
9. When you finish reviewing warnings and notes, click **Continue**.

TIP: You can still e-file the return with warnings, but review each warning to ensure that you completed the return accurately.

Completing Return Details

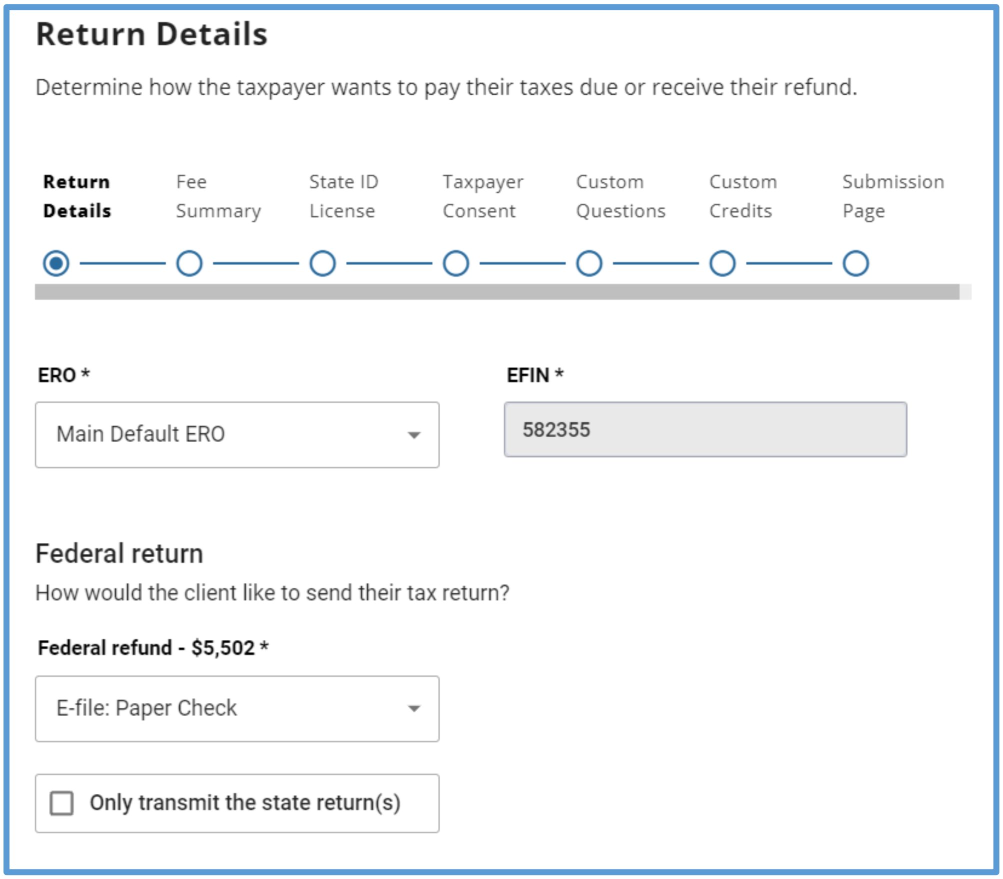
When you complete e-file information, use the **Continue** buttons at the bottom of the screen to advance to the next section. TaxSlayer Pro Online displays the section in the top navigation bar. If you need to navigate to another section while completing e-file information, click the section in the navigation bar:



Note: Once you have completed all required entries, you can go directly to the **Submission Page** during the quality review process.

Selecting the Return Type

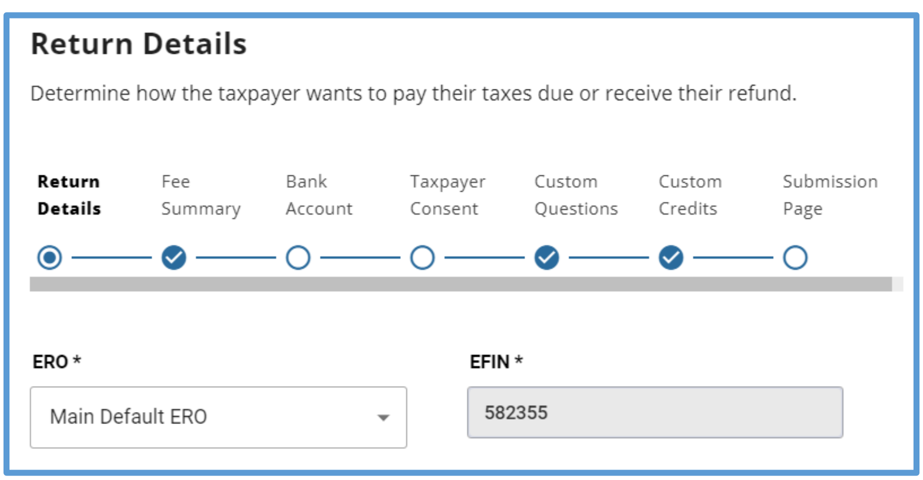
TaxSlayer Pro Online displays the **E-File** page:



Completing Return Details

Confirming ERO Information

In the **Return Details** section, TaxSlayer Pro Online displays the **ERO Information** section:



1. Review the ERO information for accuracy.

TIP: If you set up multiple EROs to accommodate ad hoc/virtual sites, TaxSlayer Pro Online displays a **ERO** drop-down box for the user and defaults to the main location.

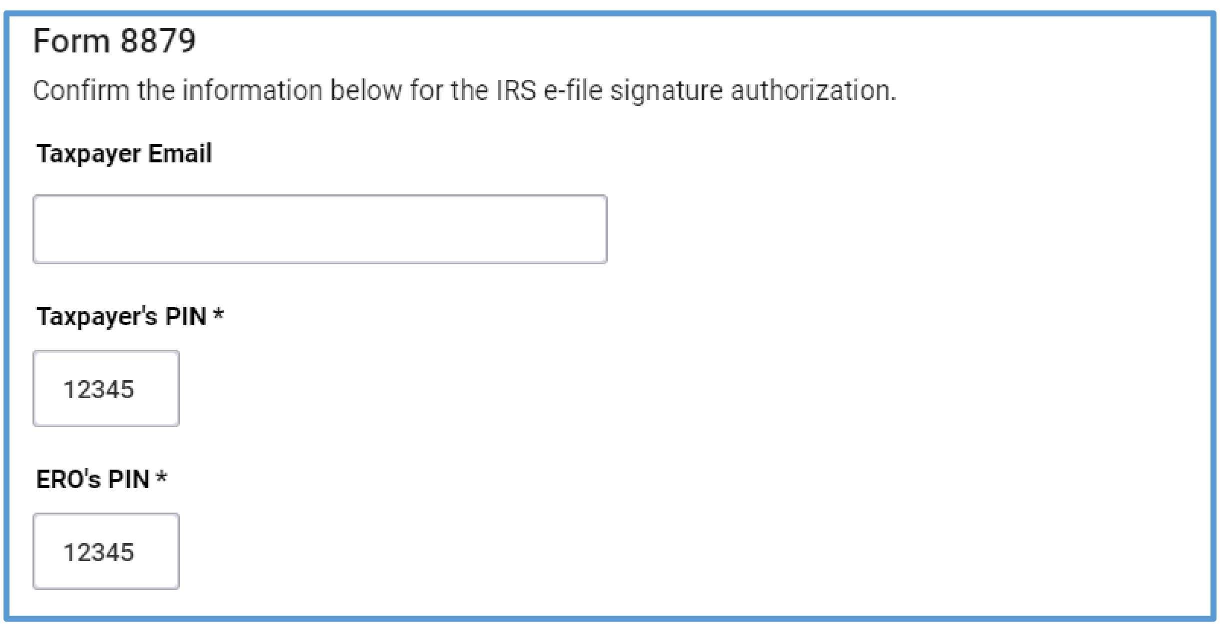
Next, complete the **Federal Return** section. To complete this section, use the following steps:

1. From the **Federal Return** drop-down list, select which of the following the taxpayer wants to do:
    a. Electronically file the return and receive a paper check for the refund (**E-file: Paper Check**)
    b. Electronically file the return and receive a direct deposit for the refund (**E-file: Direct Deposit**)
    c. Mail the return and receive a paper check (**Paper Return**)
    d. Mail the return and receive a direct deposit for the refund (**Paper Return with Direct Deposit**)

TaxSlayer Pro Online displays additional information depending on your selection.

Confirming Form 8879 Information

TaxSlayer Pro Online displays the **Form 8879** details towards the bottom of the **Return Details** section:

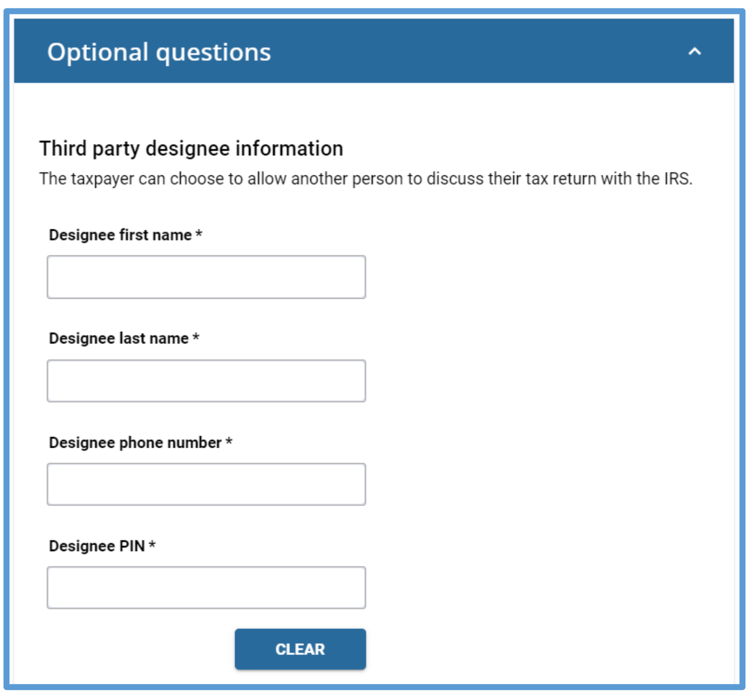


2. In the **Pin Numbers** section, review the taxpayer, spouse, and ERO PINs.
    a. TaxSlayer Pro Online automatically defaults the ERO PIN to 98765, as discussed in the *Configuring TaxSlayer Pro Online* lessons.
3. Complete any necessary information in the **State Return(s)** section. See the *Electronically Filing States* lesson in this section for information on completing this section.
4. Click **Continue**.

Third Party Designee Information

Third party designee information is in the **Optional Questions** section. TaxSlayer Pro Online does not populate the third party designee information when you have the **Disable Third Party Designee Prefill** box selected in Office Setup. If you need to enter another taxpayer as the third party designee, click **Optional Questions** at the bottom of the **Return Details** section and complete the appropriate information.

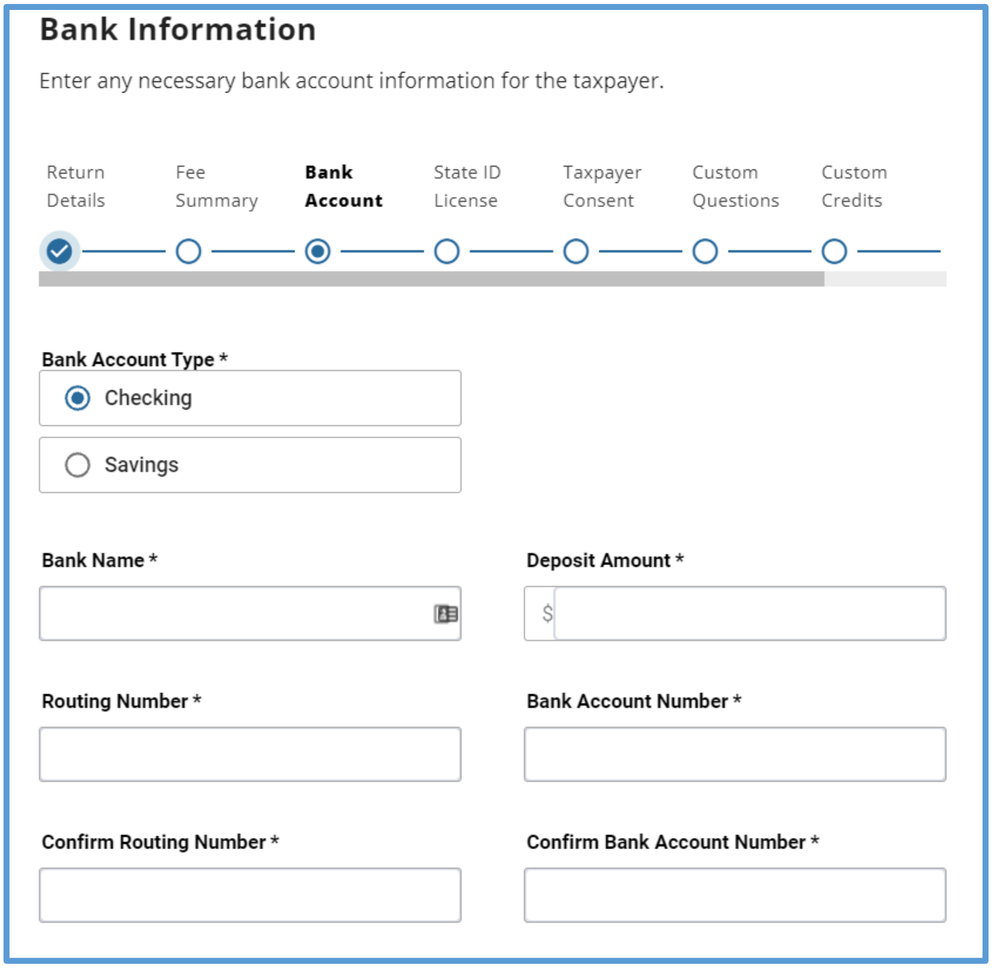
NOTE: You cannot enter a volunteer preparer as the third party designee.



Completing Bank Account Information

Entering Direct Deposit Information

If the taxpayer wants his or her refund directly deposited into a bank account, use the following steps from the **Bank Account** page:



1. Select whether the account is a checking account or savings account.
2. Type the name of the bank if you would like. This step is optional.
3. Type the routing transit and bank account numbers in the appropriate boxes. TaxSlayer Pro Online requires that you type these numbers twice for accuracy.
4. Type the deposit amount in the appropriate box.
5. Click **Continue**.

TIP: To ensure accuracy, you should enter the information from the taxpayer's document during the initial entry and the verification entry.

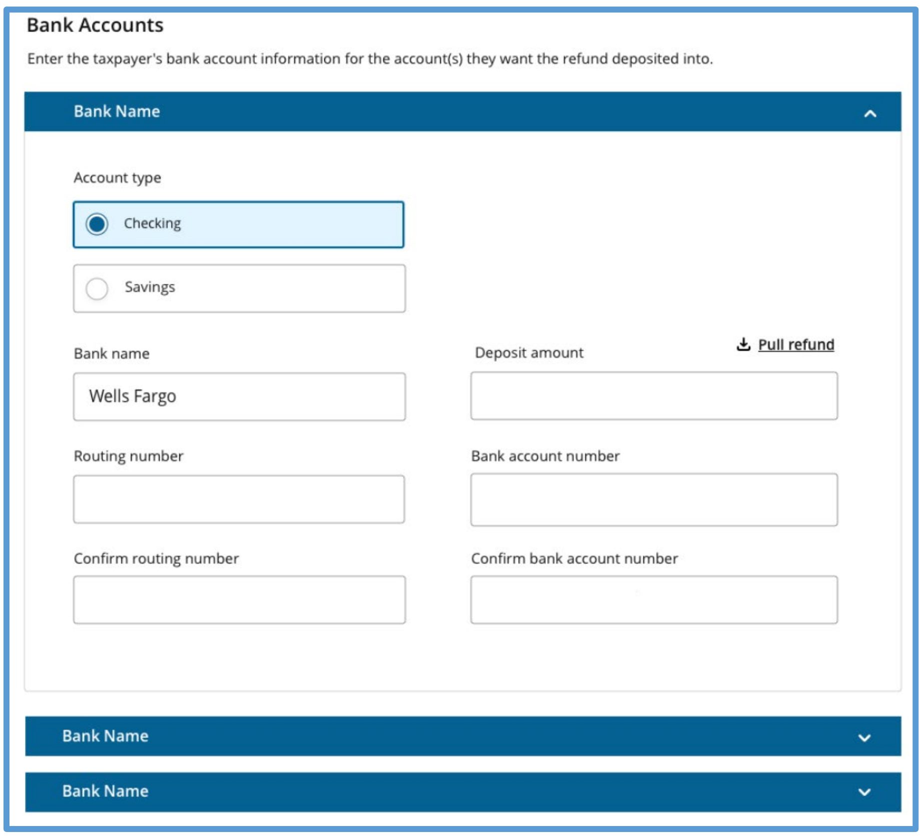
Splitting the Refund

If your site utilizes Form 8888, select that option in Office Setup. TaxSlayer Pro Online always displays the option for split refunds to the preparer when this option is enabled.

If the taxpayer wants his or her refund directly deposited into a bank account, use the following steps:

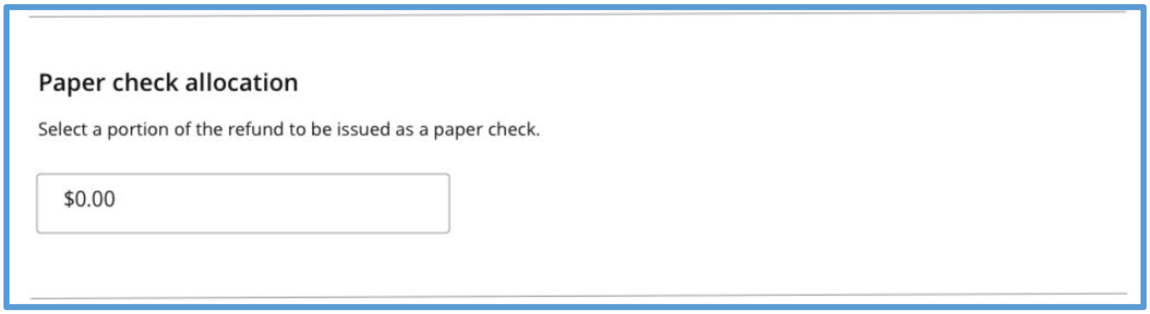
5. Make sure you selected **Direct Deposit** from the **Federal Return** drop-down list.
6. Click **Bank Account** on the top navigation bar.

TaxSlayer Pro Online displays the **Taxpayer Bank Account Information** section:



7. Select whether the account is a checking account or savings account.
8. Type the routing transit and bank account numbers in the appropriate boxes.

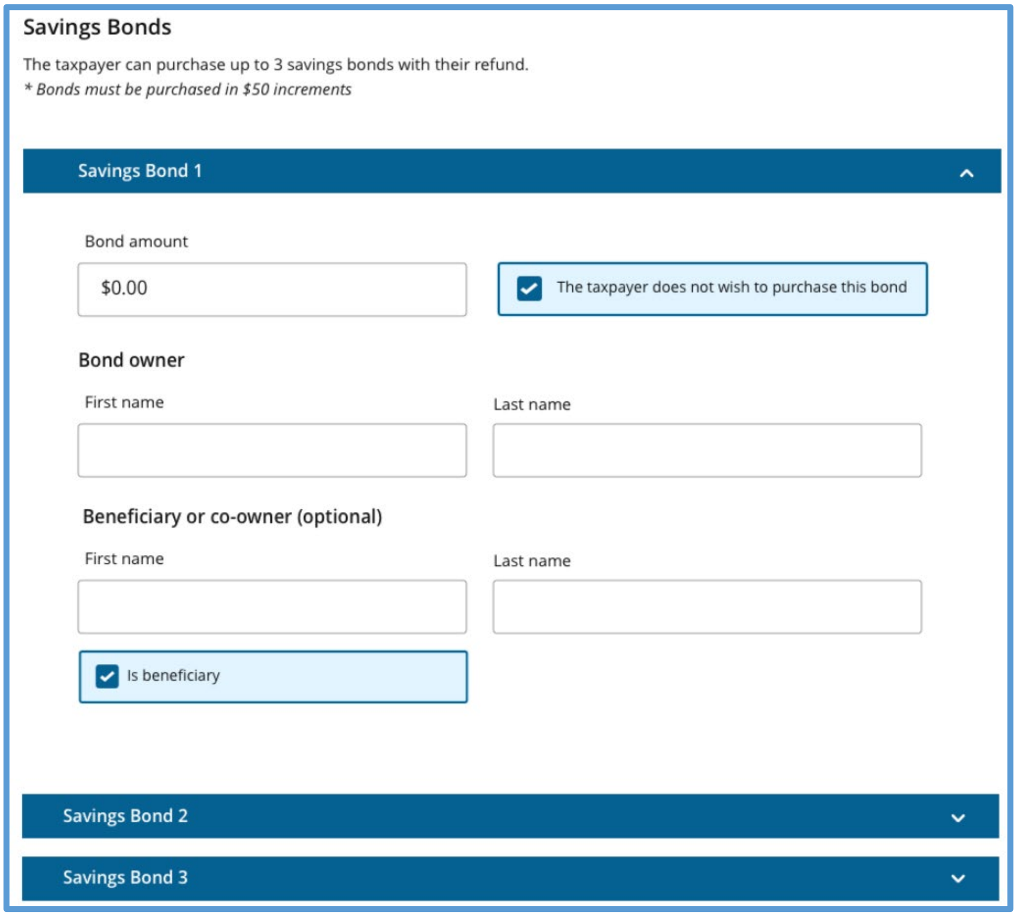
9. Type both the routing transit and bank account numbers again. TaxSlayer Pro Online requires that you verify the numbers for accuracy by retyping them.
10. For each account, type the amount the taxpayer wants deposited to that account. If the taxpayer wants part of the refund issued as a paper check, type the appropriate amount in the **Paper Check Allocation** box.



TIP: If you only want to deposit the refund into one account, click **Pull Refund**.

NOTE: State refunds will be deposited to the account listed on the first line.

11. Scroll down to enter information to purchase savings bonds.

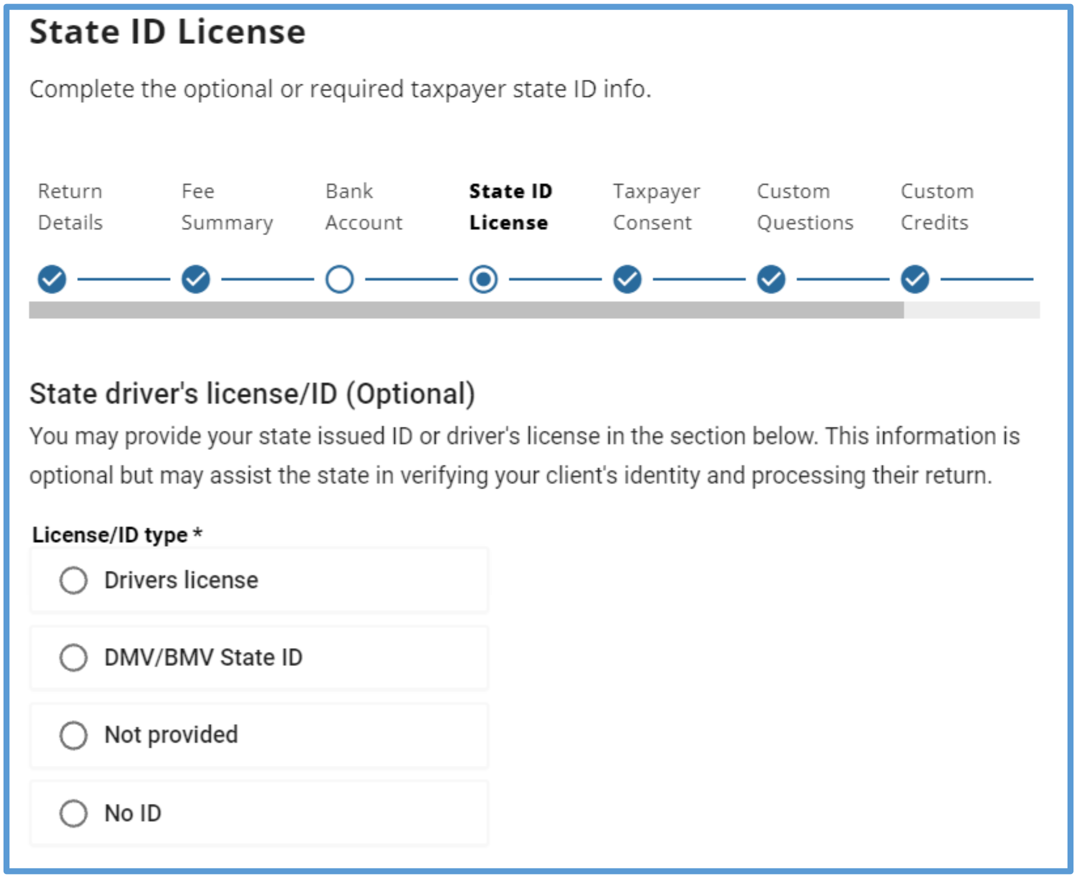


12. Clear the **The taxpayer does not wish to purchase this bond** check box.
13. Type the amount the taxpayer wants to use to purchase savings bonds. Always use $50 increments.
14. If the taxpayer is **not** purchasing the bond for himself/herself, type the owner's name.
15. If necessary, type the name of a co-owner or beneficiary. If a beneficiary, select the **Is Beneficiary?** check box.
16. Click **Continue**.

Note: The amounts you type in the **Taxpayer Bank Account Information** section must match the amount of the expected refund before you can save the page.

Completing the State ID License Section

Some states require the taxpayer/spouse state ID for electronic filing. The state typically uses this information as part of their identity protection programs. If the State ID is required, complete the information before you click **Save.**



State ID License

Complete the optional or required taxpayer state ID info.

Return Details | Fee Summary | Bank Account | **State ID License** | Taxpayer Consent | Custom Questions | Custom Credits

State driver's license/ID (Optional)

You may provide your state issued ID or driver's license in the section below. This information is optional but may assist the state in verifying your client's identity and processing their return.

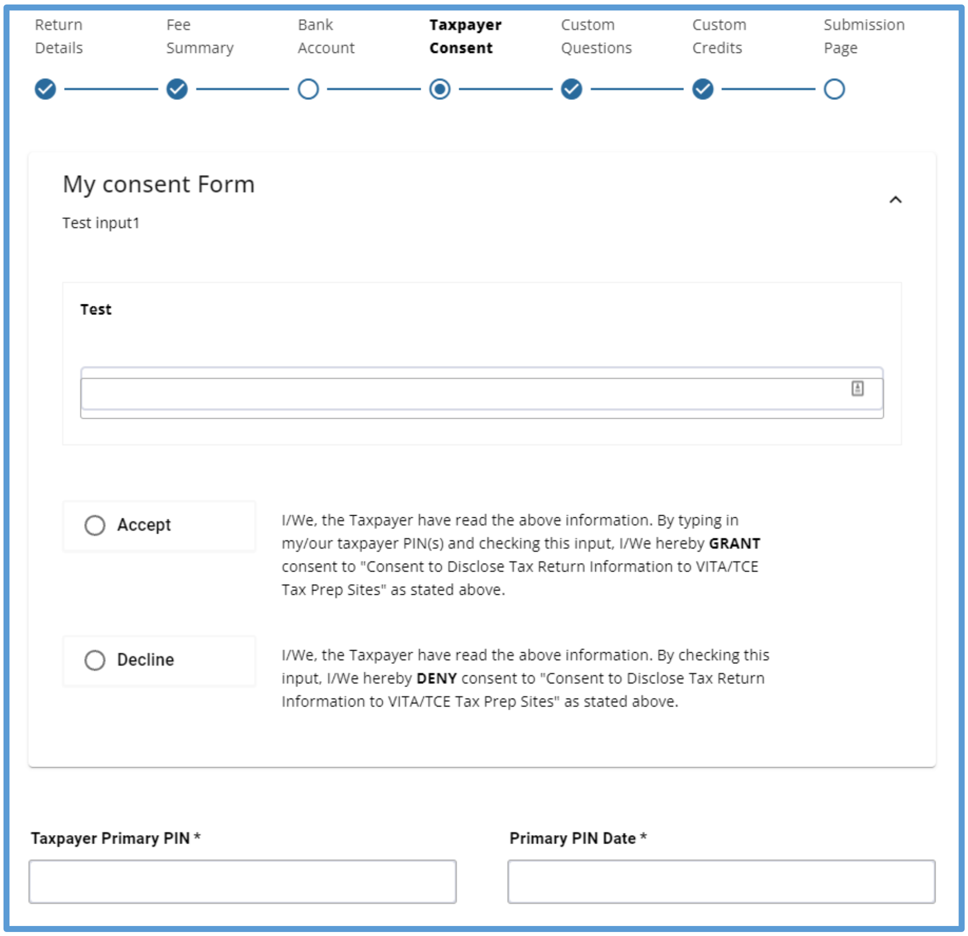
License/ID type *

- Drivers license
- DMV/BMV State ID
- Not provided
- No ID

Taxpayer Consent

TaxSlayer Pro Online displays the **Taxpayer Consent** page after the Bank Account section. TaxSlayer assigns all sites the Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites for the purposes of taxpayer participation in the Global Carryforward feature.

The following is a sample consent page:



Follow your site procedures when completing the Consent pages. If the taxpayer declines consent, leave the PIN and date blank.

TIP: If your site has set up Consents, you must answer them before creating the e-file. If the Consent is marked as **Required**, and the taxpayer declines the consent, you must paper file the return.

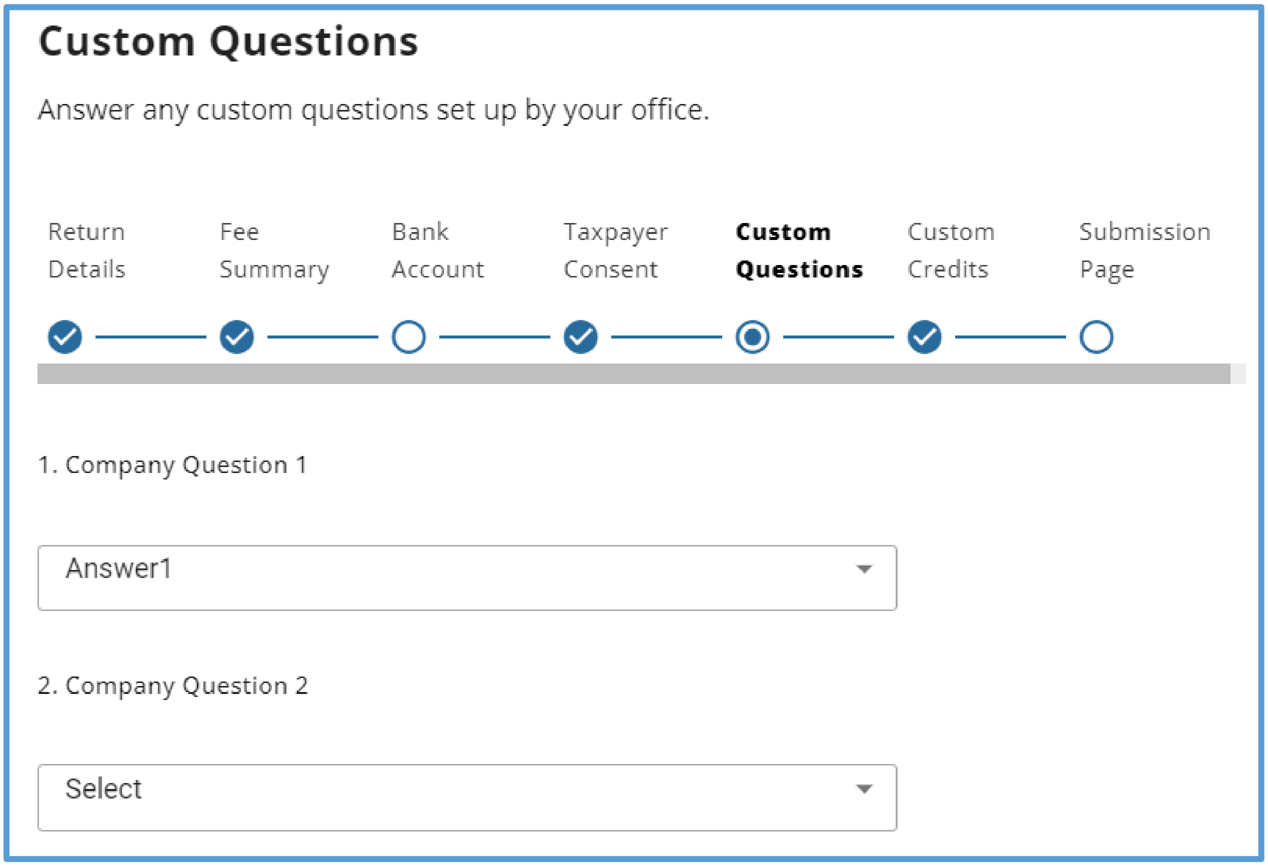
TIP: If the taxpayer declines the consent and you select **Decline**, you do not have to enter the Primary or Spouse PIN or the date.

NOTE: TaxSlayer Pro Online prints the Consent forms with taxpayer and spouse signature lines.

SUPPORT TIP: TaxSlayer Pro Online displays the consents in the order they are assigned to the site or created at the site. You cannot change the order of consents after the site starts preparing returns.

Answering Custom Questions

TaxSlayer Pro Online displays the **Custom Questions** section:



Note: TaxSlayer will assign nine questions to all sites for Tax Year 2022 on behalf of the IRS.

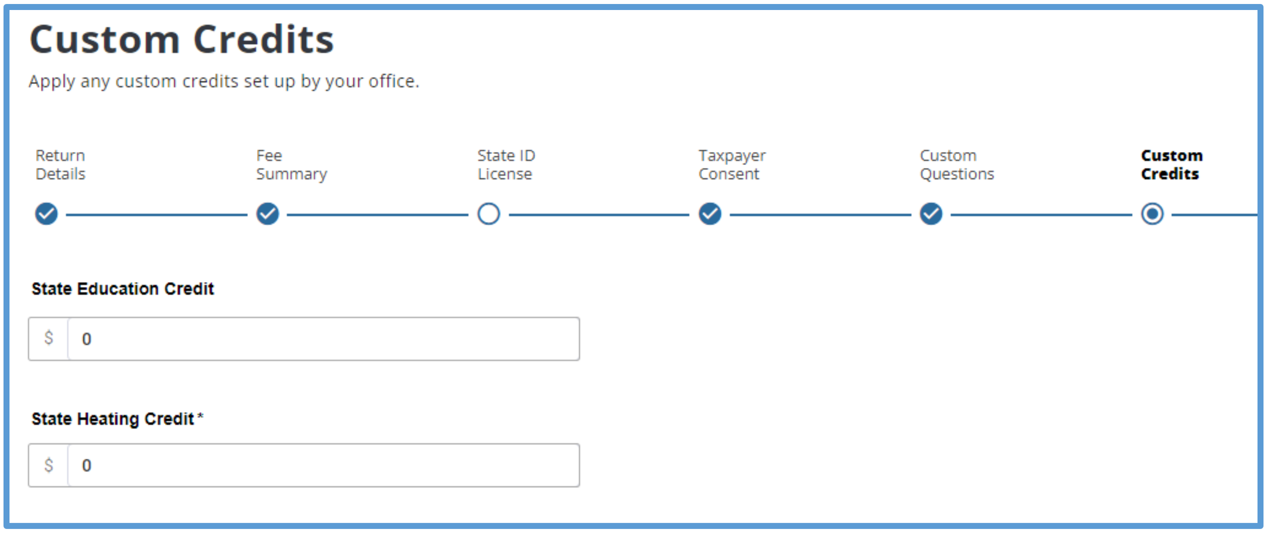
1. Answer each question in this section by selecting the appropriate answer from the drop-down list.

