



VITA/TCE User Guide

TaxSlayer Pro Online

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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:

This TaxSlayer Pro Online system is only for authorized use under the VITA/TCE program. Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. Unauthorized use of this system is prohibited. Users of this system agree to the Volunteer Standards of Conduct as listed in Form 13615.

Log in to Pro Web

Enter your username and password below to access your cloud-based tax software.

Username

Password

LOG IN

[Forgot username](#) | [Forgot password](#)

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:

Update Password

Your password has expired.
Please create a new password to continue.

Create new password

☐ Must contain one special character (@\$!%*?&)

☐ Must contain at least one upper and one lower case letter

☐ Must contain one number

☐ At least 8 characters long

☐ No more than 25 characters long

☐ New and confirm passwords must match

Confirm new password

UPDATE PASSWORD

Cancel

5. Type a new password.

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

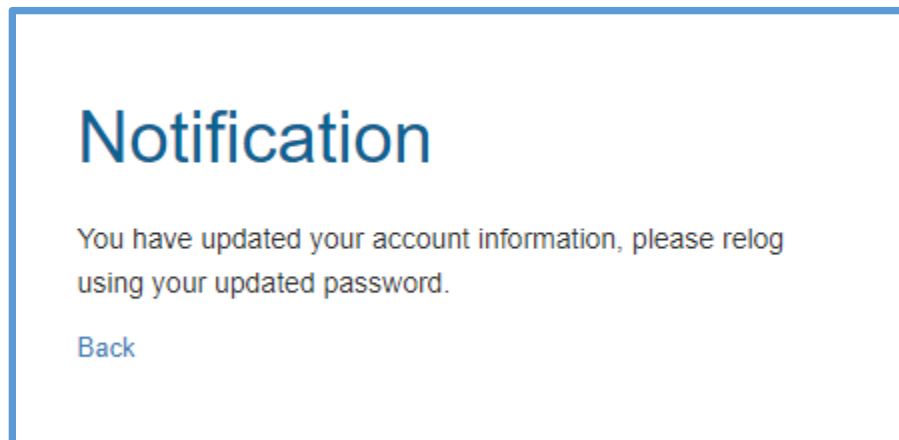
- Minimum of eight (8) characters with at least one (1) of each of the following:
 - 1 upper case letter
 - 1 lower case letter
 - 1 number
 - 1 special character

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**.

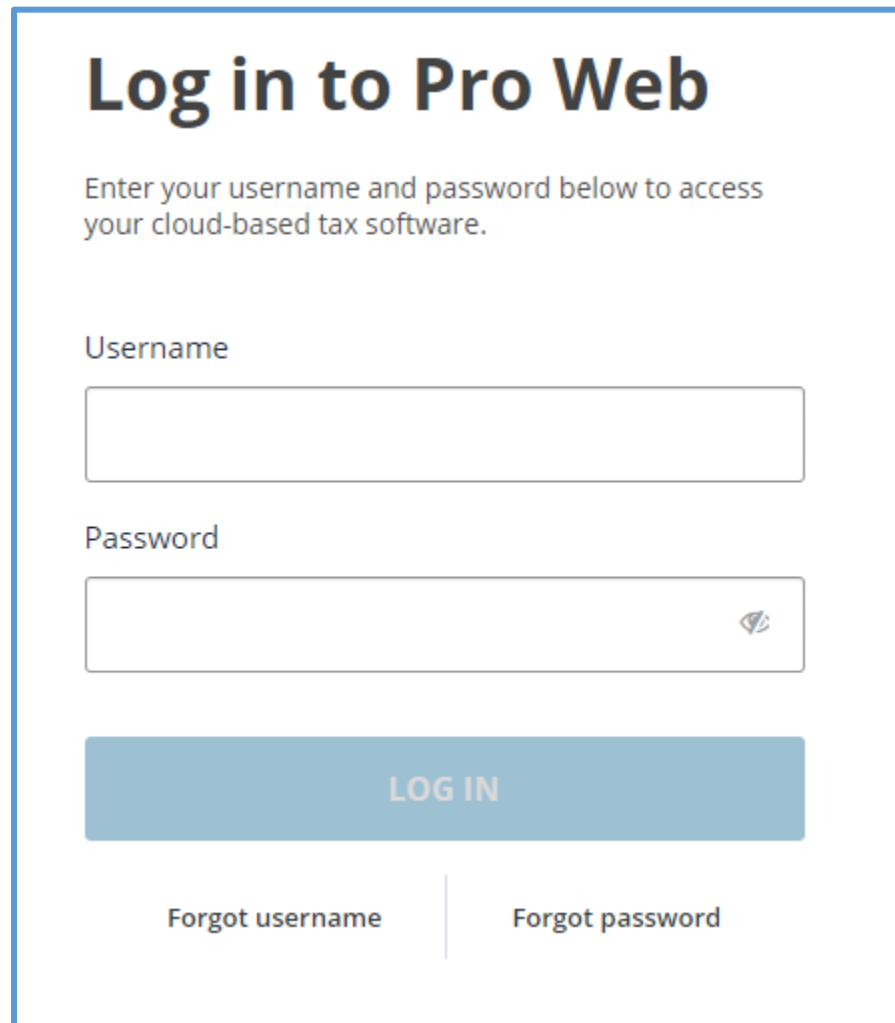
TIP: Click the **Click here to show/hide password** (eye) icon in the password boxes to display the password as you enter it.

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



8. Click **Back**.

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

The image shows a login page for 'Pro Web'. At the top, the title 'Log in to Pro Web' is displayed in a large, bold, black font. Below the title, a message in a smaller, grey font reads: 'Enter your username and password below to access your cloud-based tax software.' There are two input fields: the first is labeled 'Username' and the second is labeled 'Password'. The password field has a small eye icon on its right side to toggle visibility. Below these fields is a large, blue rectangular button with the text 'LOG IN' in white, uppercase letters. At the bottom of the form, there are two links: 'Forgot username' and 'Forgot password', separated by a vertical line.

Log in to Pro Web

Enter your username and password below to access your cloud-based tax software.

Username

Password

LOG IN

[Forgot username](#) | [Forgot password](#)

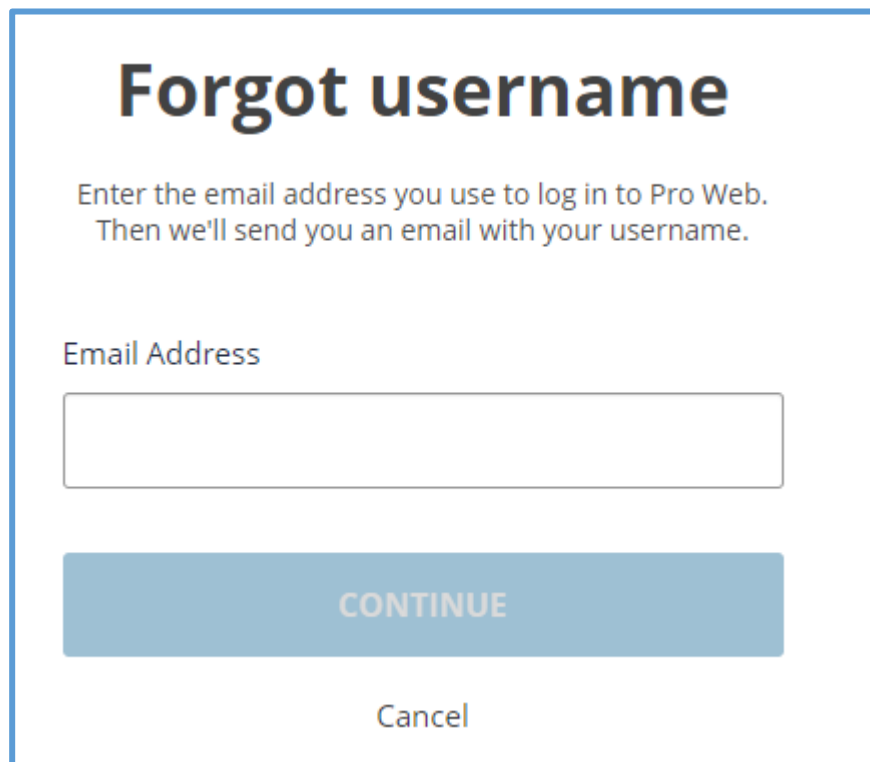
9. Type your user name and **new** password.
10. Click **LOGIN**.

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:



Forgot username

Enter the email address you use to log in to Pro Web.
Then we'll send you an email with your username.

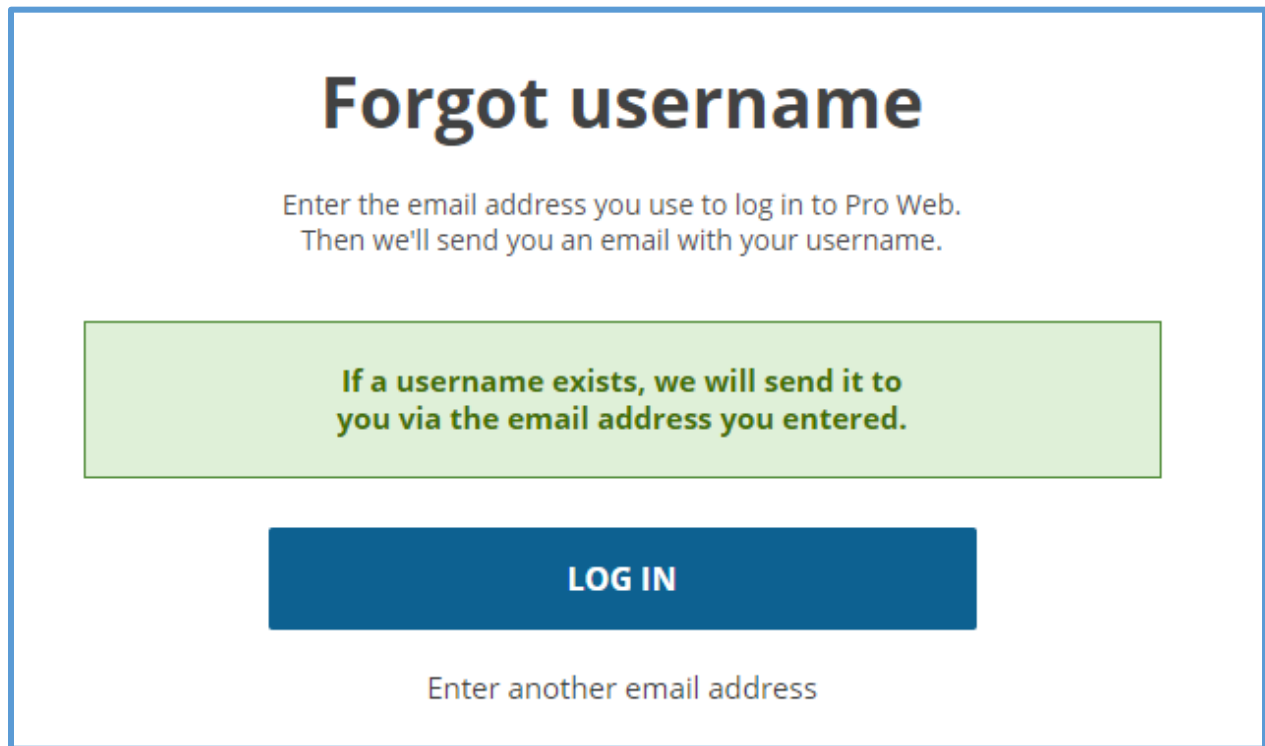
Email Address

CONTINUE

Cancel

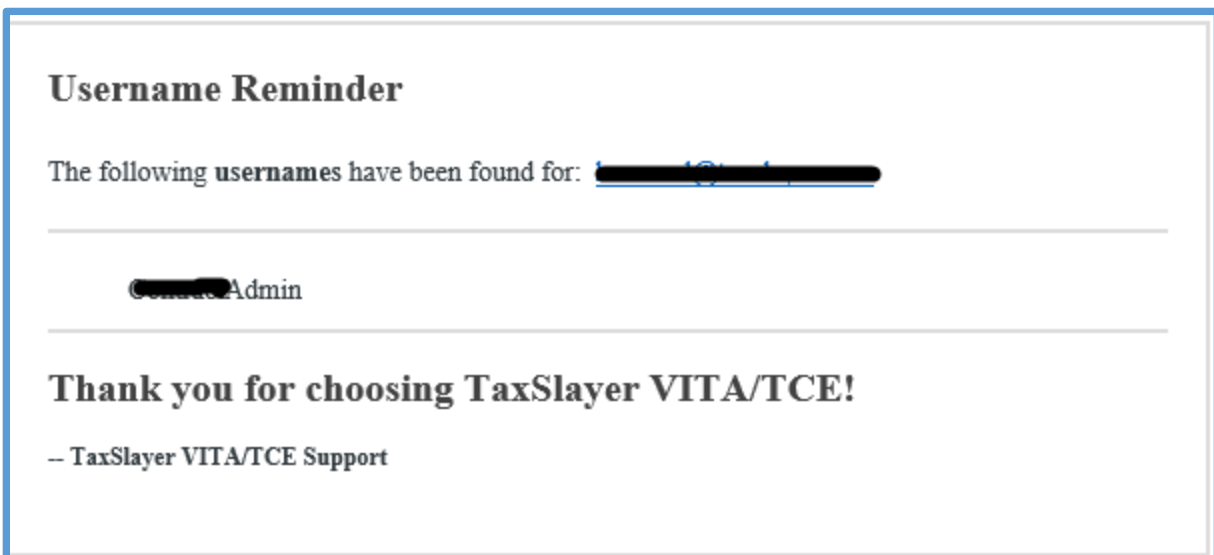
2. Type the email address used during the setup for your Preparer account.
3. Click **CONTINUE**.

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



The screenshot shows the 'Forgot username' page. At the top, the title 'Forgot username' is displayed in a large, bold, dark blue font. Below the title, a message reads: 'Enter the email address you use to log in to Pro Web. Then we'll send you an email with your username.' In the center, there is a light green rectangular box with a thin green border containing the text: 'If a username exists, we will send it to you via the email address you entered.' Below this box is a large, dark blue rectangular button with the text 'LOG IN' in white, bold, uppercase letters. At the bottom of the page, there is a text input field with the placeholder text 'Enter another email address'.

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

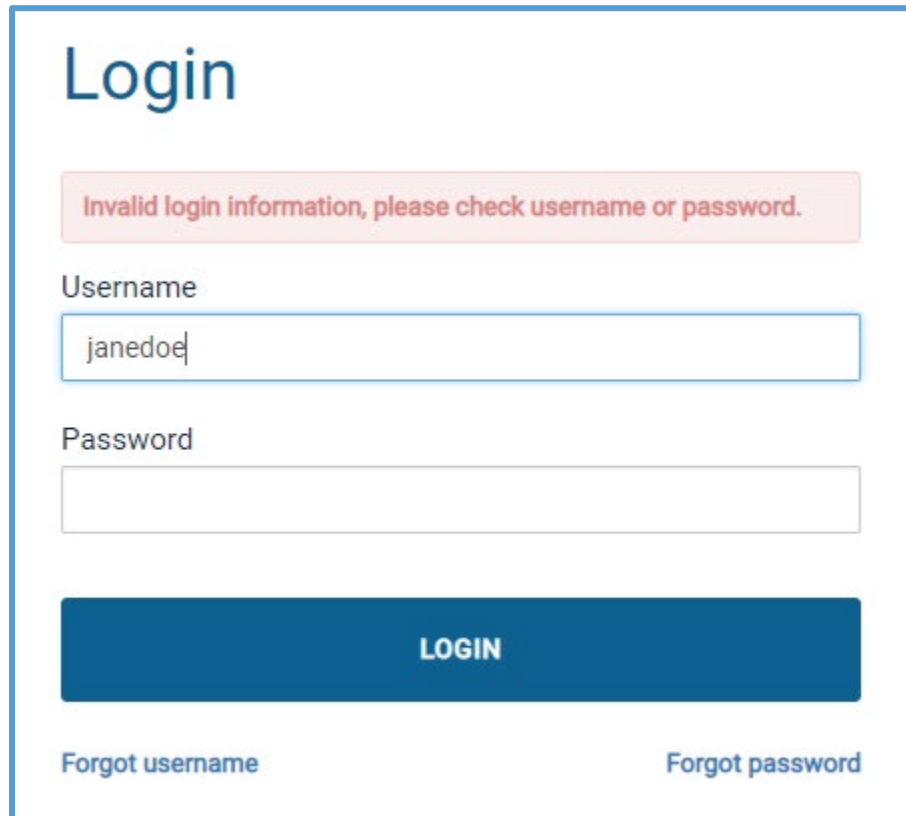


The screenshot shows an email reminder from TaxSlayer VITA/TCE. The email has a header 'Username Reminder' in a bold, dark blue font. Below the header, the text reads: 'The following usernames have been found for: [redacted]'. There is a horizontal line below this text. Below the line, the text reads: '[redacted] Admin'. There is another horizontal line below this text. At the bottom of the email, the text reads: 'Thank you for choosing TaxSlayer VITA/TCE!' in a bold, dark blue font. Below this, the text reads: '— TaxSlayer VITA/TCE Support'.

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:

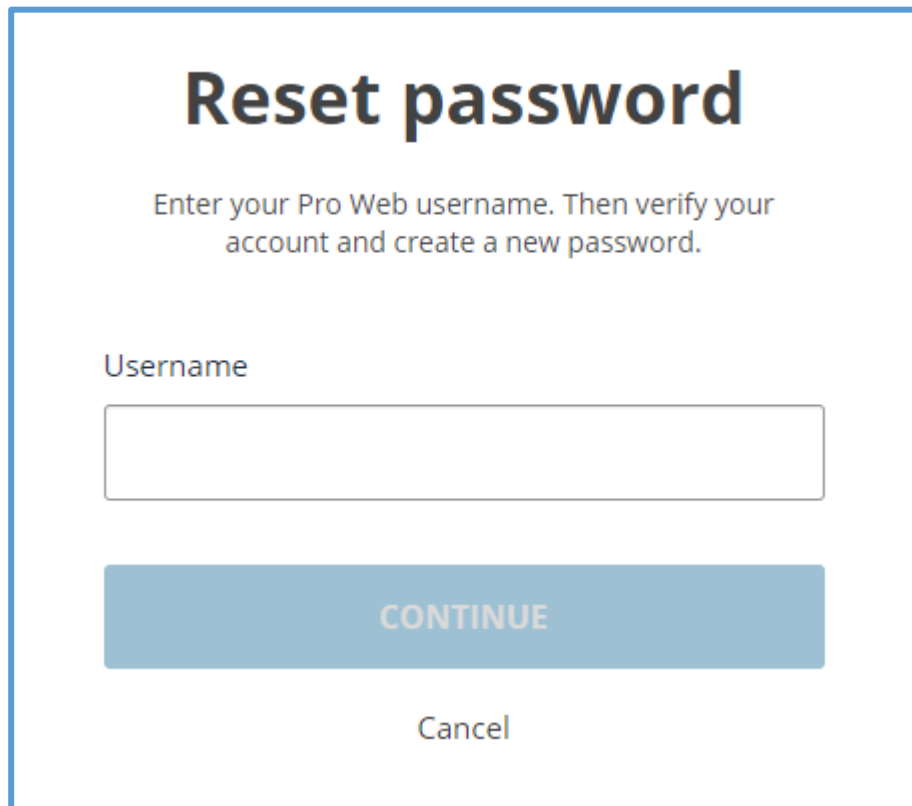


The screenshot shows a login interface with the title "Login" in blue. Below the title is a red error message box that says "Invalid login information, please check username or password." Underneath the error message are two input fields: "Username" with the text "janedoe" and "Password" which is empty. Below the input fields is a large blue button labeled "LOGIN". At the bottom of the form are two links: "Forgot username" on the left and "Forgot password" on the right.