TIP: If your site or group administrator marked a question as **Required**, you must answer the question to continue. If you select **BACK** before you answer the required questions, TaxSlayer Pro Online does **NOT** save any of the data entered on this page.

2. Click **Continue or Save & Exit**.

Entering information in Custom Credits`

TaxSlayer Pro Online displays the **Custom Credits** section:

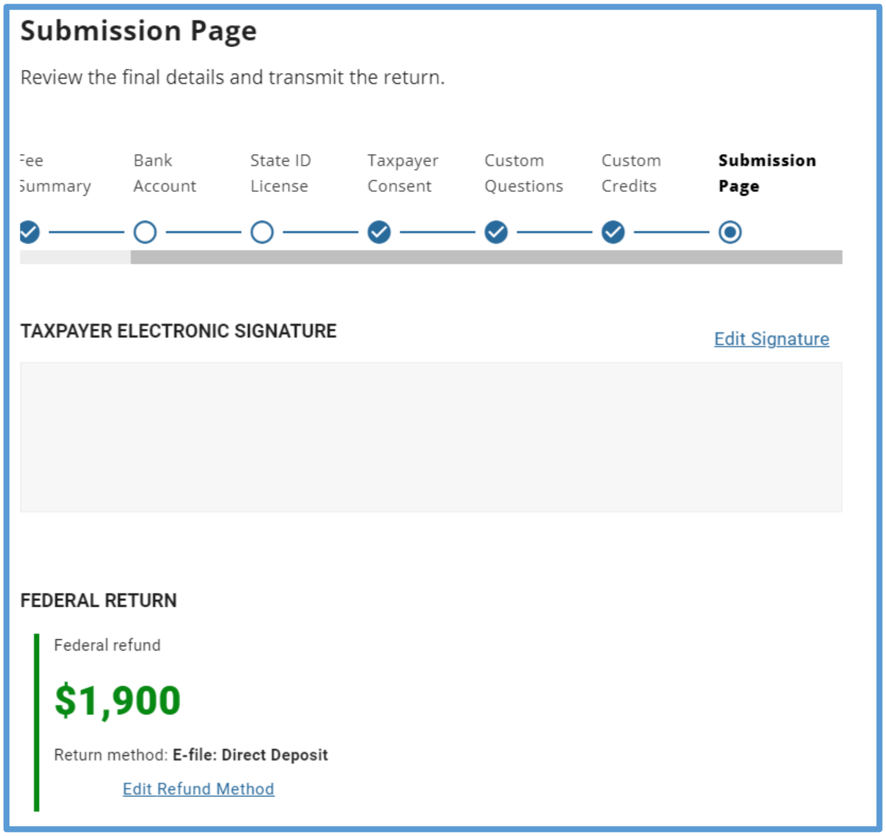


Custom credits allow the preparer to capture items that are not contained in other reports. You can use custom credits to capture state credits and other numerical items your site needs for grant purposes.

TIP: If your site or group administrator marked a custom credit as **Required**, you must enter a value (even if 0) to continue. If you click **BACK** before you enter the required credit, TaxSlayer Pro Online does **NOT** save any of the data entered on this page.

Completing the Submission Page

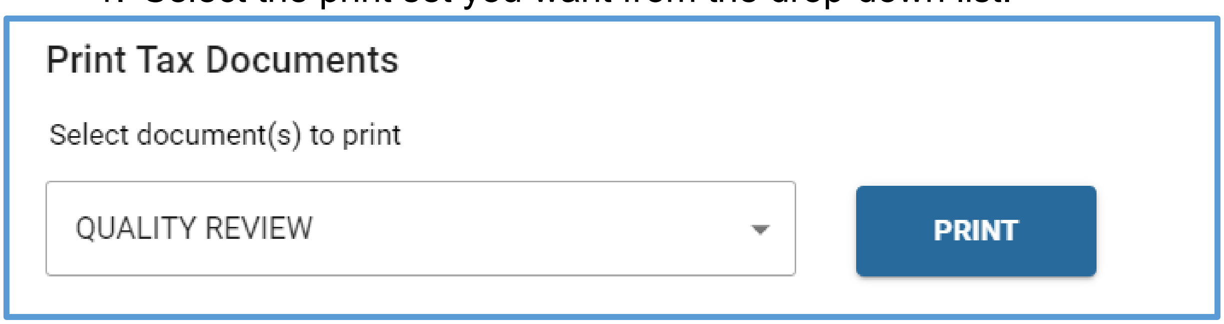
TaxSlayer Pro Online displays the **Submission** page:



Print

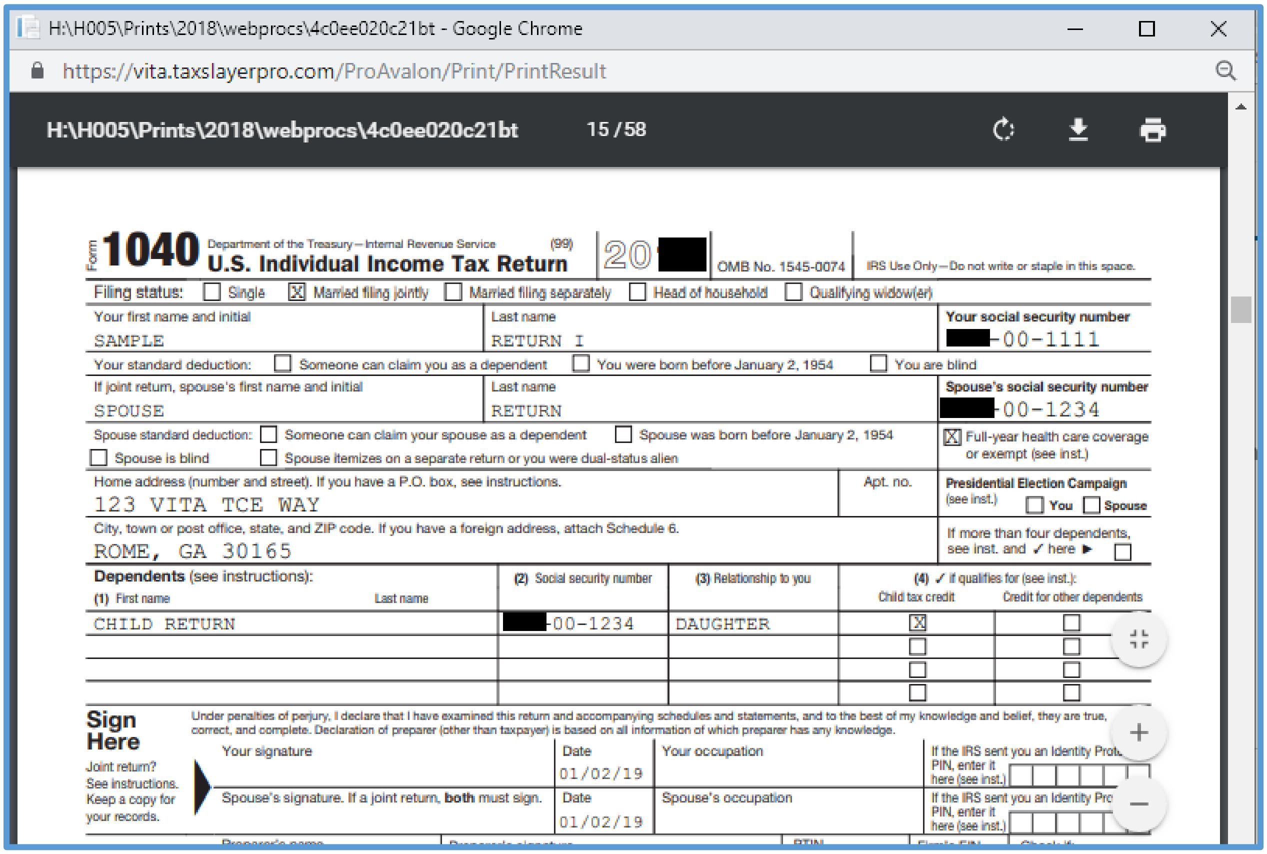
If you want to print the return now, use the following steps:

1. Select the print set you want from the drop-down list.



2. Click **Print**.

TaxSlayer Pro Online displays the return in a separate tab as a PDF:



Form 1040 Department of the Treasury—Internal Revenue Service (99) U.S. Individual Income Tax Return 20[redacted] OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing status: ☐ Single ☒ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)

Your first name and initial: SAMPLE | Last name: RETURN I | Your social security number: [redacted]-00-1111

Your standard deduction: ☐ Someone can claim you as a dependent ☐ You were born before January 2, 1954 ☐ You are blind

If joint return, spouse's first name and initial: SPOUSE | Last name: RETURN | Spouse's social security number: [redacted]-00-1234

Spouse standard deduction: ☐ Someone can claim your spouse as a dependent ☐ Spouse was born before January 2, 1954 ☒ Full-year health care coverage or exempt (see inst.)

☐ Spouse is blind ☐ Spouse itemizes on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions. Apt. no.: 123 VITA TCE WAY

Presidential Election Campaign (see inst.) ☐ You ☐ Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6.: ROME, GA 30165

If more than four dependents, see inst. and ✓ here ► ☐

Dependents (see instructions): (1) First name Last name	(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see inst.): Child tax credit	Credit for other dependents
CHILD RETURN	[redacted]-00-1234	DAUGHTER	☒	☐
			☐	☐
			☐	☐
			☐	☐

Sign Here. Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.

Your signature | Date: 01/02/19 | Your occupation | If the IRS sent you an Identity Prot... PIN, enter it here (see inst.)

Spouse's signature. If a joint return, **both** must sign. | Date: 01/02/19 | Spouse's occupation | If the IRS sent you an Identity Pro... PIN, enter it here (see inst.)

3. Click the **Print** icon at the top left to print the return.

Support Tip: If your browser does not display the PDF in a separate tab, enable pop-ups from TaxSlayer in your browser's settings.

Reviewing Information

Review the remaining sections on this page:

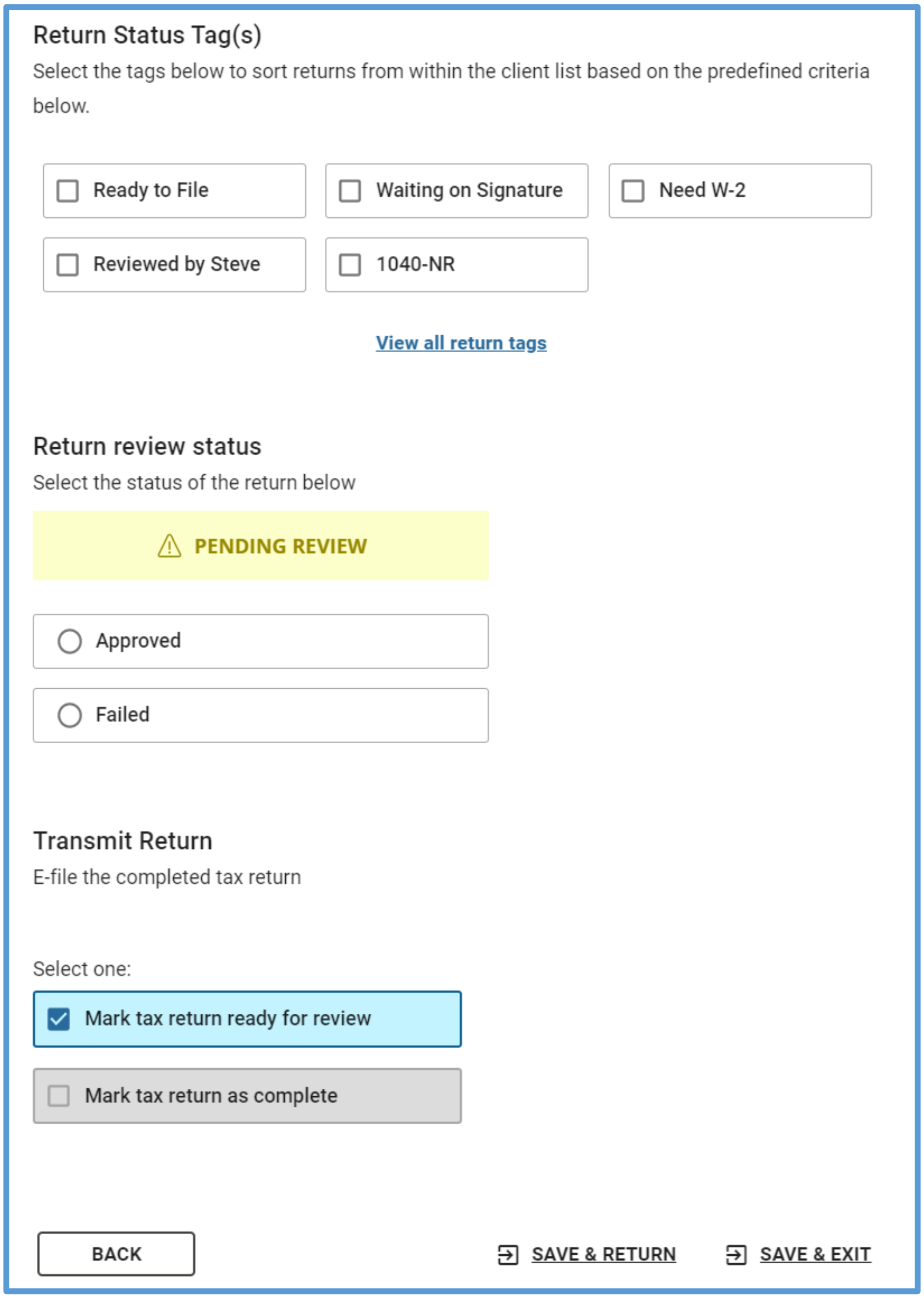
TIP: TaxSlayer Pro Online indicates in **State Return Information** if the preparer selected **Paper Return** for the state(s) associated with the return.

Next Steps

For the last steps in this lesson, you need to determine what happens to the return from this point. To mark the next step, use the following steps:

1. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the sections of the page:



2. Do one of the following:
    a. If the return is complete and ready to be e-filed, select the **Mark tax return as Complete** check box in the **Transmit Return** section.

b. If another person needs to review the return before it can be marked complete, select the **Mark Tax Return Ready for Review** check box at the bottom of the page.

TIP: You cannot select both **Complete** and **Ready for Review**.

3. Click **Save and Exit**.

TIP: Click **Save and Return** to return to the **Summary/Print** page.

Summary

You should now be able to:

- Run e-file validation.
- Correct e-file and validation errors.
- Review notes entered by the preparer.
- Review warning messages.
- Select a federal return type.
- Enter direct deposit information or split a refund.
- Confirm ERO information.
- Verify Form 8879 information.
- Select electronic filing of an amended return.
- Save and exit the return.

To see a video of what you just learned, go to Creating the e-file. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Electronically Filing a State

After completing this topic, you will be able to:

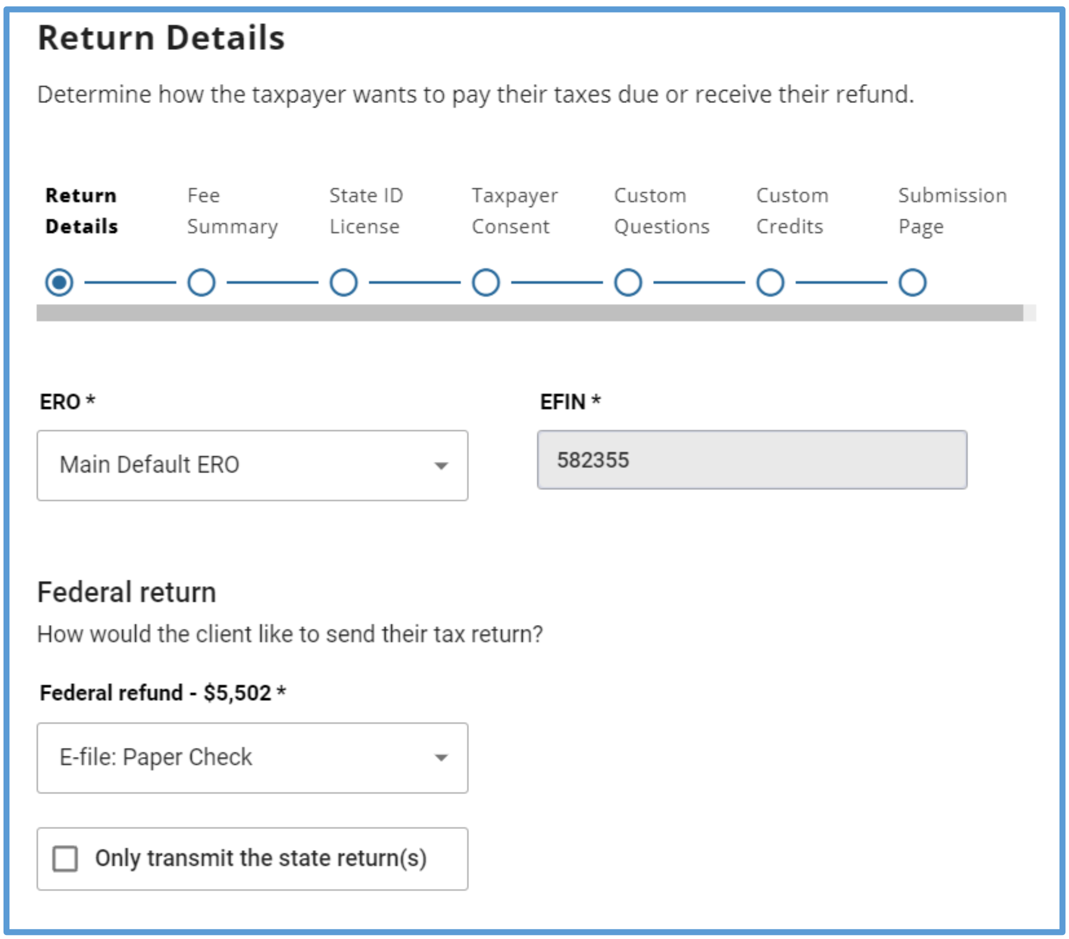
- Mark a state for e-file.
- File a state only return.

Marking a State for e-file

In order to electronically file a state return, you need to mark the state return for e-filing. To mark the state for e-file, use the following steps:

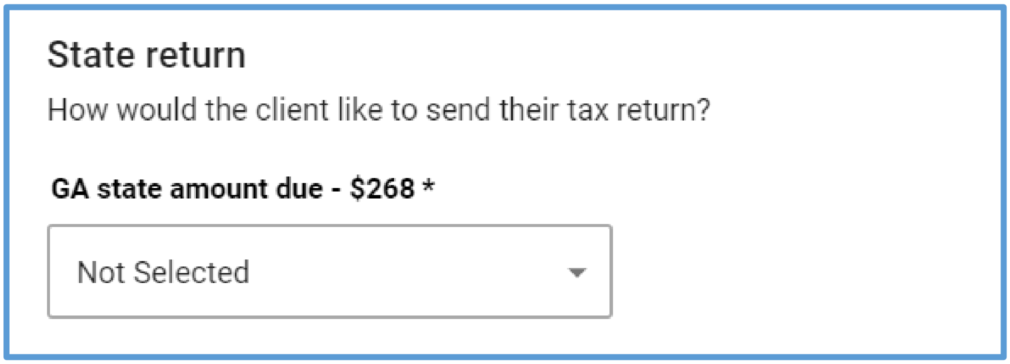
1. Click **e-File** in the left navigation bar.
2. Follow the steps discussed in the *Creating the e-file* lesson until you reach the **Return Details** page, as shown below.

TIP: Select one of the **E-file** return types for the **Federal Return**.



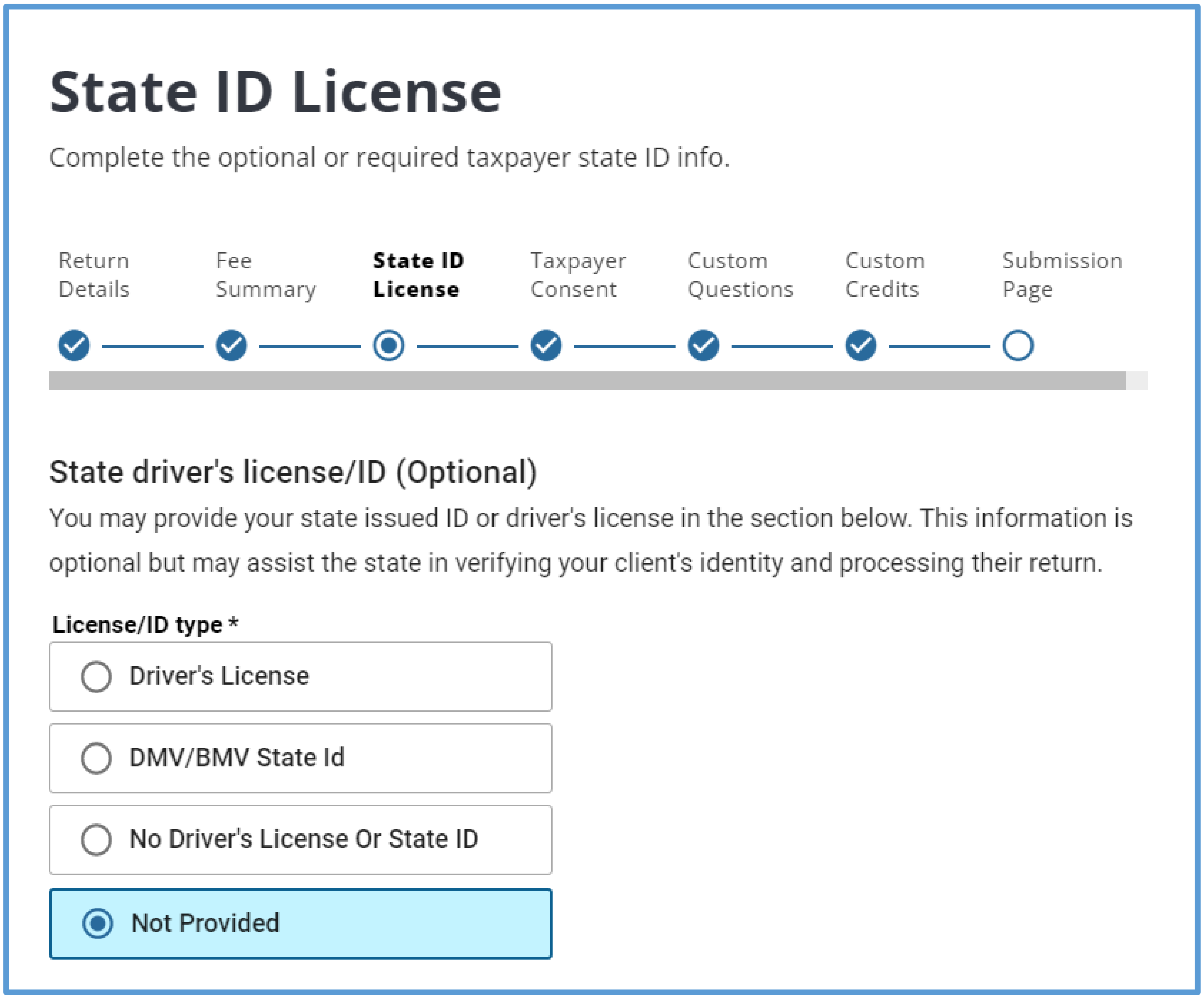
3. Scroll to the **State Return(s)** area.

TaxSlayer Pro Online displays the **State Return(s)** area:



4. From the **Return Type** box, select which of the following the taxpayer wants to do for the state return:
    a. Electronically file the return and receive a paper check for the refund (**E-file: Paper Check**)
    b. Electronically file the return and receive a direct deposit for the refund (**E-file: Direct Deposit**)
    c. Mail the return and receive a paper check for the refund (**Paper Return**)
    d. Mail the return and receive a direct deposit for the refund (**Paper Return with Direct Deposit**)
5. Complete the remaining information on this page as described in the *Creating the e-file* lesson.

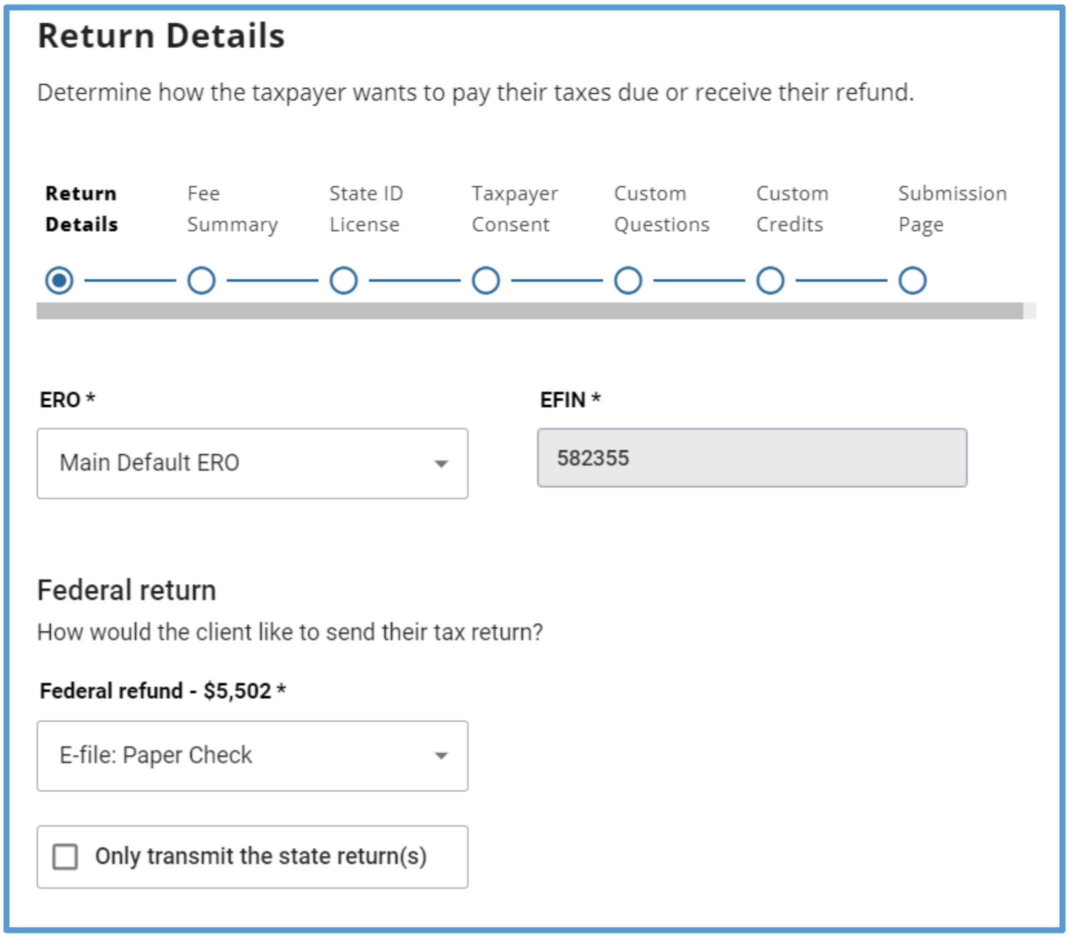
TIP: To enter a State ID for each state, select the **State ID License** section at the top of the page. If the state requires the information, TaxSlayer Pro Online marks the boxes as required.



Sending a State Only Return

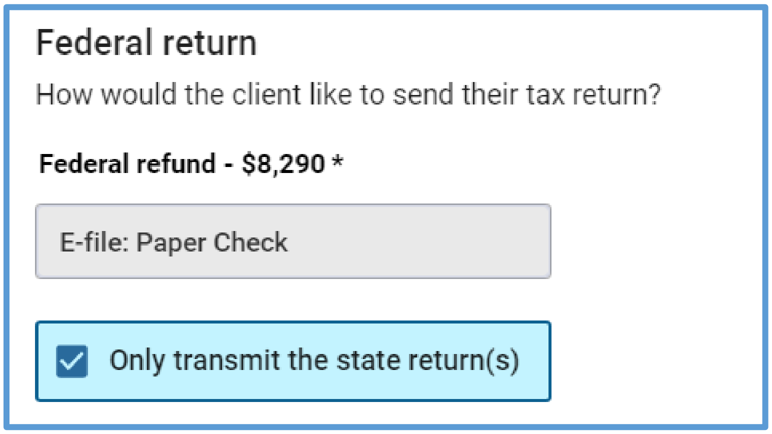
In some cases, the taxpayer only needs to electronically file a state return. You may need to do this if the taxpayer is not required to file a federal return or has already filed a federal return. To file only the state return, use the following steps:

1. Click **e-File** in the left navigation bar.
2. Follow the steps discussed in the *Creating the e-file* lesson until you reach the **Return Details** page, as shown below:



3. Select the **Only Transmit the State Return(s)** check box.

TaxSlayer Pro Online changes the display when you select the check box:



4. Select an ***E-file option*** for the federal return. You must select from this drop-down list even if you are not electronically filing the federal return.
5. Complete the remainder of the information on the **E-File** and **Submission** pages as described in this lesson and in the *Creating the e-file* section.

Summary

You should now be able to:

- Mark a state for e-file.
- File a Credit Only state return.

To see a video of what you just learned, go to Electronically Filing a State. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Submitting e-files

After completing this topic, you will be able to:

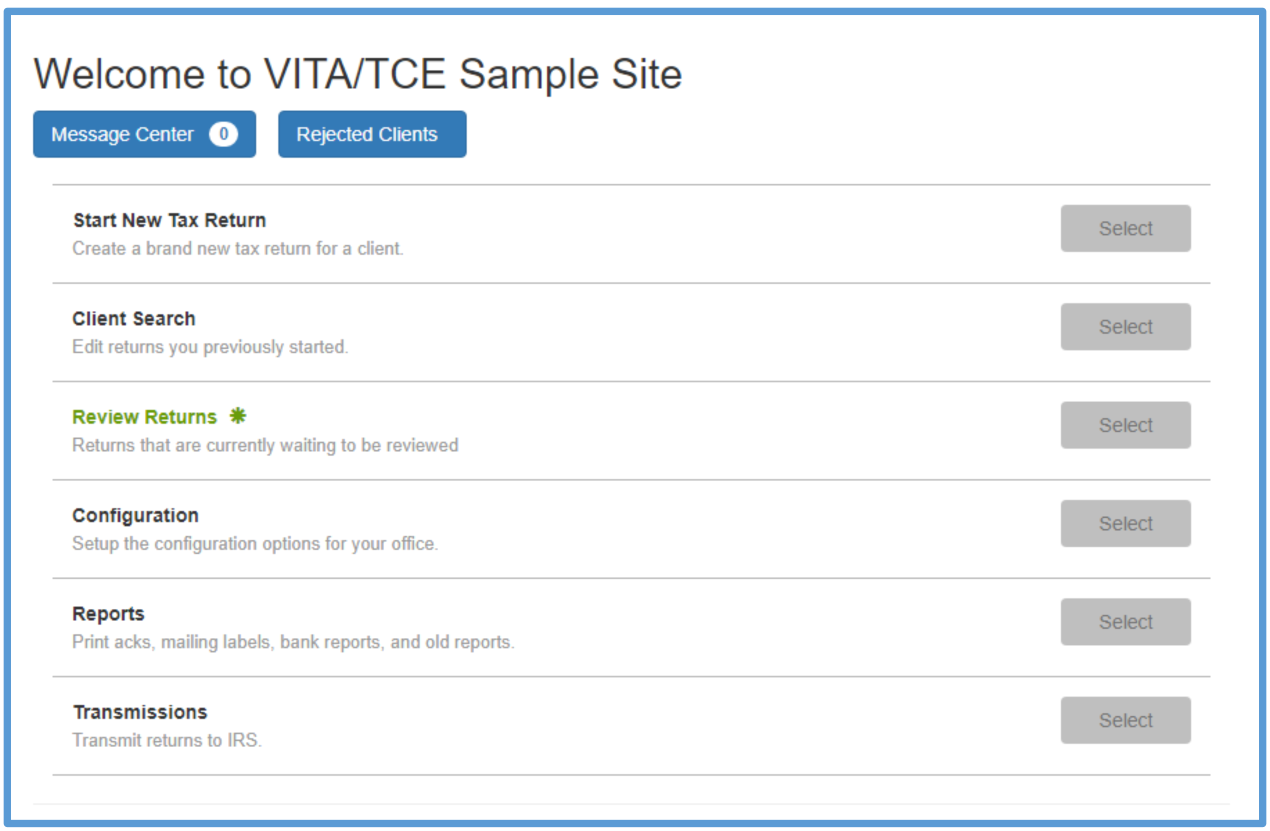
- Select e-files to submit.
- Add corrected rejects to submit.

Selecting e-files

When you are ready to e-file returns, you can select all returns that are ready to e-file. To do so, use the following steps:

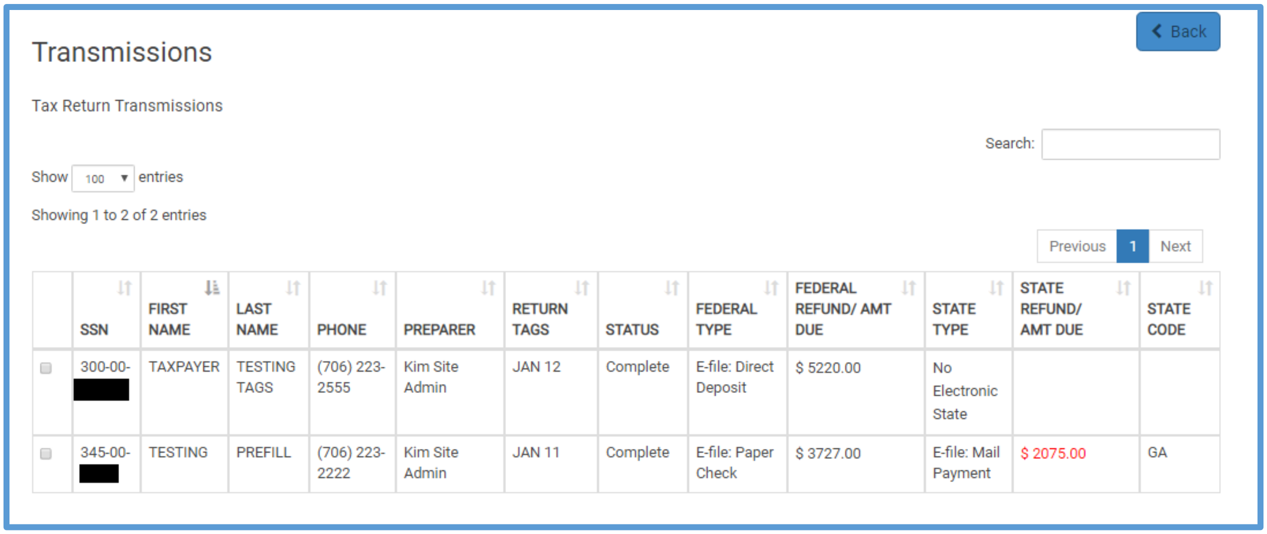
1. Log in to TaxSlayer Pro Online with a user name that is assigned a security template that allows e-file submission.

TaxSlayer Pro Online displays the **Welcome** page:



2. Click **Select** on the **Transmissions** line.

TaxSlayer Pro Online displays the **Transmissions** page, listing all returns that have been marked complete:



Transmissions

Tax Return Transmissions

Back

Search:

Show 100 entries

Showing 1 to 2 of 2 entries

Previous 1 Next

	SSN	FIRST NAME	LAST NAME	PHONE	PREPARER	RETURN TAGS	STATUS	FEDERAL TYPE	FEDERAL REFUND/ AMT DUE	STATE TYPE	STATE REFUND/ AMT DUE	STATE CODE
☐	300-00- [redacted]	TAXPAYER	TESTING TAGS	(706) 223-2555	Kim Site Admin	JAN 12	Complete	E-file: Direct Deposit	$ 5220.00	No Electronic State		
☐	345-00- [redacted]	TESTING	PREFILL	(706) 223-2222	Kim Site Admin	JAN 11	Complete	E-file: Paper Check	$ 3727.00	E-file: Mail Payment	$ 2075.00	GA

3. Select the check box(es) for the returns you want to transmit.

Note: To sort the columns within the Transmissions menu, click the column header.