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:



Reset password

Enter your Pro Web username. Then verify your account and create a new password.

Username

CONTINUE


[Cancel](#)

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

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


Verify Account

Please verify your account using one of the options below.



Send text verification

70*****41



Send email verification

kma*****com

Cancel verification

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.

Verification code sent

Enter the verification code below.

Code sent to: **70****41**
Please check your phone for your authentication code.

Don't see your code? [Resend it now.](#)

Authentication code

Verify

[Select another verification method](#)

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:

Account Change Notification

You have successfully updated your account with the username **[REDACTED]**

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:


Verify Account

Please verify your account using one of the options below.



Send text verification

70*****41



Send email verification

kma*****com

Cancel verification

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.

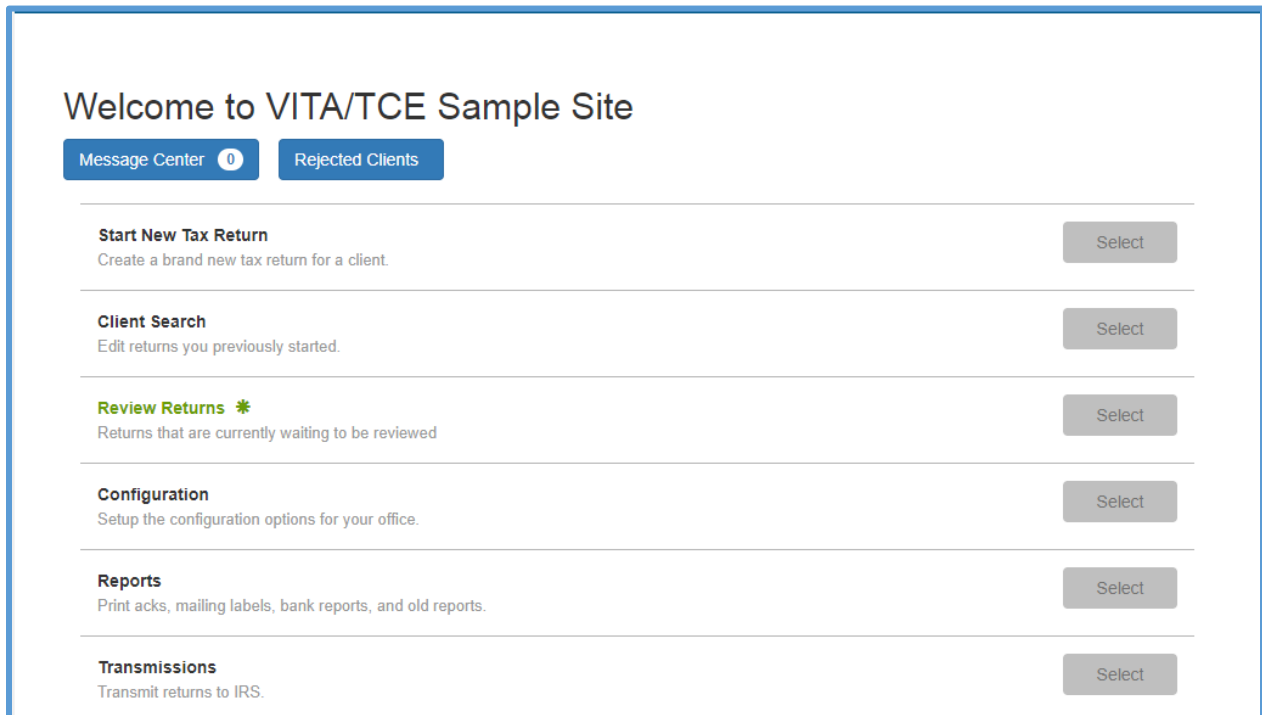
Before you begin using TaxSlayer Pro Online, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carry to tax returns so that you only have to type this information once. This includes items such as the firm/site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



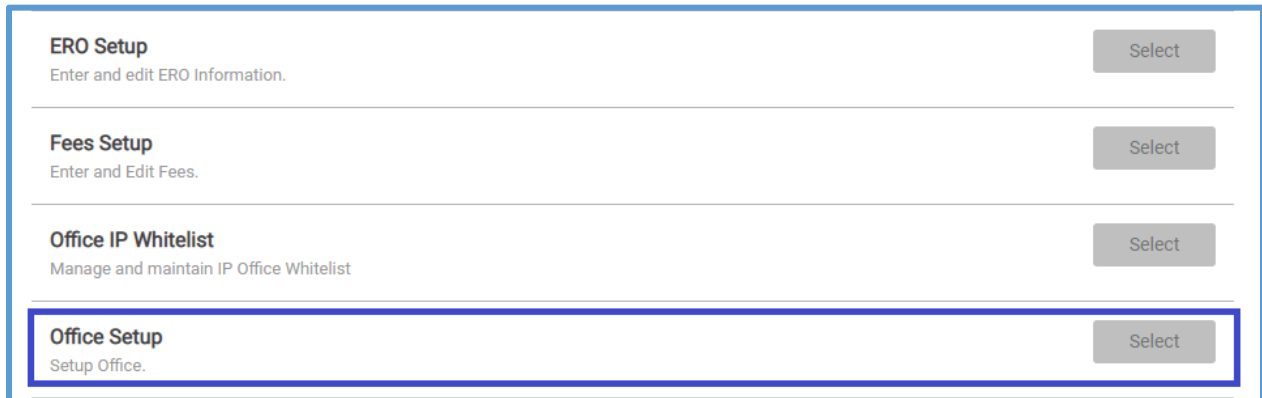
Welcome to VITA/TCE Sample Site

Message Center 0 Rejected Clients

Start New Tax Return Create a brand new tax return for a client.	Select
Client Search Edit returns you previously started.	Select
Review Returns * Returns that are currently waiting to be reviewed	Select
Configuration Setup the configuration options for your office.	Select
Reports Print acks, mailing labels, bank reports, and old reports.	Select
Transmissions Transmit returns to IRS.	Select

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

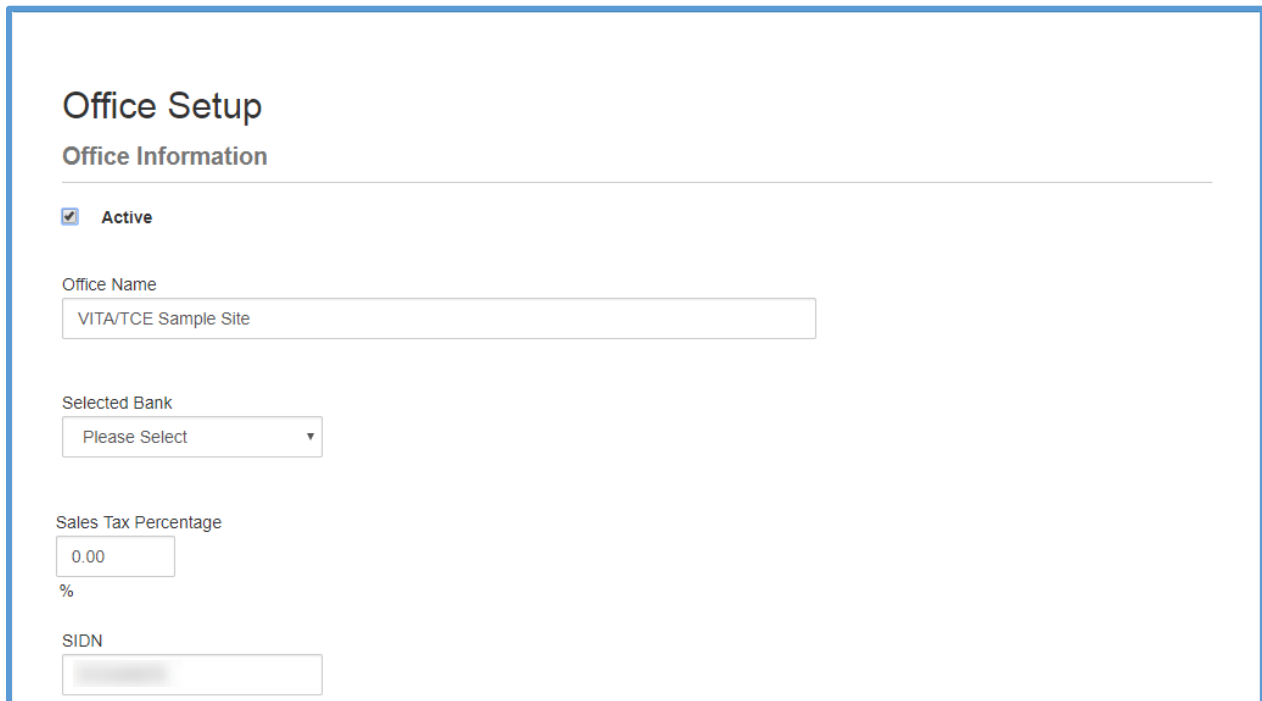
TaxSlayer Pro Online displays the **Configuration Menu** landing page:



ERO Setup Enter and edit ERO Information.	Select
Fees Setup Enter and Edit Fees.	Select
Office IP Whitelist Manage and maintain IP Office Whitelist	Select
Office Setup Setup Office.	Select

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

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



Office Setup

Office Information

☒ **Active**

Office Name
VITA/TCE Sample Site

Selected Bank
Please Select ▼

Sales Tax Percentage
0.00
%

SIDN
[Redacted]

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 <i>IP Whitelist</i> 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:

Maximum number of clients to display on client list
(default value is 999)

999

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.

Office Addresses

TYPE	STREET ADDRESS	CITY	STATE	ZIP	Plus 4	
Physical	777 VITA TCE Lane	Rome	Georgia	30165	1234	Delete
+ Add Address						

Office Phones

TYPE	TELEPHONE	EXT	
Business	706 555 5555		Delete
+ Add Phone			

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

TaxSlayer Pro Online displays a blank address line:

Please Select

Please Select

Delete

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.

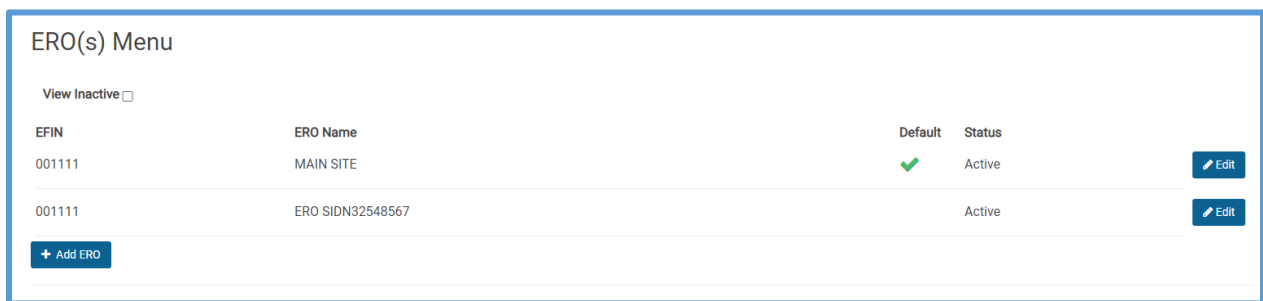
13. When you finish reviewing and adding office information, click **Continue**.

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:



EFIN	ERO Name	Default	Status
001111	MAIN SITE	✓	Active
001111	ERO SIDN32548567		Active

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:

ERO Setup

ERO Personal Information

Customer ID

ERO Name

Office Identifier

EIN

EFIN

☐ Self Employed

☐ Default

☒ Active

☐ Use Office Address and Phone Information

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.

EFIN

1111 *If your EFIN has changed, disable this ERO and create a new ERO Record with your new EFIN.

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:

ERO Address Information

Address Type
Please Select ▼

Street Address

Zip Code
 -

City

State
Please Select ▼

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:

ERO Phone Information

Type

Please Select ▾


Phone Number



() -

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:

ERO(s) Menu

View Inactive 

EFIN	ERO Name	Default	Status	
001111	New		Active	 Edit

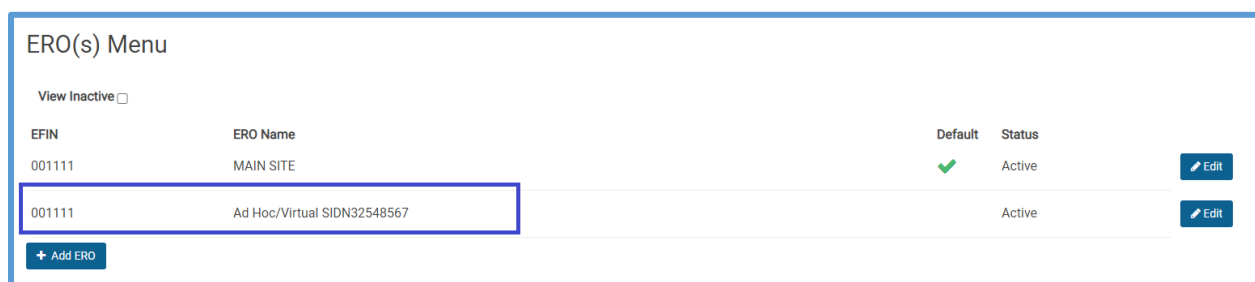
15. When you finish, click **Return**.

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.



ERO(s) Menu

View Inactive ☐

EFIN	ERO Name	Default	Status	
001111	MAIN SITE	✓	Active	Edit
001111	Ad Hoc/Virtual SIDN32548567		Active	Edit

[+ Add ERO](#)

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.

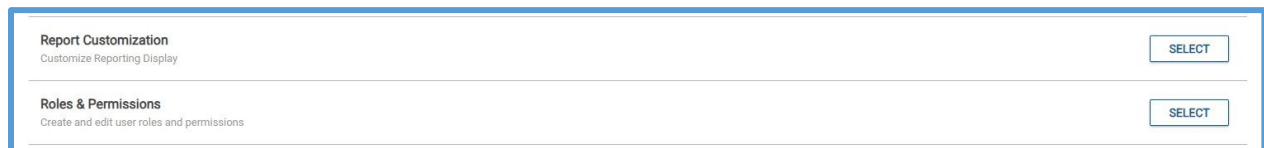
NOTE: You cannot edit the predefined/assigned security roles and will not see them listed in your site's Security Role menu. You will be able to select a role from them when setting up users. See [Adding Preparers](#) for information on selecting security roles for users.

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:

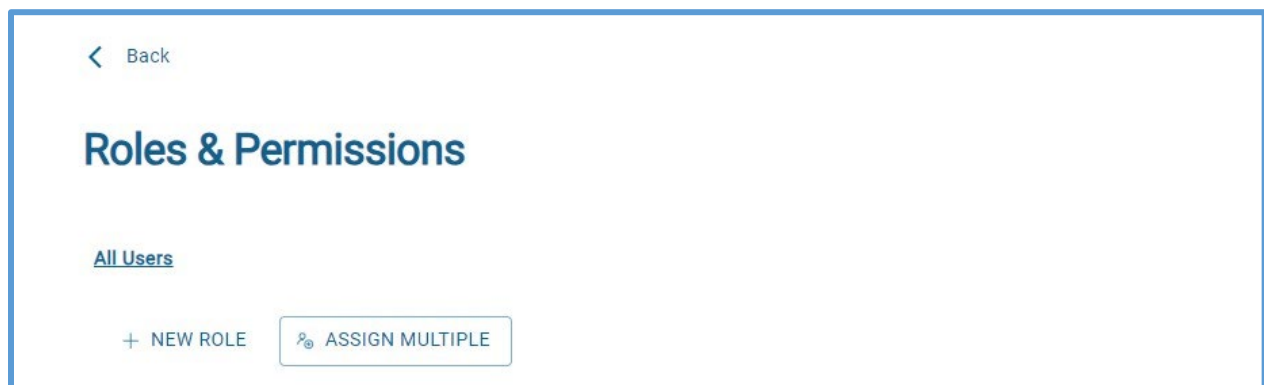
1. Click **Select** on the **Configuration** line.

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



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

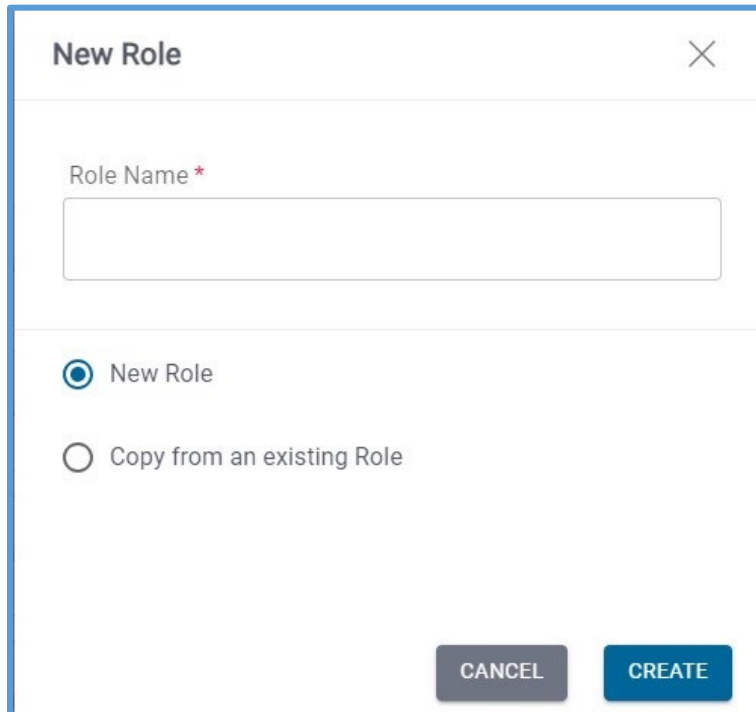
TaxSlayer Pro Online displays the **Roles & Permission** page:



3. Click **NEW ROLE**.

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

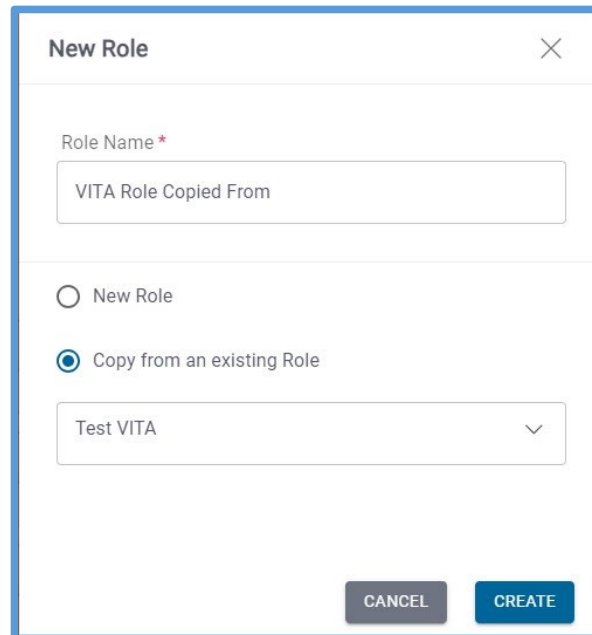
TaxSlayer Pro Online displays the **New Role** page:



The screenshot shows a modal window titled "New Role" with a close button (X) in the top right corner. Inside the modal, there is a text input field labeled "Role Name *" with a red asterisk indicating it is a required field. Below the input field, there are two radio button options: "New Role" (which is selected) and "Copy from an existing Role". At the bottom right of the modal, there are two buttons: "CANCEL" and "CREATE".

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:



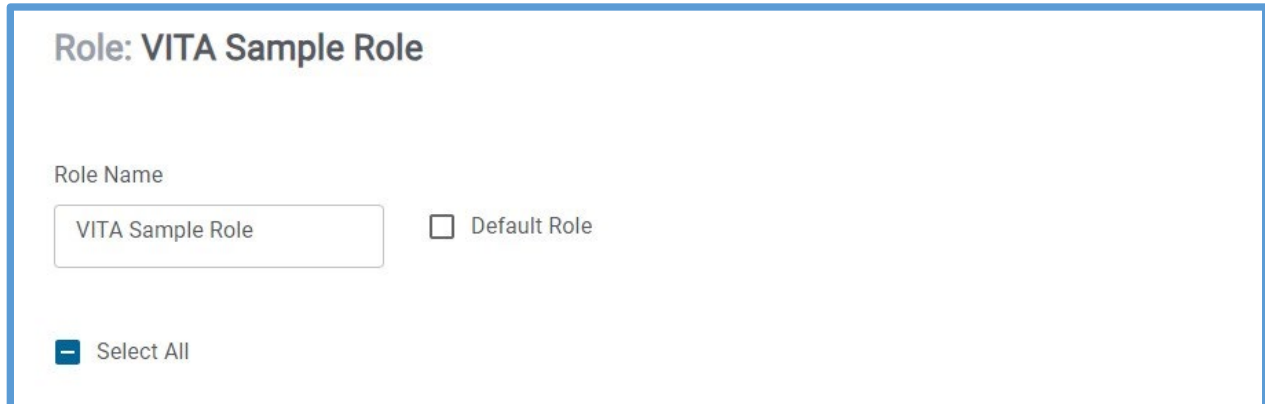
The screenshot shows a 'New Role' dialog box. At the top is the title 'New Role' with a close button (X). Below the title is a text input field labeled 'Role Name *' containing the text 'VITA Role Copied From'. Underneath this field are two radio buttons. The first is 'New Role' and is unselected. The second is 'Copy from an existing Role' and is selected with a blue dot. Below the selected radio button is a drop-down menu showing 'Test VITA' with a downward arrow. At the bottom of the dialog are two buttons: 'CANCEL' and 'CREATE'.

- 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**.

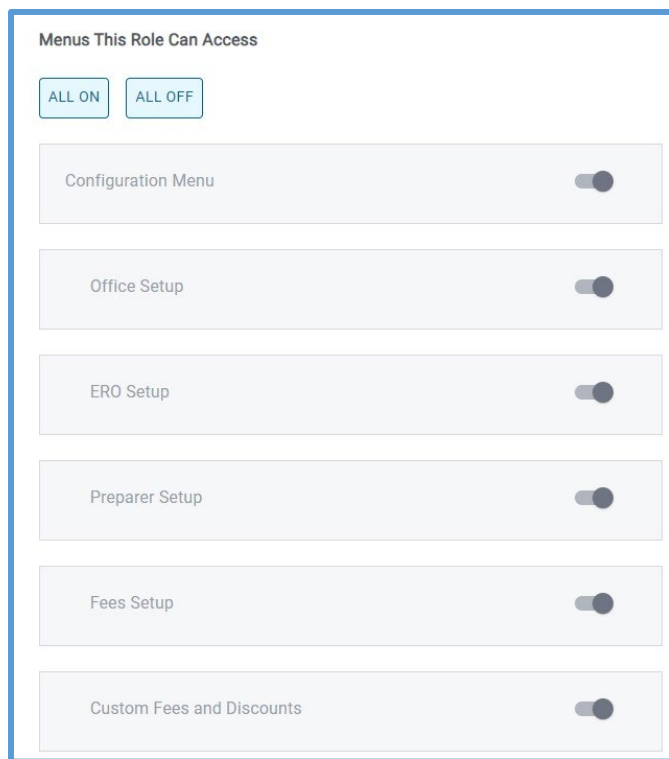
TaxSlayer Pro Online displays the **Role** page:

The screenshot shows a web interface for creating or editing a role. At the top, it says 'Role: VITA Sample Role'. Below this, there is a section labeled 'Role Name' containing a text input field with 'VITA Sample Role' and an unchecked checkbox labeled 'Default Role'. At the bottom of this section, there is a checkbox labeled 'Select All' which is currently checked, indicated by a blue square icon.

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:

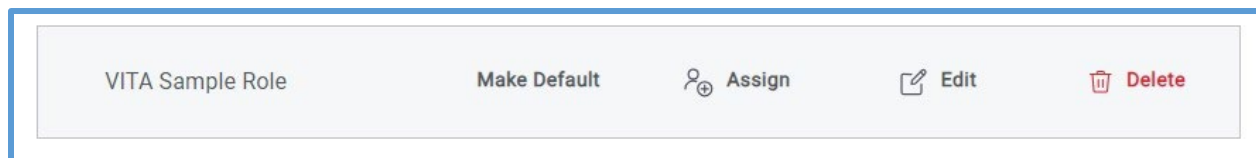


The screenshot shows a panel titled "Menus This Role Can Access". At the top, there are two buttons: "ALL ON" and "ALL OFF". Below these are six rows, each representing a menu item with a toggle switch on the right. All toggle switches are currently turned on (indicated by a dark grey circle on the right).

Menu Item	Toggle Status
Configuration Menu	On
Office Setup	On
ERO Setup	On
Preparer Setup	On
Fees Setup	On
Custom Fees and Discounts	On

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:



The screenshot shows a single entry for "VITA Sample Role" in a table. To the right of the role name are four action buttons: "Make Default", "Assign" (with a person icon), "Edit" (with a pencil icon), and "Delete" (with a trash can icon).

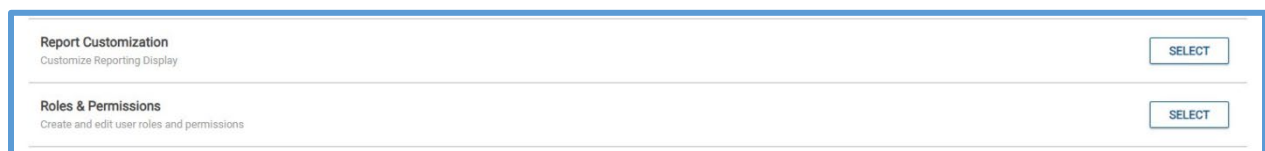
Role Name	Actions
VITA Sample Role	Make Default Assign Edit Delete

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

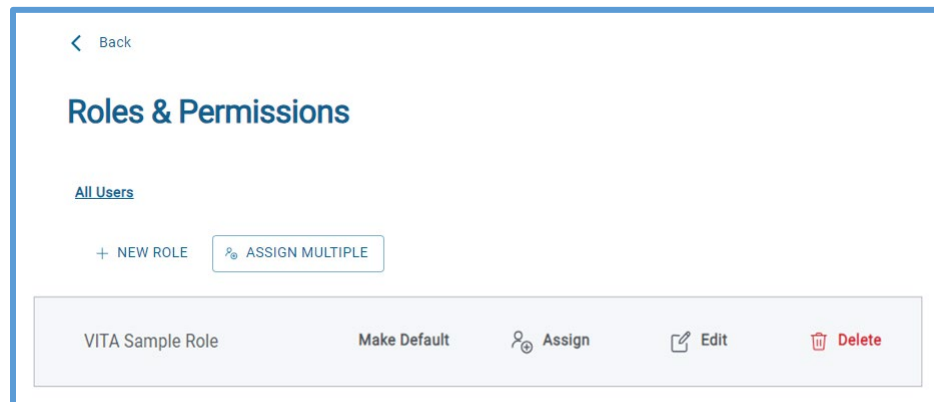
After you add security roles, you can edit those roles at any time. Remember, you cannot edit predefined/assigned security roles. To edit security roles, use the following steps from the **Welcome** page:

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



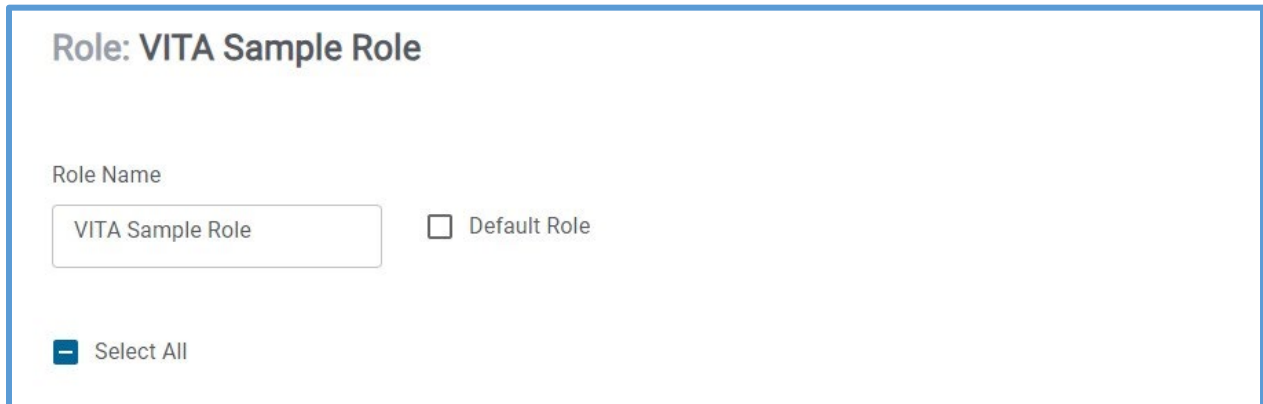
2. Click **Select** on the **Roles & Permissions** line.

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:



Role: VITA Sample Role

Role Name

VITA Sample Role ☐ Default Role

 Select All

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

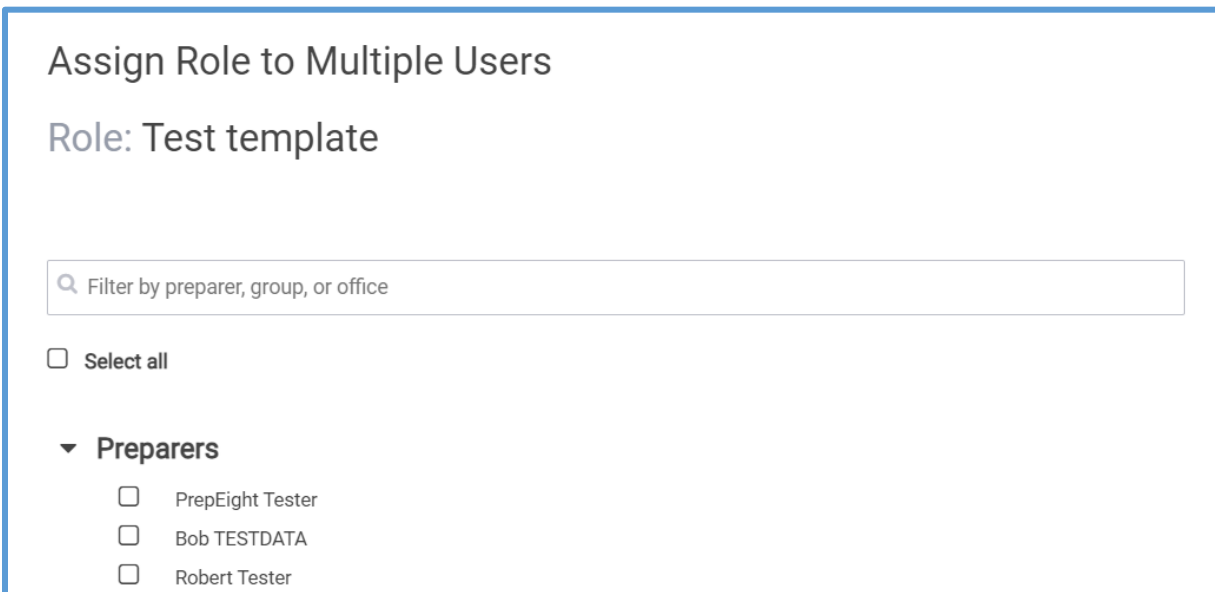
TaxSlayer Pro Online displays the **Security Roles** page.

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:



Assign Role to Multiple Users

Role: Test template

Filter by preparer, group, or office

☐ Select all

▼ Preparers

- ☐ PrepEight Tester
- ☐ Bob TESTDATA
- ☐ Robert Tester

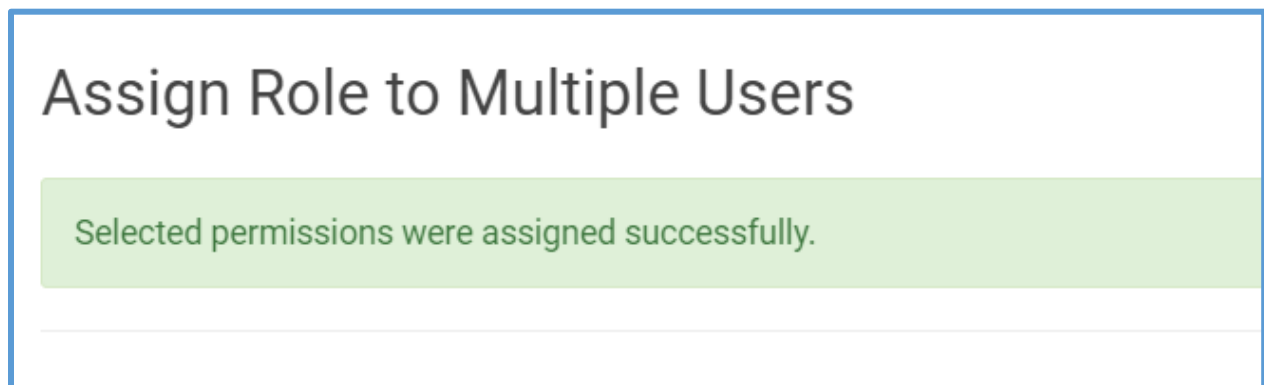
2. Select the check box(es) for any preparers to which you want to assign this role.

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:



Assign Role to Multiple Users

Selected permissions were assigned successfully.

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)	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

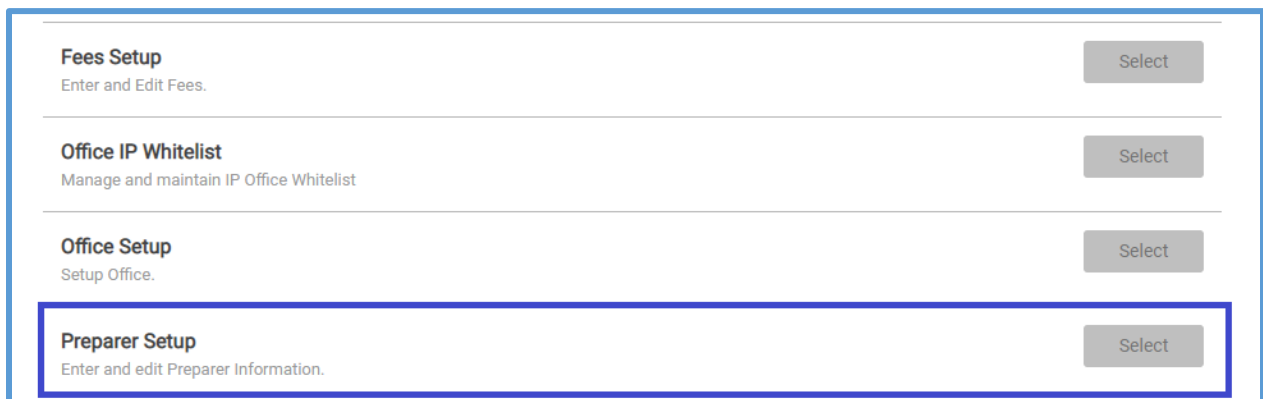
Creating Users

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:



Fees Setup Enter and Edit Fees.	Select
Office IP Whitelist Manage and maintain IP Office Whitelist	Select
Office Setup Setup Office.	Select
Preparer Setup Enter and edit Preparer Information.	Select

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

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

Preparer(s) Menu - Sample VITA/TCE Site

View Archived < Return

Search By:

Status: Active Flip Active Status

+ Add Preparer

SSN	PTIN	Preparer Name	Email	Active	
S12345678		Amy Preparer		<input checked="" type="checkbox"/>	Edit

3. Click **Add Preparer**.

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

Preparer(s) Setup Menu

Preparer Personal Information

First Name

Middle Initial

Last Name

Suffix

Default PIN Number

98765

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 with the taxpayer, you may want to use the word *Volunteer* in the first name box and then 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:

2848 CAF Number

PTIN OR SIDN

[Pull from office](#)

☐ **Office Contact?**

☐ **Self Employed**

☐ **Can view own returns only?**

☐ **Required to use Guide?**

☐ **Prepares NY returns?**

☐ **Prepares OR returns?**

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.