TIP: Review the state columns for the filing status of the state return. In this view, TaxSlayer Pro Online displays the first state listed on the return. If the preparer marked the state for **paper** filing, TaxSlayer Pro Online displays the **No Electronic State** status.

4. If you want to select all returns, click **Check All**.
5. If you have rejected returns that you did not mark **Ready to Retransmit** on the **Submission** page and need to resubmit them, click **Add Returns**.

TaxSlayer Pro Online displays the **Add Returns** page:

☐	400-[redacted]	W Two	Problems	(706) 456-4654	Will Smith		Complete	E-file: Mail Payment	$ (12574.00)	E-file: Direct Debit
☐	700-[redacted]	WFTC	NoIncome	(706) 800-9000	Craig Smith		Complete	E-file: Direct Deposit	$ 5648.00	No Electronic State

Add Returns | Check All | Uncheck All | Delete Selected | Delete All

6. Select the return(s) you want to add to the transmission list.

TIP: To automatically add returns that have been corrected and are ready to retransmit, select the **Ready for Retransmit** check box on the return's **Submission** page. TaxSlayer Pro Online then automatically lists those returns in the **Transmissions** list. If you do not select the **Ready for Retransmit** check box, continue with Step 7

7. Click **Add Returns**.
8. When you finish selecting returns to transmit, click **Transmit selected return(s) to IRS**.

TaxSlayer Pro Online displays the **Tax Return Transmissions** page indicating the number of returns submitted:

Transmissions

Tax Return Transmissions

Back

1 return transmitted.

9. Click **Back** to return to the site's **Welcome** page.

TaxSlayer Pro Online changes the taxpayer's status in Client Status to **Transmitted** after you submit the return, as shown below:

XXX-XX-1234	TESTING	EFILE SECTION	[redacted]	Kim [redacted]	Transmitted	AL •••	Tools

Refer to the *Managing Returns* lesson in the *Configuring TaxSlayer Pro Online* to review filtering by status.

Support Tip: You cannot edit a return with the status of **Transmitted**.

All e-files you submit to the TaxSlayer Processing Center go through a secondary validation check. If the e-file does not pass this secondary validation, TaxSlayer issues a validation error.

The TaxSlayer development team reviews all validation errors received during this secondary process to determine if programmatic changes can be made.

Summary

You should now be able to:

- Select e-files to submit.
- Add corrected rejects to submit.

To see a video of what you just learned, go to Submitting e-files. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Electronically Filing a Federal 1040X

After completing this topic, you will be able to:

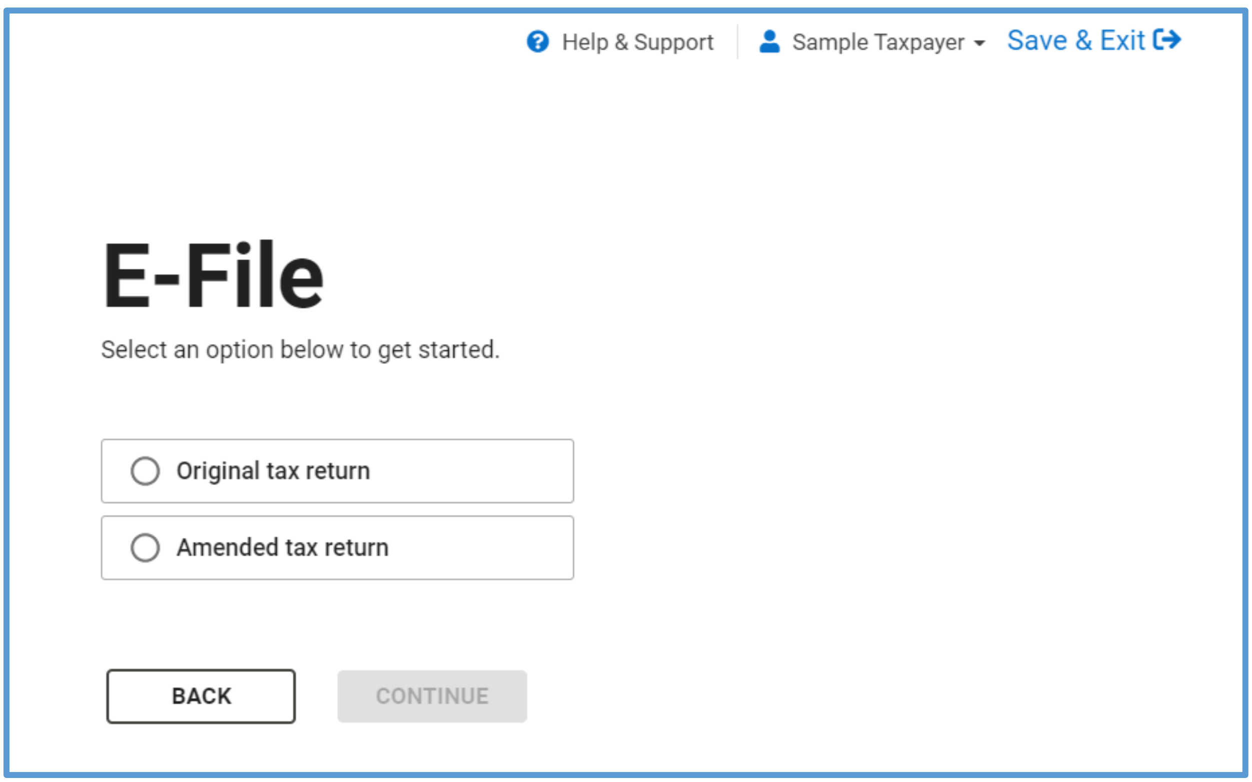
- Make the selection to electronically file a Federal 1040X.
- File a Federal 1040X return.

To e-file an amended federal return, use the following steps:

1. Complete the steps for e-filing, including reviewing warnings and notes, and navigate to the **E-File** page.

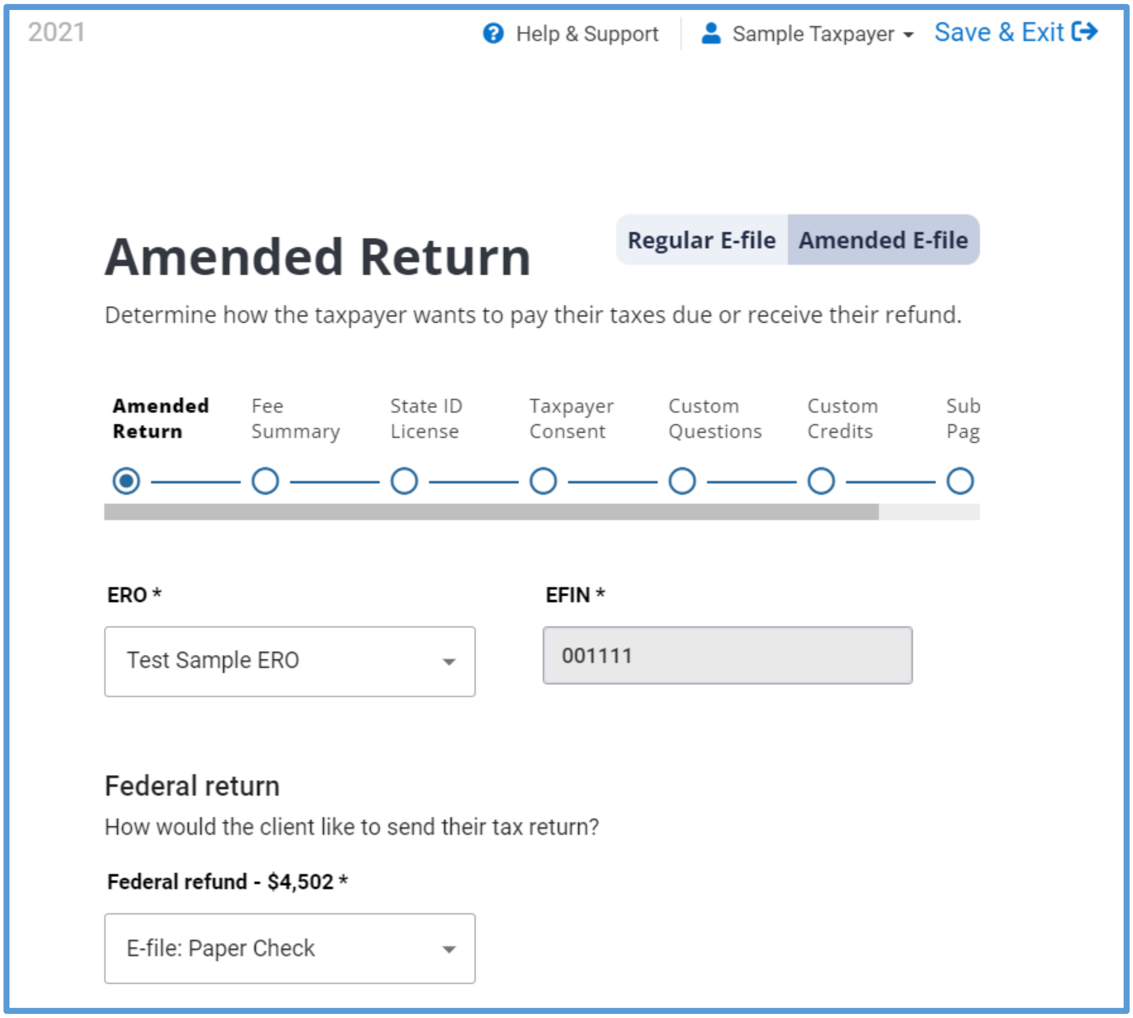
Tip: See the *Creating the e-file* lesson for more information on preparing a return for e-filing.

TaxSlayer Pro Online displays the **E-File** page:



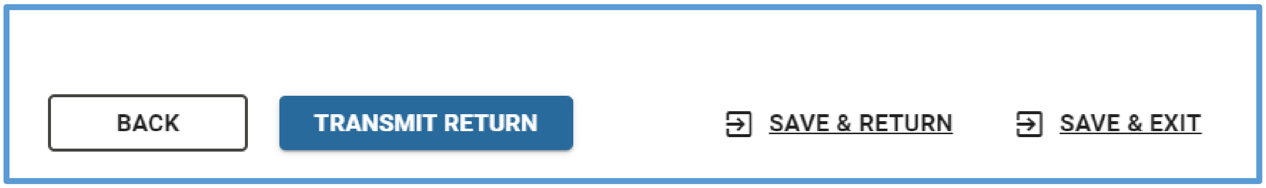
2. Select **Amended tax return** to choose that you want to e-file Form 1040X.
3. Click **CONTINUE**.

TaxSlayer Pro Online displays the **ERO** and **Federal Return** sections, as well as the **State Return** section if a state return is included:



4. Select how the taxpayer wants to file the federal return and receive any refund or pay the balance due.
5. Select how the taxpayer wants to file the state return and receive any refund or pay the balance due.
6. Click **CONTINUE**.

7. Follow the usual process for completing all other information to e-file the return.
8. When you finish information on the **E-File** and **Submission** pages, click **TRANSMIT RETURN**.



Summary

You should now be able to:

- Make the selection to electronically file a Federal 1040X.
- File a Federal 1040X return.

Working with Acknowledgements

After completing this topic, you will be able to:

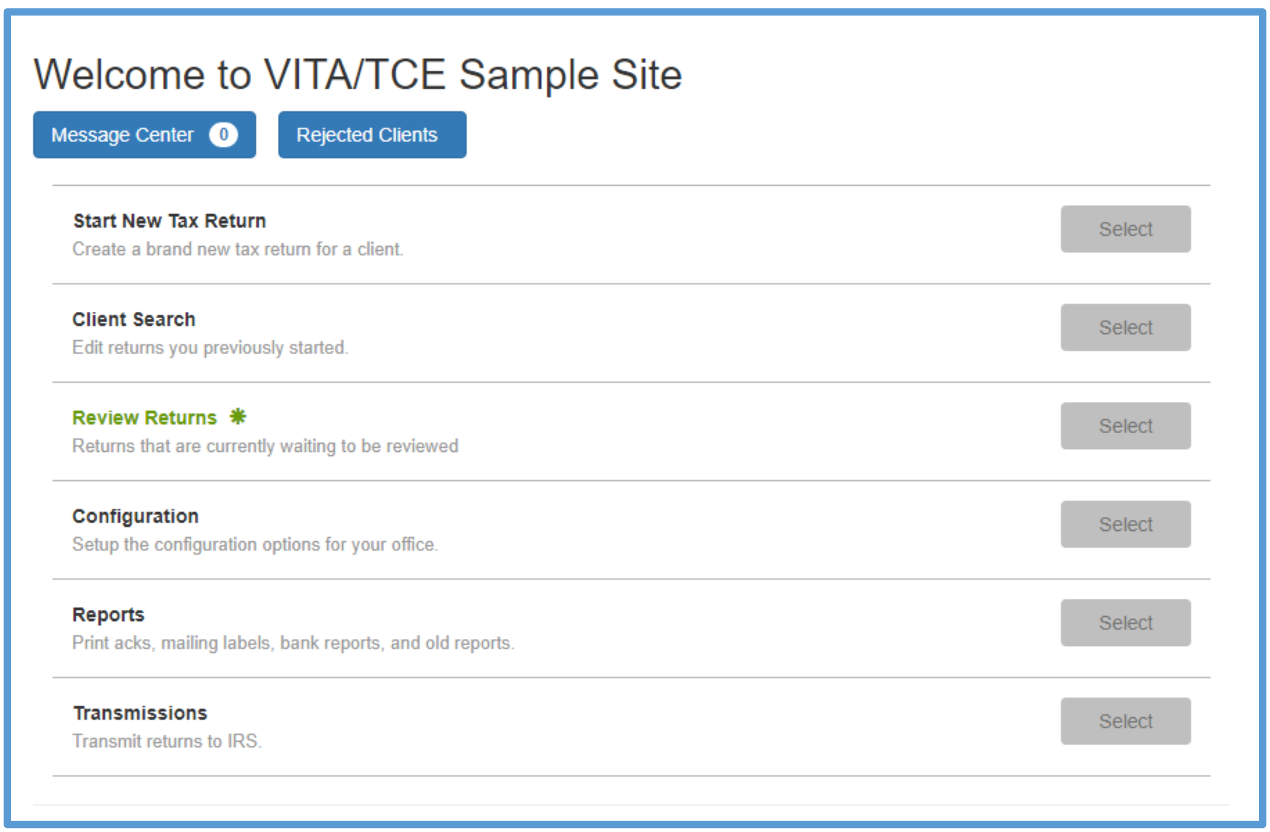
- Receive acknowledgements.
- Print an acknowledgement report.
- Review processing center rejects.
- Review rejected returns using the Rejected Clients tool.

Receiving Acknowledgements

When you transmit returns, you usually receive an acknowledgement within one hour for federal returns and 24-48 hours for state returns. We recommend that you check for acknowledgements several times a day. To check for acknowledgements, use the following steps:

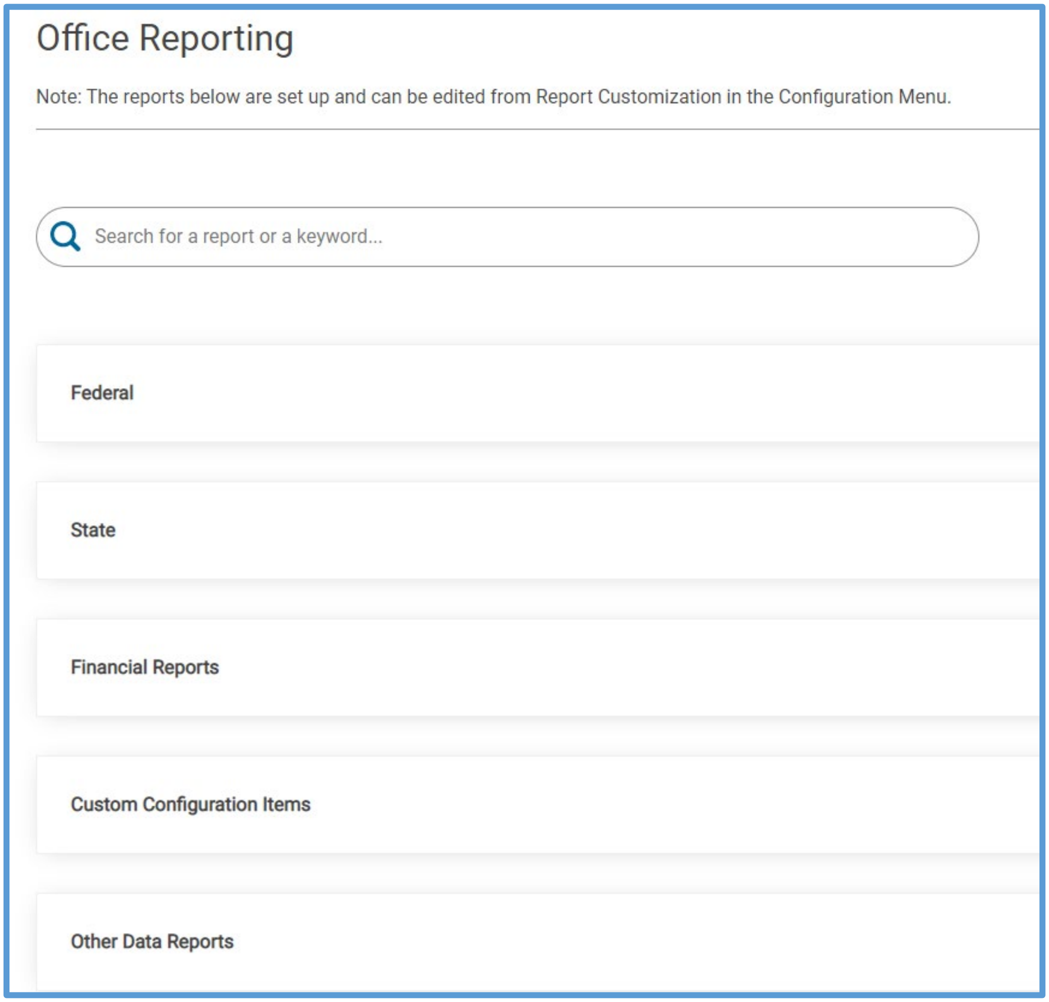
1. Log in to TaxSlayer Pro Online.

TaxSlayer Pro Online displays the **Welcome** page:



2. Click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the **Office Reporting** page:



3. Click **Federal** or **State** to expand the list. For this lesson, click **Federal**.

TaxSlayer Pro Online displays the **Federal** transmission reports:

Federal

Accepted Returns
List of accepted returns.

IRS Acknowledgements
View federal acks.

Federal Non-accepted Returns
List of federal returns with status other than accepted.

Federal Returns Not Transmitted
List of federal non-transmitted returns.

Old IRS Acknowledgements
View Old IRS Acknowledgements.

Old Validation Errors
View Old Validation Errors.

Rejected Returns
List of rejected returns.

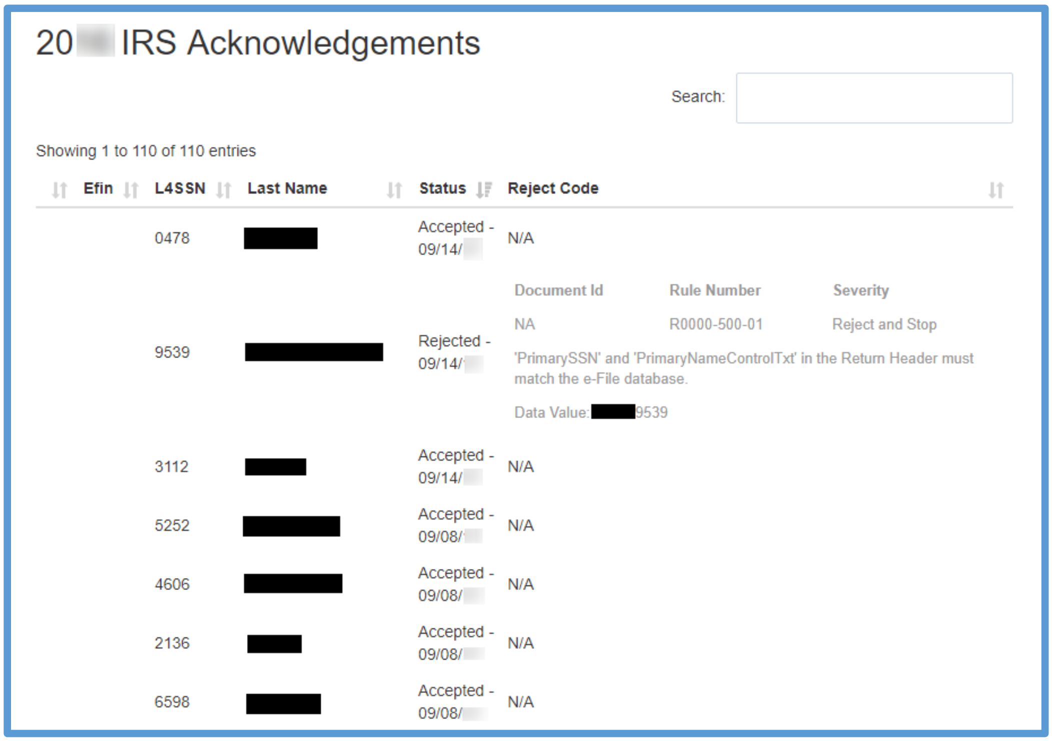
Returns Transmitted
List of transmitted returns.

Validation Errors
View returns with pending validation errors.

Extension Report
View Extension (Form 4868) Information Per Return.

4. Click **Select** on the **IRS Acknowledgements** line. For this lesson, we cover IRS acknowledgements. You will use the same steps to work with state acknowledgements.

TaxSlayer Pro Online displays the **IRS Acknowledgements** page, listing all acknowledged returns that have not previously been viewed:



5. Review each acknowledged return.
    a. If the IRS accepted the return, TaxSlayer Pro Online displays **Accepted** and the date in the **Status** column.
    b. If the IRS rejected the return, TaxSlayer Pro Online displays **Rejected** and the date in the **Status** column, then the reason for the rejection in the **Reject Code** column.
6. Print your acknowledgement report. Click **Print PDF**.
7. Click **Open** in the browser's dialog box. This dialog box varies depending on what browser you use.

TaxSlayer Pro Online displays the acknowledgement report as a PDF.

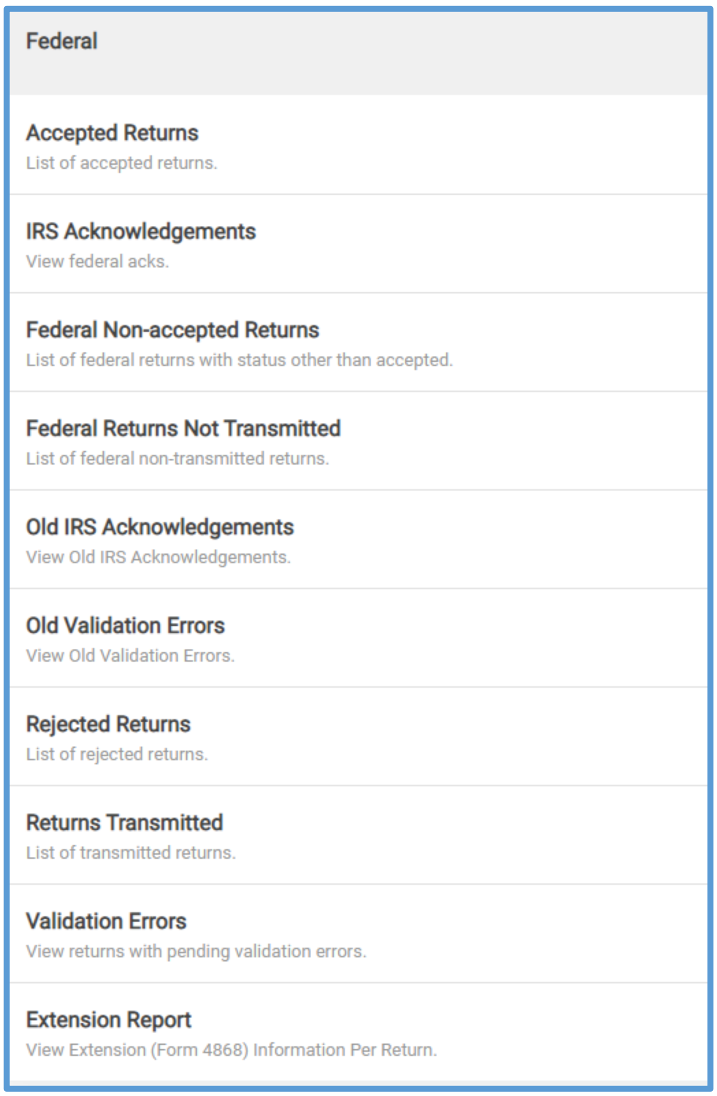
8. When you finish reviewing acknowledgements and printing the report, click **Back**.

Reviewing Processing Center Rejects

When checking for acknowledgements, you also need to search for returns that TaxSlayer's processing center may have rejected for validation errors. To do so, use the following steps from the **Office Reporting** page:

1. Click **Federal** to expand the list.

TaxSlayer Pro Online displays the **Federal** transmission reports category:



2. Click **Select** on the **Validation Errors** line.

TaxSlayer Pro Online displays the **Validation Errors** page:

20 Validation Errors

Search:

Showing 1 to 5 of 5 entries

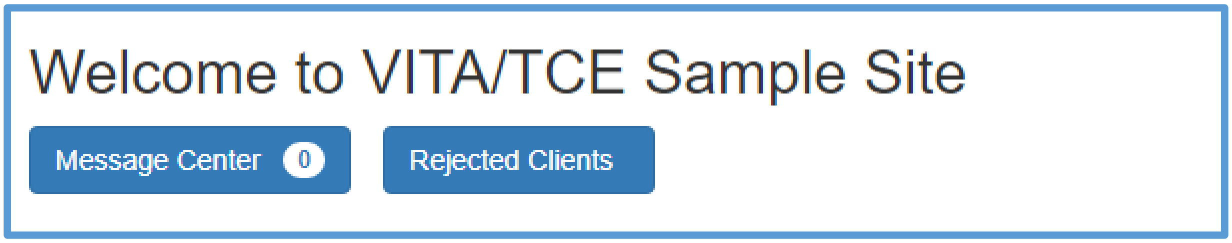
	Efin	L4SSN	Last Name	State	Error Date	Error Message	Help
		3966	[redacted]	FD	03/09/20	The element 'IRS1040NR' in namespace 'http://www.irs.gov/efile' has invalid child element 'AppLawfulPermanentResidentInd' in namespace 'http://www.irs.gov/efile'. List of possible elements expected:	Missing Information on 1040NR Schedule OI

3. Review each return rejected from the TaxSlayer Processing Center.
    a. If the TaxSlayer Processing Center rejected the return
    b. TaxSlayer Pro Online displays the reason for the validation error in the **Help** column.

Print your Validation Errors report. Click **Print PDF**.

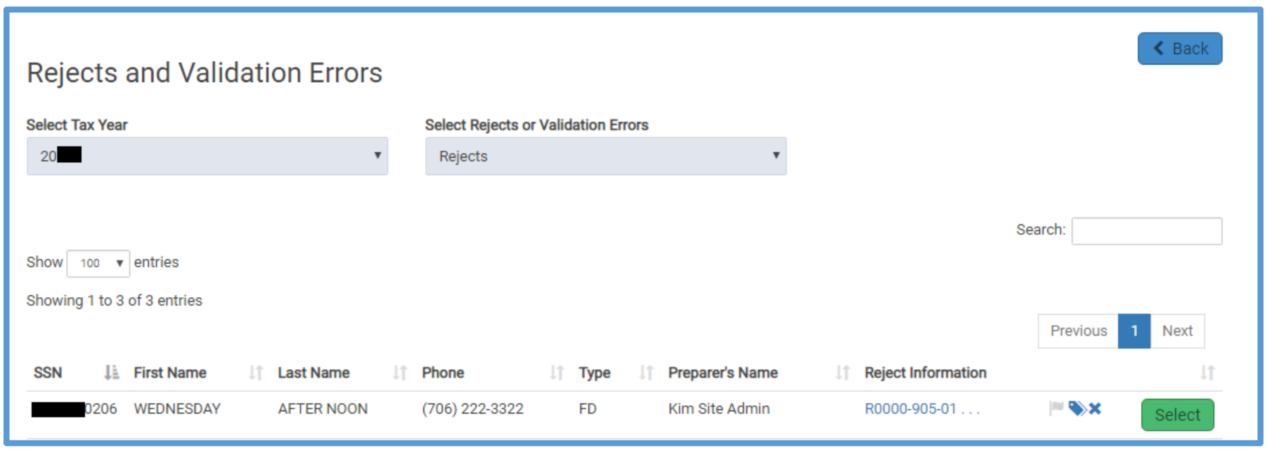
Using Rejected Clients

To quickly review all outstanding IRS rejected returns, state rejected returns, and validation errors, use the following steps from the **Welcome** page:



1. Click the **Rejected Clients** button.

TaxSlayer Pro Online displays the **Rejects and Validation Errors** page:



2. Select the year from the drop-down list.

TIP: TaxSlayer Pro Online defaults to the current year.

3. Select **Rejects** or **Validation errors** from the drop-down list.

TIP: TaxSlayer Pro Online defaults to search for rejected returns.

TaxSlayer Pro Online displays any outstanding IRS and state rejections or outstanding validation errors, depending on your selection:

SSN	First Name	Last Name	Phone	Type	Preparer's Name	Reject Information		
[redacted]0102	ITEMIZED	[redacted]	(706) 000[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]1818	TAG	[redacted]	(770) 555[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]0418	ACA	[redacted]	(766) 766[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]0116	TESTING	[redacted]	(706) 766[redacted]	CA	Kim Site Admin	S0000-080 . . .		Select
[redacted]1234	TESTING	[redacted]	(706) 223[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]0207	TESTING	[redacted]	(706) 222[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]1123	TESTING	[redacted]	(706) 222[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]0126	KIMS	[redacted]	(706) 223[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]0203	TEST	[redacted]	(706) 232[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select
[redacted]0203	AFTER	[redacted]	(706) 222[redacted]	FD	Kim Site Admin	R0000-905-01 . . .		Select

4. Click **Select** on the line for the return you want to open.

Summary

You should now be able to:

- Receive acknowledgements.
- Print an acknowledgement report.
- Review processing center rejects.
- Review rejected returns using the Rejected Clients tool.

To see a video of what you just learned, go to Working with Acknowledgements. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

TaxSlayer Optional Programs

FSA Program

After completing this lesson, you should be able to:

- Define the TaxSlayer FSA program.
- Set up the TaxSlayer FSA program at your site.
- Guide taxpayers to complete a return in TaxSlayer FSA.
- List and describe the differences in TaxSlayer Pro Online and TaxSlayer FSA.
- Deactivate a TaxSlayer FSA return if opened using the wrong URL.

What is the FSA Program?

The TaxSlayer FSA Program is the Facilitated Self Assistance program. The FSA program allows taxpayers to self-prepare returns with assistance from a certified volunteer. VITA/TCE sites can order FSA three different ways for the 2023 Filing Season:

- **Fusion**: FSA has the same physical location as the traditional site. Clients can self-prepare their current Federal and state tax returns with a certified volunteer available to help with tax law questions. The FSA fusion product must be ordered at the same time as the traditional online or desktop TaxSlayer product.
- **Standalone**: FSA has a separate physical location. Clients can come in during posted hours to self-prepare their current Federal and state tax returns with a certified volunteer available to help with tax law questions.
- **Remote**: A volunteer can email the site's custom FSA URL to known individuals or place a link on a private website. Clients can self-prepare their current Federal and state tax returns with a certified volunteer available to help with tax law questions via phone, chat, or email. Remote sites cannot place the custom FSA URL on any public-facing website, social media or blog platform, or include the URL in any electronic newsletter or newspaper article or mass email.

Note: Sites cannot use the TaxSlayer product name in any communications regarding the FSA program, including when emailing the link, describing the link on a private website, or any advertisement for self-prepared returns.

The TaxSlayer Online FSA program works the same way for the taxpayer in all cases.

Setting up FSA

TaxSlayer sends each participating FSA site a unique link that contains the site's SIDN. Read the email you receive from TaxSlayer carefully and ensure that the last characters of the URL correspond with your SIDN:

Note: FSA unique URLs change every year an FSA order is placed.

> Please safeguard this URL and DO NOT make any modifications to it. If the last 8 numbers do not correspond with the URL assigned to your FSAFS order, please let us know so we can update our records and generate a new URL
>
> We recommend making your URL the default homepage for each self-prep station at your site. Refresh the homepage after each use to ensure the next taxpayer is creating their account under the correct URL for your site.
>
> The above URL will take the taxpayer directly to a VITA/TCE Kiosk landing page login page. They will click continue to create a user account.

Tip: TaxSlayer recommends making the FSA URL the default home page on the kiosk you will use for FSA.

Note: Each site is required to submit the information they want displayed to the taxpayer for assistance. This includes the Site Name, Support phone number and/or Support email. This information must be submitted prior to the URL being activated and emailed to the site.

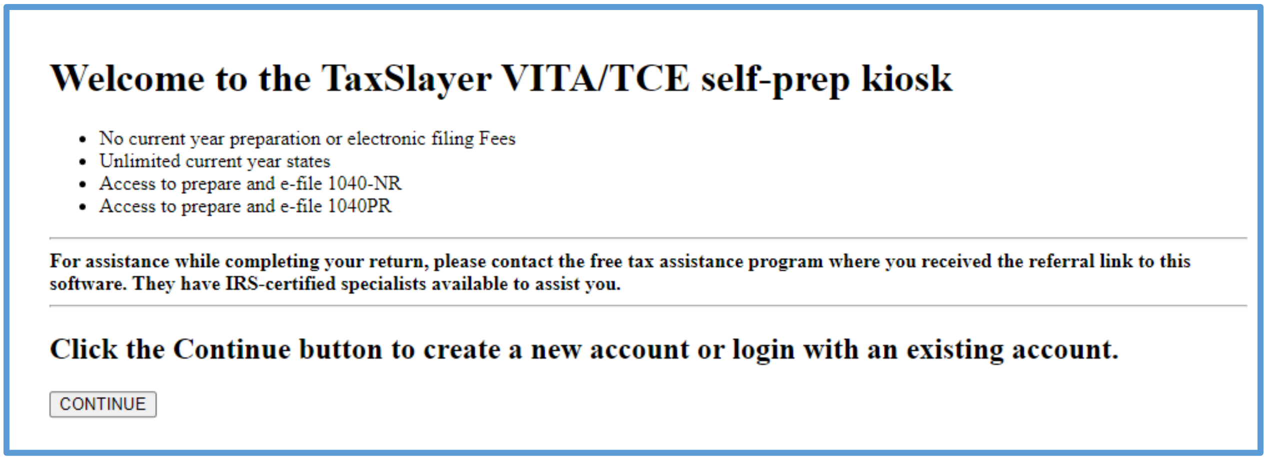
You do not need any additional setup from TaxSlayer for FSA.