Preparer Agent Information

Title

Company Name

Office Code

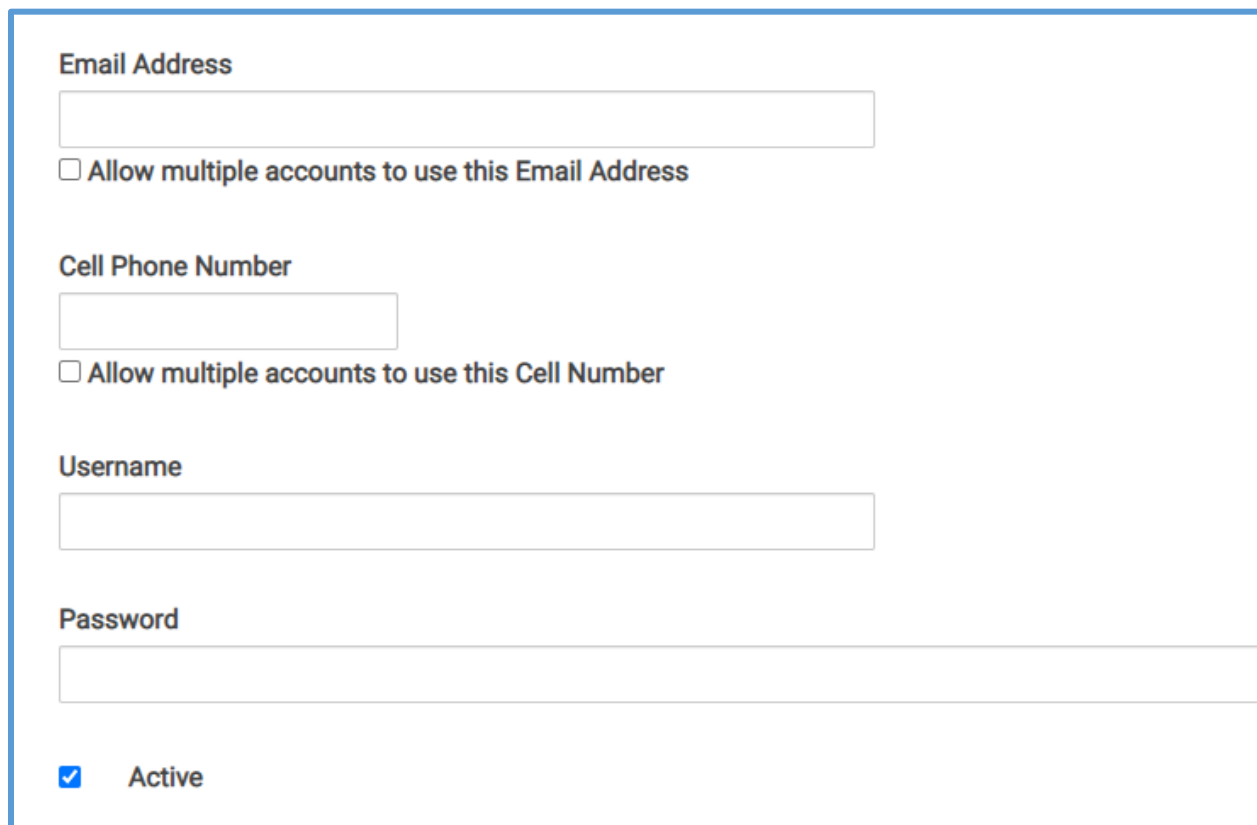
IRS Agreement Date

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:



Email Address

☐ Allow multiple accounts to use this Email Address

Cell Phone Number

☐ Allow multiple accounts to use this Cell Number

Username

Password

☒ Active

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.

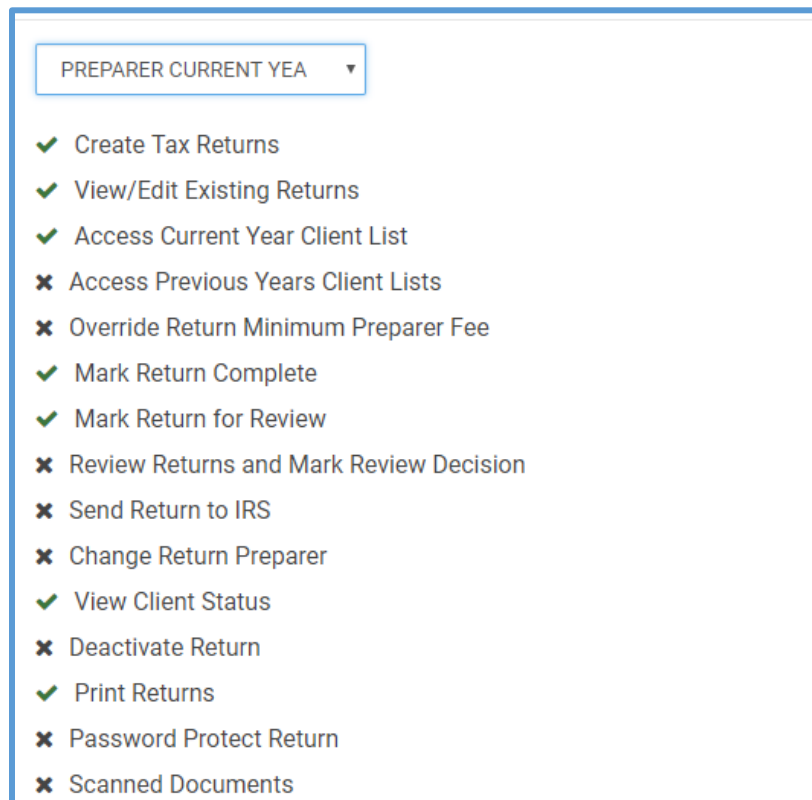
Security Template

Note: There is no Security Template selected for this preparer. They will have full access to the program unless you assign a template.

Please Select ▼

[Show Definitions](#)

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:



PREPARER CURRENT YEA ▼

- ✓ Create Tax Returns
- ✓ View/Edit Existing Returns
- ✓ Access Current Year Client List
- ✗ Access Previous Years Client Lists
- ✗ Override Return Minimum Preparer Fee
- ✓ Mark Return Complete
- ✓ Mark Return for Review
- ✗ Review Returns and Mark Review Decision
- ✗ Send Return to IRS
- ✗ Change Return Preparer
- ✓ View Client Status
- ✗ Deactivate Return
- ✓ Print Returns
- ✗ Password Protect Return
- ✗ Scanned Documents

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**:

Email Address

☒

Allow multiple accounts to use this Email Address

Cell Phone Number

☐

Allow multiple accounts to use this Cell Number

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?

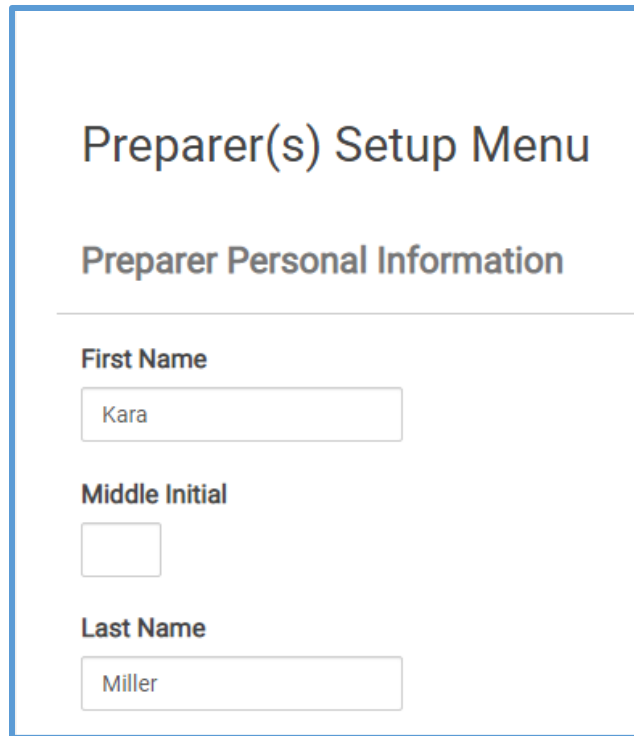
Any user with a security role that allows adding or editing of preparers can archive users. You can only archive inactive users.

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:



The screenshot shows a web form titled "Preparer(s) Setup Menu". Below the title is a section header "Preparer Personal Information" followed by a horizontal line. Under this line are three labeled input fields: "First Name" with the value "Kara", "Middle Initial" which is empty, and "Last Name" with the value "Miller".

Preparer(s) Setup Menu

Preparer Personal Information

First Name

Middle Initial

Last Name

2. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the appropriate section:

The screenshot shows a user management form for 'kimiller'. It includes a 'Username' field with the value 'kimiller', an 'Active' checkbox which is checked, a 'Security Template' section showing 'Current Template: SAMPLE TO UNASSIGN' and a dropdown menu currently set to 'SAMPLE TO UNASSIGN', a 'Show Definitions' link, an 'Is Archived' checkbox which is unchecked, and an 'Electronically Sign' button at the bottom.

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**:

Kara Miller	SAMPLE TO UNASSIGN	VITA/TCE Sample Site	VITA/TCE Main		Archived	Yes
-------------	--------------------	----------------------	---------------	--	----------	-----

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**:

Preparer(s) Menu - Sample VITA/TCE Site View Archived Return

1. Click **View Archived**.

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

Archived Preparer(s) Menu - Sample VITA/TCE Site View Inactive/Active Return

Search By:

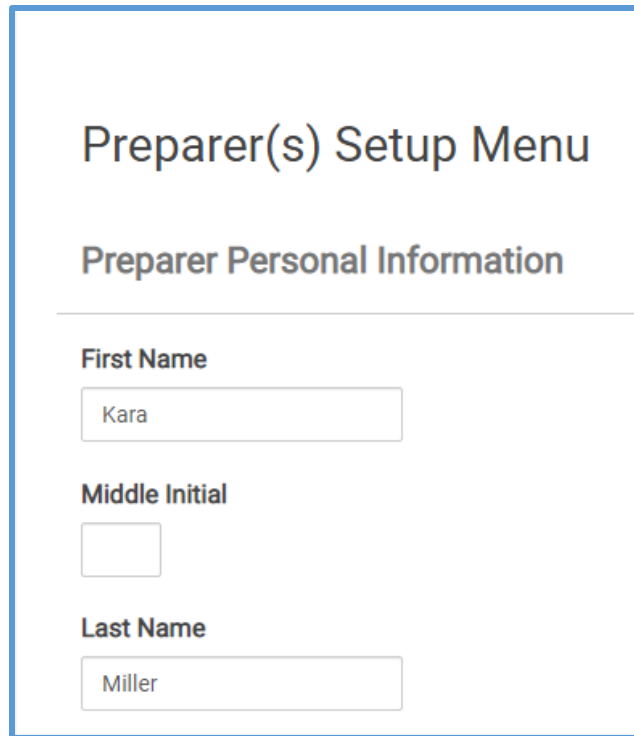
+ Add Preparer

SSN	PTIN	Preparer Name	Email	
S12345678		JAN 24 2018 TEST 2		<div>Edit</div>

Showing 1 to 1 of 1 entries

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:



The screenshot shows a web form titled "Preparer(s) Setup Menu". Below the title is a section header "Preparer Personal Information" followed by a horizontal line. Under this line are three labeled input fields: "First Name" with the value "Kara", "Middle Initial" which is empty, and "Last Name" with the value "Miller".

Preparer(s) Setup Menu

Preparer Personal Information

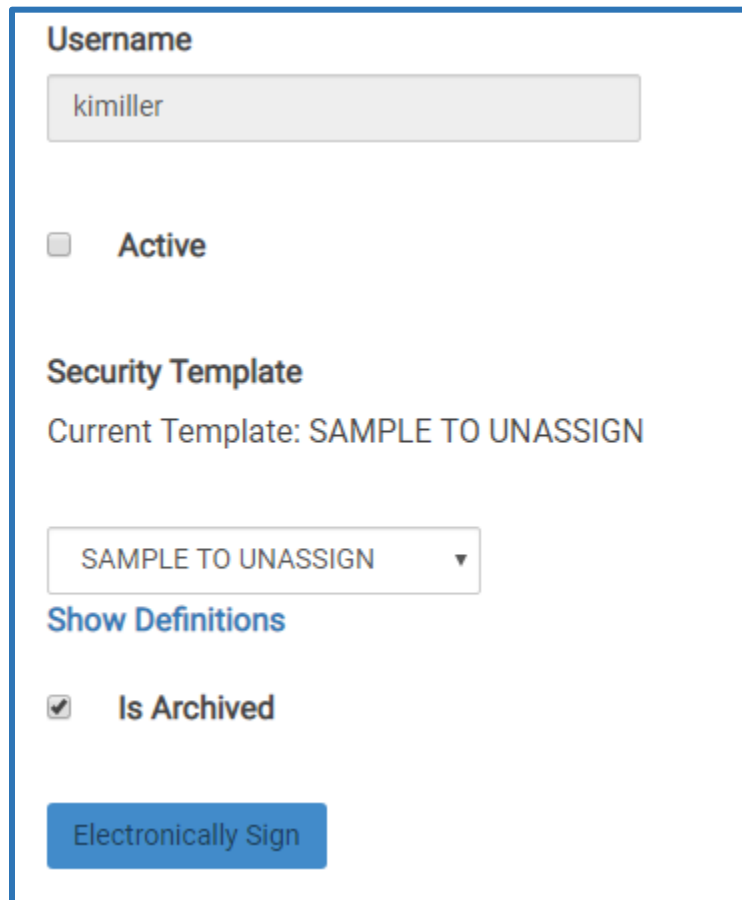
First Name

Middle Initial

Last Name

2. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the appropriate section:



The screenshot shows a user configuration form with the following elements:

- Username**: A text input field containing the value "kimiller".
- Active**: A checkbox that is currently unchecked, followed by the text "Active".
- Security Template**: A section header.
- Current Template**: A text label showing "SAMPLE TO UNASSIGN".
- Template Selection**: A dropdown menu currently displaying "SAMPLE TO UNASSIGN".
- Show Definitions**: A blue hyperlink.
- Is Archived**: A checkbox that is currently checked, followed by the text "Is Archived".
- Electronically Sign**: A blue button at the bottom of the form.

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

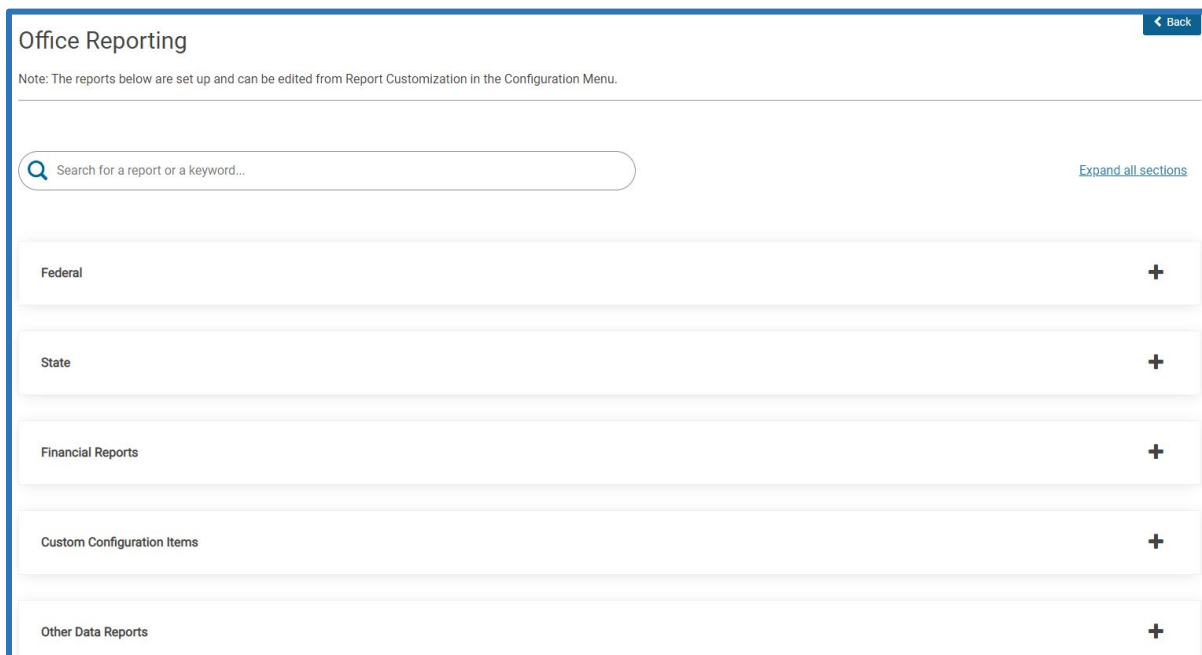
TaxSlayer Pro Online activates the preparer and displays the information in the **Preparer(s) Menu**.

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.

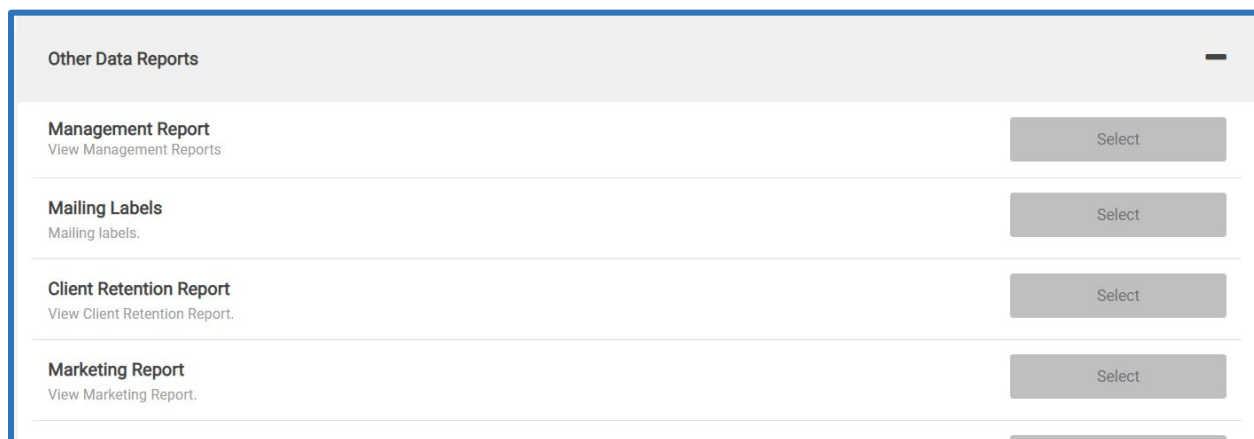
TaxSlayer Pro Online displays the **Office Reporting** page:



The screenshot shows the 'Office Reporting' page. At the top, there is a 'Back' button. Below the title, a note states: 'Note: The reports below are set up and can be edited from Report Customization in the Configuration Menu.' A search bar with a magnifying glass icon and the text 'Search for a report or a keyword...' is present. To the right of the search bar is a link that says 'Expand all sections'. Below the search bar, there are five expandable sections, each with a plus sign on the right: 'Federal', 'State', 'Financial Reports', 'Custom Configuration Items', and 'Other Data Reports'.

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

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



The screenshot shows the 'Other Data Reports' section expanded. It contains a list of four reports, each with a 'Select' button to its right: 'Management Report' (with a sub-link 'View Management Reports'), 'Mailing Labels' (with a sub-link 'Mailing labels.'), 'Client Retention Report' (with a sub-link 'View Client Retention Report.'), and 'Marketing Report' (with a sub-link 'View Marketing Report.').

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:

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:



Office Setup Setup Office.	Select
Preparer Setup Enter and edit Preparer Information.	Select
Print Sets Create Print Sets	Select
Question Templates Create and assign question templates	Select
Report Customization Customize Reporting Display	Select

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:

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

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

Question

Required:

Not Required

Tax Year:

All

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.