Taxpayer Login Procedures

When a taxpayer needs to use FSA to complete the return, he or she will use the following steps:

1. Click the link for TaxSlayer FSA.

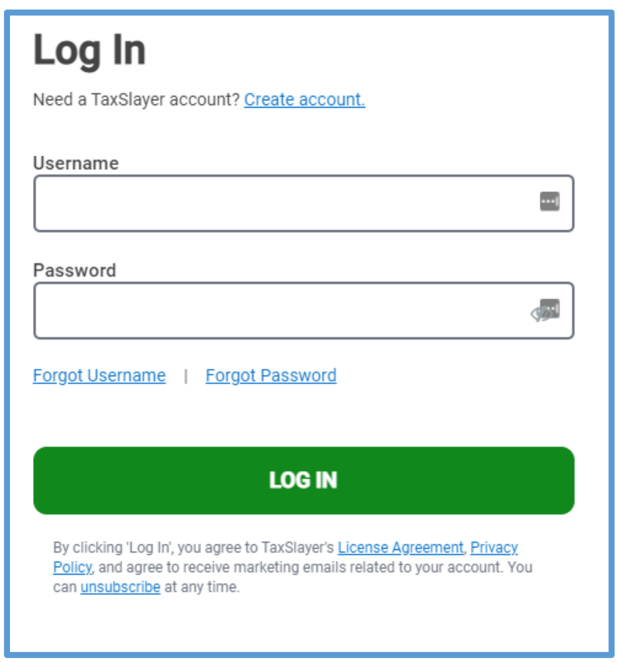
TaxSlayer FSA displays the **Welcome** page:



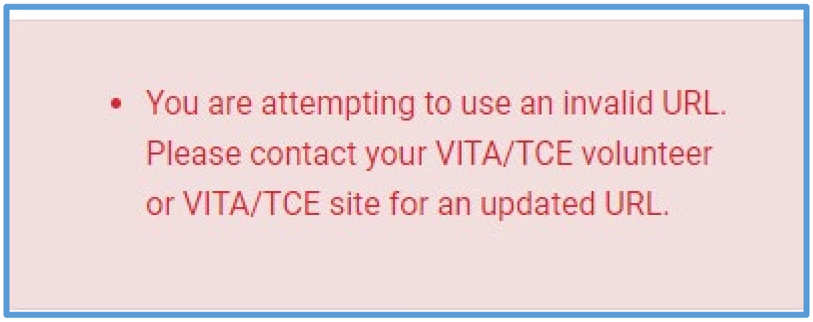
2. Click **Continue**.

Note: The taxpayer will have the ability to change the language to Spanish from the **Welcome** page.

TaxSlayer FSA displays the **Log In** page:



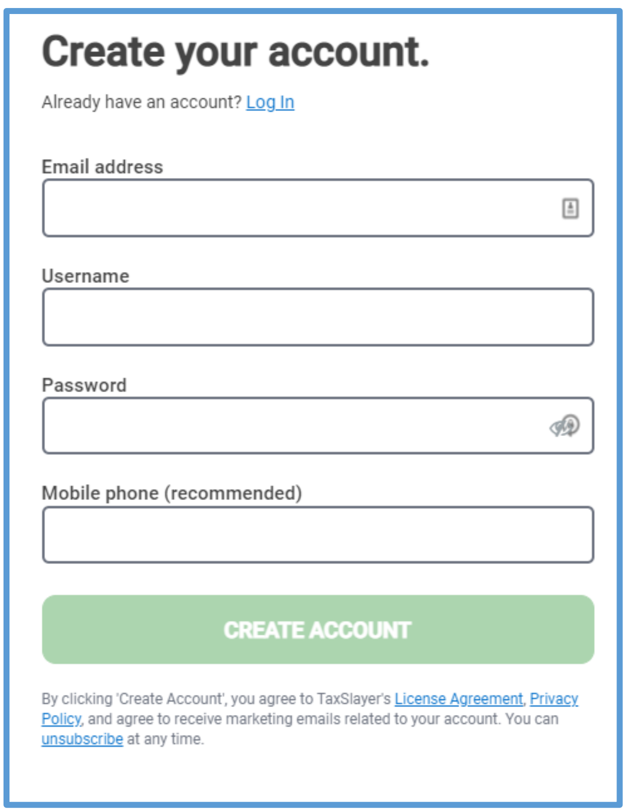
Note: If the taxpayer uses an invalid URL, TaxSlayer FSA displays the error message shown below. Do not allow the taxpayer to continue. Restart the taxpayer using the correct URL.



Tip: If the taxpayer already has a TaxSlayer account from a previous year and has not logged in yet during the current filing season, he or she can log in with the existing user name and password.

3. If the taxpayer does not have a TaxSlayer account, he or she should click **Create account**.

TaxSlayer FSA displays the **Create your account** page:

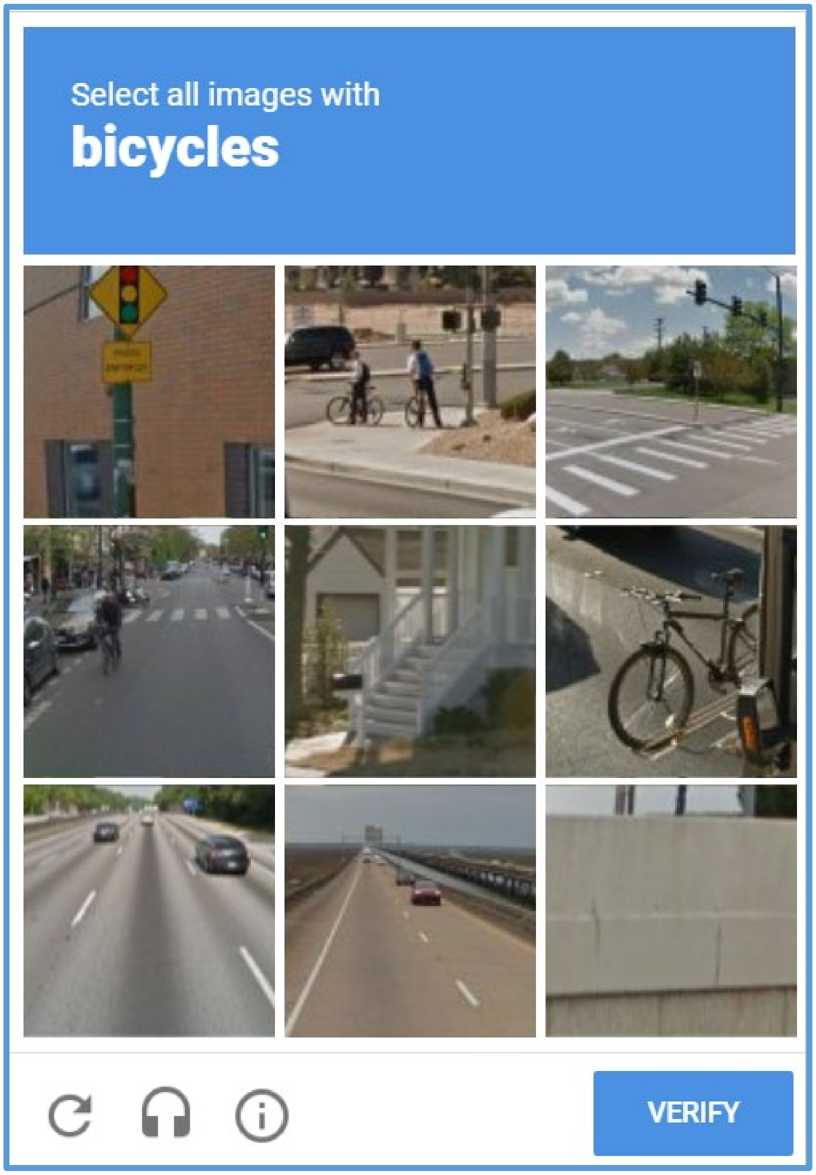


4. Type an email address, user name, password, and cell phone number in the appropriate boxes.

Tip: TaxSlayer FSA uses the same password requirements as TaxSlayer Pro Online.

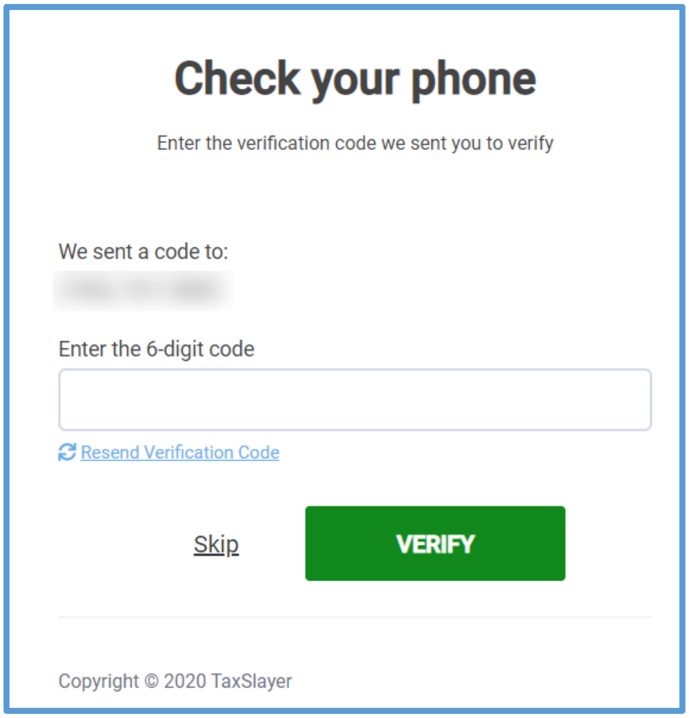
5. Click **CREATE ACCOUNT**.

TaxSlayer FSA displays the reCAPTCHA verification page:



6. Follow the instructions on the reCAPTCHA page.
7. Click **VERIFY**.

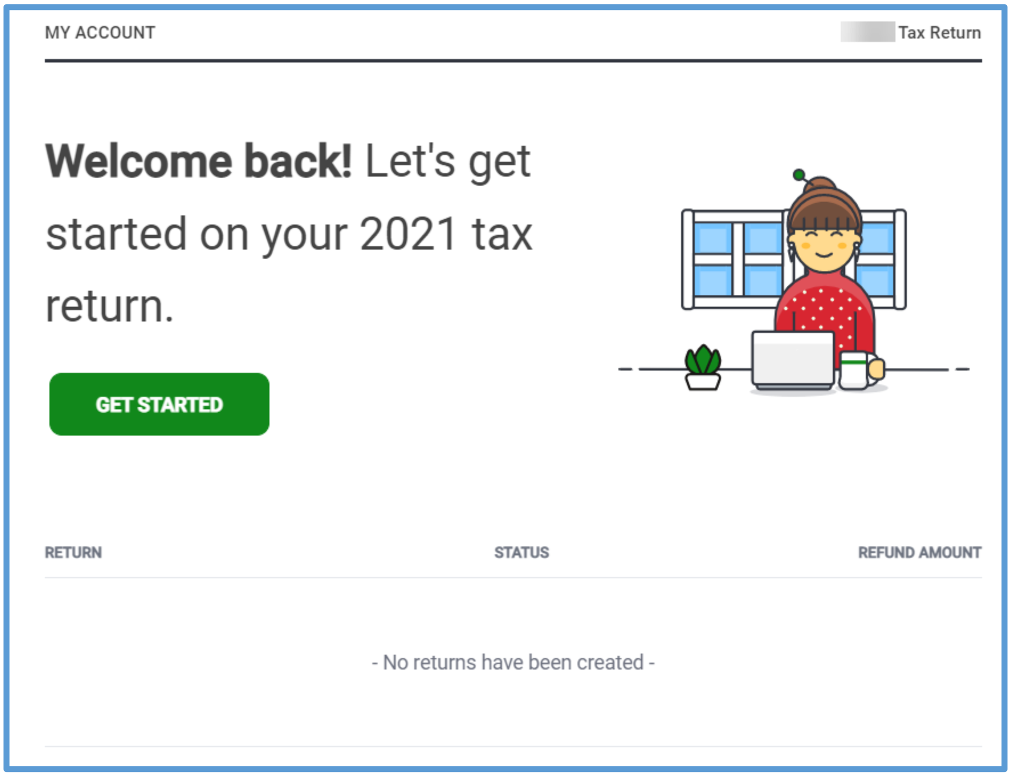
If the taxpayer entered a cell phone number on the **Create your account** page, TaxSlayer FSA displays the **Check your phone** page:



8. Type the 6-digit code from the text into the appropriate box.
9. Click **VERIFY**.

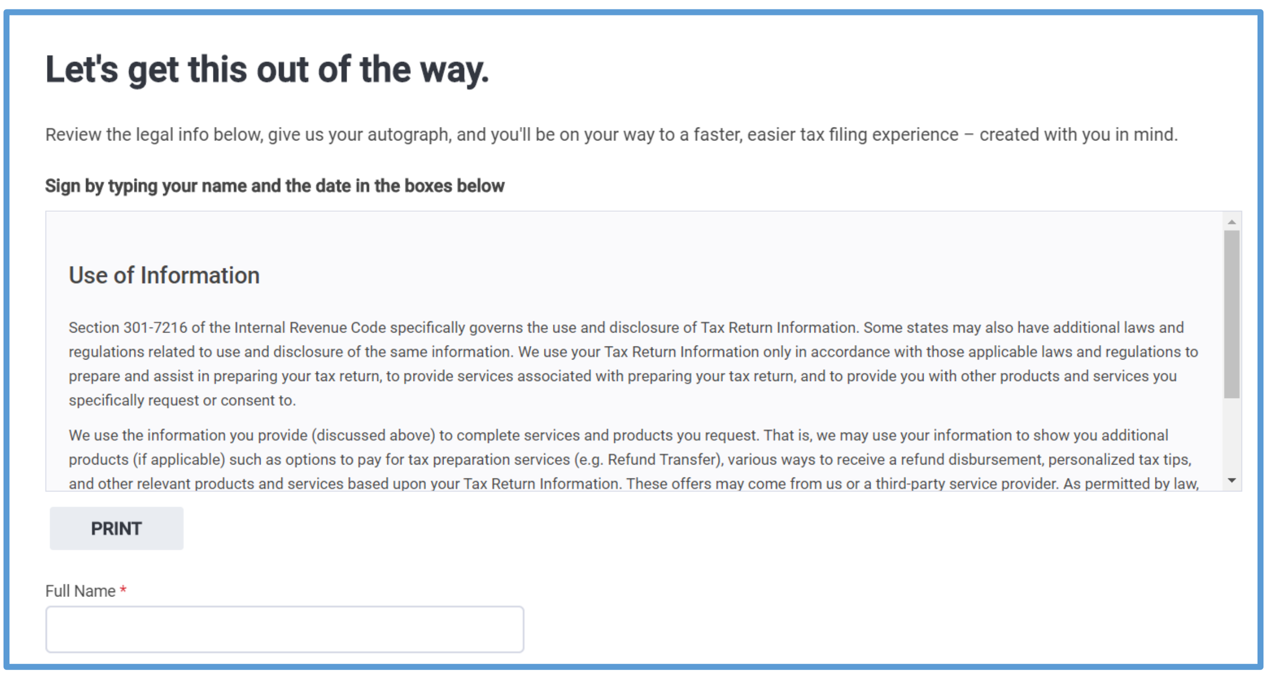
Tip: The taxpayer can verify the code by email if he or she did not add a cell phone number when creating the account.

TaxSlayer FSA displays the **My Account** page:



10. Click **GET STARTED**.

TaxSlayer FSA displays the **Let's get this out of the way** page:

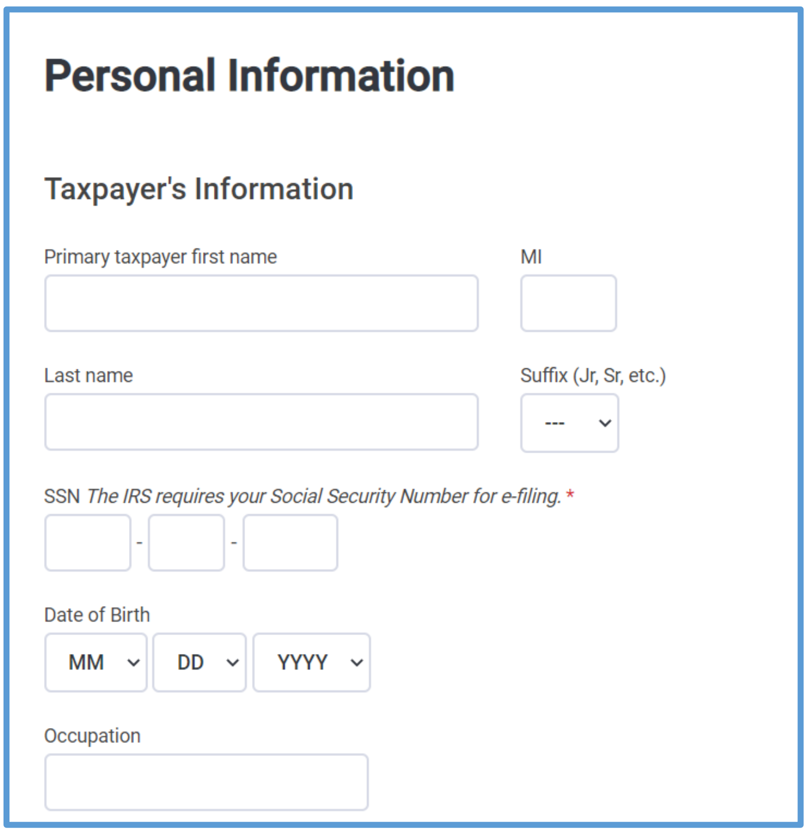


11. Read the information on the page and type your full name and today's date in the appropriate boxes.
12. If you are filing a return with your spouse, select the **I am filing with my spouse** check box and have your spouse type the appropriate information.
13. Click **CONTINUE**.

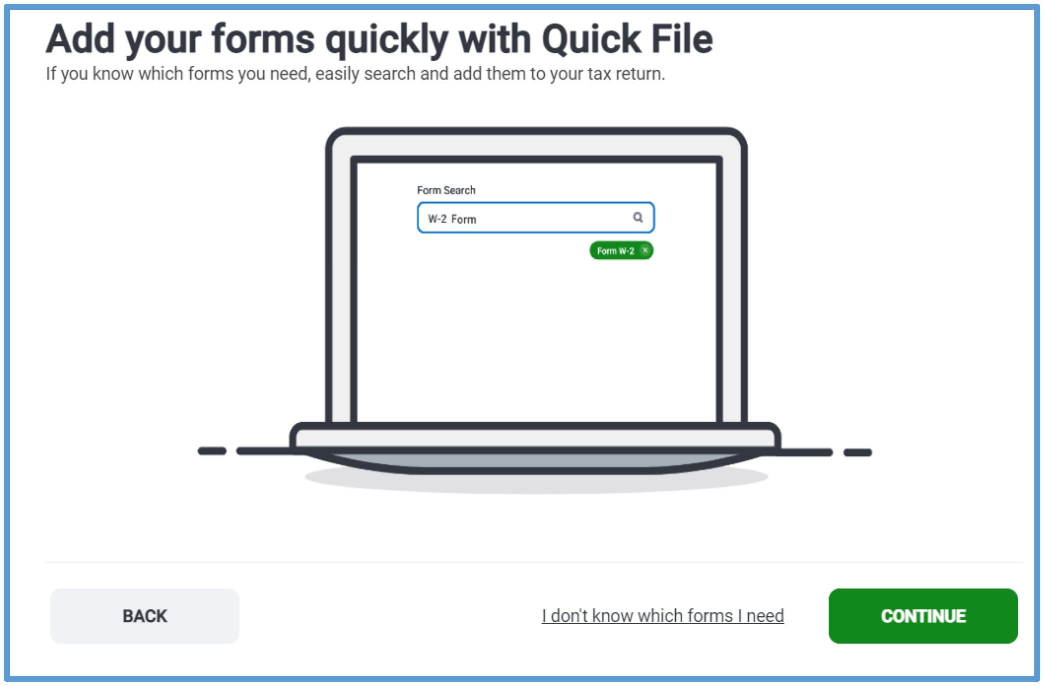
Preparing the Return

After the taxpayer logs in to the return, he or she can begin preparing the return. To prepare the return, use the following steps:

1. Do one of the following:
    a. If you have a PDF of the previous year's return, upload it to import personal information.
    b. Click **Skip**.
2. Type or verify your personal information.



TaxSlayer FSA guides the taxpayer through personal and dependent information just like TaxSlayer Pro Online. When the personal and dependent information is completed, TaxSlayer Pro Online displays the **Add your forms quickly with Quick File** page:



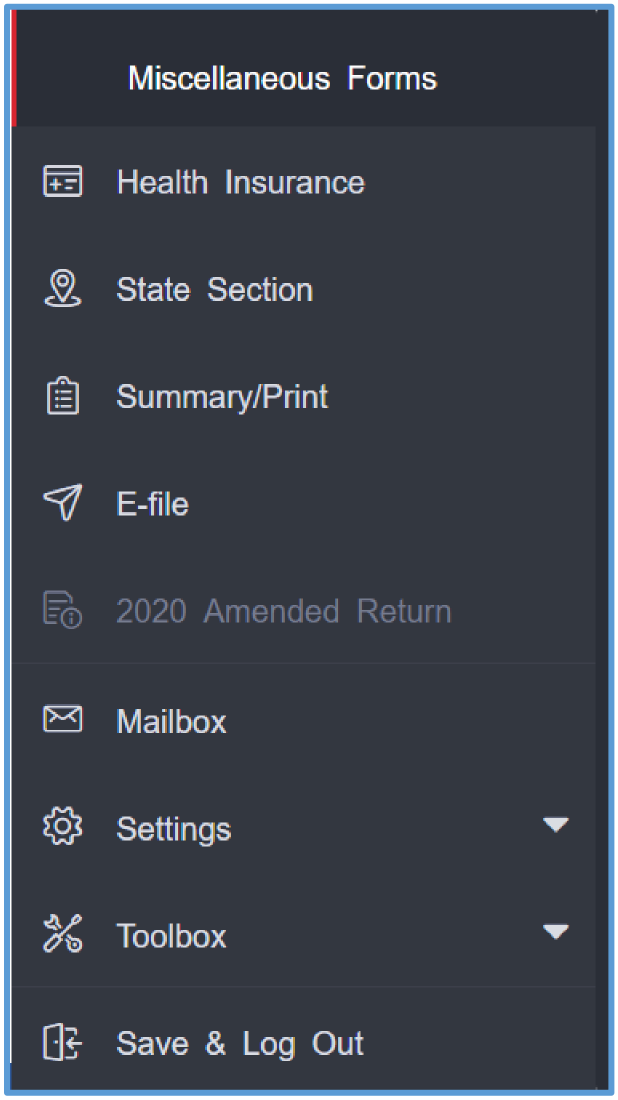
3. Select **CONTINUE** to use Quick File or **I don't know which forms I need** to skip loading forms.

4. If you selected that you want to use Quick File, select the forms you need in the return.

TaxSlayer FSA allows the taxpayer to choose either **Guide Me** or **Enter Myself** just as in TaxSlayer Pro Online. The taxpayer can prepare the return using either method.

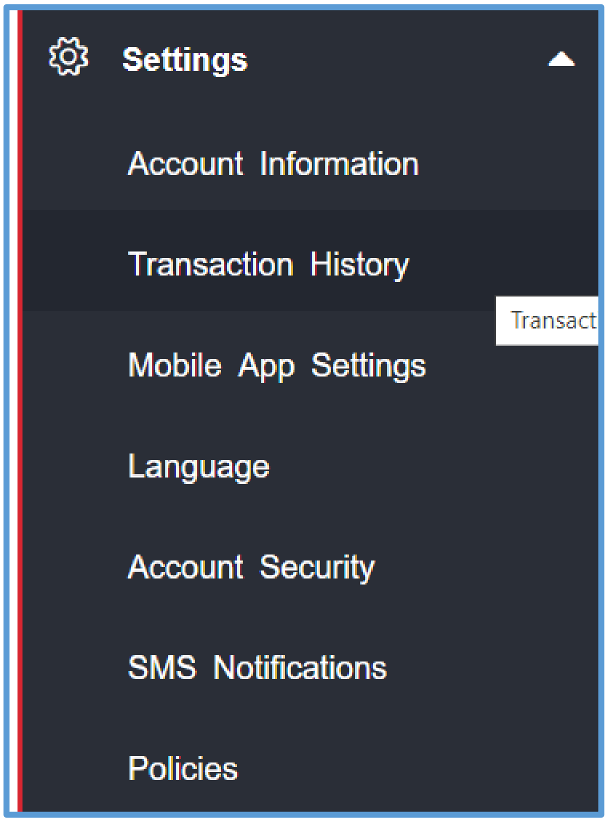
Preparing the Return in Spanish

If the taxpayer needs to prepare the return using Spanish and the user did not select Spanish from the Welcome page, you can change the language using the following steps from the left navigation panel:



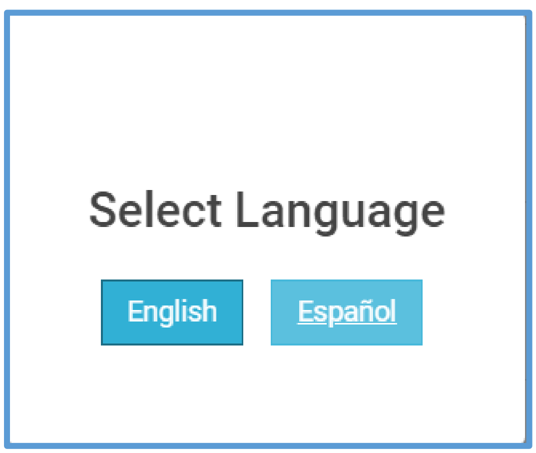
1. Click **Settings** to expand the section.

TaxSlayer FSA displays the **Settings** options:



2. Click **Language**.

TaxSlayer Pro Online displays the **Select Language** pop-up window:



3. Click **Español** to change the language to Spanish.

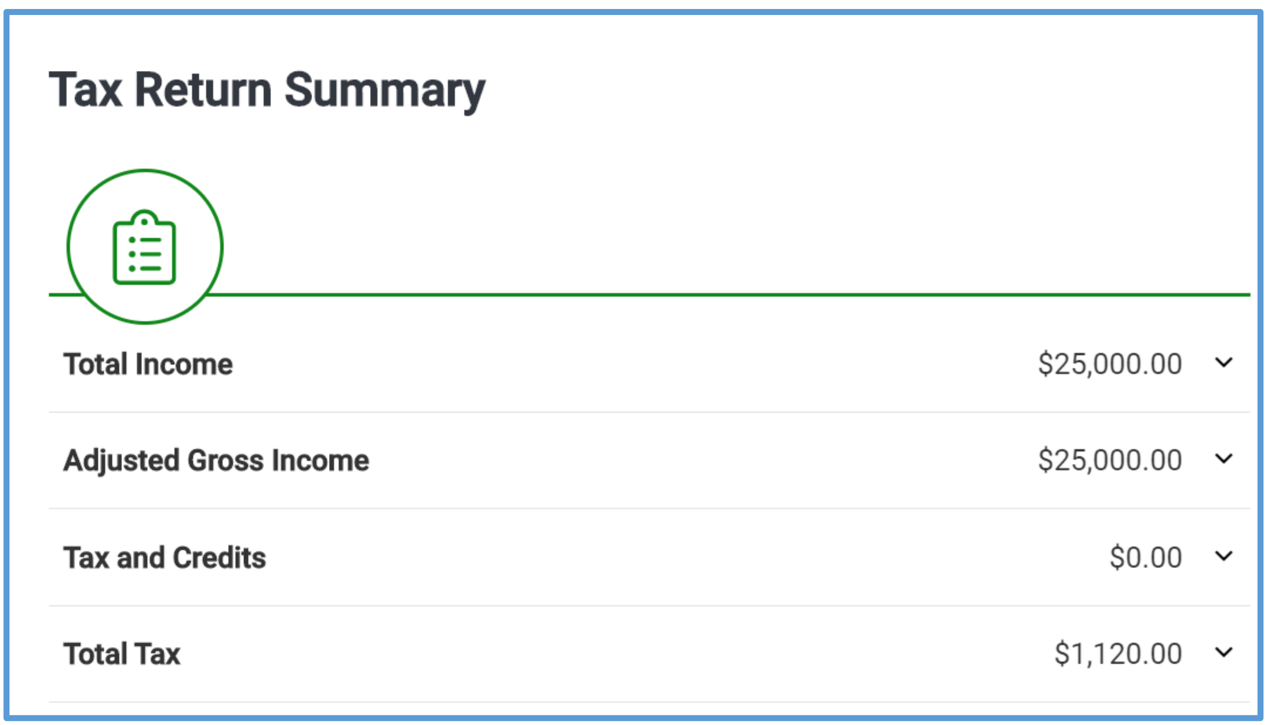
TaxSlayer FSA displays Spanish on-screen and in IRS-available forms:

Differences in TaxSlayer Pro Online and TaxSlayer FSA

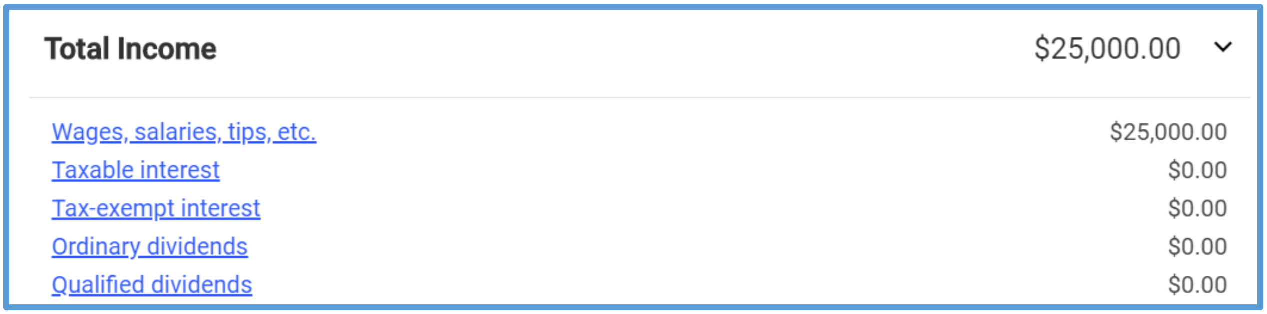
When the taxpayer works through FSA, you will see some differences in the two programs.

Summary/Print Page

TaxSlayer FSA displays only the Summary View display on the **Summary/Print** page. Taxpayers cannot view the 1040 View.



The taxpayer can click a heading to expand the section:



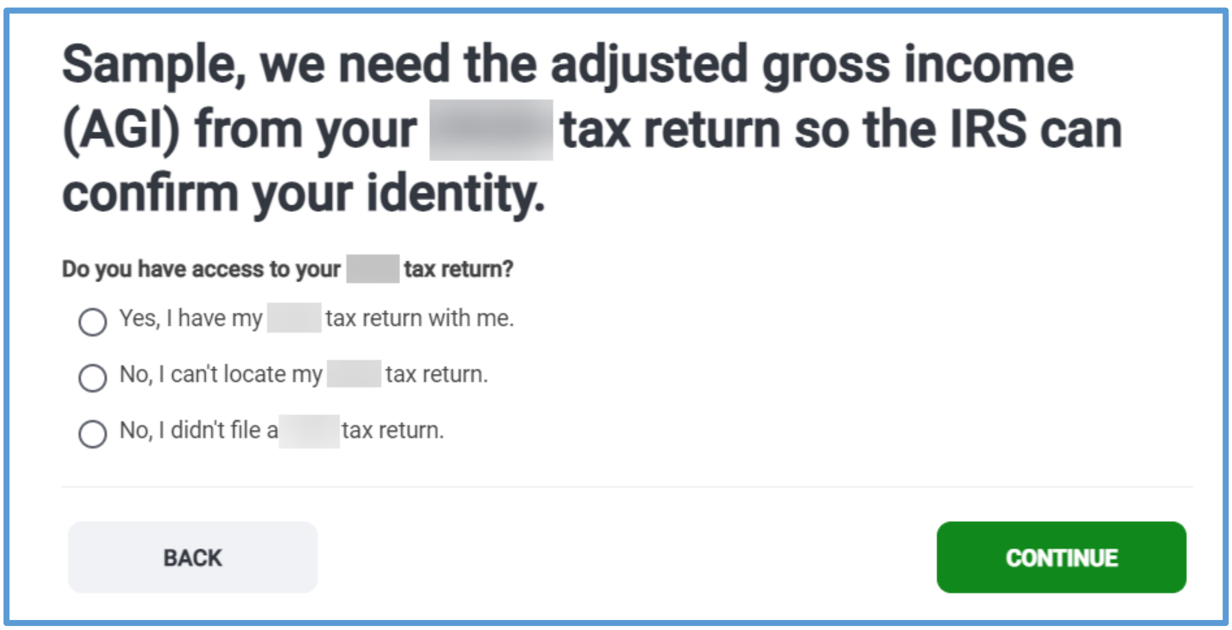
Click the line to navigate to that section in the return.

AGI

With TaxSlayer FSA, the AGI is limited to a maximum AGI, which is evaluated each year. If the tax return exceeds the AGI limits, FSA prompts the taxpayer to contact the VITA/TCE site for additional tax preparation and electronic filing options.

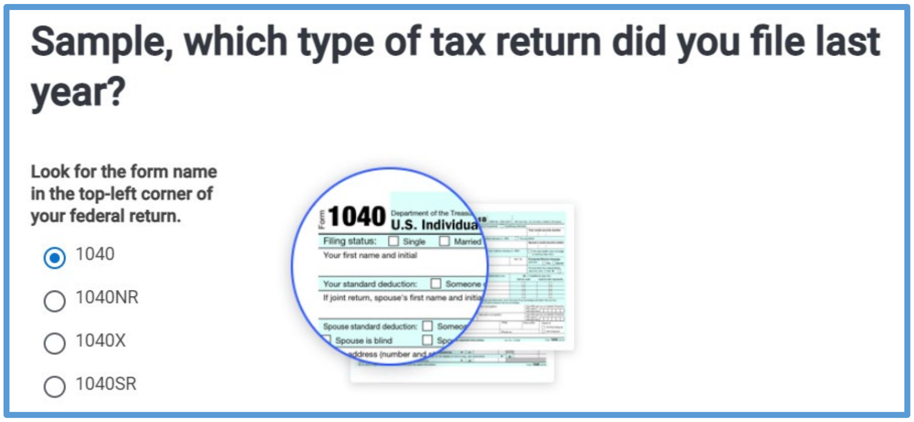
E-file

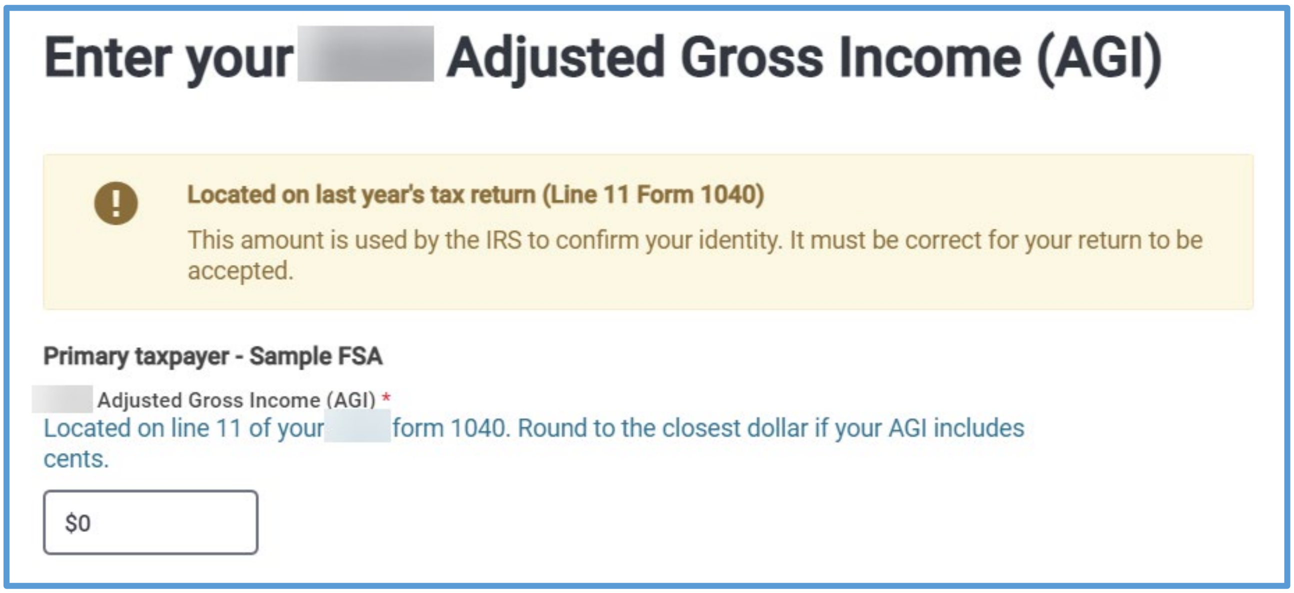
With TaxSlayer FSA, the taxpayer e-files his or her own return. TaxSlayer FSA asks for the taxpayer's prior year AGI:



If the taxpayer does not have access to the previous year's return, or did not file a previous year's return, make the appropriate selection. TaxSlayer FSA provides additional assistance..

If the taxpayer does have the previous year’s AGI, TaxSlayer FSA walks the taxpayer through entering the information from that return:

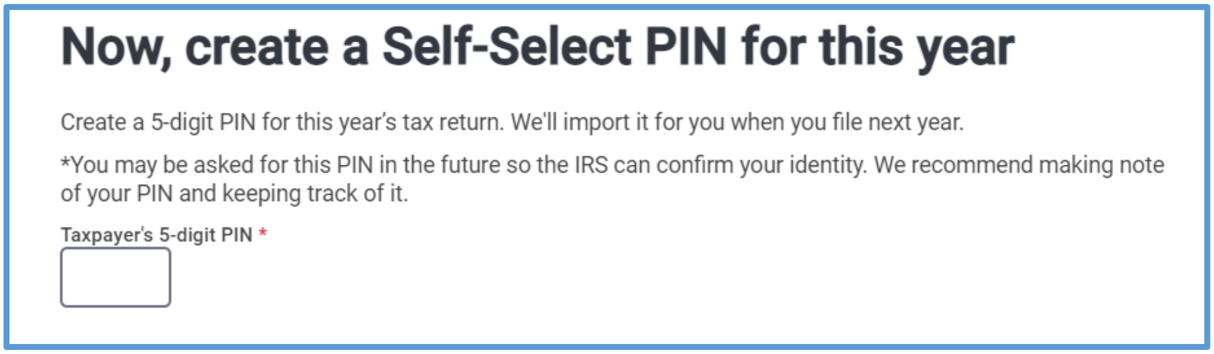




Taxpayer PIN

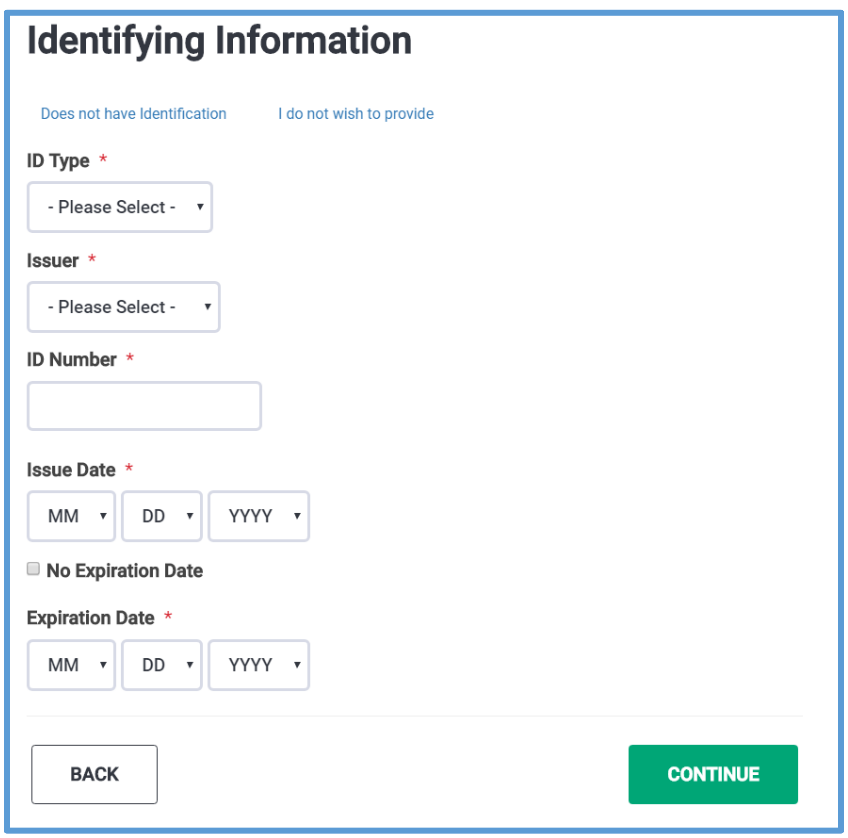
With TaxSlayer FSA, the taxpayer creates his or her own PIN to e-file the return. The taxpayer can use any 5-digit number for the PIN.

Note: Your 5-digit PIN cannot begin with zero (0).



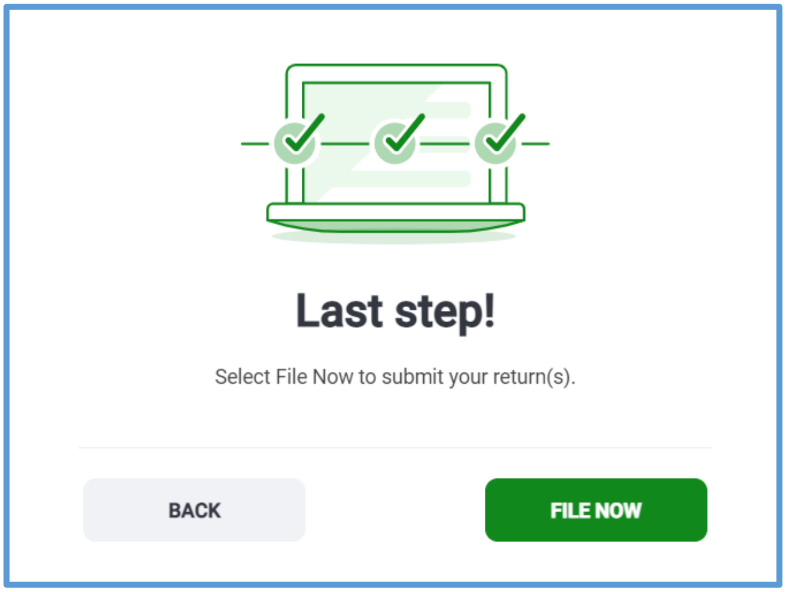
State Information

Some states request the taxpayer's ID information. If so, TaxSlayer FSA walks the taxpayer through entering the information.



Submit Return

Click **File Now**, as shown below:

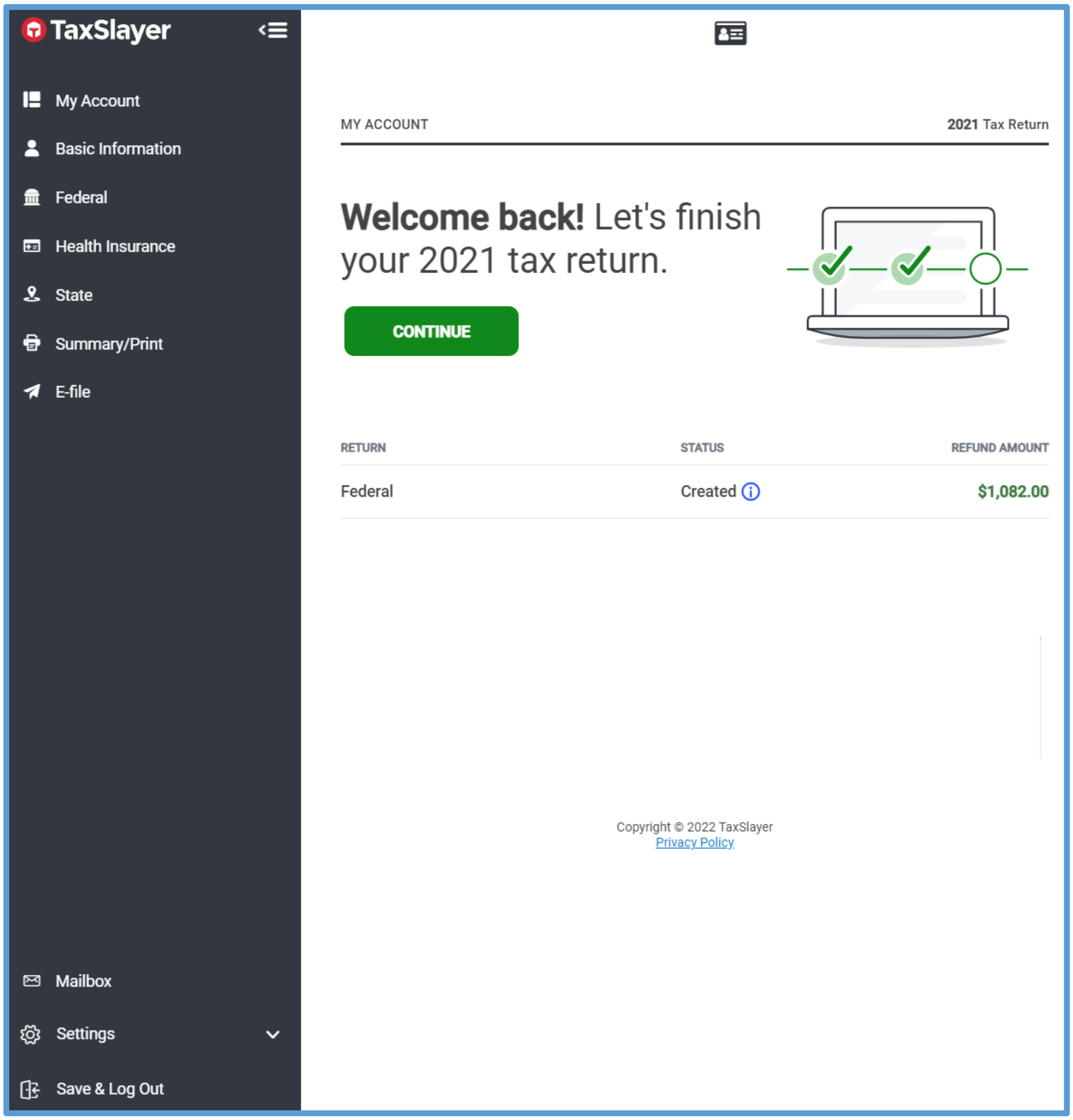


Payment

Taxpayers do not need to pay when preparing a return though TaxSlayer FSA. If TaxSlayer asks the client to pay, the taxpayer did not start from the appropriate TaxSlayer FSA URL. He or she will need to deactivate the return and start from the correct TaxSlayer FSA URL provided by your site. If the taxpayer needs to deactivate the return, direct the client to use the following steps:

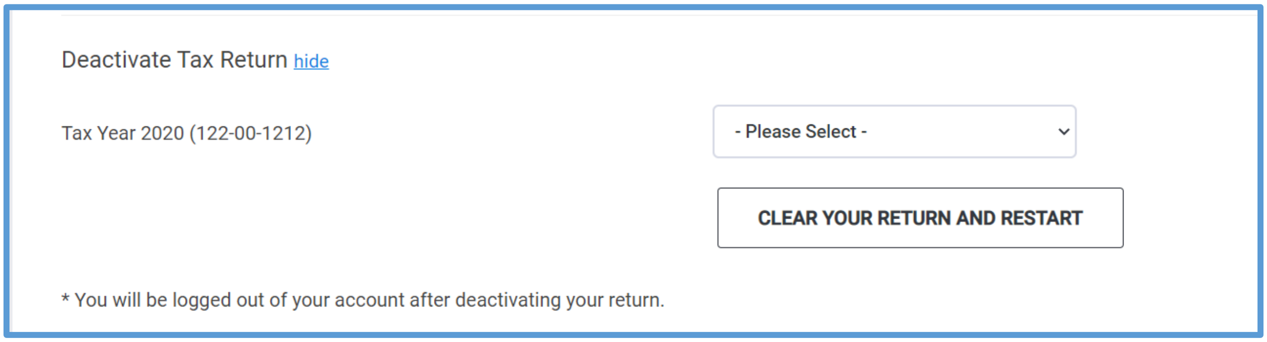
1. Click **My Account** in the left navigation panel.

TaxSlayer FSA displays the **My Account** page:



2. Click **Settings** on the left navigation panel. to expand the section.
3. Click **Transaction History**.

TaxSlayer FSA displays the **Transaction History** page:



4. Select the appropriate option from the **Tax Year 20XX** drop-down list.
5. Click **CLEAR YOUR RETURN AND RESTART**.

TaxSlayer FSA clears the return and logs the taxpayer out of the FSA program.

6. Ensure that the taxpayer uses the correct URL and restarts the return using the same credentials used earlier.

Summary

You should now be able to:

- Define the TaxSlayer FSA program.
- Set up the TaxSlayer FSA program at your site.
- Guide taxpayers to complete a return in TaxSlayer FSA.
- List and describe the differences in TaxSlayer Pro Online and TaxSlayer FSA.
- Deactivate a TaxSlayer FSA return if opened using the wrong URL.

To see a video of what you just learned, go to TaxSlayer FSA Program. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Scanned Documents

After completing this lesson, you should be able to:

- Define the Scanned Document program.
- Set up Scanned Documents in security templates.
- Upload scanned documents to a return.
- Access scanned documents to prepare a return.
- Delete scanned documents from a return.

What is the Scanned Document Program?

The Scanned Document program allows volunteers to upload scanned documents into TaxSlayer for storage. A certified volunteer can then access those documents later to prepare the return.

Benefits

The Scanned Document program gives the following benefits:

- The client keeps all original documents.
- TaxSlayer securely stores all documents used in tax preparation.
- The volunteer can prepare the return remotely.

Overview

Each site provides their own scanner and any scanning software. Ensure that you have a security role available that allows users to access scanned documents.

When you upload scanned documents into a return, use the appropriate return tag to denote that the return contains scanned documents.

Setting up Scanned Documents

The office administrator can create security roles to allow users to access or delete scanned documents.

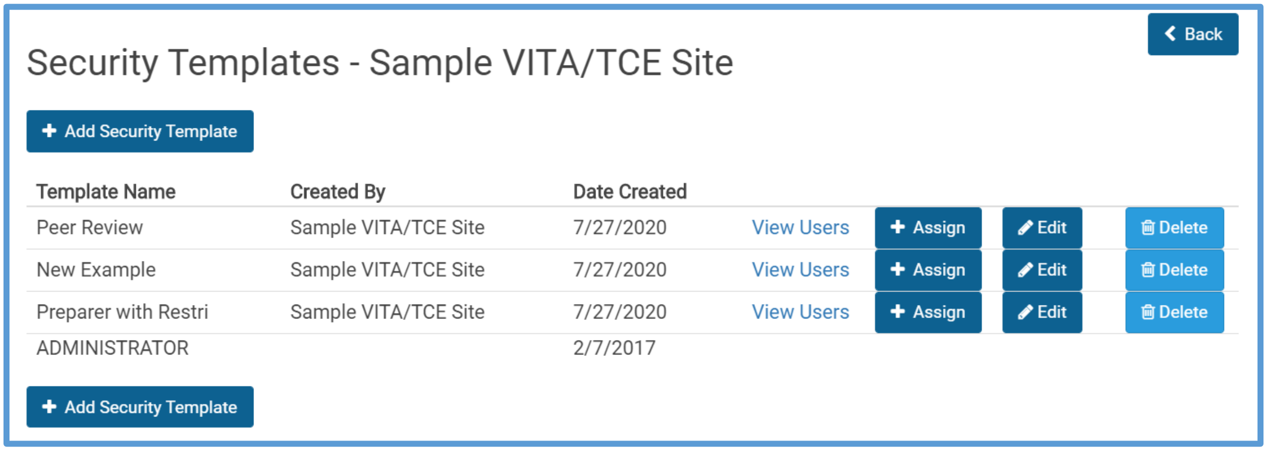
TIP: All security roles assigned by TaxSlayer will automatically enable the Scanned Document feature.

Set up a Security Role

To add a security role for scanned documents, use the following steps from the **Configuration Menu**:

1. Click the **Security Roles** line.

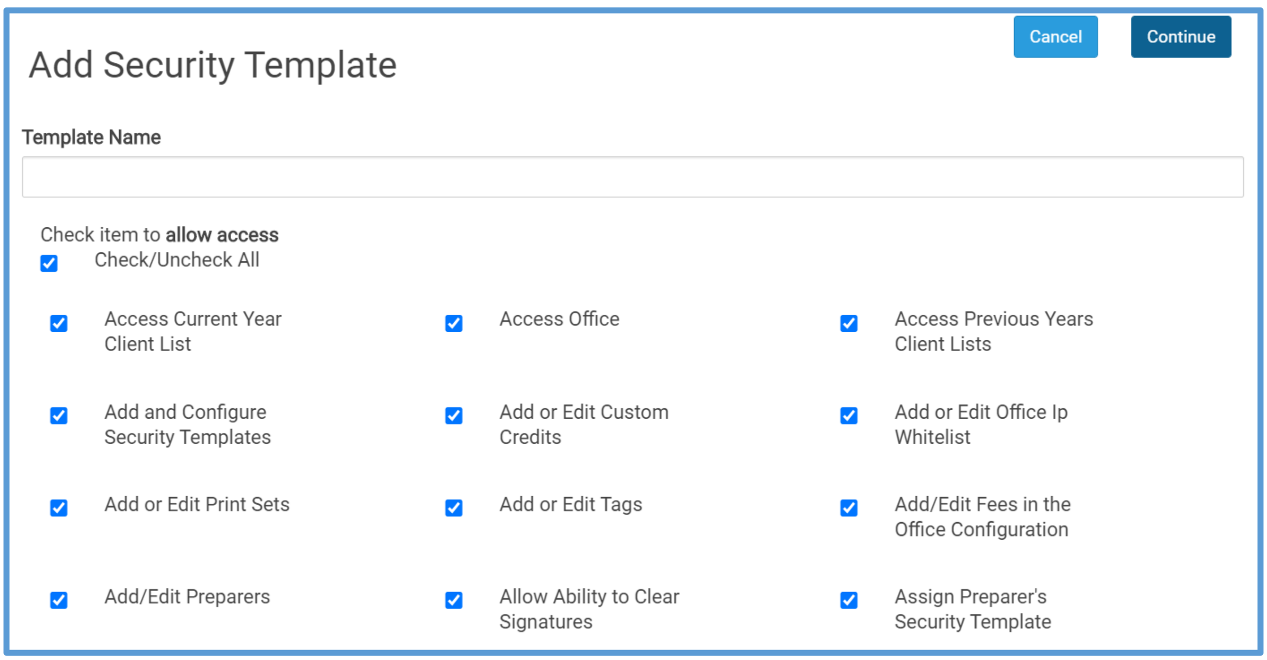
TaxSlayer Pro Online displays the **Security Roles** page:



2. Click **Add Security Role**.

Tip: You can also add Scanned documents to an existing security role by clicking the **Edit** button for that template.

TaxSlayer Pro Online displays the **Add Security Role** page:



3. Type a descriptive name for the security template in the **Template Name** box.
4. Select the **Scanned Documents** check box to allow the user to access scanned documents in a return.

5. Select the **Delete Scanned Documents** check box to allow the user to delete scanned documents.

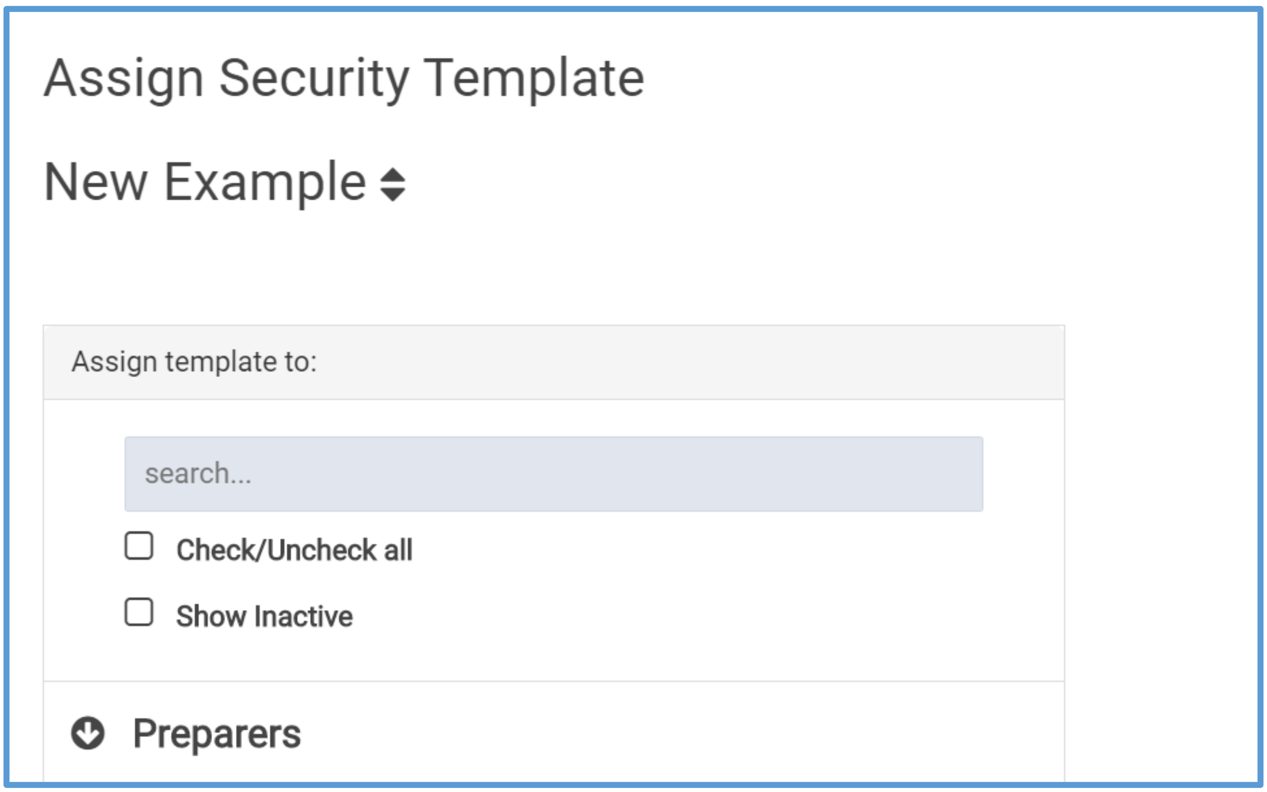
Note: TaxSlayer Pro Online defaults a new security role to allow all features. Select the **Check/Uncheck All** check box to clear all check boxes.

6. Select any other check boxes you want to allow for this security template.
7. Click **Continue**.

After you add the security role, assign it to users. To assign a security role, use the following steps from the **Security Roles** page:

1. Click **Assign** on the line for the security role you want to assign.

TaxSlayer Pro Online displays the **Assign Security Role** page:

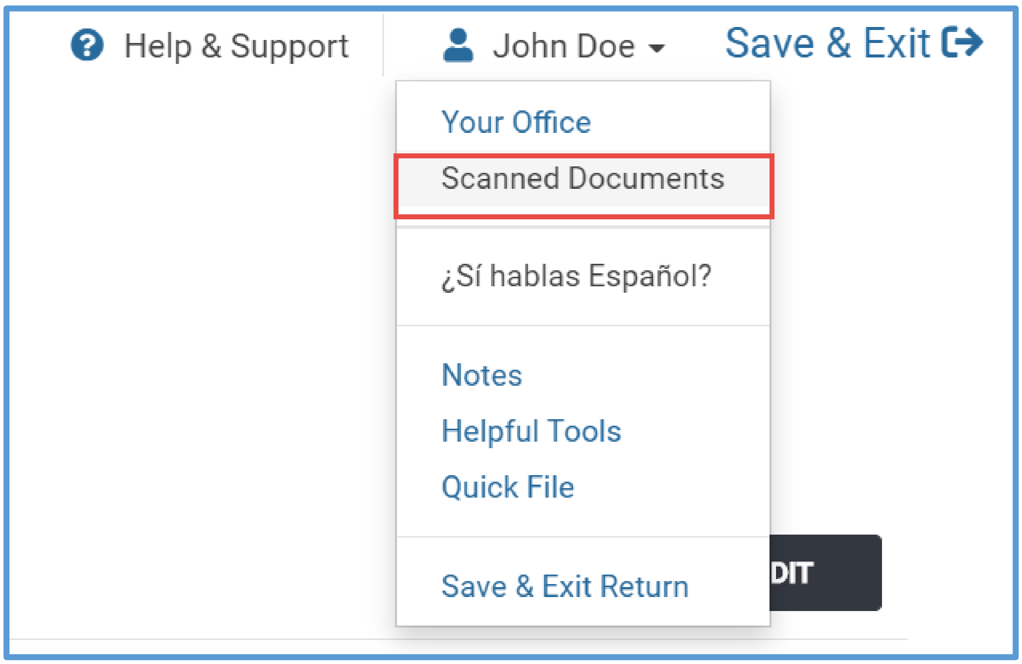


2. Select the check box for the user(s) you want to allow access to scanned documents.
3. Click **Continue**.

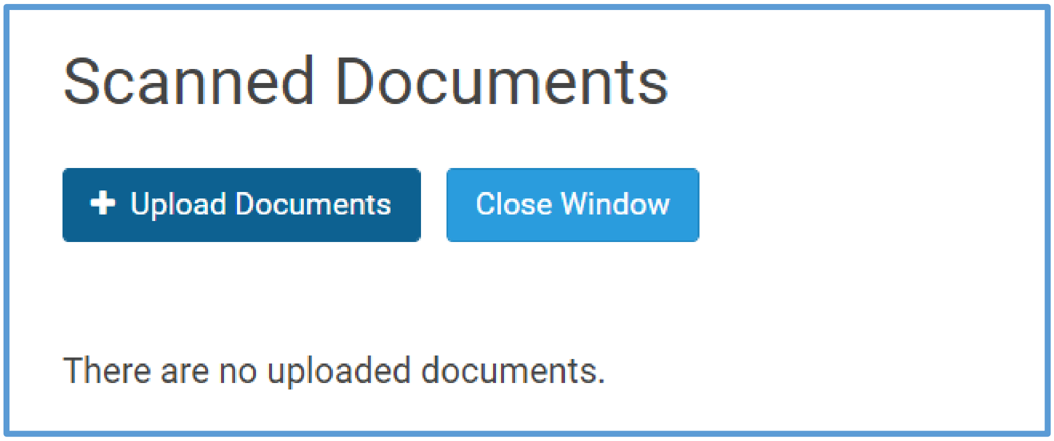
Adding Scanned Documents to a Return

Any user who has the appropriate permissions in an assigned security role can add scanned documents to a return. To add scanned documents to a return, use the following steps:

1. Start a new return or open an existing return.
2. Complete the taxpayer's filing status and personal information based on IRS Publication 13614.
3. Select **Scanned Documents** from the **taxpayer** drop-down list, as shown below:

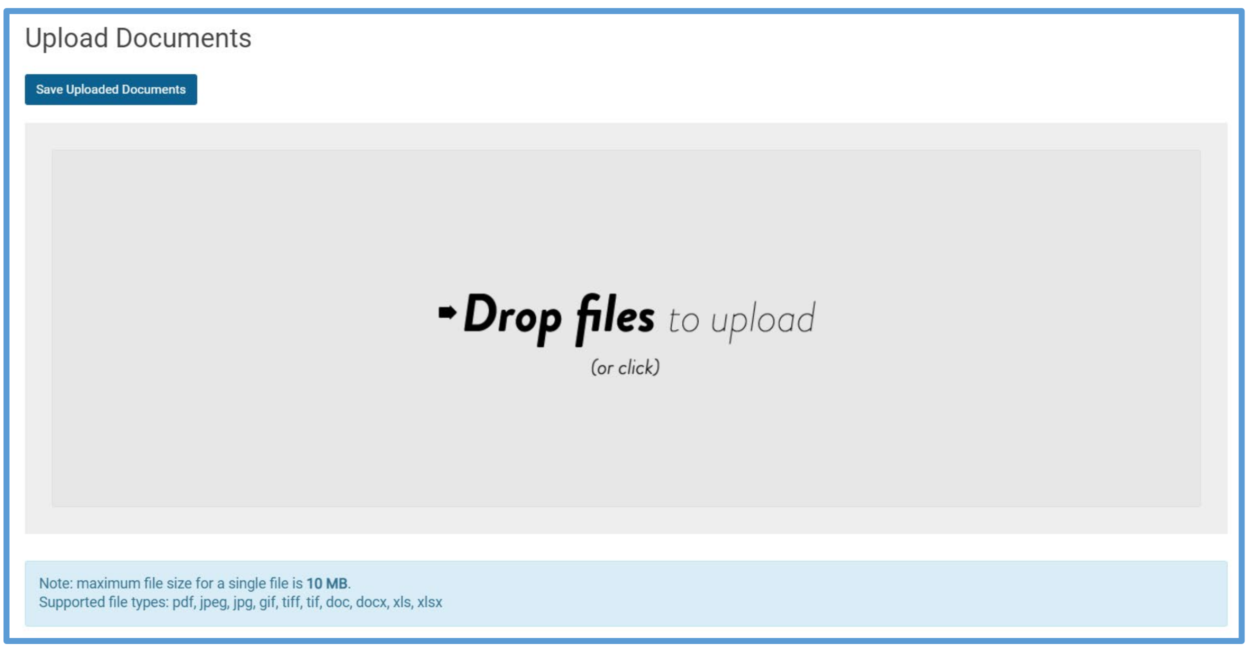


TaxSlayer Pro Online displays the **Upload Documents** page in a new browser window:



4. Click **Upload Documents**.

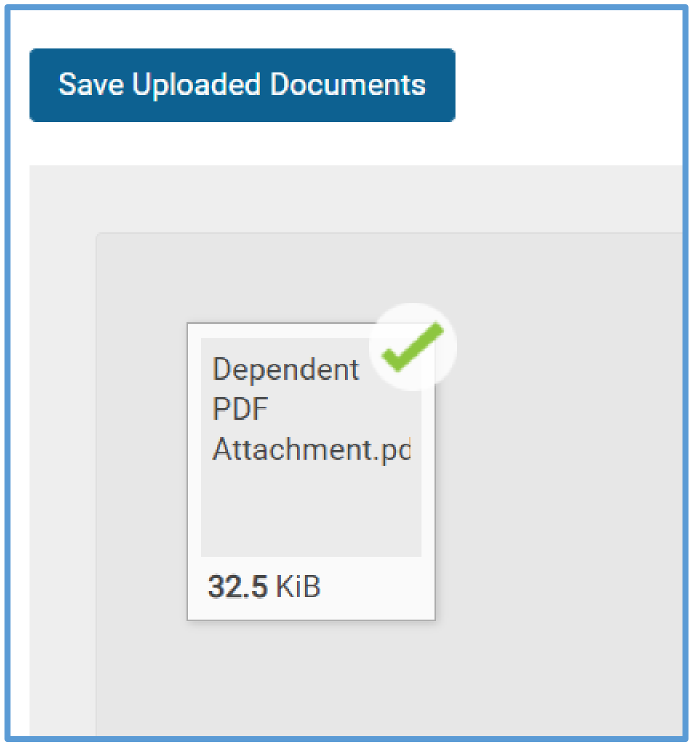
TaxSlayer Pro Online displays the **Upload Documents** page:



5. Do one of the following:
    a. Drag a PDF from your desktop and drop it into the **Drop files** box.
    b. Click the **Drop files** box, navigate to the PDF, and upload it using the Windows upload process.

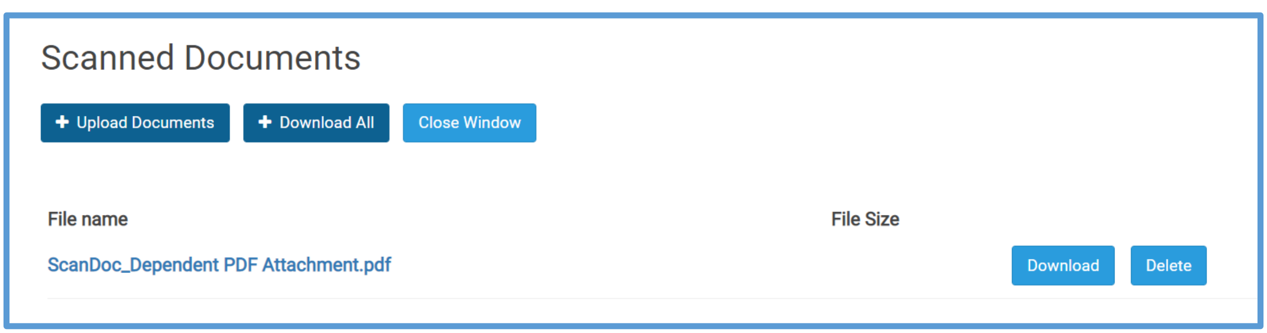
Note: You cannot upload single documents larger than 10 MB or a total of more than 25 MB.

TaxSlayer Pro Online displays the file in the box:



6. Continue using the same steps to add as many files as you need.
7. Click **Save Uploaded Documents**.

TaxSlayer Pro Online displays the **Scanned Documents** page with the PDFs listed:



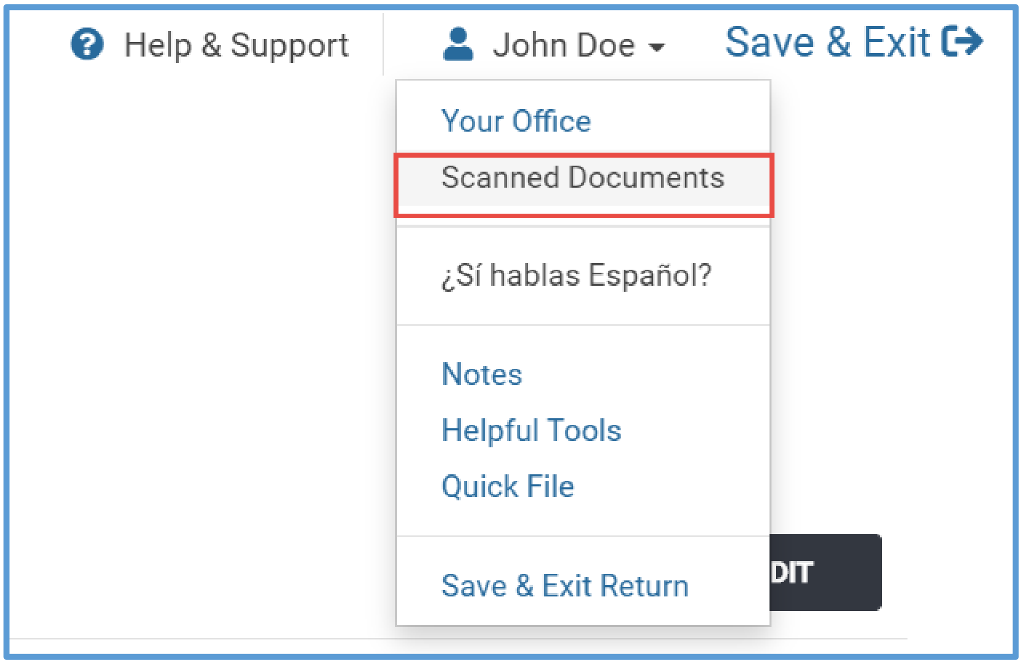
8. Click **Close Window**.

TaxSlayer Pro Online closes the window and displays the return.