Available Answers

one

two

three

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

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

Question	Required	
Q01: Sample question	No	Edit Delete

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:

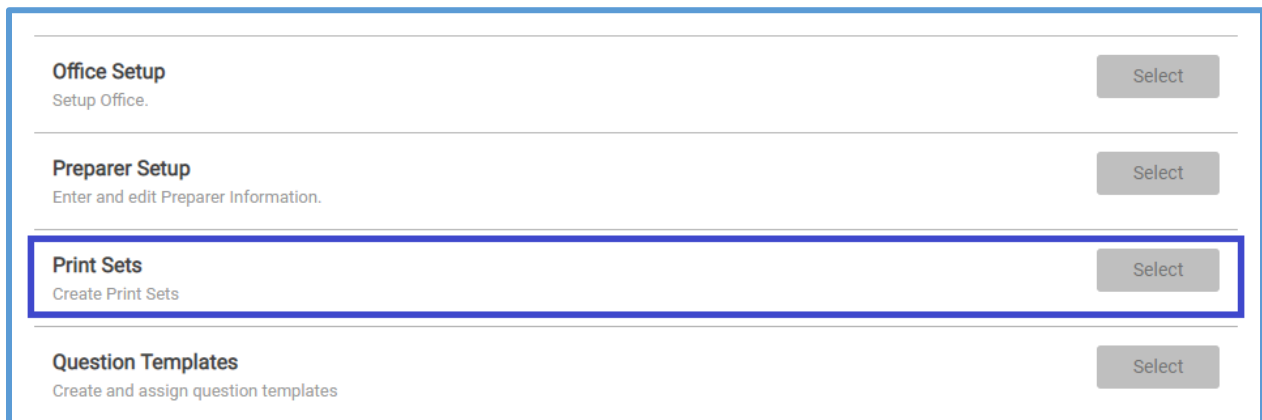
- a) TAXPAYER COPY PRINT (TaxSlayer assigned)
- b) PAPER FILE COPY (TaxSlayer assigned)
- c) QUALITY REVIEW (TaxSlayer assigned)
- d) Any print set created at the site
- e) Any print set assigned from a Group Level

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:



Office Setup Setup Office.	Select
Preparer Setup Enter and edit Preparer Information.	Select
Print Sets Create Print Sets	Select
Question Templates Create and assign question templates	Select

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

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

Template Name	Created By	Date Created	Print Watermark		
QUALITY REVIEW	VITA/TCE Main	5/13/2016	<input type="checkbox"/>	Remove Default	View
PAPER FILE COPY	VITA/TCE Main	1/4/2019	<input type="checkbox"/>	Set As Default	View
TAXPAYER COPY PRINT	VITA/TCE Main	9/30/2016	<input type="checkbox"/>	Set As Default	View

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:

The screenshot shows the 'Print Set Setup' interface. At the top left is a blue button labeled '+ SET RANGE'. Below it is a text input field for 'Print Set Name' containing 'RJ Quality'. Underneath is a checked checkbox labeled 'Watermark Print'. A light blue box contains a 'Search forms...' input field and a 'Filter by state' dropdown menu. Below this is a table with four columns: 'No.', 'Fed/St', 'Form/Schedule Name', and 'Number of Copies'. The table lists two items: 'Form 1040' and 'Client Invoice', each with a 'Number of Copies' dropdown set to '1'.

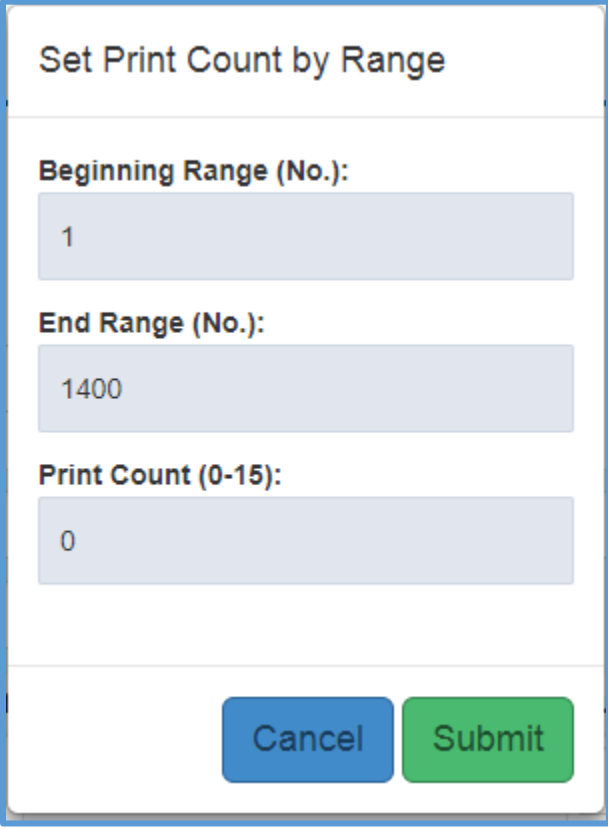
No.	Fed/St	Form/Schedule Name	Number of Copies
1	FD	Form 1040	1
2		Client Invoice	1

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:



Set Print Count by Range

Beginning Range (No.):

1

End Range (No.):

1400

Print Count (0-15):

0

Cancel Submit

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:

Print Set Setup

+ Set Range

Print Set Name

Search forms...

Filter by state

No.	Fed/St	Form/Schedule Name	Number of Copies
1	FD	Audit Maintenance Pro	2
2	FD	Audit Guard	2
3	FD	Federal Electronic Filing	2

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:

SAMPLE PRINT SET	Sample VITA/TCE Site	1/18/2017	Set As Default	Edit	Delete
New Print Set	Sample VITA/TCE Site	9/22/2019	Set As Default	Edit	Delete

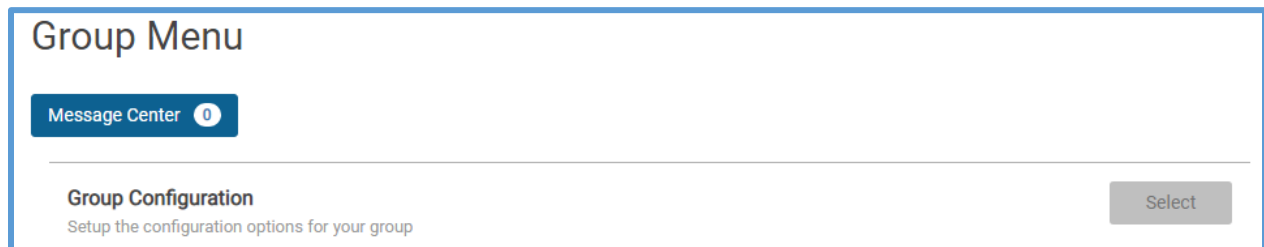
10. Click **Add** and follow the same steps for any additional print sets you want to use.
11. To set a print set as the default set for all returns printed from the Client List and/or Submission page, click **Set As Default** on the line for that print set.
12. If you need to edit or delete a print 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:

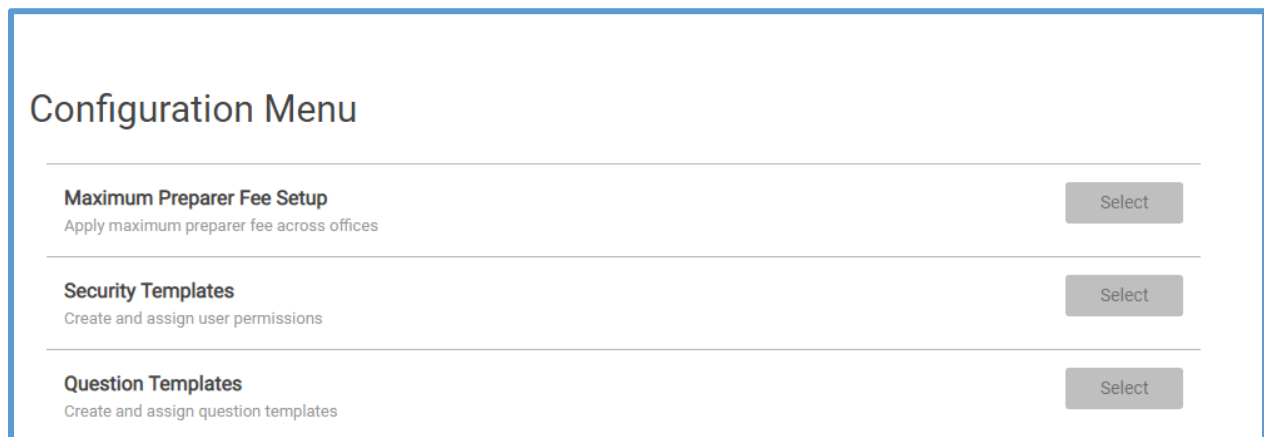
1. Log in to TaxSlayer Pro Online with the assigned Group Level login.

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:

Template Name	Created By	Date Created	View Users	+ Assign	Edit	Delete
TRAINING PRINT	TA-R01-CT1-D01	6/8/2020				

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

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

Assign template to:

search...

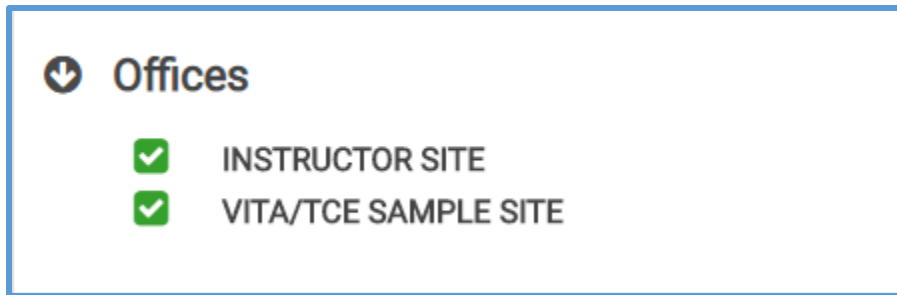
☐ Check/Uncheck all

☐ Show Inactive

⌵ Offices

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:



↓ Offices

- ☒ INSTRUCTOR SITE
- ☒ VITA/TCE SAMPLE SITE

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.

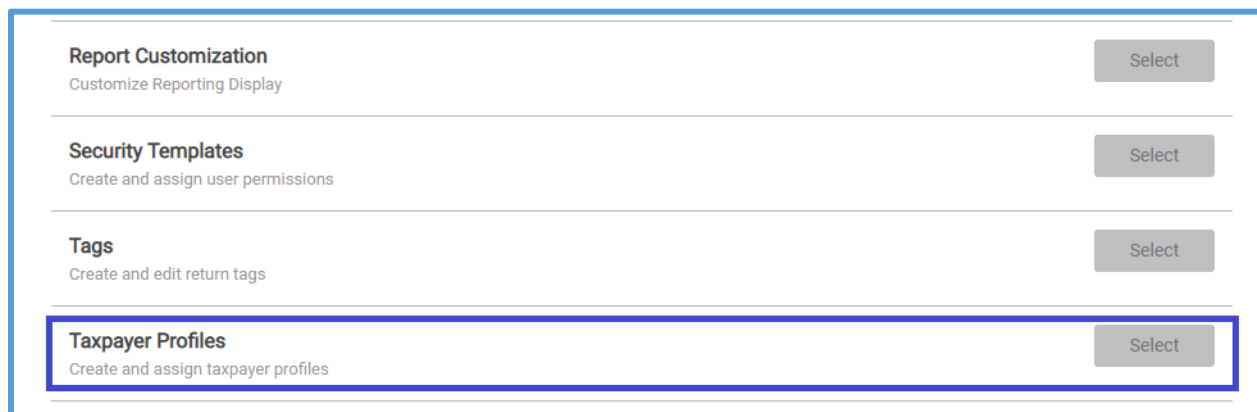
You can add more profiles during tax season as the type of returns prepared at your site changes.

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.

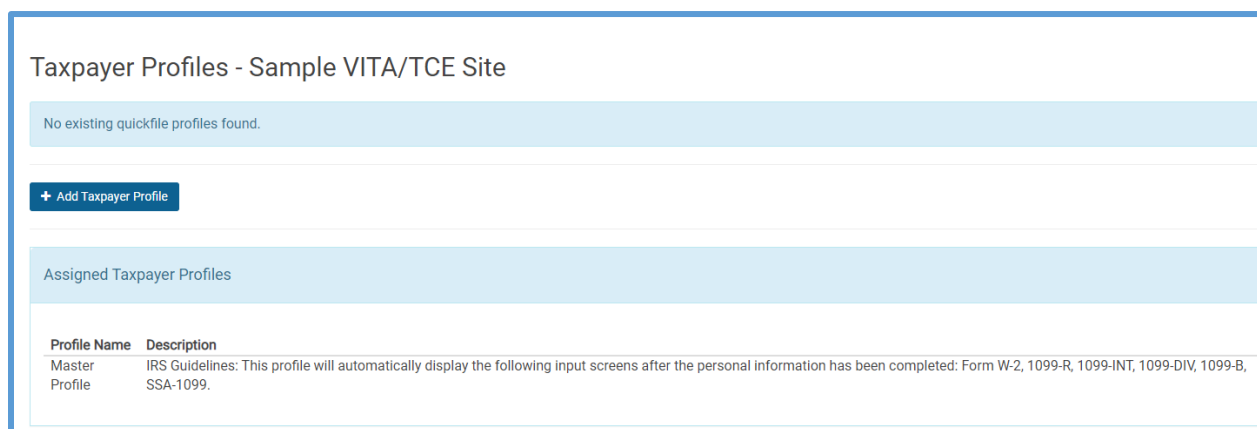
TaxSlayer Pro Online displays the **Configuration Menu** landing page:



Report Customization Customize Reporting Display	Select
Security Templates Create and assign user permissions	Select
Tags Create and edit return tags	Select
Taxpayer Profiles Create and assign taxpayer profiles	Select

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

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



Taxpayer Profiles - Sample VITA/TCE Site

No existing quickfile profiles found.

+ Add Taxpayer Profile

Assigned Taxpayer Profiles

Profile Name	Description
Master Profile	IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

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:

Edit Taxpayer Profile

Profile Name

Description

Tax Year

2016 ▼

Tax Form (Lookup)

Selected Tax Forms

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:

Selected Tax Forms		
↕↑ W-2, Wages and Salaries		ⓧ
↕↑ 1099-INT, Interest Income		ⓧ
↕↑ 1099-INT, Tax Exempt Interest Income		ⓧ
↕↑ Contract and Self Employment Income and Losses		ⓧ
↕↑ Contributions made to SEP, Simple and Qualified Plans		ⓧ

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:

Taxpayer Profiles - Sample VITA/TCE Site			← Back
Profile Name	Description	Tax Year	
Sample Taxpayer Profile	Sample Form	2019	Edit Delete

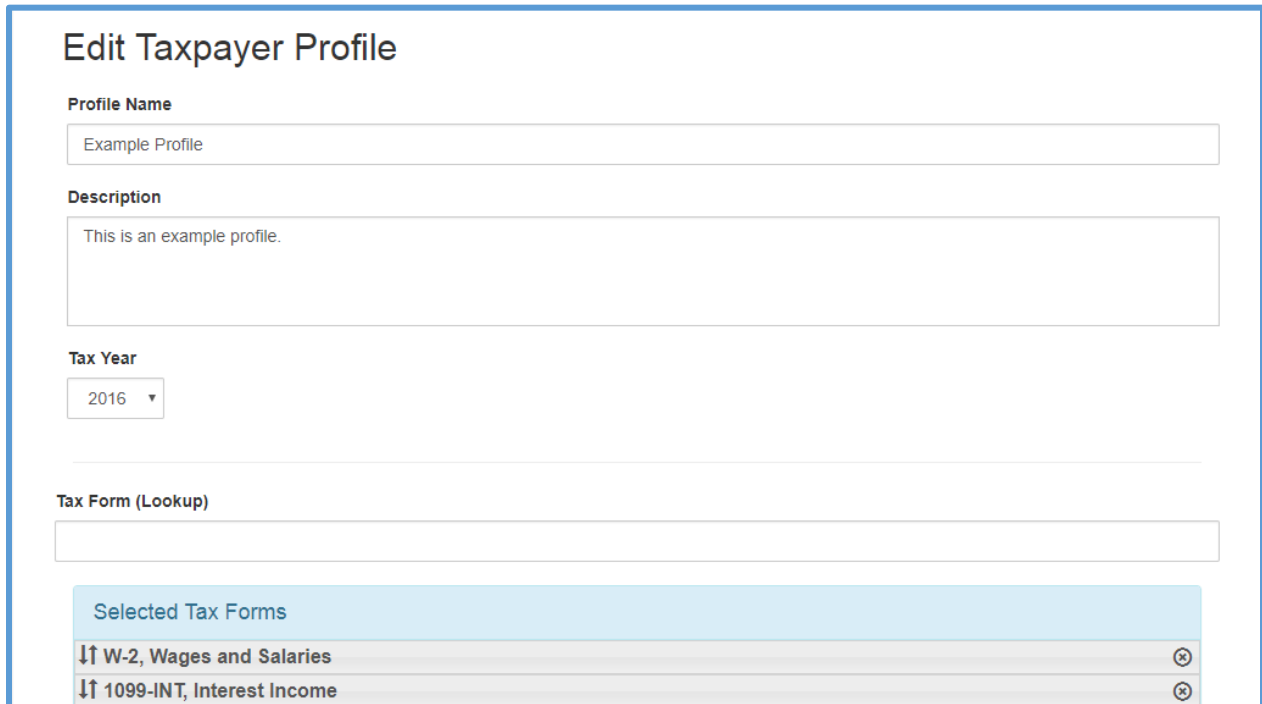
12. To add more taxpayer profiles, click **Add** and follow the same steps.

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:



Edit Taxpayer Profile

Profile Name
Example Profile

Description
This is an example profile.

Tax Year
2016 ▼

Tax Form (Lookup)

Selected Tax Forms
↕ W-2, Wages and Salaries
↕ 1099-INT, Interest Income

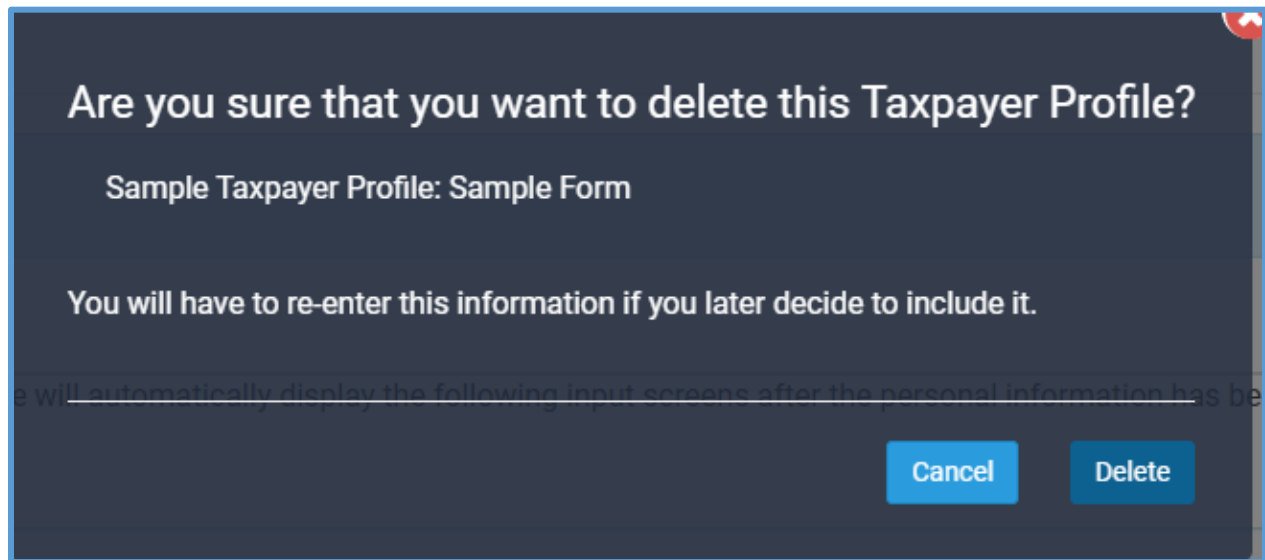
2. Edit the profile name, description, or tax year as needed.
3. Add and sort forms as described previously in this lesson.
4. Click **Save** to save the edited profile.