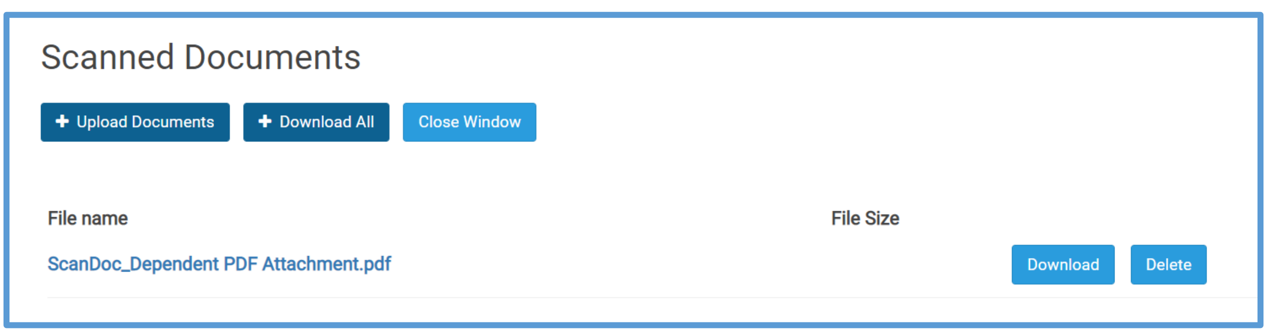
Accessing Scanned Documents

When the user is ready to prepare the return, use the following steps from the open return:

1. Select **Scanned Documents** from the **Taxpayer** drop-down list, as shown below:



TaxSlayer Pro Online displays the **Upload Documents** page in a new browser window:



2. Click the name of the document to open it.

TaxSlayer Pro Online displays the **View Document** window with the PDF:

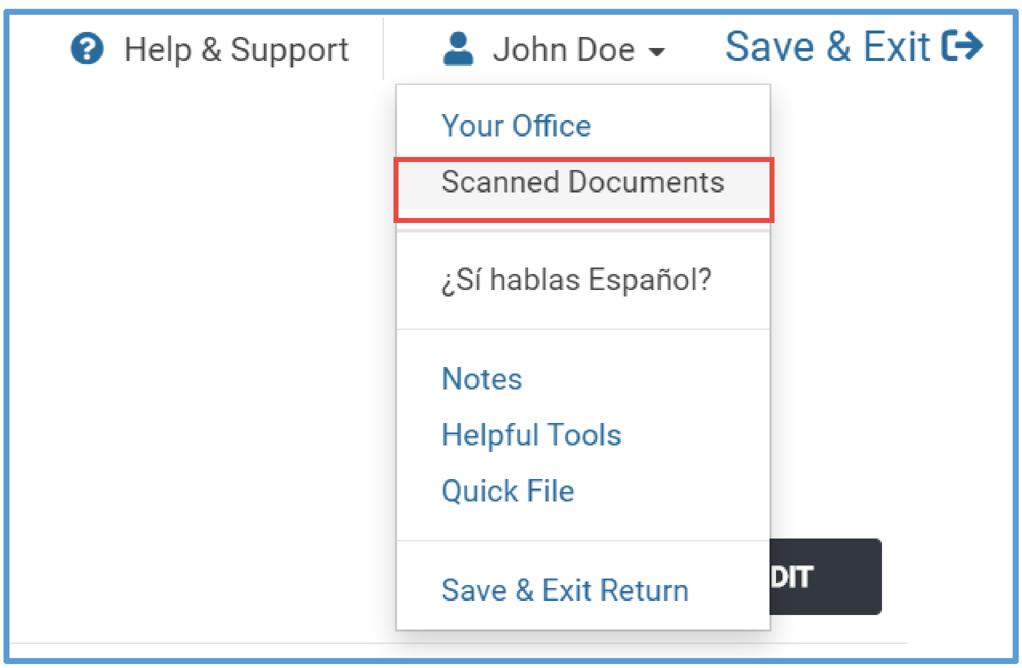
3. Use the document to prepare the taxpayer's return.
4. Click **Go Back**.
5. Click each document as needed and use it to prepare the taxpayer's return.

Note: You are not required to have two monitors to use Scanned Documents, but it is helpful to do so when preparing a return using Scanned Documents.

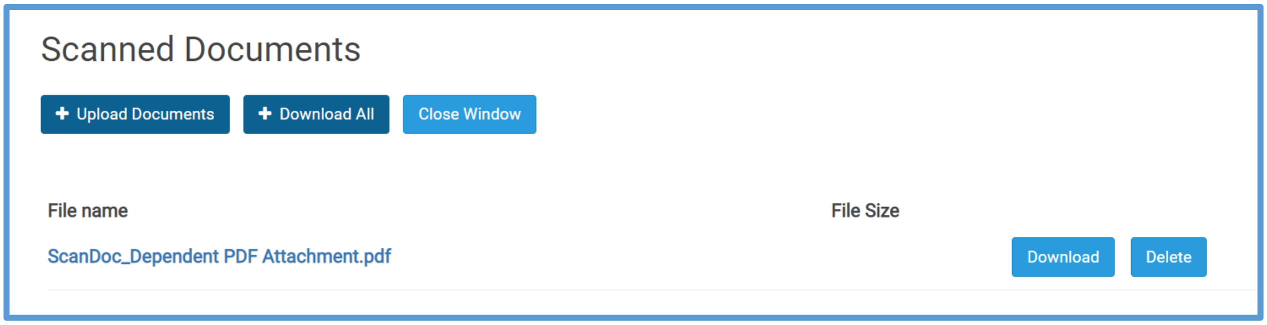
Deleting Scanned Documents

After you use the scanned documents to prepare the return, you can delete the scanned documents. To do so, use the following steps from the open return:

1. Select **Scanned Documents** from the **Taxpayer** drop-down list, as shown below:



TaxSlayer Pro Online displays the **Upload Documents** page in a new browser window:



2. Click **Delete** on the line for the PDF you want to delete.

TaxSlayer Pro Online deletes the document.

3. When you finish deleting the documents, click **Close Window**.

Note: TaxSlayer will automatically delete all scanned documents in December of each tax year.

Summary

You should now be able to:

- Define the Scanned Document program.
- Set up Scanned Documents in security templates.
- Set up a return tag for Scanned Documents.
- Upload scanned documents to a return.
- Access scanned documents to prepare a return.
- Delete scanned documents from a return.

To see a video of what you just learned, go to Scanned Documents. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Using the Customer Portal

After completing this lesson, you should be able to:

- Define the purpose of the Customer Portal.
- Set up preparer access to the Customer Portal.
- Send a Customer Portal invitation to a taxpayer.
- Resend a Customer Portal link to a taxpayer.
- Access Customer Portal files uploaded by the taxpayer.
- Message/chat with a taxpayer through the Customer Portal.
- Make tax documents available via the taxpayer's Customer Portal.
- Guide a taxpayer through creating a Customer Portal account.
- Guide a taxpayer through uploading or reviewing files in the Customer Portal.
- Guide a taxpayer to sign a tax document through the Customer Portal.
- Guide a taxpayer to view the return status through the Customer Portal.

Purpose of the Customer Portal

The Customer Portal is a feature available to all VITA/TCE sites with a Taxpayer Pro Online license. It integrates with Scanned Documents to allow taxpayers to send, receive, and review documents. The administrator controls preparer access to the Customer Portal through security templates.

The Customer Portal allows you to do the following:

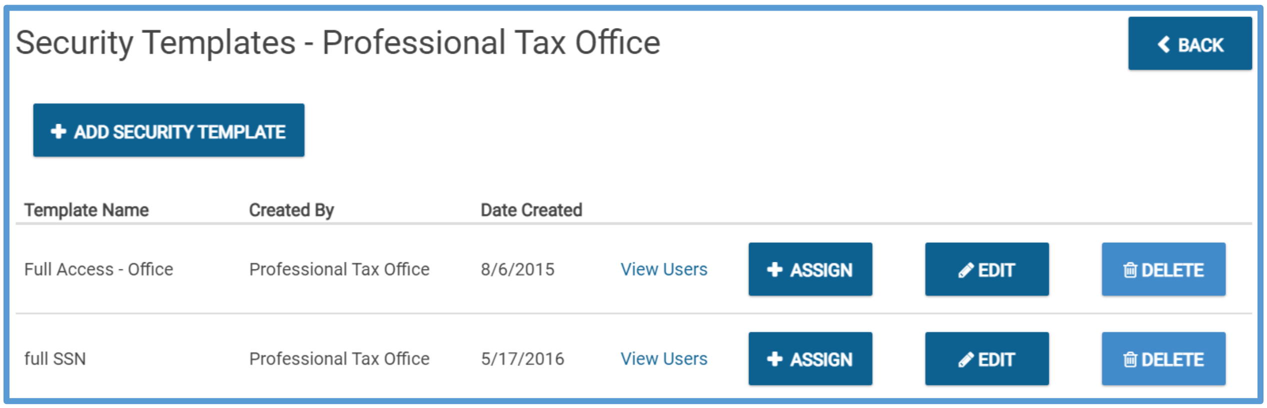
- Request that the taxpayer upload electronic documents.
- Share a copy of the return for Quality Review.
- Request that the taxpayer sign documents.
- Share a copy of the signed return.
- Open a communication channel with the taxpayer through chat/message.
- Direct taxpayers to a quick way to check IRS status of a return.

Setting Up Customer Portal Access

The site administrator controls access to the Customer Portal through security roles. To allow preparers to access to the Customer Portal, use the following steps from the **Configuration Menu**:

1. Click the **Security Roles** line.

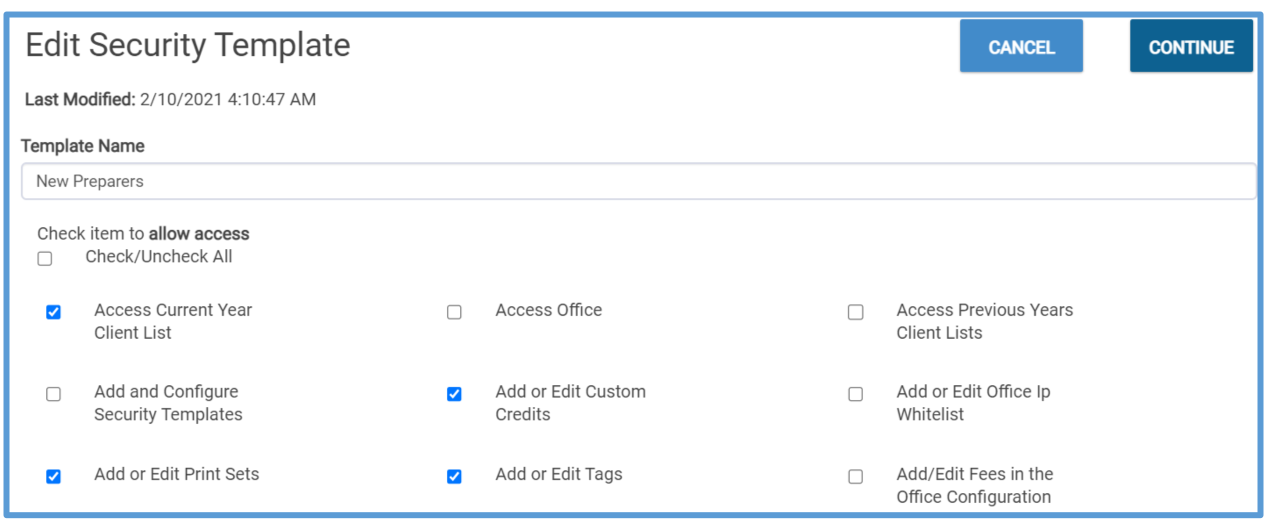
TaxSlayer Pro Online displays the **Security Roles** page:



1. Click **EDIT** for the security role to which you want to add Customer Portal access.

TIP: You can also add Customer Portal access when creating a new security role. See the *Setting up Security Templates* lesson for full instructions on setting up and editing security roles.

TaxSlayer Pro Online displays the **Edit Security Role** page:



2. Select the **Customer Portal** check box.

Note: If the security role does not allow Scanned Documents access, select the check box(es) for that feature. See the *Scanned Document Program* lesson for full instructions on setting up access to Scanned Documents.

3. Click **CONTINUE**.

Preparers with that security role can now access the Customer Portal.

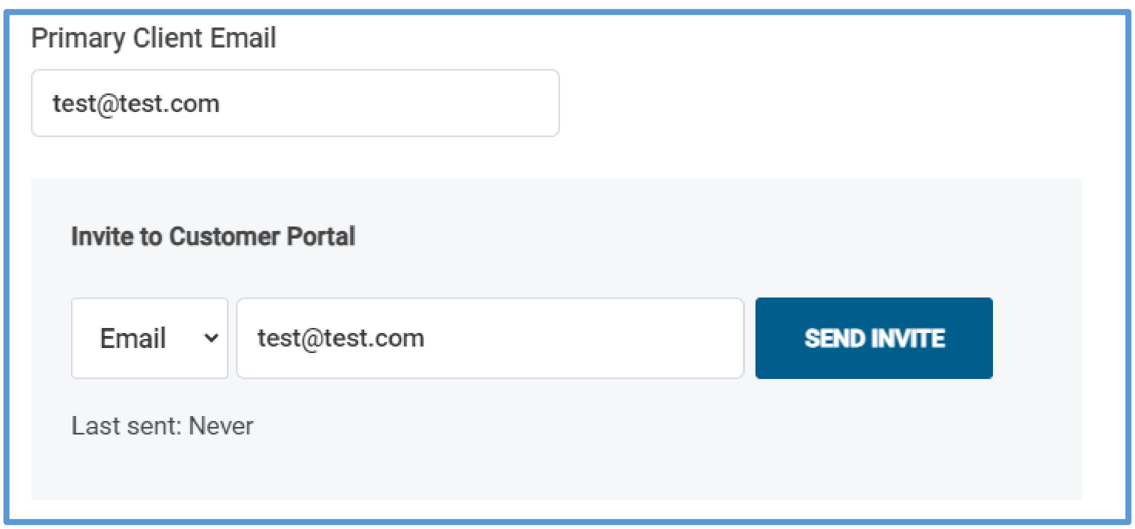
NOTE: Security roles assigned by TaxSlayer will have both Customer Portal and Scanned Documents enabled.

Inviting Taxpayers to the Customer Portal

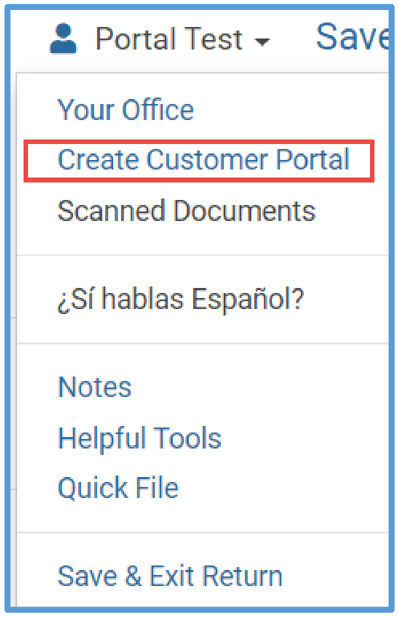
Initial Invitation

You can invite the taxpayer to the Customer Portal beginning with the Personal Information page or at any point after you complete the taxpayer's Basic Information pages. To begin the invitation to the Customer Portal, use the following steps:

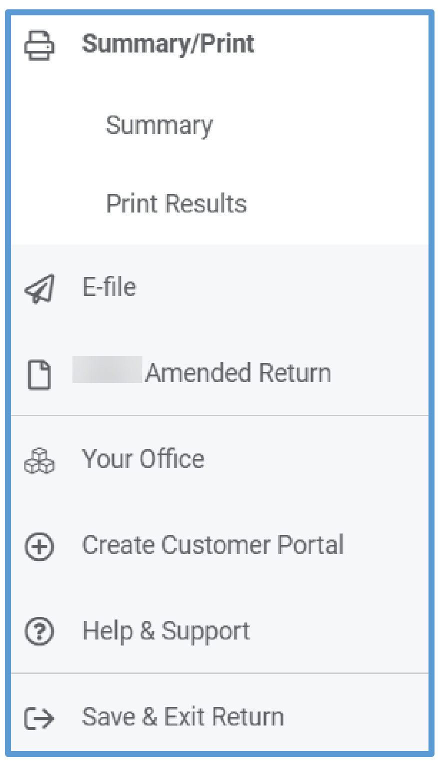
1. Do one of the following:
   a. Type the taxpayer’s e-mail address and click **SEND INVITE**.



b. Click **Create Customer Portal** from the taxpayer drop-down menu, as shown below:

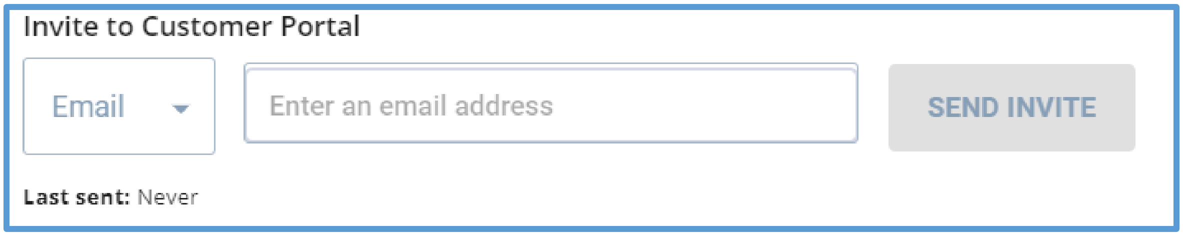


c. Click **Create Customer Portal** from the left navigation panel, as shown below:



d. Type the taxpayer's e-mail address and click **SEND INVITE** on the **Submission** page, as shown below:

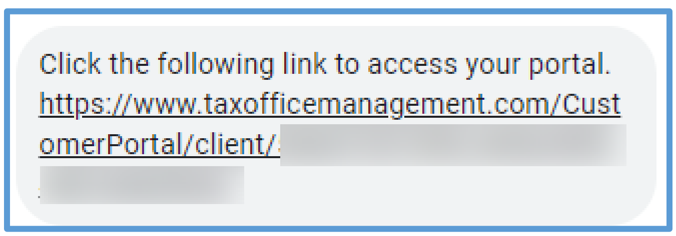
Note: Preparers can change the dropdown to **Text** to send the Customer Portal link via text instead of email.



2. Click **CONTINUE**.

TaxSlayer Pro Online displays a message that the link was sent to the taxpayer successfully.

The taxpayer receives either a text or email (as designated) with a link to create a Customer Portal account:



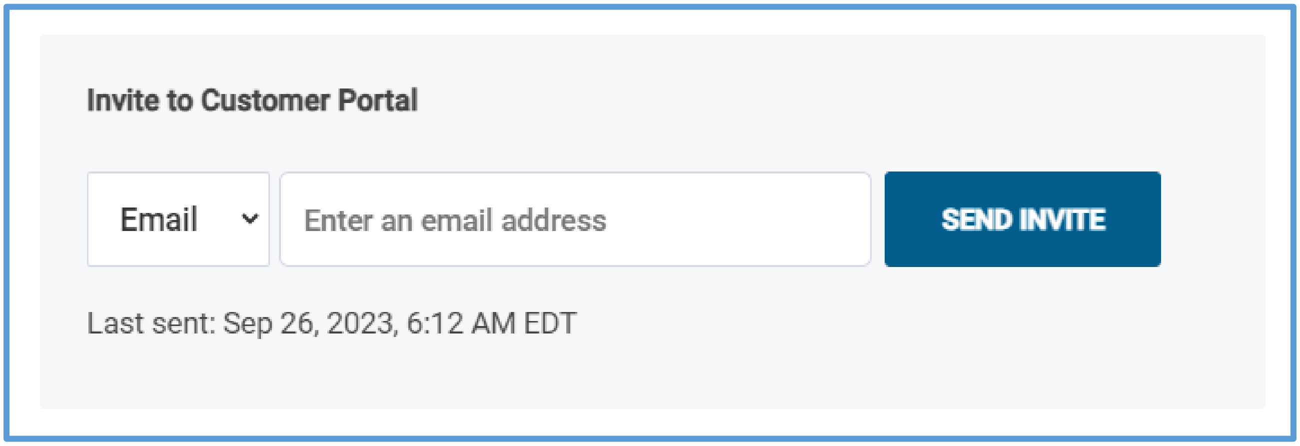
Note: Each link is unique to the taxpayer. It cannot be used to create a Customer Portal account for another taxpayer.

Resend Invitation

If the taxpayer later loses the link, you can resend it. To do so, use the following steps:

1. Click **Create Customer Portal** from either the Personal Information page, Taxpayer drop-down menu, left navigation panel, or **Submission** page.

TaxSlayer Pro Online displays the **Customer Portal Link** page with a **SEND INVITE** button and also displays a time stamp when the customer portal link was last sent:



2. Verify the phone number or email address.
3. Click **SEND INVITE**.

Working in the Customer Portal

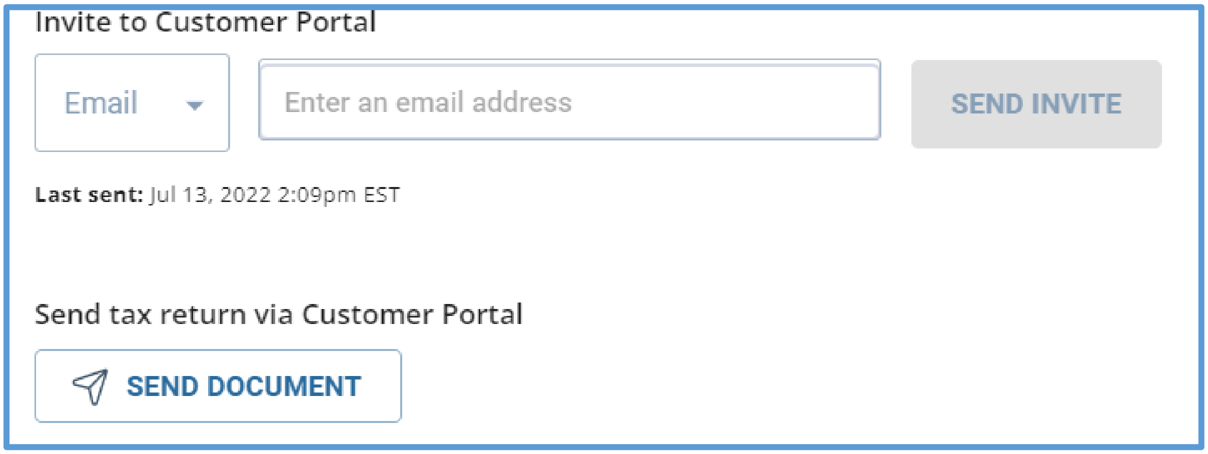
As the tax preparer, you can send tax documents to the taxpayer, access files when the taxpayer uploads them, and chat with the taxpayer. This provides a full range of communication and document sharing options when working with a taxpayer on a tax return.

Making Tax Documents Available to the Taxpayer

When you need a taxpayer to review tax documents, whether as a review before filing or after filing, you can make those documents available through Customer Portal. To do so, use the following steps:

1. Navigate through the return to the **Submission** page.

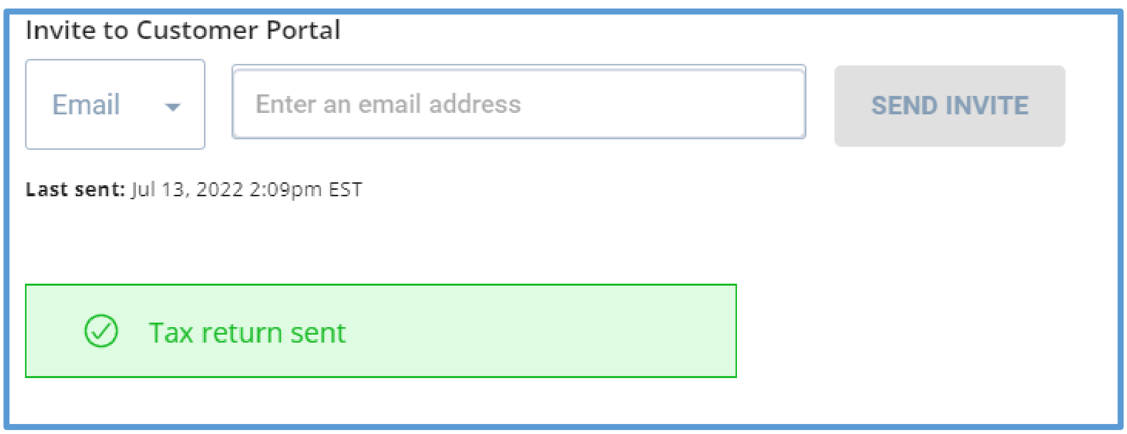
TaxSlayer Pro Online displays the **Submission** page:



2. Click **SENDDOCUMENT**.

Note: This button is only available after the taxpayer sets up their Customer Portal account.

TaxSlayer Pro Online makes the documents available and displays a message confirming that the transfer is complete:

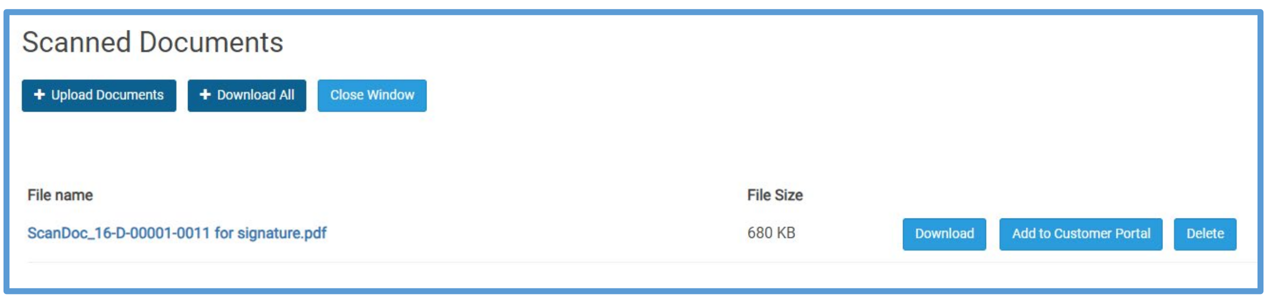


Once the taxpayer signs the document, TaxSlayer Pro Online displays the signature in the **Electronic Signature** section of the **Submission** page and uses it for necessary signatures on Form 1040, Form 8879, applicable consents, and state documents:

Making Other Documents Available to the Taxpayer

When you need to send a document that is not the tax return to the taxpayer, you can do this through the Scanned Document feature. To send a document, do the following:

1. Access Scanned Documents.
2. Upload the PDF as described in the *Scanned Documents* section.



3. Click **Add to Customer Portal.**

Note: This will make the document available to the taxpayer's client portal under the **Files Shared with Me** section. The taxpayer can view and/or print the document. They cannot electronically sign any document made available to them via Scanned Documents.

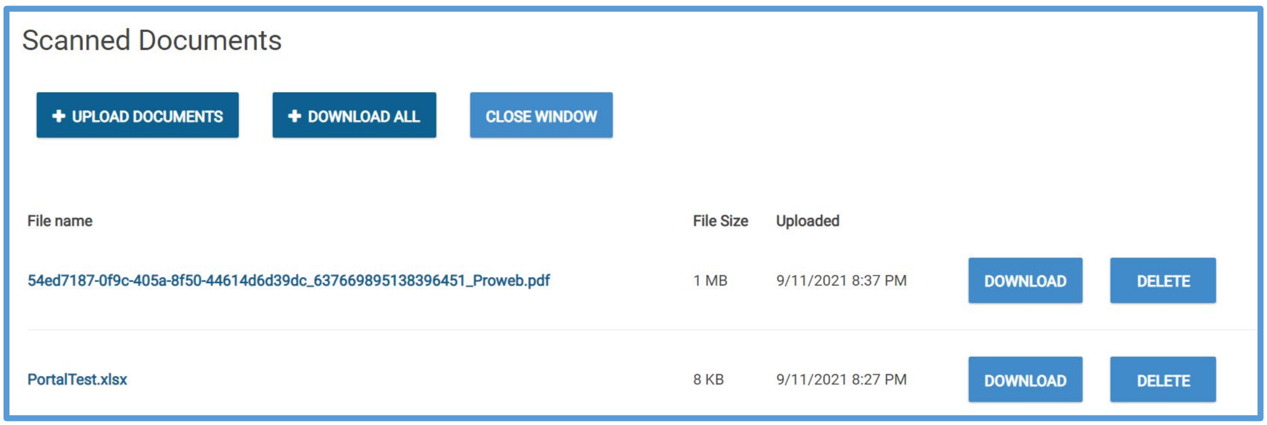
TIP: This is an alternative way of making the PDF of a prior year return available to the taxpayer in secured manner.

Accessing Documents After Taxpayer Upload

After a taxpayer uploads documents, you can access them from Scanned Documents. To do so, use the following steps:

1. Click **Scanned Documents** from the Taxpayer drop-down menu.

TaxSlayer Pro Online displays the **Scanned Documents** page, which includes any tax return documents you have made available to the taxpayer through Customer Portal and any documents the taxpayer has uploaded:



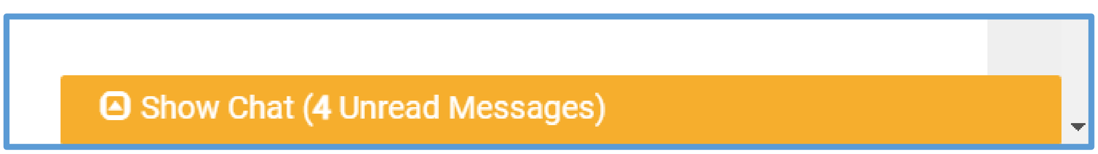
2. Download the documents as needed.

TIP: See the *Scanned Document Program* lesson for detailed information on using Scanned Documents**.**

Chat/Messaging with a Taxpayer

Taxpayers can exchange chat messages with you through the Customer Portal. To view chat messages from taxpayers, use the following steps from any page after logging in to TaxSlayer Pro Online:

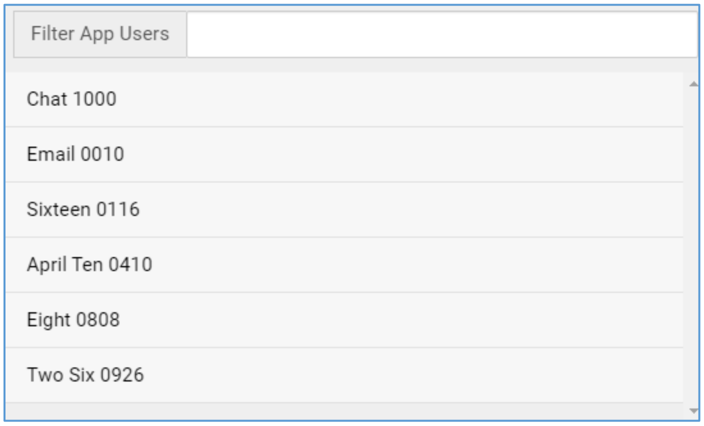
1. Find the **Show Chat** box at the lower left of the page.



Note: The chat box displays how many unread messages you have.

2. Click the box to expand it.

TaxSlayer Pro Online displays a chat window with the last name and last 4 digits of the primary taxpayer Social Security number for whom you have a tax return in progress:

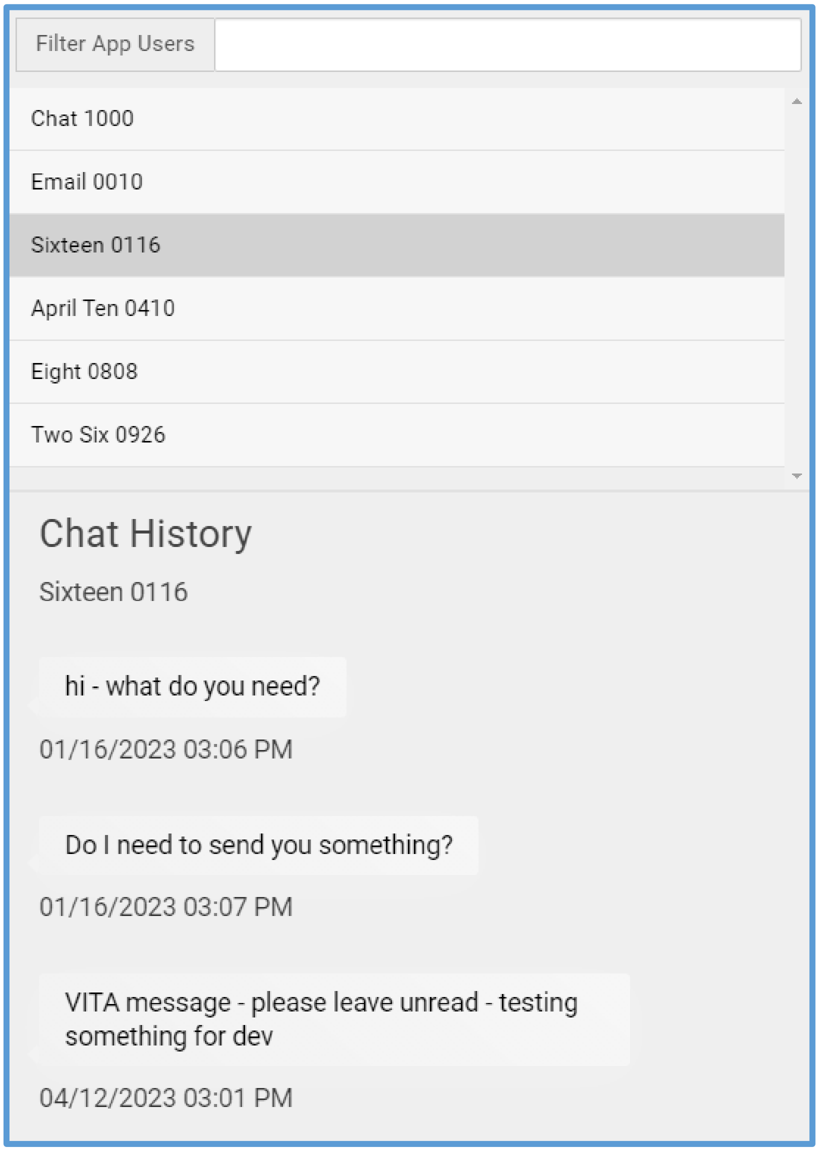


Note: If a taxpayer has sent you a message that you have not read, TaxSlayer Pro Online displays that email address in orange with the number of unread messages in bold.

3. To start a new chat to a taxpayer, click the taxpayer's last name and last 4 digits of the Social Security number.

TIP: To find a specific taxpayer in the list, begin typing the taxpayer's last name in the **Filter App Users** box.

TaxSlayer Pro Online displays the chat window with any chat history:



4. Type the message you want to send to the taxpayer in the **Enter Message** box.
5. Click **Send Message**.

TaxSlayer Pro Online sends the message to the taxpayer.

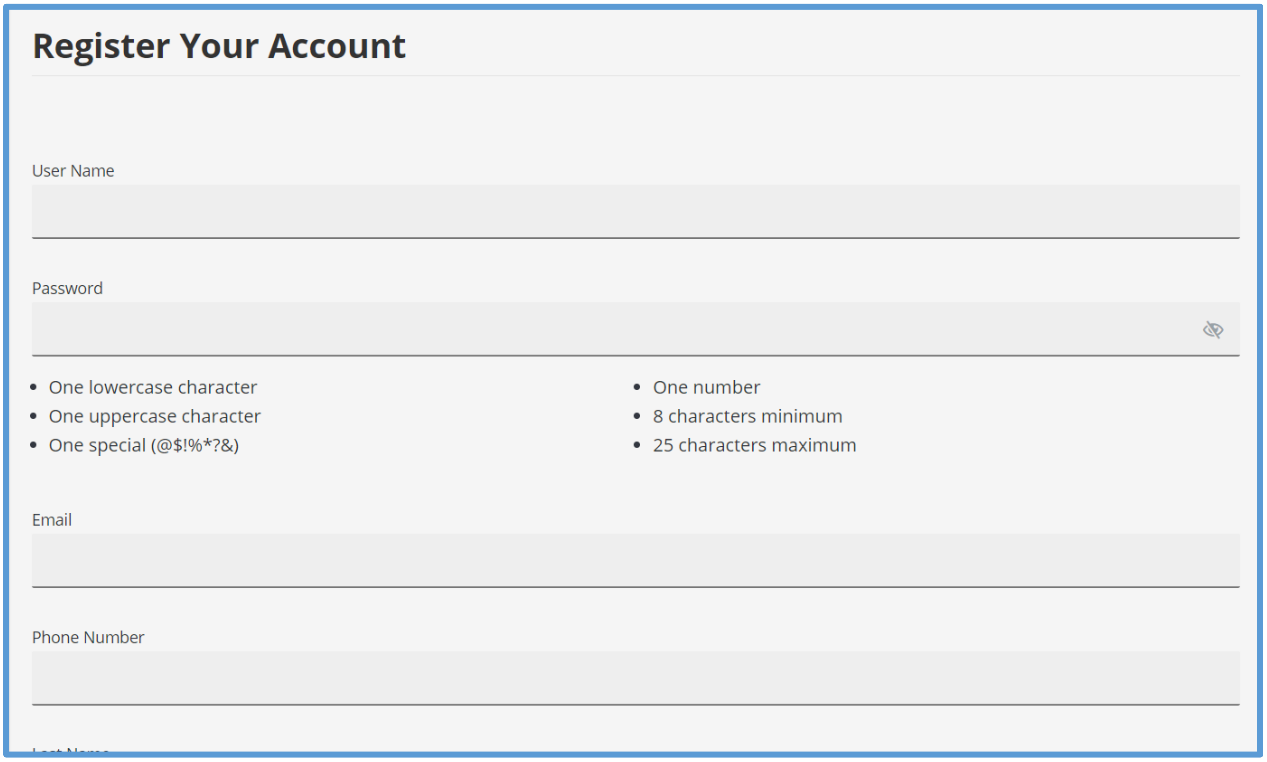
Guiding the Taxpayer in the Customer Portal

Registering for Customer Portal

When the taxpayer receives the link either through text or email, he or she needs to register before their Customer Portal account is set up. To guide the taxpayer through setting up a Customer Portal account, have the taxpayer use the following steps:

1. Click the Customer Portal link in the text or email.

Customer Portal displays the **Register Your Account** page:



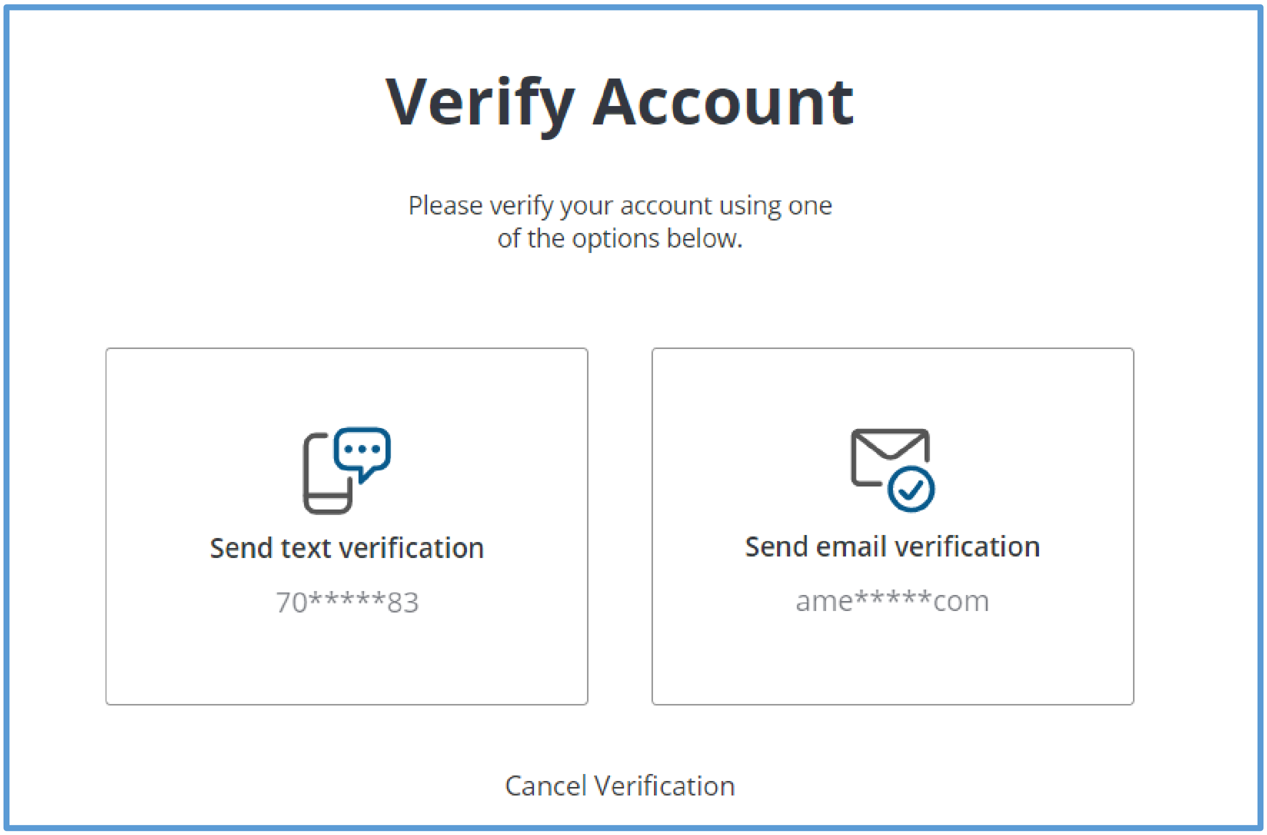
2. Type a new user name.

Note: Each user name must be unique. If the taxpayer types a user name that has been used by another taxpayer, Customer Portal displays a warning. The taxpayer should choose another user name.

3. Type a password. The password must contain at least 8 characters but not more than 25 and must contain at least one of each of the following:
    a. Lowercase character
    b. Uppercase character

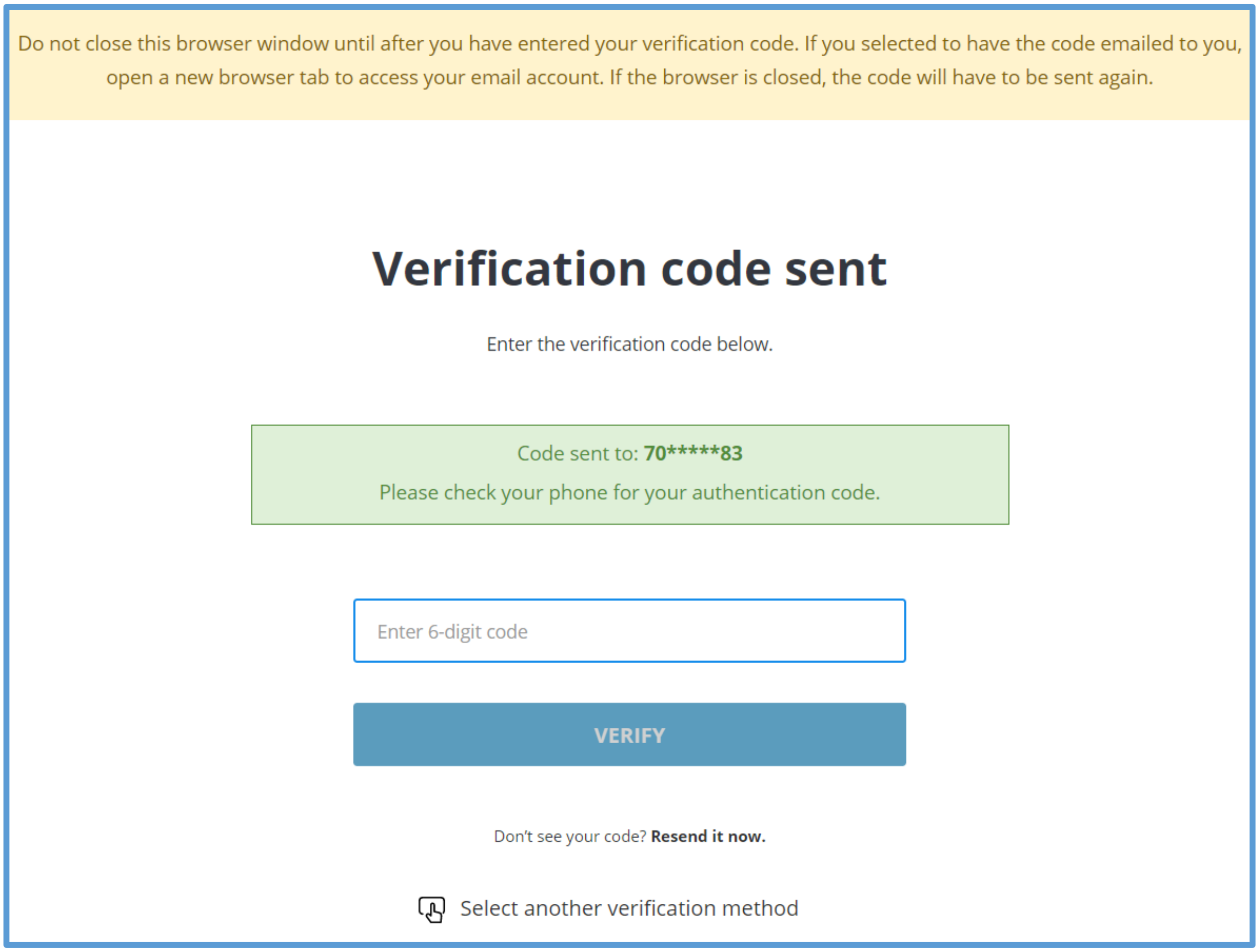
    c. Number
    d. Special character (@$!%*?&)
4. Type the email address and phone number you want associated with the Customer Portal account.
5. Type your last name for verification.
6. Type the last four digits of your Social Security number for verification.
7. Click **Submit**.

Customer Portal displays the **Verify Account** page:



8. Click either **Send text verification** or **Send email verification**.

Customer Portal sends a verification code through your selected method and displays the **Verification code sent** page:



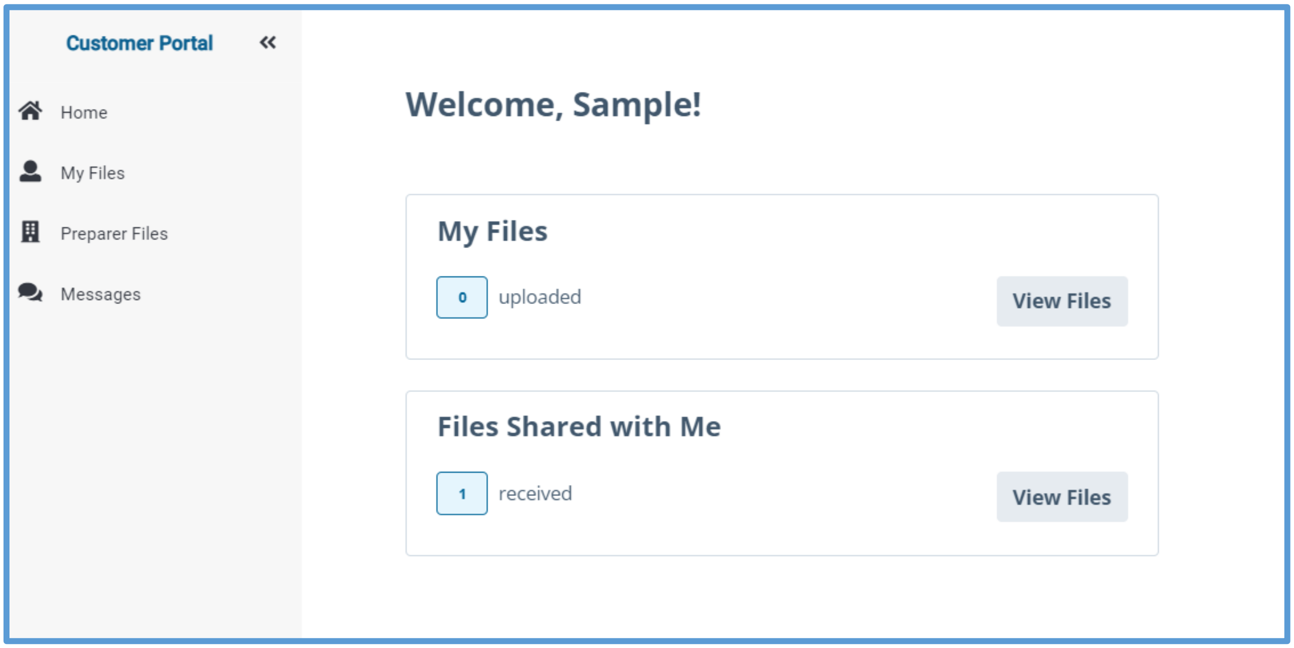
9. Find the code in your text or email and type it in the box.

TIP: If you have not received your code within a few minutes, click **Resend it now** to resend the code.

TIP: If you still do not receive the code, you can change the verification method. Click **Select another verification method** and repeat Step 8.

10. Click **VERIFY**.

Customer Portal displays the home page:



Uploading a File

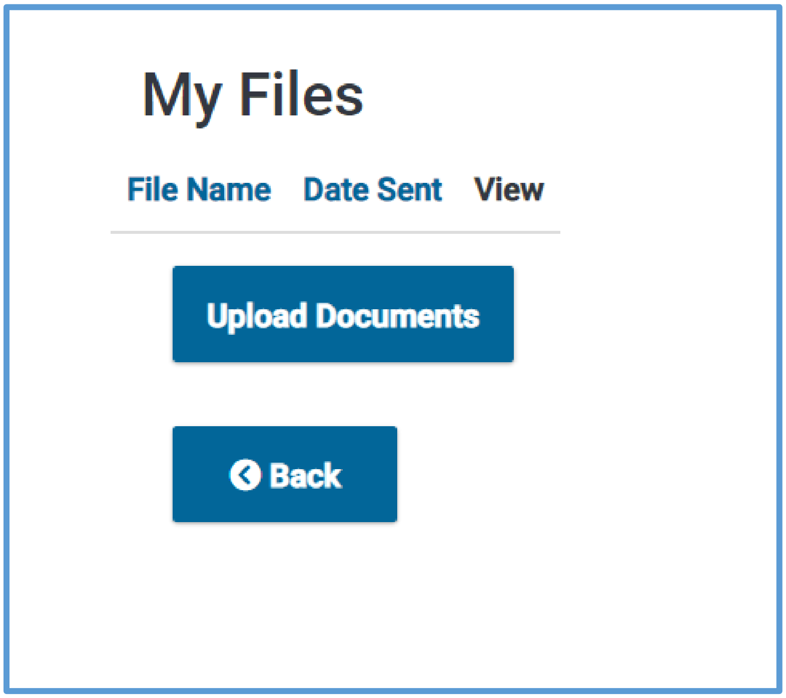
If you need additional forms or documents to complete a taxpayer's return, he or she can upload them through Customer Portal. Customer Portal accepts the following file types up to 5 mb each, with a maximum of 25 mb:

- .pdf
- .png
- .jpg
- .tif
- .doc
- .docx
- .xls
- .xlsx

To guide the taxpayer through uploading a file, have the taxpayer use the following steps:

1. Click **View Files** in **My Files**.

Customer Portal displays the **My Files** page:



2. Click **Upload Documents**.
3. Do one of the following:
    a. Drag a file from your desktop to the **Drop files here to upload** box.
    b. Click the **Drop files here to upload** box to navigate to the file you want to upload.

Customer Portal uploads the document and displays the file in the box.

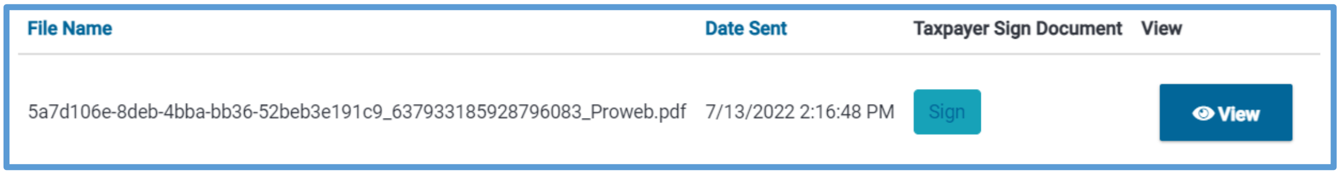
TIP: If you want to upload an updated file, select the **Check To Overwrite Existing Files** check box. Customer Portal displays a warning if you attempt to upload a file that already exists.

Reviewing Forms

You can make the tax return available for the taxpayer to review. To guide the taxpayer through reviewing forms that you have sent, have the taxpayer use the following steps from the Customer Portal home page:

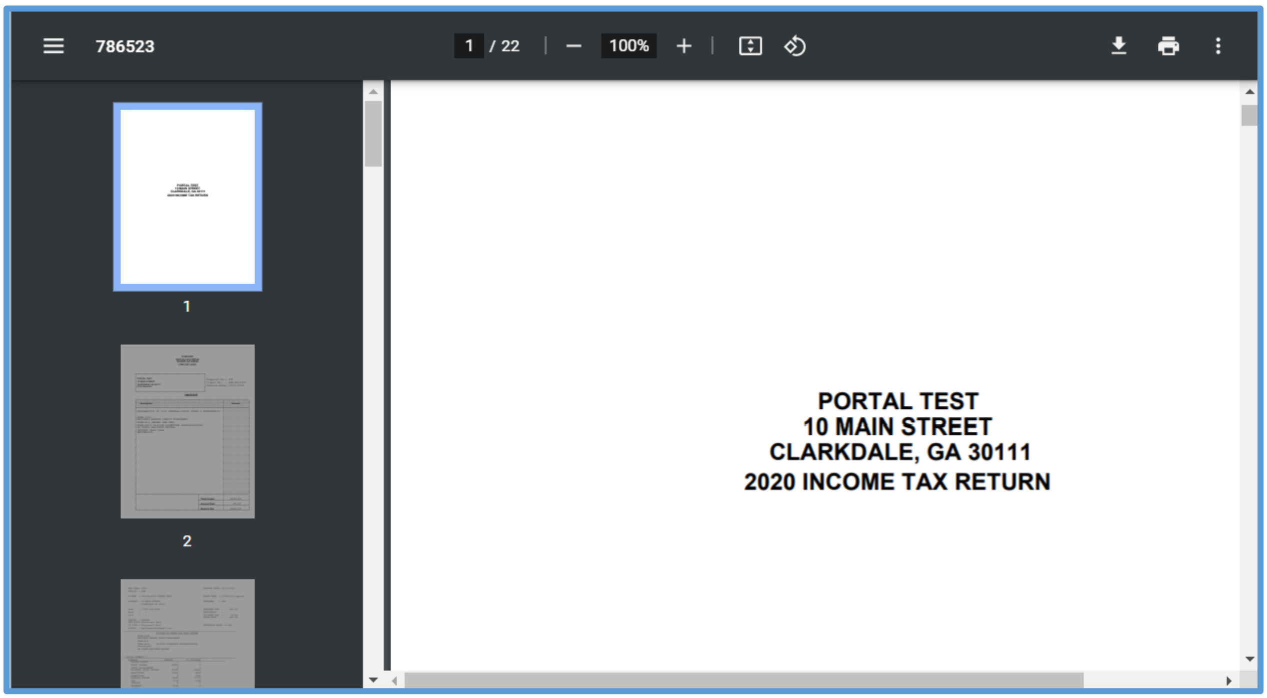
1. Click **Preparer Files**.

Customer Portal displays the **Files From My Preparer** page:



2. Click **View** on the line for the tax return document you want to view.

Customer Portal displays the tax return documents in a new tab in Adobe Reader or default PDF viewer on your device:



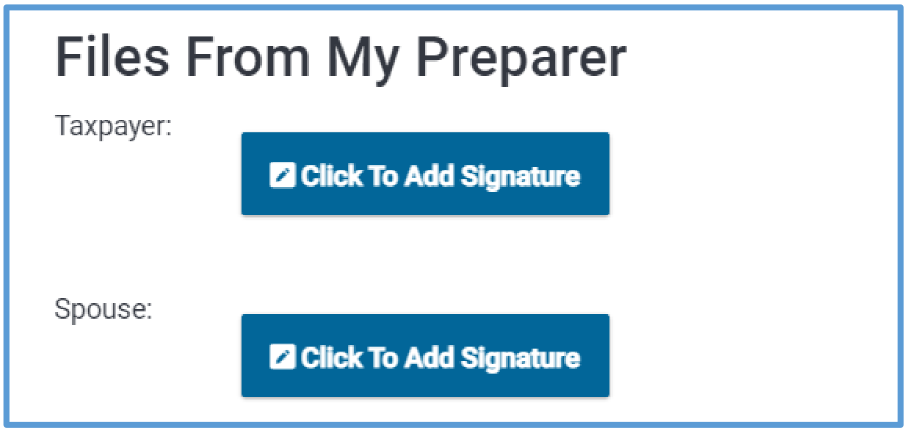
3. Use Adobe Reader's features to navigate in or print the documents to review.

Saving a Signature in the Customer Portal

The taxpayer can sign tax return documents through the Customer Portal. Before signing documents, the taxpayer needs to create a signature to have on file. To guide the taxpayer through creating a signature, have the taxpayer use the following steps from the Customer Portal home page:

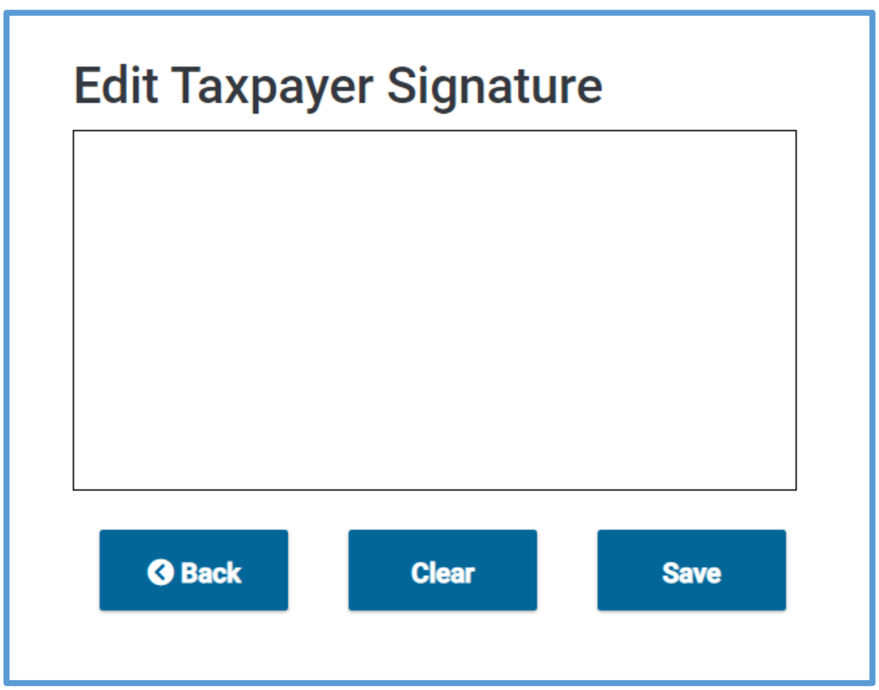
1. Click **Preparer Files**.

Customer Portal displays the **Files From My Preparer** page:



2. Review the files as needed.
3. Click **Click To Add Signature**.

Customer Portal displays the **Edit Taxpayer Signature** page:

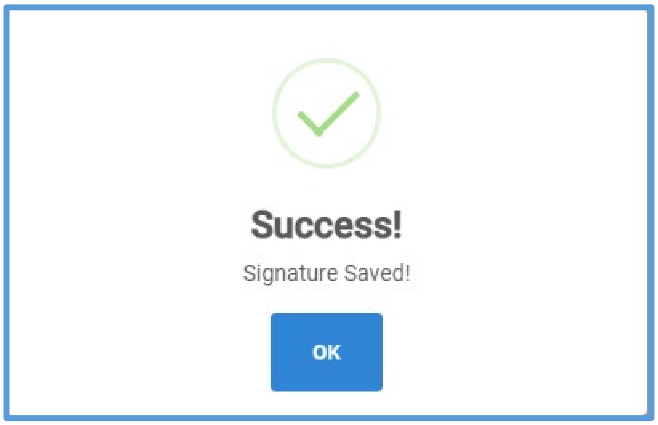


4. Using your finger or e-pen on a touch-screen device, or your mouse on a computer, sign within the box.

TIP: If you want to re-sign, click **Clear** to clear the box, and then sign again.

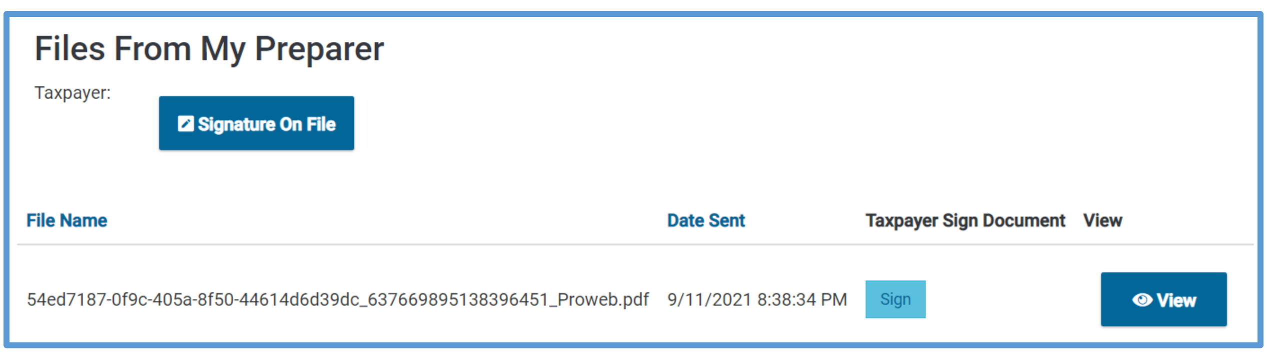
5. Click **Save**.

Customer Portal displays a **Success** window informing you that your signature is saved:



6. Click **OK**.

Customer Portal changes the **Click to Add Signature** box to **Signature On File** and displays a **Sign** button on the line for any tax return documents:



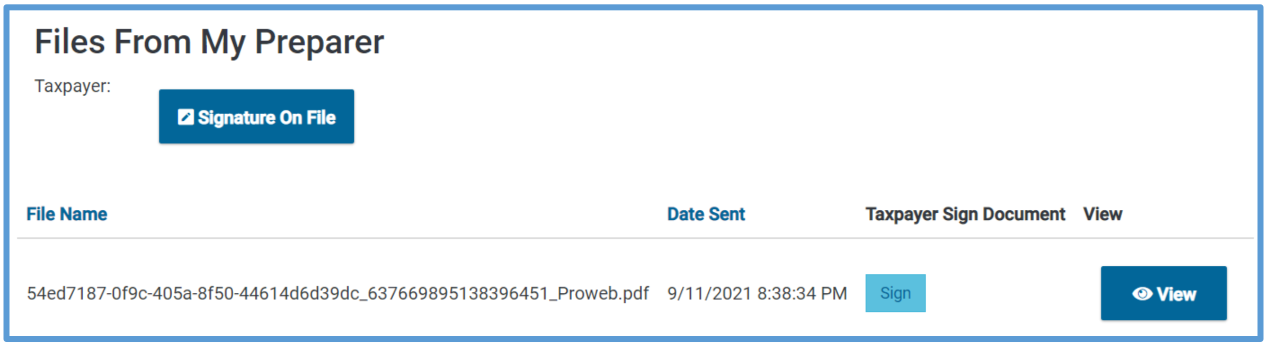
Tip: If the return is Married Filing Jointly, Client Portal also allows the spouse to add a signature.

Signing a Document Through the Client Portal

After the taxpayer saves a signature, he or she can sign documents that you send for review. To guide the taxpayer through signing a document, have the taxpayer use the following steps from the Customer Portal home page:

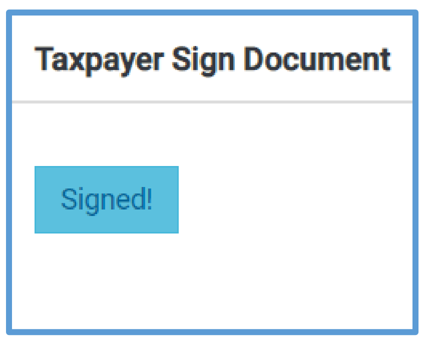
1. Click **Preparer Files**.

Customer Portal displays the **Files From My Preparer** page:



2. Review the document to sign.
3. Click **Sign** on the line for that document.

Customer Portal uses the signature on file to sign the document and displays **Signed**! in the **Taxpayer Sign** column:



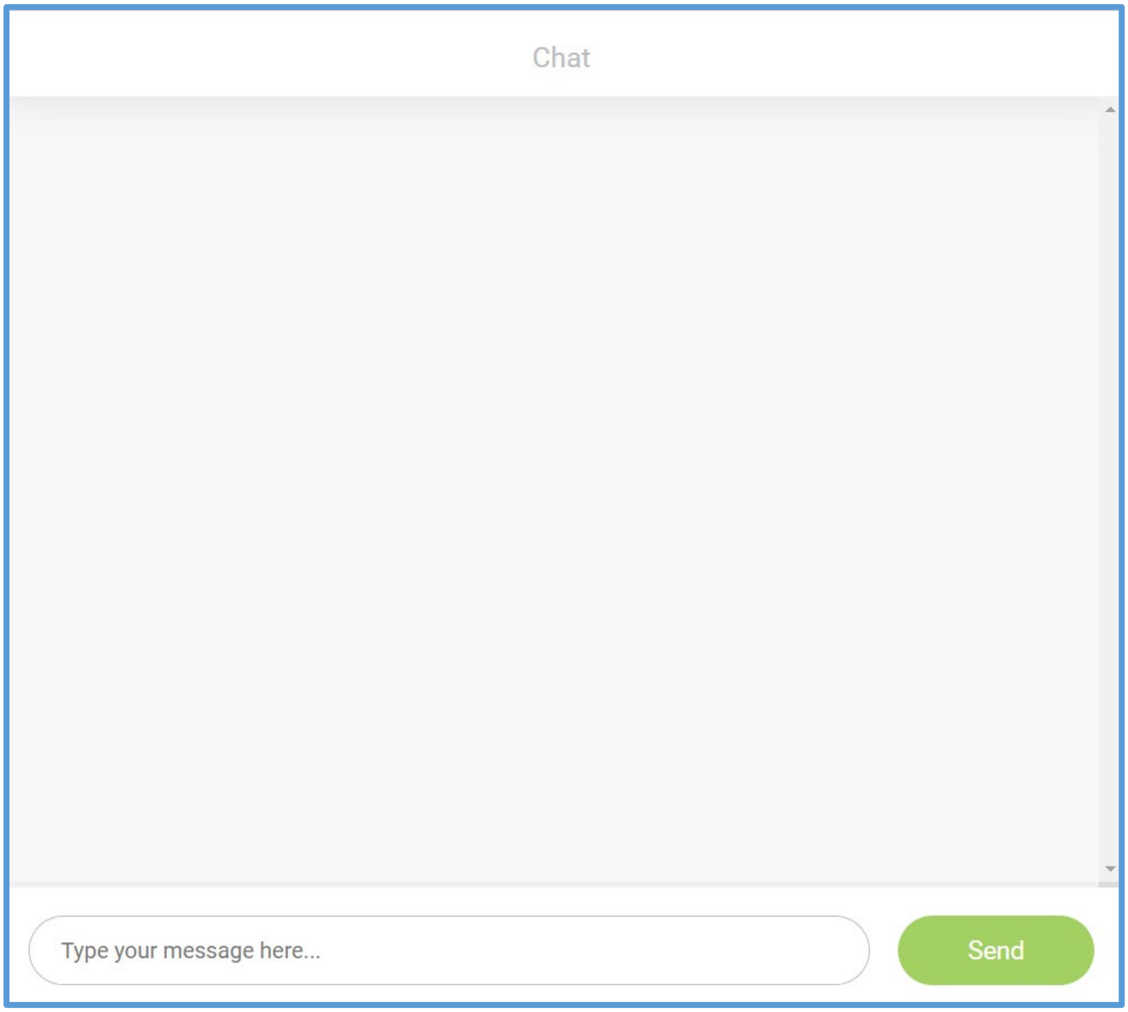
Customer Portal also transfers the signature to the **Submission** page in TaxSlayer Pro Online as a signature for Form 1040, Form 8879, and any necessary consents, along with appropriate state documents.

Chatting with the Tax Preparer

The taxpayer can also exchange chat messages with the preparer. To guide the taxpayer through sending and reading chat messages, have the taxpayer use the following steps from the Customer Portal home page.

1. Click **Messages**.

Customer Portal displays the **Chat** page:

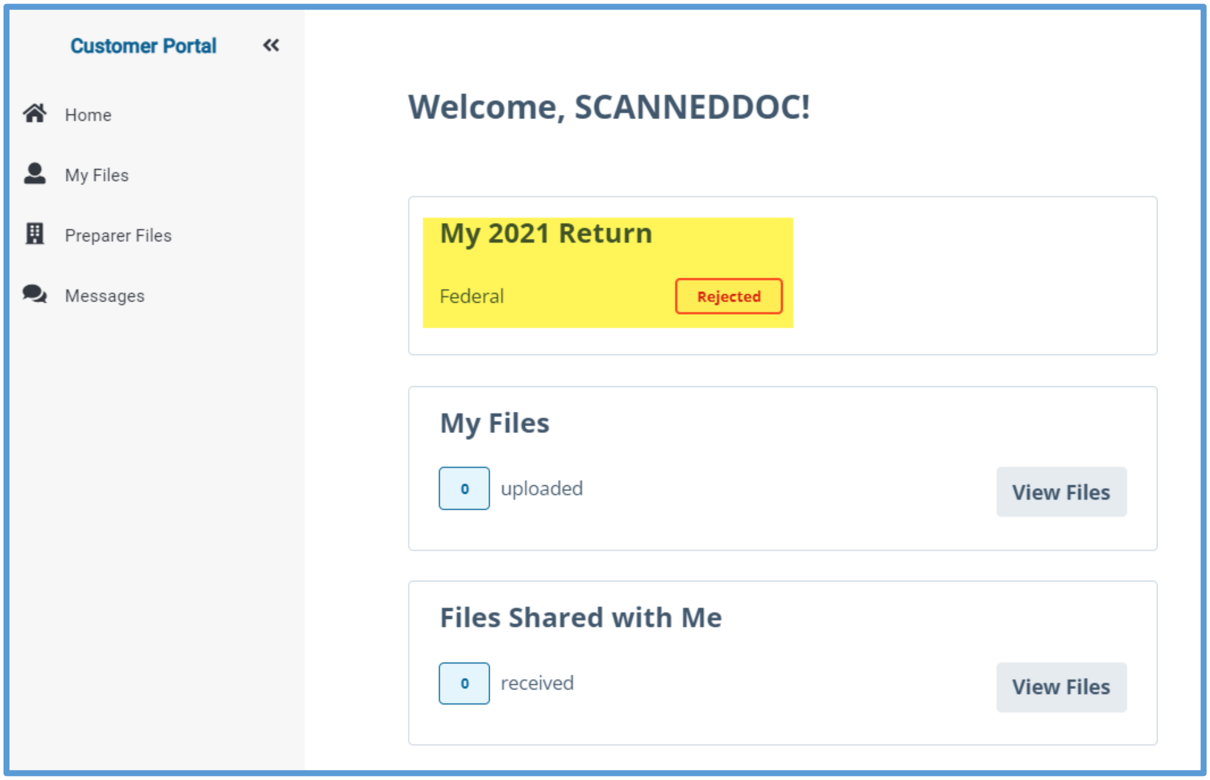


2. Type the message you want to send to the preparer in the **Type your message here…** box.
3. Click **Send**.

Customer Portal sends the message to the preparer.