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:

Configuration Menu

Security Templates Create and assign user permissions	Select
Question Templates Create and assign question templates	Select
Taxpayer Profiles Create and assign taxpayer profiles	Select
Consent Forms Create and assign consent forms	Select
Tags Create and edit return tags	Select
Print Set Templates Create and edit print set templates	Select

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

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


Taxpayer Profiles

Profile Name	Description	Tax Year	
Example	This is an example taxpayer profile.	2016	+ Assign Edit Delete

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

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

Assign Taxpayer Profile


Example 

Selected Tax Forms

- W-2, Wages and Salaries
- 1099-INT, Interest Income
- 1099-INT, Tax Exempt Interest Income
- Contract and Self Employment Income and Losses
- Contributions made to SEP, Simple and Qualified Plans

Assign profile to:

search...

 Offices

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:

Assign Taxpayer Profile

Selected Taxpayer Profile was assigned successfully.

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:

The screenshot shows the 'Enter Social Security Number' section with two rows of input fields. The first row is for the 'Social Security Number' and the second row is for the 'Confirm Social Security Number'. A red box highlights the first field of the first row. Below the input fields, a red message states 'Social Security Number must match.' The 'Available Taxpayer Profiles' section below shows two options: 'Basic (No Profile)' with the description 'Create a return without a Taxpayer Profile.' and 'Master Profile' with a mouse cursor icon and the description 'IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.' A 'Start Return' button is located at the bottom right of the form.

Enter Social Security Number

Social Security Number

Confirm Social Security Number

Social Security Number must match.

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Start Return

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:

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 filing for sites using a Relational EFIN	Yes	No	2018	
Consent to Disclose/Use Information to the VITA/TCE programs Relational Offices	Required for electronic filing 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:

The screenshot shows the 'Edit Consent Form' page in TaxSlayer Pro Online. It features a form with the following sections:

- Consent Form Name:** A text input field.
- Description:** A text input field with a '(500 character limit)' note.
- Consent Tax Year:** A dropdown menu currently set to 'All'.
- Display Disclosure Limitations:** An unchecked checkbox.
- Required For Efile:** An unchecked checkbox.
- Consent Form Terms:** A light blue section with a '+' icon on the right, indicating where to add terms.

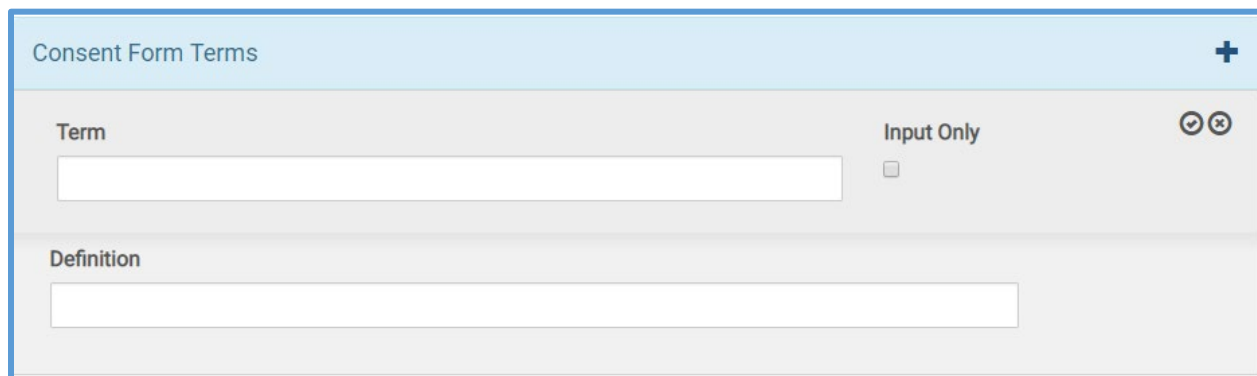
3. Type a name and description for your consent form.
4. Select the **Consent Tax Year**. You can select either **All** to display the consent in all tax years, the current year, or one of the five prior years.
5. Select the **Display Disclosure Limitations** check box if you need to display the disclosure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

Edit Consent Form

Consent Form Name
Test Consent

Description
Test Consent Description

Display Disclosure Limitations
☒

Required For Efile
☐

Consent Form Terms +

↑↓ This is the term. - Term definition.

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

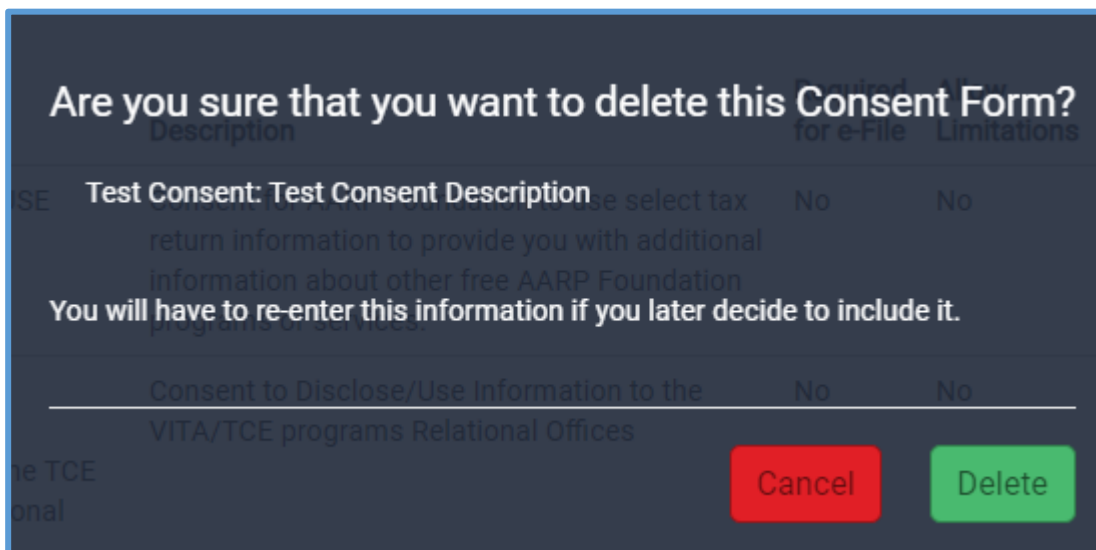
TIP: TaxSlayer Pro Online makes changes to a consent immediately available in returns. We do not recommend making changes to consents after you start preparing returns.

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:

Return Details Fee Summary Bank Account **Taxpayer Consent** Custom Questions Custom Credits Sub Pag

Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites

TaxYear 2021: the taxpayer/spouse will be required to accept or deny. If they deny, the return is still eligible for site to site carryforward

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.

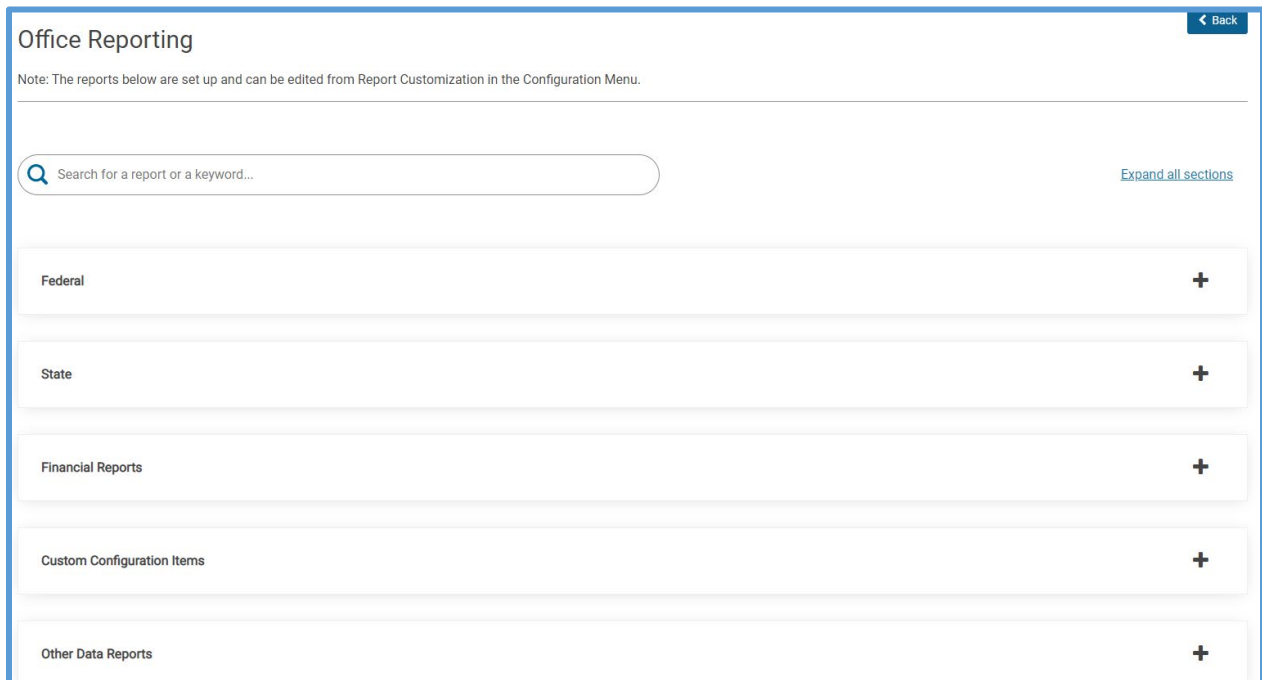
Note: If the taxpayer denied the Global Consent in the prior year, there is no impact on the same-site carryforward option.

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:



The screenshot shows the 'Office Reporting' page. At the top left is the title 'Office Reporting' and a 'Back' button. Below the title is a note: 'Note: The reports below are set up and can be edited from Report Customization in the Configuration Menu.' There is a search bar with the placeholder text 'Search for a report or a keyword...'. To the right of the search bar is a link 'Expand all sections'. Below these are five report categories, each with a plus sign to its right: 'Federal', 'State', 'Financial Reports', 'Custom Configuration Items', and 'Other Data Reports'.

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

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	[redacted]	[redacted]	[redacted]	70622
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**:



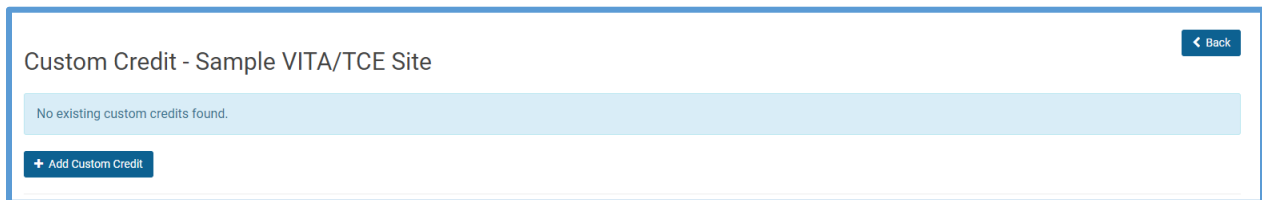
Configuration Menu

[Return](#)

Consent Forms Create and assign consent forms	Select
Custom Credit Create and edit Custom Credits	Select
Custom Fees and Discounts Enter and Edit Custom Fees or Discounts.	Select
ERO Setup Enter and edit ERO Information.	Select

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

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



Custom Credit - Sample VITA/TCE Site

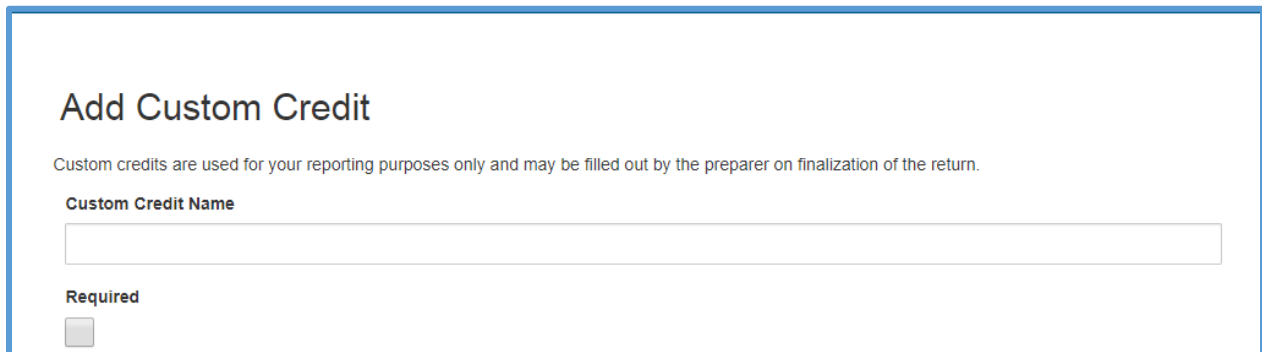
[Back](#)

No existing custom credits found.

[+ Add Custom Credit](#)

3. Click **Add Custom Credit**.

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



Add Custom Credit

Custom credits are used for your reporting purposes only and may be filled out by the preparer on finalization of the return.

Custom Credit Name

Required

☐

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:

Custom Credit - Sample VITA/TCE Site			← Back	
Credit Name	Date Created	Required		
Example Credit	6/15/2020	Yes	Edit	Delete
Example Credit not required	6/15/2020	No	Edit	Delete
+ Add Custom 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:

Custom Credit				
Credit Name	Date Created	Required		
New Custom	9/21/2017	No	+ Assign	Edit Delete

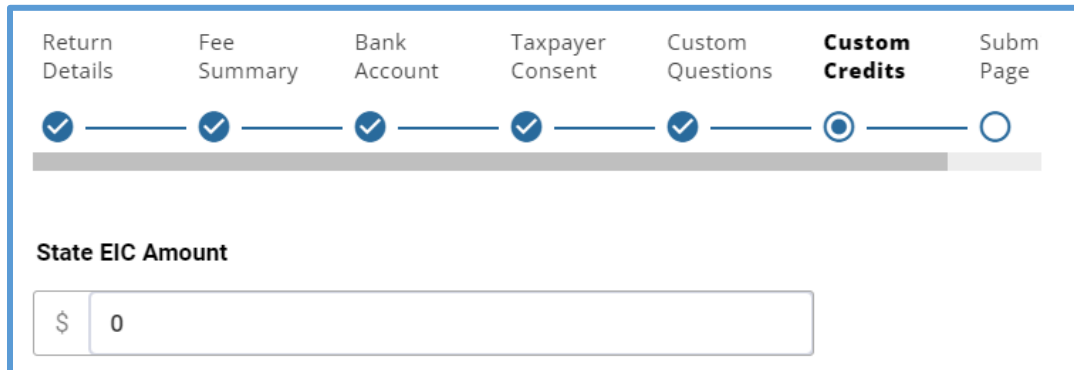
WARNING: You must unassign custom credits from all sites before deleting them. Once you delete a custom credit, you cannot remove it from an assigned site.

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:



Return Details Fee Summary Bank Account Taxpayer Consent Custom Questions **Custom Credits** Subm Page

✓ ✓ ✓ ✓ ✓ ● ○

State EIC Amount

\$ 0

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:

Configuration Menu

[Return](#)

Consent Forms Create and assign consent forms	Select
Custom Credit Create and edit Custom Credits	Select
Custom Fees and Discounts Enter and Edit Custom Fees or Discounts.	Select
ERO Setup Enter and edit ERO Information.	Select
Fees Setup Enter and Edit Fees.	Select
Office IP Whitelist Manage and maintain IP Office Whitelist	Select

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

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

Edit Office IP Whitelist - SUPPORT

IP Address

123.123.123.123 [Add](#)

Whitelisted IP Addresses

IP Address	
[REDACTED]	Delete

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.

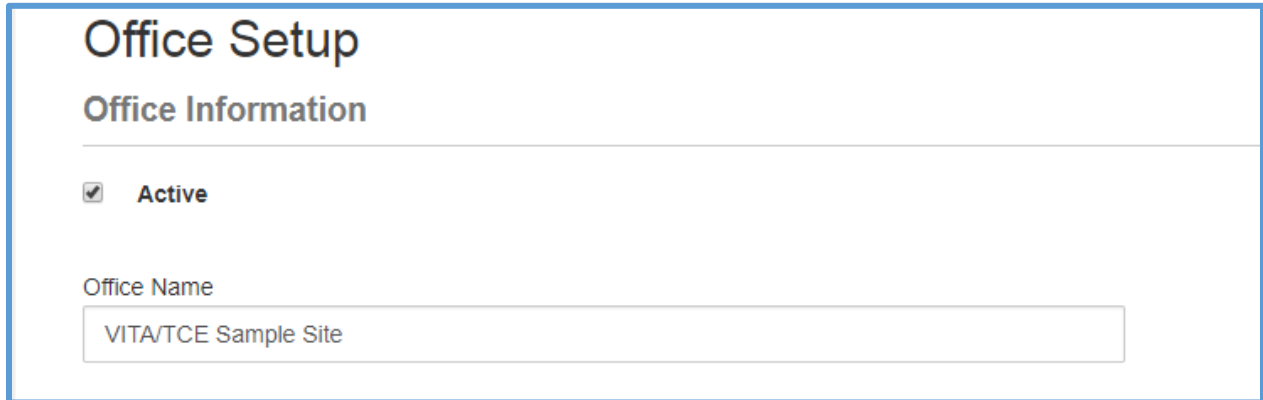
5. Repeat the last two steps for all allowed IP addresses.