Viewing Return Status

The taxpayer can view the return status after acknowledgement. When the taxpayer logs in to their Customer Portal, they can see whether the return is accepted or rejected.



If the return is rejected, Customer Portal displays a message to contact the VITA/TCE preparer for more information on the rejection reason.

Summary

You should now be able to:

- Define the purpose of the Customer Portal.
- Set up preparer access to the Customer Portal.
- Send a Customer Portal invitation to a taxpayer.
- Resend a Customer Portal link to a taxpayer.
- Access Customer Portal files uploaded by the taxpayer.
- Chat with a taxpayer through the Customer Portal.
- Make tax documents available via the taxpayer's Customer Portal.
- Guide a taxpayer through creating a Customer Portal account.
- Guide a taxpayer through uploading or reviewing files in the Customer Portal.
- Guide a taxpayer to sign a tax document through the Customer Portal.
- Guide a taxpayer to view the return status through the Customer Portal.

To see a video of what you just learned, go to Using the Customer Portal. Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

Index

Glossary

1040 View – Entry method that allows the preparer to click the dollar amount associated with a specific line item to access the associated entry form

Assigned Questions – Custom questions and answer banks assigned to a site by TaxSlayer or multi-site administrator; they cannot be modified or deleted

Assigned Security Templates – Security templates assigned to a site by TaxSlayer or a multi-site administrator; they cannot be modified or deleted

Assigned Taxpayer Profiles – Taxpayer profiles assigned to a site by TaxSlayer or a multi-site administrator; they cannot be modified or deleted

Cancel Button – This button takes the preparer to the previous screen

Change Preparer – Assign a return to a different preparer than the one who initially created the return; the site administrator enables privacy settings through Security Templates

Client List – A list of all created returns at the site that the user is allowed to access

Client Return History – A list of specific actions taken when the preparer saves and exits the return through the e-file section, including: user name, log time, preparer, ERO, taxpayer's Social Security number, state return, RTN and other return information

Client Search – Search for returns at your site through various filtering options

Client Status – Displays the taxpayer's Social Security number, phone numbers, address, Federal return type, IRS Transaction date, and Reject information

Complete – An option selected in the e-file section when the return passes review and is ready to be e-filed; Complete returns are available for transmission to the Processing Center

Configuration – A TaxSlayer menu including Office Setup, ERO setup, Preparer Setup, Security Templates, Question Templates, Taxpayer Profiles, Print Sets, and Return Tags

Contingency Plan – TaxSlayer Pro, also referred to as *Desktop*, to be utilized in the rare occasion that TaxSlayer Pro Online is unavailable or the site loses internet for an extended period of time

Continue button – In the Federal section, this button saves information and allows the preparer to proceed to the next screen

Consent – A form the taxpayer (and spouse, if applicable) signs giving the preparer permission to use or disclose tax information for a specific purpose

Custom Credits – Credits you can add to the E-File page of a tax return to be tracked in reports

Custom Questions – Site Administrator can create questions and answers that preparers can use to capture data during the return preparation process

Deactivate Return – Users/Preparers with a Security Template that enables deactivation can deactivate/delete a return; returns can only be deactivated/deleted if the status is **In Progress** or **Review Failed**

EFIN – Electronic Filing Identification Number

EIN Database – A feature that auto-populates the employer name and address when you type a previously entered EIN on Form W-2, 1099-R, 2441, etc.

Enter Myself – Entry method displaying submenus allowing for quick navigation to specific entry sections

ERO – Electronic Return Originator

ERO Setup – A TaxSlayer menu listing the ERO name, EFIN, address, and phone number

Federal Return Type: Direct Debit – A return type selection to indicate that the return is electronically filed and the amount owed is directly debited from the taxpayer's account

Federal Return Type: Direct Deposit – A return type selection to indicate that the return is filed electronically and the taxpayer's refund is deposited in their bank account

Federal Return Type: Electronic Mailed – A return type selection to indicate that the return is filed electronically and the taxpayer receives the refund as a mailed check

Federal Return Type: Mail Payment – A return type selection to indicate that the return is electronically filed and the taxpayer mails a check for the amount owed

Federal Return Type: Paper Return – A return type selection to indicate that the return is printed and mailed and the taxpayer either receives the refund via mail or mails a balance due

Federal Return Type: Paper Return with Direct Deposit – A return type selection to indicate that the return is printed and mailed; the taxpayer's refund is deposited into their bank account

Fees Setup – set prices for forms to run reports at the end of tax season, etc. showing the amount of return prep fees saved

Filing Status Wizard – A questionnaire that takes the preparer through a series of questions to determine the taxpayer's filing status

Forms Search – Entry method that takes the preparer to specific entry pages based on a form number search

Group Administrator – A user name assigned to site designated as the Multi-Site Administrator through the order process; grants the ability to assign configurable items to designated sites

Guide Me – Interview style entry method that takes the preparer through a series of Yes/No questions

Is Required – Indicates that a Custom Question is required to be answered before TaxSlayer creates an e-file

Login Security Code – Additional level of security required for logging into the site; the code is configurable by the site administrator

Message Center – A one way communication from TaxSlayer to the sites, or between the users at a site

Multi-Factor Authentication (MFA) – A requirement utilizing something other than what you know to authenticate yourself; Users/Preparers are required to use an code sent via email and/or text at first login from a device

Multi-Site Administrator – A user who can assign configurable items to designated sites; designated during the ordering process

MyRA – A savings initiative from the Department of the Treasury

Office IP Whitelist – A custom list of IP addresses that are allowed to access TaxSlayer Online for your site

Office Setup – A TaxSlayer menu listing the site name, address, phone number, SIDN, and login security code

Preview Return – Generates the forms used in the return

Print Sets (Assigned) – A print set assigned by TaxSlayer or a Multi-Site Admin site; assigned print sets cannot be modified or deleted

Print Sets (Custom) – A print set in which the site admin, and anyone assigned the role, can create print sets to include the desired forms and number of copies printed for each form

Privacy Settings – An option to make a return private by requiring a password for accessing it; the site administrator enables privacy settings through Security Templates

Processing Center Rejects – Returns that fail secondary validation at the Processing Center

Public Safety Officers Distribution – The amount of a Public Safety Officer's exclusion for health insurance premiums (Form 1099-R)

Quick File – A feature used to create a list of forms based on the information presented to the preparer by the taxpayer to automatically display income and adjustment entry pages

Railroad Retirement Benefits – Retirement benefits received from the Railroad Retirement Board. These are either Tier 1 benefits (equivalent to Social Security benefits) or Tier 2 benefits (equivalent to pension benefits)

Reactivate Return – A feature that allows you to restore a deactivated return when you begin a new return with that Social Security number

Ready for Retransmit – A status indicating that corrections have been completed for a rejected return and the transmitter has selected this return in the Add Returns option during transmission

Relational EFIN – A connection designated during the ordering process allowing a multi-site administrator to run group reports and access designated sites; requires the use of 7216 Consent to Use/Disclose forms

Required to Use Guide – Option which forces the preparer to use the **Guide Me** entry method.

Return Tags – A list of identifiers created at the site level that can be used to help manage returns.

Review Approved – A status through the built-in review process where the return is marked as approved by the reviewer; TaxSlayer sends an approved message to the preparer via the Message Center

Review Failed – A status through the built-in review process where the return is marked as failed by the reviewer; TaxSlayer sends a failed message to the preparer via the Message Center

Review Pending – A status through the built-in review process where the return is marked as ready for review in the e-file section; the return displays in the Review Returns queue for users marked as reviewers

Save and Exit Return – A link in a return to take the preparer back to the home page where new returns can be created, the client list can be searched, etc.

Save and Transmit – Allows a user with the ability to transmit returns to Save and Transmit a single return

Security Templates – Allow and disallow access to specific program features involving the tax return process for members of the site; the site admin can customize security roles

Send State Only – This option allows the state return to be e-filed without the Federal return

SIDN – Site Identification Number

Si hablo Espanol? – A link to change the program to Spanish; while in a return, click the taxpayer's name in the top left and select **Si hablo Espanol?** from the drop-down menu

Simplified Method Worksheet – A worksheet used to calculate the taxable portion of a pension

Summary View – A view that displays a collapsed view for each return section; expand and select sections to navigate to appropriate entry forms

Taxpayer Notes – Printable messages used to assist in quality review; access notes by clicking the taxpayer's name in the top left or the flag icon on the Office Client list page; Taxpayer Notes carry forward to the next tax year

Taxpayer Profile – Presents designated entry forms to the preparer after completing the Basic Information Section; profiles can be established by the site administrator and must be selected at the time the return is created

Your Office – A link to save and exit the return

Zip Code Lookup – A feature that auto-populates the city and state in an address when you type the ZIP code

Appendix 1: Office Configuration Options

Office Configuration Option	Definition
Print Digital Signatures on 1040	Not applicable for VITA/TCE
Print Firm Information on Cover Page	Use this if you are using the Cover Page in one of your print sets.
Disable Third Party Designee	Select this so TaxSlayer does not auto-populate the Third Party Designee information on the **E-File** page.
Require Taxpayer Signatures Prior to e-file	Not applicable for VITA/TCE
Offer 8888	Select this if your site is offering split refunds
Display Summary using 1040 View	Select this if you want TaxSlayer to default to Form 1040, pages 1 and 2 when you access Summary/Print.
Hide Preparer Name on 1040 Print	Select this so TaxSlayer does not print the volunteer name on state returns for TaxSlayer 2016 and TaxSlayer 2017.
Always Print Schedule A	Select this to include Schedule A in the print set even if the taxpayer uses the standard deduction.
Use Topaz Signature Pad	Not applicable for VITA/TCE
Force Verification of IP Address	Select this if you are using the IP Whitelist feature that limits the IP addresses that can access the site.

Office Configuration Option	Definition
Default State Return Type to be Sent Through Bank	Not applicable for VITA/TCE
Require Email Address Entry on Efile Page	Select this to require the preparer to type an email address in the e-file section of the return.
Default Tax Returns to Spanish	Select this to have TaxSlayer open all returns in Spanish so you do not need to select Spanish on each return.
Require Return Tag(s) for Saving Returns	Select this to force preparers to choose a return tag before saving and exiting a return.

Appendix 2: Security Template Definitions

This security template option…	allows the user to…
Access Current Year Client List	display the current year client list.
Access Office	Not Applicable at the site level; must be assigned by TaxSlayer at the group level
Access Previous Years Client Lists	display the client list for each of the three prior years.
Add and Configure Security Templates	access Security Templates.
Add or Edit Custom Credits	access Custom Credits.
Add or Edit Office IP Whitelist	access IP Whitelist.
Add or Edit Print Sets	access Print Sets.
Add or Edit Tags	access Tags.
Add/Edit Fees in Office Configuration	enter fees to capture fee savings for sites tracking this information.
Add/Edit Preparers	access Preparers menu.
Allow Ability to Clear Signatures	Not Applicable for VITA/TCE
Assign Preparer's Security Templates	assign security templates to certain preparers.
Cannot Change Return Status back to In Progress	Select if you **do not** want the preparer to change a return marked **Complete** back to **In Progress.**
Change Consent Forms	create and edit consents.
Change Questions and Available Answers	access Custom Questions.

This security template option…	allows the user to…
Change return preparer	change the preparer associated with a return via the Tools menu.
Change tax profiles	access Taxpayer Profiles
Configuration	access the Configuration menu.
Create Tax Returns	create tax returns for current and/or previous years.
Customer Portal	Not Applicable for VITA/TCE
Deactivate Return	delete a return with an *In Progress* or *Review Failed* status.
Delete Return Notes	delete notes associated with the tax return.
Delete Scanned Document	allows user to delete PDFs in the Scanned Document program
Dismiss/Restore Main Menu Notifications	Not Applicable for VITA/TCE
Do not Force Return Review	Clear this check box to require the preparer to always select **Ready for Review** during return preparation.
Edit and customize reporting display	access Report Customization to remove reports not applicable to the site and also change the order to place the most used reports at the top of the category.
Edit calculated preparer fee	Not Applicable for VITA/TCE
Edit ERO Setup	access ERO setup.
Edit Minimum Preparer Fee	Not applicable for VITA/TCE
Edit Office Setup	access Office Setup.

This security template option…	allows the user to…
Email Return	Not Applicable for VITA/TCE
Hide Accepted Returns from Limited Users	users who cannot see other preparers' returns also cannot see and/or edit IRS accepted returns.
Import Desktop Returns	Not Applicable for VITA/TCE
Mark Return Complete	indicate that the return is complete and ready for transmission.
Mark Return for Review	mark that the return is ready for review, adding it to the Review Returns queue.
Override Return Maximum Preparer Fee	Not applicable for VITA/TCE
Override Return Minimum Preparer Fee	Not applicable for VITA/TCE
Password Protect Return	add a password to a return. This option is required for opening and printing returns, as well as viewing client status.
Print Checks	Not applicable/disabled for VITA/TCE
Print Returns	generate a PDF of the tax return
Review Returns and Mark Review Decision	review return(s) marked **Ready for Review** and either approve or fail the return.
Scanned Documents	allows user to access the Scanned Document program
Send Returns to IRS	transmit returns to the TaxSlayer Processing Center.

This security template option…	allows the user to…
View Client Status	view the taxpayer’s return status and return history.
View Full SSN	view the client’s entire Social Security number on the client list and other areas of the return.
View Refund Status	Not Applicable for VITA/TCE
View Reports	view reports, including the Acknowledgements Report.
View TaxesToGo Client List	Not applicable for VITA/TCE
View/Edit Existing Returns	view or edit previously created tax returns. You must use this option in conjunction with **Access Current Year Client List**.

Appendix 3: TaxSlayer Pro Reports and Descriptions

IRS Acknowledgements

Report section: Transmission Reports

This report displays the following information per taxpayer:

- EFIN
- SSN (last 4)
- Last Name
- Status
- Reject Code and reason if applicable
- ERO Identifier

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

This report only shows unviewed acks. Once you view the report, the information is no longer visible under IRS Acks. They are immediately available under Old IRS Acknowledgements.

Old IRS Acknowledgements

Report section: Transmission Reports

Select the EFIN (even if there is only 1), select the date range, and click **Continue**.

This report displays the following information per taxpayer:

- EFIN
- SSN (Last 4)
- Last Name
- Status
- Reject Code and reason if applicable

- ERO Identifier

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

State Acknowledgements

Report section: Transmission Reports

This report displays the following information per taxpayer:

- EFIN
- SSN (Last 4)
- Last Name
- Status
- State
- Reject Code and reason if applicable
- ERO Identifier

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

This report only shows unviewed acks. Once you view the report, the information is no longer visible under State Acks. They are immediately available under Old State Acknowledgements.

Old State Acknowledgements

Report section: Transmission Reports

Select the EFIN (even if there is only 1), select the date range, and click **Continue**.

This report displays the following information per taxpayer:

- EFIN

- SSN (Last 4)
- Last Name
- Status
- State
- Reject Code and reason if applicable
- ERO Identifier

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Validation Errors

Report section: Transmission Reports

This report displays the following information per taxpayer that did not pass the secondary validation at the Processing Center:

- EFIN
- SSN
- Last Name
- State (FD = Federal or State Abbreviations)
- Error Date
- Error Message
- Help Message (We typically put in a hint where to fix the error if we are seeing a lot of them)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

This report maintains these errors for several days. If you do not see any validation errors under this report, you can also run the Old Validation Errors report.

Old Validation Errors

Report section: Transmission Reports

This report displays the following information per taxpayer that did not pass the secondary validation at the Processing Center:

- EFIN
- SSN
- Last Name
- State (FD = Federal or State Abbreviations)
- Error Date
- Error Message
- Help Message (We typically put in a hint where to fix the error if we are seeing a lot of them)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Fees Charged

Report section: Financial Reports

Select the EFIN (even if there is only 1), select the date range, and click **Continue**.

Listing of fees saved by the taxpayer at your site if you are utilizing the Price Sheet

This report displays the following information per taxpayer:

- EFIN
- SSN (Last 4)
- Taxpayer Last Name
- Prep Fee (amount calculated or manually entered)
- Calc Fee (calculates from the $ values entered in fees)
- Difference (difference between Calc Fee and Prep Fee)
- Elec Fee

- Audit Protection Settings Fee
- Audit Protection Settings Fee Paid
- ID Theft Fee
- Total
- Paid
- Date Funded
- Preparer Name
- Office Identifier

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Federal Returns Transmitted with No State

Report section: Transmission Reports

This report displays the following information per taxpayer:

- EFIN
- Office Name
- Taxpayer Last Name
- SSN (Last 4)
- Preparer
- Status (i.e., In Progress, Complete, Review, etc.)
- Time submitted (date and time)

Federal Returns Not Transmitted

Report section: Transmission Reports

Listing of Federal returns that have been created, but not transmitted

This report displays the following information per taxpayer:

- EFIN
- Office Name
- Taxpayer Last Name
- SSN (Last 4)

- Preparer
- Status (i.e., In Progress, Complete, Review, etc.)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

State Returns Not Transmitted

Report section: Transmission Reports

Listing of state returns that have been created, but not transmitted

This report displays the following information per taxpayer:

- EFIN
- Office Name
- Taxpayer Last Name
- SSN (Last 4)
- Preparer
- Status (i.e. In Progress, Complete, Review, etc.)
- State Code (State Abbreviations)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Returns Transmitted

Report section: Transmission Reports

Listing of returns are in the status of transmitted

This report displays the following information per taxpayer:

- EFIN
- Office Name

- SSN (Last 4)
- Preparer
- Status
- Time Submitted (Date and Time)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Amended Returns Transmitted

Report section: Transmission Reports

This report displays the following information per taxpayer:

- EFIN
- Office Name
- Taxpayer Last Name
- SSN (Last 4)
- Preparer
- Status
- Time Submitted (Date and Time)

Accepted Returns

Report section: Transmission Reports

Listing of IRS returns that are in the status of accepted

This report displays the following information per taxpayer:

- SSN (Last four)
- Taxpayer Last Name
- EFIN
- Preparer
- Return Tags (if applicable)
- RetTypeDesc (Return Type Description: i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- Trans Date (Date Transmitted)

- Status
- Ack Date (Date Accepted)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Rejected Returns

Report section: Transmission Reports

Listing of IRS returns that are in the status of Rejected

This report displays the following information per taxpayer:

- SSN (Last Four)
- Taxpayer Last Name
- EFIN
- Preparer
- Return Tags (if applicable)
- RetTypeDesc (Return Type Description: i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- Trans Date (Date Transmitted)
- Status
- Ack Date (Date Rejected)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Federal Non-Accepted Returns

Report section: Transmission Reports

Listing of IRS returns that are in a status other than Accepted such as Rejected, Transmitted, Complete, etc.

This report displays the following information per taxpayer:

- SSN (Last Four)
- Taxpayer Last Name
- EFIN
- Preparer
- Return Tags (if applicable)
- RetTypeDesc (Return Type Description: i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- Trans Date (Date Transmitted)
- Status
- Ack Date (only for Rejected status)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

State Non-Accepted Returns

Report section: Transmission Reports

Listing of State returns that have been transmitted but not accepted

This report displays the following information per taxpayer:

- SSN (Last Four)
- Taxpayer Last Name
- EFIN
- Preparer
- Return Tag (if applicable)
- RetTypeDesc (Return Type Description: i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- Trans Date (Date Transmitted)
- Status
- Ack Date (Date Rejected)
- State Code (State Abbreviation)

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Username Report

Report section: Other Data Reports

Listing of usernames created at your site that displays the following per Username

- User Log In (username you created)
- Full Name (First and Last name entered in Preparer Setup)
- Security Template
- Office Name
- Company Name (This will always be VITA/TCE Main)
- Email Address

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Return Questions

Report section: Custom Configuration Items

Listing of the Questions and corresponding answers that are setup at your site

Note: You will not see the entire report on the screen, you will need to export to CSV or Excel

- EFIN
- SSN (Last 4)
- Taxpayer First Name
- Taxpayer Last Name
- Taxpayer E-mail
- Taxpayer Phone Number

- Taxpayer Address (City, State, and Zip Code)
- Office Name
- Question is listed in the header
- Answer to the corresponding question is listed on the SSN row

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Question Statistics Report

Report section: Custom Configuration Items

Lists statistical information on all questions and answers at your site

- Question
- Number of times skipped
- Number of times answered per each question
- Total returns

Extension Report

Report section: Transmission Reports

Lists transmitted federal extensions

- SSN (Last 4)
- Taxpayer First Name
- Taxpayer Last Name
- Office Name
- Preparer First Name
- Preparer Last Name
- Form Type
- Transmission Date

You have the ability to do the following:

- Export to CSV
- Export to Excel

- Print via PDF

Print via HTML

Marketing Report

Report section: Other Data Reports

Listing of information needed to contact the Taxpayer(s)

- SSN (Last 4)
- Office Name
- Taxpayer Full Name
- Phone Number
- Email Address
- Address
- City
- State
- Zip

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Return Tag Report

Report section: Custom Configuration Items

Listing of current Status and Return Tag(s) associated with the taxpayer's return

- SSN (Last 4 digits)
- Taxpayer First Name
- Taxpayer Last Name
- Taxpayer Phone Number
- Status (generated by the software)
- Return Tags (will list each tag associated with the return)
- EFIN

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Custom Credit Report

Report section: Custom Configuration Items

Listing of the credit description and corresponding answers that are setup at your site

- EFIN
- Primary SSN (last 4)
- Last Name
- Description is listed in the header
- Answer to the corresponding question is listed on the SSN row

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF

Custom Consents

Report section: Custom Configuration Items

Listing of all consents granted or denied per return

- SIDN
- EFIN
- Primary SSN (Last 4)
- Taxpayer First Name
- Taxpayer Last Name
- Email address
- City
- State
- Zip
- Taxpayer Phone Number

- Office Name
- Each consent assigned to your site is listed separately with Yes or No

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Return Questions With Consent Indicator Report

Report section: Custom Configuration Items

Listing of all questions with answers and consents granted or denied for each return

- SIDN
- EFIN
- Office Name
- Primary SSN (Last 4)
- Taxpayer First Name
- Taxpayer Last Name
- Taxpayer Date of Birth
- Spouse First Name
- Spouse Last name
- Address
- City
- State
- ZIP
- Taxpayer Phone Number
- AGI
- Each consent assigned to your site is listed separately with Yes or No
- Each question assigned to your site is listed separately with the taxpayer's answer

You have the ability to do the following:

- Export to CSV
- Export to Excel

- Print via PDF
- Print via HTML

Client Retention Report

Report section: Other Data Reports

- EFIN
- Office Name
- Taxpayer First Name
- Taxpayer Last Name
- Primary SSN (Last 4)
- Spouse First Name
- Spouse Last Name
- Spouse SSN (Last 4)
- Date Return Created
- Email Address
- Phone Number
- Address
- Return Status
- Return Type
- Preparer Fee
- Preparer Fee Paid
- SVB Fee
- SVB Fee Paid
- Audit Protection Settings Fee
- Audit Protection Settings Fee Paid
- ID Theft Fee
- ID Theft Fee Paid

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

EIN Report

Report section: Other Data Reports

List of all EINs in returns

- Employer Name
- Employer Address
- Employer EIN

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Failed Review Report

Report section: Other Data Reports

List of all returns that have failed quality review

- EFIN
- Taxpayer Last Name
- Primary SSN (Last 4)
- Date Failed Review
- Reason for Failed Review

You have the ability to do the following:

- Export to CSV
- Export to Excel
- Print via PDF
- Print via HTML

Management Reports

Opens a list of management reports that are hosted on our Web Reports

- Electronic Filing Summary
- State Detail Summary Report
- Pro Web Reports – Audit Report

- Pro Web Returns – Detailed Return Report
- Site Production Detail Report – Electronic
- Site Production State Detail Report
- Site Production Detail Report – Paper
- Site Production Summary Report
- Returns Awaiting Acknowledgement
- Extension Report
- View Saved Reports – Houses all Management Reports saved at your site

Returns Awaiting Acknowledgements

List returns with an outstanding federal and/or state acknowledgement.

1. Select the Tax Year
2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN
- Agency ID (FD=Federal or State Abbreviation)
- SSN (last 4)
- First Name
- Last Name
- Transmitted Date
- Preparer Name

4. Sort the report by column
5. Drag a column to the top to group items together.
6. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

Electronic Filing Summary

List of e-file returns

1. Select the Tax Year

2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN
- Agency ID (FD=Federal or State Abbreviation)
- SSN (last 4)
- First Name
- Last Name
- Ack code (Accepted, Rejected, Transmitted)
- Started Date
- Transmit Date
- Ack Date
- Submission ID
- Preparer Name

4. Sort the report by column
5. Drag a column to the top to group items together.
6. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

Site Production Detail Report - Electronic

1. Select the Tax Year
2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN
- SIDN (pulls from the SIDN setup for the Preparer)
- SSN (Last 4 of Primary Taxpayer)
- Taxpayer First Name
- Taxpayer Last Name
- Primary Taxpayer Date of Birth

- E-mail Address
- Spouse SSN (if applicable) – Last 4
- Spouse SSN Encrypted (Internal column use only)
- Spouse First Name
- Spouse Last Name
- Spouse Date of Birth
- Address, City, State, and Zip Code
- Preparer's Name
- Accepted Date
- Return Type (0=1040; 1=1040A; 2 = 1040EZ)
- Filing Status
- Total IRS Exemptions (can be used to determine number of dependents on return)
- Refund (Amount of refund)
- Calculated Prep Fee
- Prep Fee
- Paper State (Number of states on return marked as paper)
- Paper Federal (Return marked as paper)
- Requesting Direct Deposit (Yes if Federal was marked for direct deposit)
- Federal Rejected (number of times the federal return was rejected)
- State Accepted (Date of State Ack)
- State Rejected (number of times the state return was rejected)
- Total States Transmitted (number of electronic states on the return)
- Primary or Secondary 60+ (0, 1 or 2)
- AGI
- Created Date
- Additional CTC
- # Savings Bonds Purchased (Count)
- Savings Bonds (Dollar value purchased)
- Earned Income Tax Credit
- Child Tax Credit
- Education Credit
- Elderly Credit
- RESP Payment

- Total Adv PTC Payment
- AVG Adv PTC Payment
- Total PTC
- Balance Due (Amount of Balance Due)
- ITIN (Primary SSN is an ITIN)
- Exemption 7 (F8965, Line 7 exemption)
- Full Year coverage
- Form 8888 (Yes = Completed in the return)
- Schedule A (Yes = Completed in the return)
- Schedule B (Yes = Completed in the return)
- Schedule C (Yes = Completed in the return)
- Schedule CEZ (Yes = Completed in the return)
- Schedule D (Yes = Completed in the return)
- Schedule E (Yes = Completed in the return)
- Schedule F (Yes = Completed in the return)
- Schedule H (Yes = Completed in the return)
- Schedule R (Yes = Completed in the return)
- Schedule SETP (Yes = Completed for the Taxpayer in the return)
- Schedule SESP (Yes = Completed for the Spouse in the return)

4. Sort the report by column
5. Drag a column to the top to group items together.
6. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

Site Production Detail Report - Paper

1. Select the Tax Year
2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN

- SIDN (pulls from the SIDN setup for the Preparer)
- SSN (Last 4 of Primary Taxpayer)
- Taxpayer First Name
- Taxpayer Last Name
- Primary Taxpayer Date of Birth
- Primary DOB Encrypted (Internal column use only)
- E-mail Address
- Address, City, State, and Zip Code
- Spouse SSN (if applicable) – Last 4
- Spouse SSN Encrypted (Internal column use only)
- Spouse First Name
- Spouse Last Name
- Spouse Date of Birth
- Return Type (Paper Return)
- Total IRS Exemptions (can be used to determine number of dependents on return)
- Refund (Amount of refund)
- Calculated Prep Fee
- Prep Fee
- Paper State (Number of states on return marked as paper)
- Paper Federal (Return marked as paper)
- Federal Rejected (number of times the federal return was rejected)
- State Accepted (Date of State Ack)
- State Rejected (number of times the state return was rejected)
- Total States Transmitted (number of electronic states on the return)
- Primary or Secondary 60+ (0, 1 or 2)
- Created Date
- AGI
- Additional CTC
- # Savings Bonds Purchased (Count)
- Savings Bonds (Dollar value purchased)
- Earned Income Tax Credit
- Child Tax Credit
- Education Credit
- Elderly Credit

- Total RESP Payment
- Total Adv PTC Payment
- AVG Adv PTC Payment
- Total PTC
- Balance Due (Amount of Balance Due)
- ITIN (Primary SSN is an ITIN)
- Exemption 7 (F8965, Line 7 exemption)
- Full Year coverage
- Form 8888 (Yes = Completed in the return)
- Schedule A (Yes = Completed in the return)
- Schedule B (Yes = Completed in the return)
- Schedule C (Yes = Completed in the return)
- Schedule CEZ (Yes = Completed in the return)
- Schedule D (Yes = Completed in the return)
- Schedule E (Yes = Completed in the return)
- Schedule F (Yes = Completed in the return)
- Schedule H (Yes = Completed in the return)
- Schedule R (Yes = Completed in the return)
- Schedule SETP (Yes = Completed for the Taxpayer in the return)
- Schedule SESP (Yes = Completed for the Spouse in the return)
- Marked Complete
- Marked Paid
- Ancillary Fee 1
- Ancillary Fee 2
- Preparer Name

4. Sort the report by column
5. Drag a column to the top to group items together.
6. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

Site Production Summary Report

1. Select the Tax Year
2. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN
- SIDN (pulls from the SIDN setup for the Preparer)
- Federal Accepted (Total accepted)
- Federal Rejected (Total rejected)
- Federal Transmitted (Total transmitted)
- State Accepted (Total accepted)
- State Rejected (Total rejected)
- Total State Transmitted
- Total 1040 Returns
- Total 1040A Returns
- Total 1040EZ Returns
- Total 1040NR Returns
- Total 1040PR Returns
- Total 1040X Returns
- Total Single Return
- Total Married Filing Joint Returns
- Total Married Filing Separate Returns
- Total Head of Household Returns
- Total Qualifying Widow(er) Returns
- Requesting Direct Deposit
- Total IRS Exemptions (Personal and Dependent)
- Total Refund (Total Federal Refunds)
- Average Federal Refunds
- Total Federal EIC
- Average Federal EIC
- Zero AGI ($0 Federal AGI)
- Average Federal AGI
- Primary or Secondary 60+ (Total count)
- Additional CTC (Total count)
- Total Additional CTC (Total $ amount)
- # Savings Bonds Purchased (Count)
- Savings Bonds (Dollar value purchased)
- Earned Income Tax Credit
- Child Tax Credit (Total count)

- Total CTC (Total $ amount)
- Education Credit (Total count)
- Total Education Credit (Total $ amount)
- Elderly Credit (Total count)
- Total Elderly Credit (Total $ amount)
- ITIN Count
- Total Balance Due Amt (Total Federal $ amount owed)
- Total Balance Due Returns (Total count)
- ACA Exemptions 7 (Total F8965, Line 7 exemption count)
- Full Year Coverage Count
- Total RESP Payment Count
- Total RESP Payment Amount
- Average RESP Payment Amount
- Total Adv PTC Payment Count
- Total Adv PTC Payment Amount
- AVG Adv PTC Payment Amount
- Total PTC Count
- Total PTC Amount
- Average PTC Amount
- Form 8888 Total Count
- Schedule A Total Count
- Schedule B Total Count
- Schedule C Total Count
- Schedule CEZ Total Count
- Schedule D Total Count
- Schedule E Total Count
- Schedule F Total Count
- Schedule H Total Count
- Schedule R Total Count
- Schedule SETP Total Count
- Schedule SESP Total Count

3. Sort the report by column
4. Drag a column to the top to group items together.
5. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

State Detail Summary Report

1. Select the Tax Year
2. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- Group Name (Not applicable)
- EFIN
- SSN (Last 4 of Primary)
- Taxpayer First Name
- Taxpayer Last Name
- Federal Status (Accepted or Rejected)
- Federal Ack Date
- State Code (State Abbreviation)
- State Type (i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- State Ack (Accepted or Rejected)
- State Ack Date
- State Refund (shows refund/balance due)
- Active Status

3. Sort the report by column
4. Drag a column to the top to group items together.
5. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

Pro Web Returns – Detailed Return Report

1. Select the Tax Year
2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- Group Name (not applicable)

- EFIN
- SSN (Last 4 of Primary)
- Taxpayer First Name
- Taxpayer Last Name
- Taxpayer Phone Number
- Federal Status (Accepted, Rejected, Complete, etc.)
- Federal Return Type (i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- Federal Refund
- State ID (State Abbreviation)
- State Return Type (i.e. Direct Deposit, Paper, Electronic Balance Due, etc.)
- State Refund
- State Status
- Started Date
- Calculated Prep Fee
- Prep Fee
- Marked Complete
- Marked Paid
- Ancillary Fee 1
- Ancillary Fee 2
- Preparer Name

4. Sort the report by column
5. Drag a column to the top to group items together.
6. The column selection allows you to remove columns from the report prior to exporting it.

You have the ability to do the following:

- Export to CSV

Pro Web Returns – Audit Report (Reserved for Commercial customers)

1. Select the Tax Year
2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN
- SSN (Last 4 of Primary)
- EIC Amount
- Schedule C count
- Schedule C-EZ count
- Schedule F count

Extension Reports

Lists returns with an e-filed Federal extension.

1. Select the Tax Year
2. Select the starting and ending date range
3. Select the EFIN (even if there is only 1)

This report displays the following information per taxpayer:

- EFIN
- Agency ID (FD = Federal)
- SSN (last 4 of Primary)
- First Name
- Last Name
- Ack Code (Accepted or Rejected)
- Created Date
- Transmitted Date
- Ack Date (Date acknowledged by IRS)

Appendix 4: Form 1099-R Distribution Codes

The following is a list of distribution codes and explanations for Form 1099-R, Box 7:

Distribution Code	Explanation
1	Early distribution, no known exception (in most cases, under age 59 ½
2	Early distribution, exception applies (under 59 ½)
3	Disability
4	Death
5	Prohibited transaction
6	Section 1035 exchange (a tax-free exchange of life insurance, annuity, qualified long-term care insurance, or endowment contracts)
7	Normal distribution
8	Excess contributions plus earnings/excess deferrals (and/or earnings) taxable in current year
9	Cost of current life insurance protection
A	May be eligible for 10-year tax option (see Form 4972)
B	Designated Roth account distribution (Note: If code B is in box 7 and an amount is reported in Box 11, see the instructions for Form 5329)
C	Reportable death benefits under section 6050Y
D	Annuity payments from nonqualified annuities that may be subject to tax under section 1411
E	Distributions under Employee Plans Compliance Resolution System (EPCRS)
F	Charitable gift annuity
G	Direct rollover of a distribution to a qualified plan, a section 403(b) plan, a governmental section 457(b) plan, or an IRA
H	Direct rollover of a designated Roth account distribution to a Roth IRA
J	Early distribution from a Roth IRA, no known exception (in most cases, under age 59 ½)

Distribution Code	Explanation
K	Distribution of traditional IRA assets not having a readily available FMV
L	Loans treated as distributions
M	Qualified plan loan offset
N	Recharacterized IRA contribution made for current year and recharacterized in current year
P	Excess contributions plus earnings/excess deferrals (and/or earnings) taxable in previous year
Q	Qualified distribution from a Roth IRA
R	Recharacterized IRA contribution made for previous year and recharacterized in current year
S	Early distribution from a SIMPLE IRA in first 2 years, no known exception (under age 59 ½)
T	Roth IRA distribution, exception applies
U	Dividend distribution from ESOP under section 404(k) Note: This distribution is not eligible for rollover
W	Charges or payments for purchasing qualified long-term care insurance contracts under combined arrangements