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:



Office Setup

Office Information

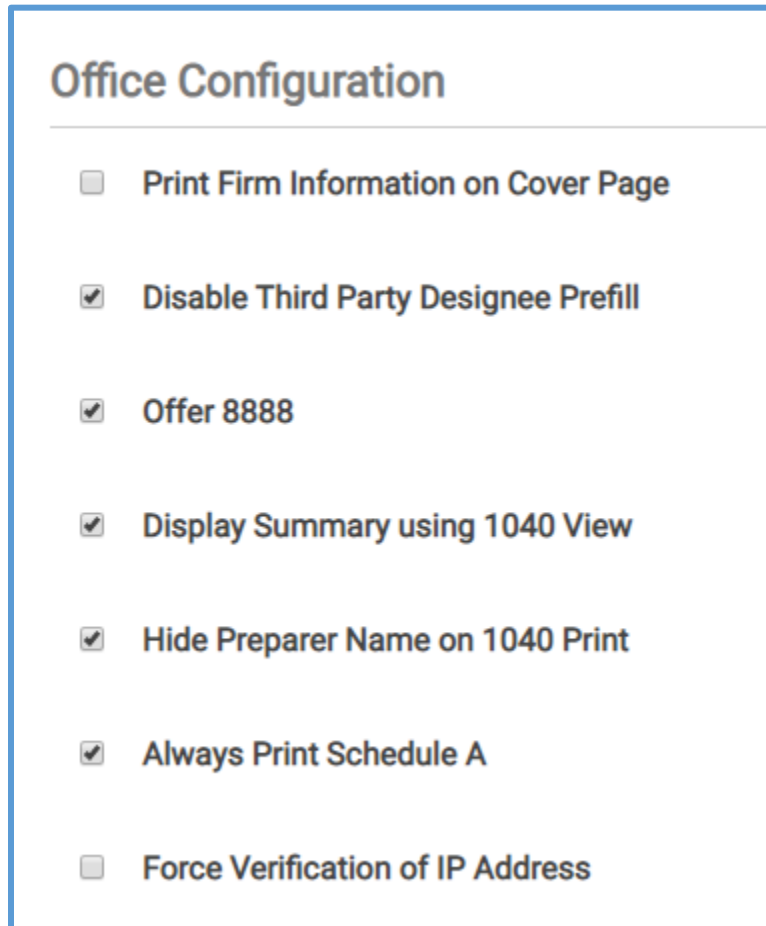
☒ **Active**

Office Name

VITA/TCE Sample Site

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

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



Office Configuration

- ☐ Print Firm Information on Cover Page
- ☒ Disable Third Party Designee Prefill
- ☒ Offer 8888
- ☒ Display Summary using 1040 View
- ☒ Hide Preparer Name on 1040 Print
- ☒ Always Print Schedule A
- ☐ Force Verification of IP Address

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:

Edit Office IP Whitelist - SUPPORT

IP Address

123.123.123.123 + Add

Whitelisted IP Addresses

IP Address
[Redacted IP Address] Delete

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:

Question Templates Create and assign question templates	Select
Report Customization Customize Reporting Display	Select
Security Templates Create and assign user permissions	Select
Tags Create and edit return tags	Select
Taxpayer Profiles Create and assign taxpayer profiles	Select

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

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

Office Tags - Sample VITA/TCE Site

+ Add Tag

Return Tags

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:

Office Tags

Return Tags

↑↓	Add Missing Information	×
↑↓	Contacted Taxpayer	×

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:

Return Status Tag(s)

Select the tags below to sort returns from within the client list based on the predefined criteria below.

☐ Ready to File

☐ Waiting on Signature

☐ Need W-2



☐ Reviewed by Steve

☐ 1040-NR

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**:

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS		
700-00-5550	Sample	Taxpayer	(706) 800-9000	Craig Smith	Review			

Tools

Select

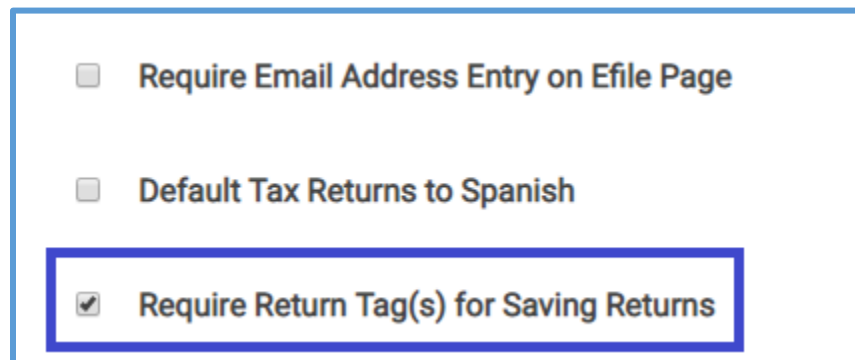
Making Return Tags Required

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.



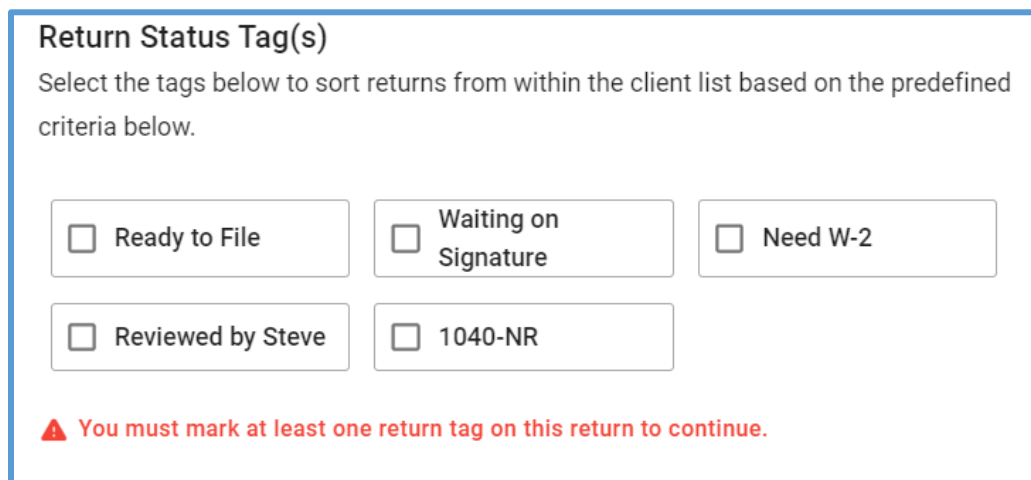
☐ Require Email Address Entry on Efile Page

☐ Default Tax Returns to Spanish

☒ Require Return Tag(s) for Saving Returns

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.



Return Status Tag(s)

Select the tags below to sort returns from within the client list based on the predefined criteria below.

<input type="checkbox"/> Ready to File	<input type="checkbox"/> Waiting on Signature	<input type="checkbox"/> Need W-2
<input type="checkbox"/> Reviewed by Steve	<input type="checkbox"/> 1040-NR	

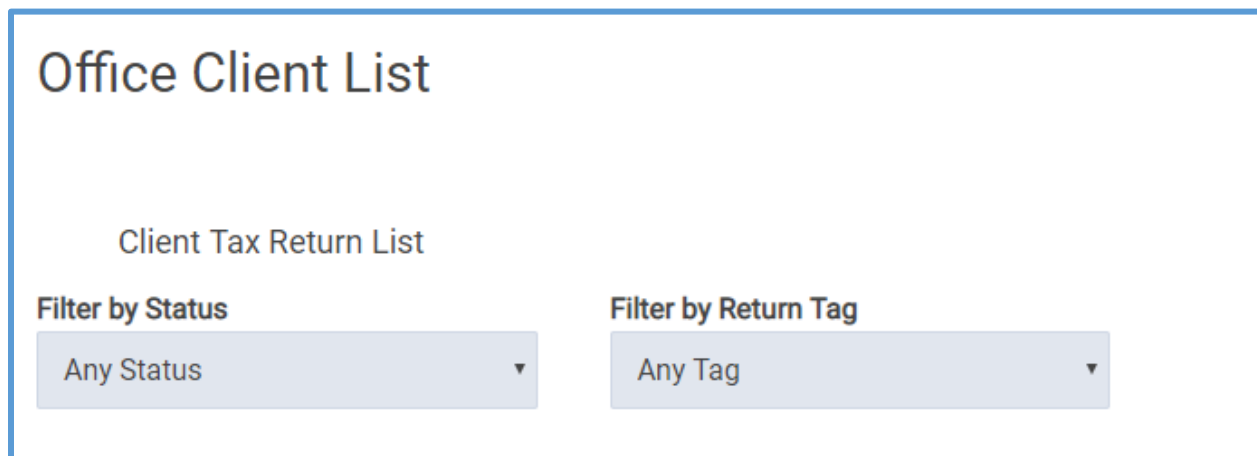
⚠ You must mark at least one return tag on this return to continue.

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:

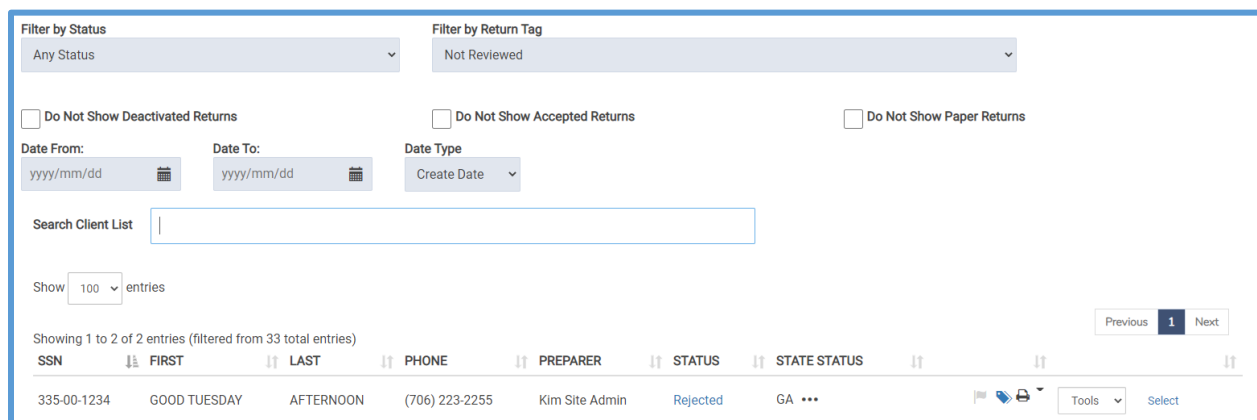


The screenshot shows the 'Office Client List' page. At the top, it says 'Office Client List'. Below that is 'Client Tax Return List'. There are two filter sections: 'Filter by Status' with a dropdown menu showing 'Any Status', and 'Filter by Return Tag' with a dropdown menu showing 'Any Tag'.

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:



The screenshot shows the 'Office Client List' page with filters applied. The 'Filter by Status' dropdown is set to 'Any Status' and the 'Filter by Return Tag' dropdown is set to 'Not Reviewed'. There are three checkboxes: 'Do Not Show Deactivated Returns', 'Do Not Show Accepted Returns', and 'Do Not Show Paper Returns'. Below these are date filters: 'Date From:' (yyyy/mm/dd), 'Date To:' (yyyy/mm/dd), and 'Date Type' (Create Date). There is a 'Search Client List' text box. Below that is a 'Show' dropdown set to '100' entries. At the bottom, it says 'Showing 1 to 2 of 2 entries (filtered from 33 total entries)'. There are navigation buttons: 'Previous', '1', and 'Next'. Below that is a table with columns: SSN, FIRST, LAST, PHONE, PREPARER, STATUS, STATE STATUS. The table has two rows of data. The first row is: 335-00-1234, GOOD TUESDAY, AFTERNOON, (706) 223-2255, Kim Site Admin, Rejected, GA. The second row is: 335-00-1234, GOOD TUESDAY, AFTERNOON, (706) 223-2255, Kim Site Admin, Rejected, GA. There are icons for print, email, and a 'Tools' dropdown menu.

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

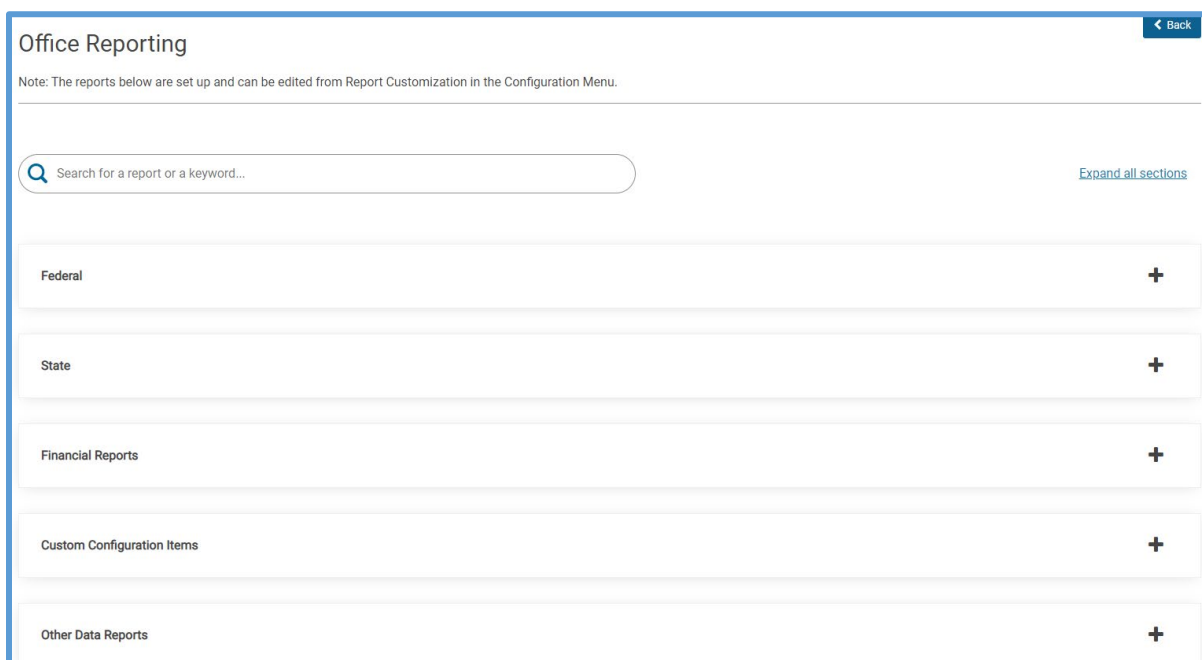
Utilizing the Return Tag Report

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.

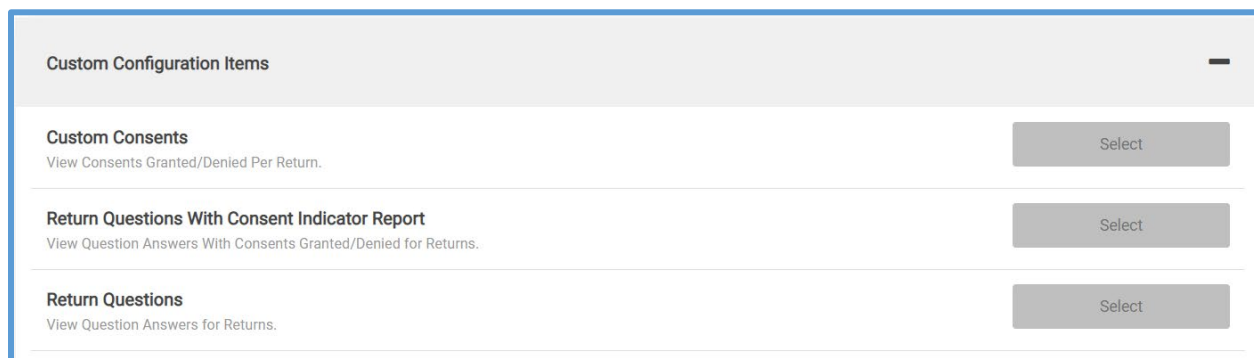
TaxSlayer Pro Online displays the **Office Reporting** page:



The screenshot shows the 'Office Reporting' page. At the top, there is a 'Back' button. Below the title, a note states: 'Note: The reports below are set up and can be edited from Report Customization in the Configuration Menu.' A search bar with the placeholder 'Search for a report or a keyword...' is on the left, and a link 'Expand all sections' is on the right. The main content area lists five report categories, each with a plus icon to its right: 'Federal', 'State', 'Financial Reports', 'Custom Configuration Items', and 'Other Data Reports'.

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

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

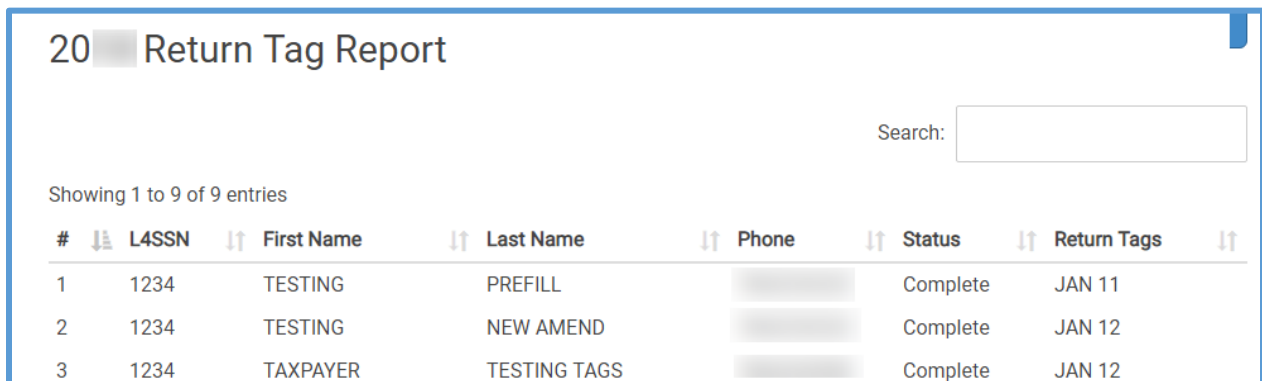


The screenshot shows the 'Custom Configuration Items' section. It has a title bar with a minus icon. Below the title, there are three items, each with a 'Select' button to its right: 'Custom Consents' (with a sub-link 'View Consents Granted/Denied Per Return.'), 'Return Questions With Consent Indicator Report' (with a sub-link 'View Question Answers With Consents Granted/Denied for Returns.'), and 'Return Questions' (with a sub-link 'View Question Answers for Returns.').

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:



#	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

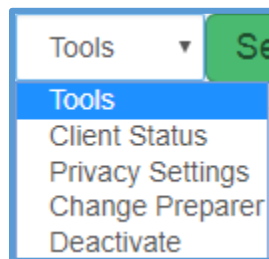
Refer to the [Working with Reports](#) lesson for detailed instructions on sorting the report and exporting the data for further analysis.

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:

Deactivate Return

Are you sure you want to deactivate this return?

Tag Example

No ▼

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		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:

Enter Social Security Number

Social Security Number

- -

Confirm Social Security Number

- -

Social Security Number must match.

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Start Return

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:

There is a deactivated return associated with this SSN. You may choose to reactivate the return, use a different SSN, or proceed to replace this return with a new one. If you choose to replace the return, you will no longer be able to recover this deactivated return.

Name	Preparer	Filing Status	Date Created	Date Modified
Kim Site	Admin	Deactivated	02/06/2020	06/09/2020

Remove and Create NewReactivate

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.

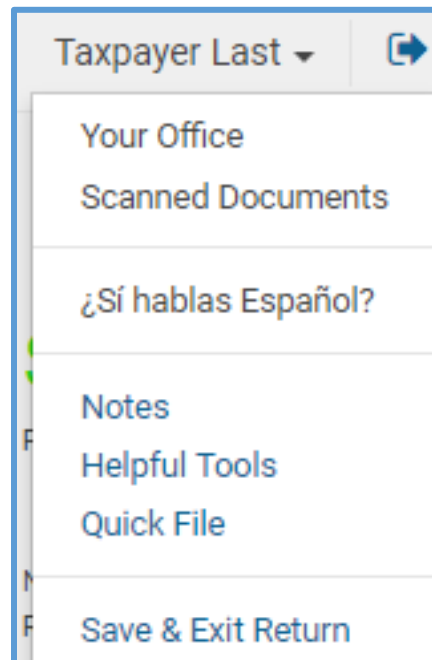
Adding Notes

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:

Add a new note

Note Name

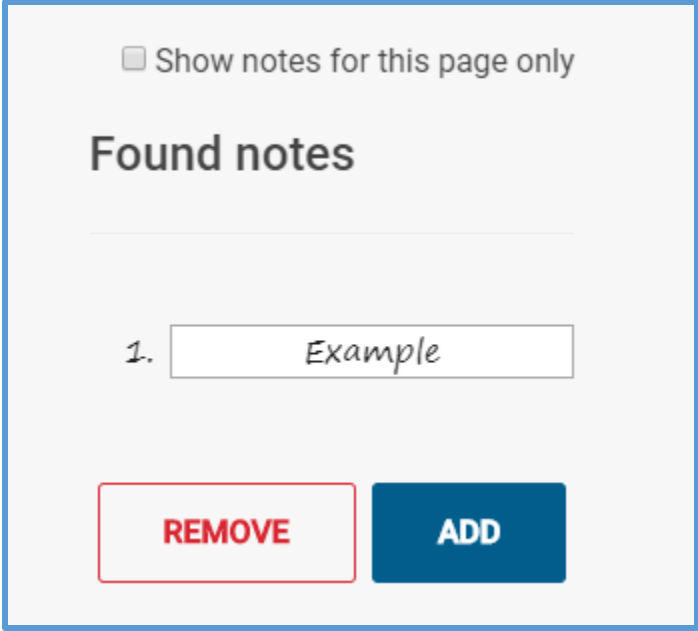
Text for this note

Color

CANCEL SAVE

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:



☐ Show notes for this page only

Found notes




1.

REMOVE **ADD**

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:

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	
118-00-1818	Tag	Example	(770) 555-4458		In Progress	  
						Add Notes

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

Example
Add New +

Create New Note

Title

Description

Print PDF Export CSV Save

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.

Personal Notes

ANOTHER NOTE
Display Date and Time,
along with username

Print Operation Fail
ANOTHER NOTE
Add New +

Edit ANOTHER NOTE

Title

ANOTHER NOTE


Description

Display Date and Time, along with username

Note edited by Kim Site Admin on 8/9/2018
12:16:05 PM

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

Warnings Concerning Your Federal Return

 The following warnings concerning your Federal return were found.

There is no information entered for your state income and withholdings in your W-2. If you reside in AK, FL, NH, NV, SD, TN, TX, WA or WY, boxes 15-20 may be blank on your W-2. Select Visit if you would like to enter state information.

You have the following sticky notes in your account.

- *Example*
 - *Example Note for Mini Guide*

BACK

CONTINUE

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.

NotesClose Details ^

PULL ITEM?	NAME	NOTE
<input type="checkbox"/>	CF to delete	Example of a year specific note that can be removed
<input checked="" type="checkbox"/>	CF to keep	Example of note that needs to carry forward from year to year

No Data Found to Pull Forward

☐ Form 1099R Items

No Prior Data Found

☐ Schedule A Miscellaneous Deductions

No Prior Data Found

☐ Schedule B Items

No Prior Data Found

SHOW ALL

NO THANKS

YES, IMPORT MY DATA.

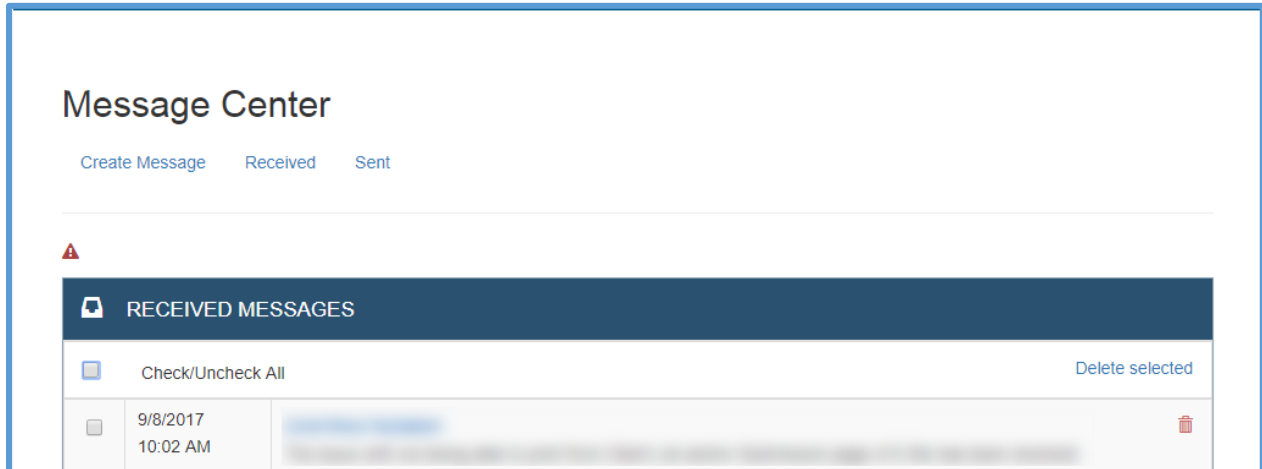
3. Click **YES, IMPORT MY DATA.**

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**.

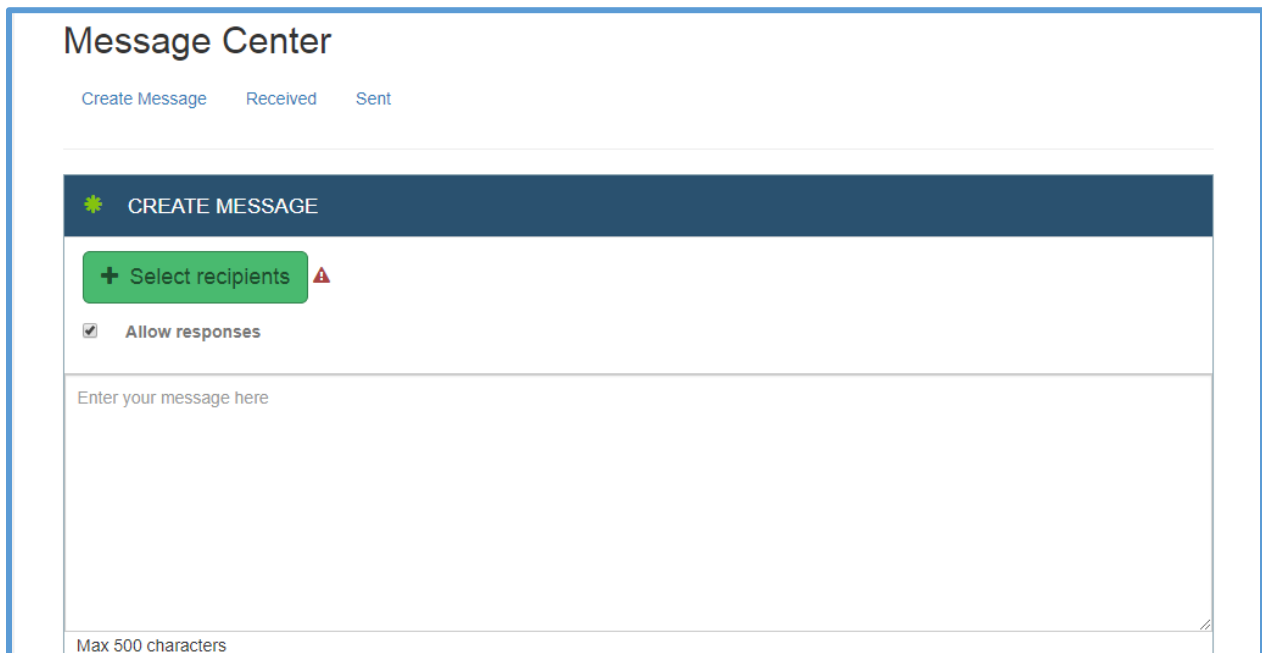
TaxSlayer Pro Online displays the **Message Center** page:



The screenshot shows the 'Message Center' interface. At the top, there are three tabs: 'Create Message', 'Received', and 'Sent'. Below the tabs, there is a section titled 'RECEIVED MESSAGES' with a dark blue header. Under this header, there is a table of messages. The first row shows a message received on 9/8/2017 at 10:02 AM. To the right of the message, there is a 'Delete selected' link. A red warning icon is visible in the top left corner of the message list area.

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:



The screenshot shows the 'Message Center' interface with the 'CREATE MESSAGE' section active. At the top, there are three tabs: 'Create Message', 'Received', and 'Sent'. Below the tabs, there is a section titled 'CREATE MESSAGE' with a dark blue header. Under this header, there is a green button labeled '+ Select recipients' with a red warning icon. Below the button, there is a checkbox labeled 'Allow responses' which is checked. Below the checkbox, there is a text area labeled 'Enter your message here'. At the bottom of the text area, there is a label 'Max 500 characters'.

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

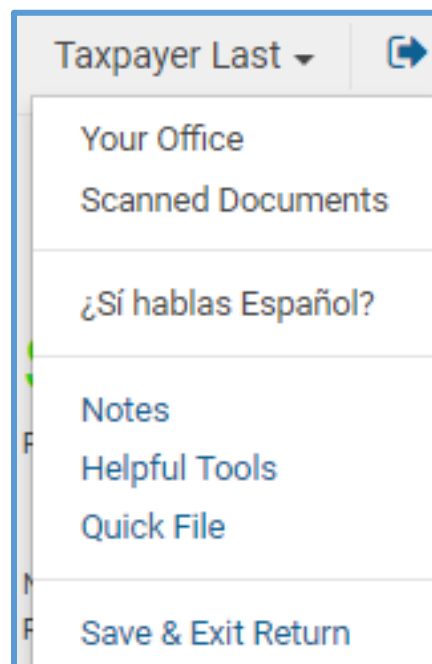
TaxSlayer Pro Online defaults to displaying and printing all returns in English unless you select **Default Tax Returns to Spanish** when configuring your office setup.

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:

Select Language

English

Español

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 <small>Uso exclusivo del IRS - No escriba o engrape en este espacio</small>	
Estado Civil: <input type="checkbox"/> Soltero(a) <input type="checkbox"/> Casado(a) declarando conjunto <input type="checkbox"/> Casado(a) por separado <input checked="" type="checkbox"/> Cabeza de familia <input type="checkbox"/> Viudo(a) calificado(a)	
Su nombre e inicial MAY	Apellido [redacted]
Su deducción estándar <input type="checkbox"/> Alguien lo puede reclamar como dependiente <input type="checkbox"/> Ud. nació antes del 2 de enero de 1954 <input type="checkbox"/> Eres ciego(a)	
Si casado conjunto, primer nombre e inicial del cónyuge	Apellido
Su número de seguro social 678-[redacted]-0505	
Deducción estándar del cónyuge <input type="checkbox"/> Alguien más puede reclamar su cónyuge como dependiente <input type="checkbox"/> Cónyuge nació antes del 2 de enero de 1954 <input checked="" type="checkbox"/> Año completo con cobertura de seguro médico o exención (vea instrucciones)	
<input type="checkbox"/> Cónyuge es ciego(a) <input type="checkbox"/> Cónyuge detalla en una declaración separada o Ud. es un extranjero con doble residencia	
Dirección residencial (número y calle). Si Ud. tiene un P.O. Box, ver instrucciones. [redacted]	
Núm. de Apt. Campaña Electoral Presidencial (vea instrucciones) <input type="checkbox"/> Usted <input type="checkbox"/> Cónyuge	
Ciudad, provincia ó 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 <input checked="" type="checkbox"/> aquí ▶	
Dependientes (vea instrucciones):	
(1) Primer nombre	Apellido
(2) Número de seguro social	(3) Relación del dependiente con Ud.
(4) <input checked="" type="checkbox"/> 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:

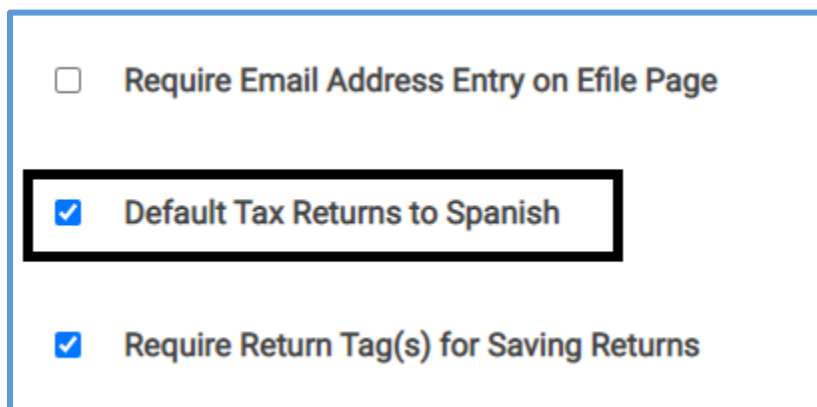
1. Click **Select** on the **Office Setup** line.

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.



The screenshot shows a section of the 'Office Configuration' settings page. It contains three checkboxes with their corresponding labels: 'Require Email Address Entry on Efile Page' (unchecked), 'Default Tax Returns to Spanish' (checked and highlighted with a black border), and 'Require Return Tag(s) for Saving Returns' (checked).

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:

Office Reporting ← Back

Note: The reports below are set up and can be edited from Report Customization in the Configuration Menu.

[Expand all sections](#)

Federal	+
State	+
Financial Reports	+
Custom Configuration Items	+
Other Data Reports	+

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	RTN AND						
			WRONG	ACCOUNT						
2	001111	1234	TESTING	CONSENT			123 VITA	ROME	GA	30
							WAY			

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.

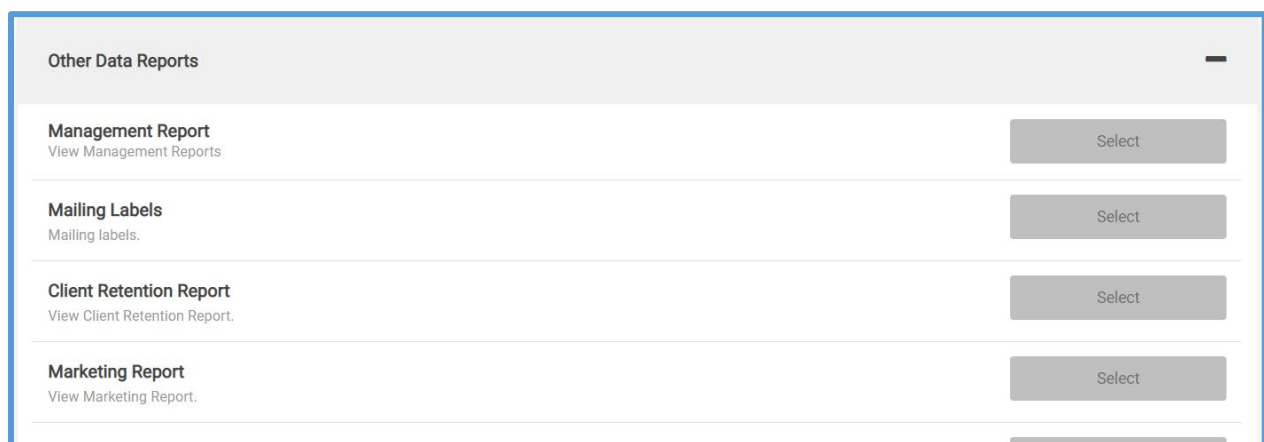
Management Reports

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:

Web Reports KIMINSTRUCT - Home Logoff

Web Reports

Below are a list of your available web reporting options.

New: If a report contains too much data to export on demand, they will be scheduled as a Saved Report and be available for download approximately the next day from the Saved Reports Section of Web Reports.

Available Reporting Tools

Summary Reports

Electronic Filing Summary View Your Return Extension Summary	State Detail Summary Report View Production State Detail Summary for your EFINs
---	--

Pro Web Reports

Pro Web Returns - Audit Report View Production Audit information for your site and EFINs	Pro Web Returns - Detailed Return Report View Refund and State Refund Information for your EFINs
---	---

Production Detail Reports

Site Production Detail Report - Electronic View Electronic Production Detail information for your site and EFINs	Site Production Detail Report - Paper View Paper Production Detail information for your site and EFINs	Site Production Summary Report View Production Summary information for your site and EFINs
---	---	---

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.

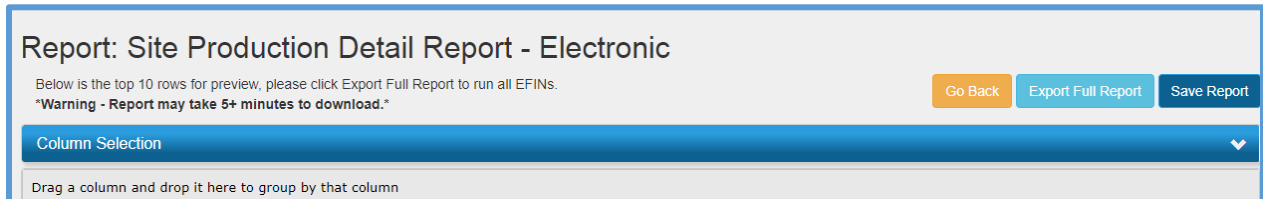
NOTE: Use the **EFIN Filter** box to search for a specific EFIN in the list.

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**.

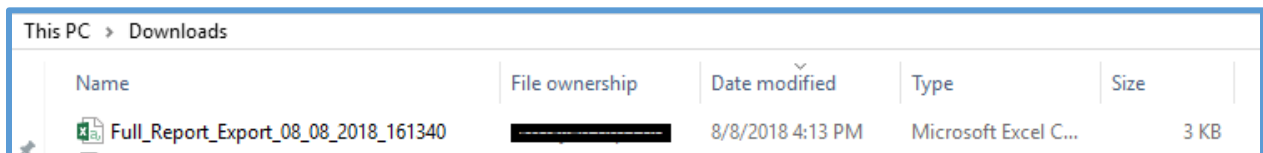
- a. Click **Run Report** to display the report on the screen.
- b. Click **Run Report to Export** to enable an export and display the first ten (10) rows of the report on the screen.

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.

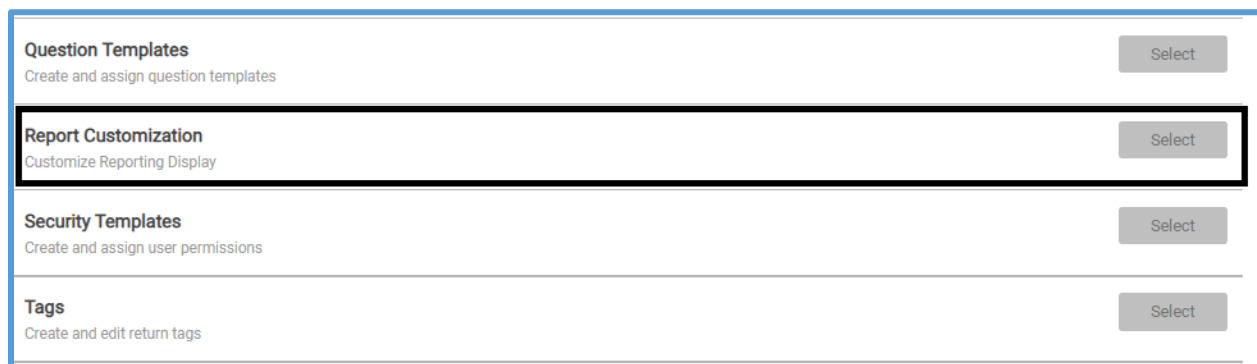
Report Customization

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:



Question Templates
Create and assign question templates

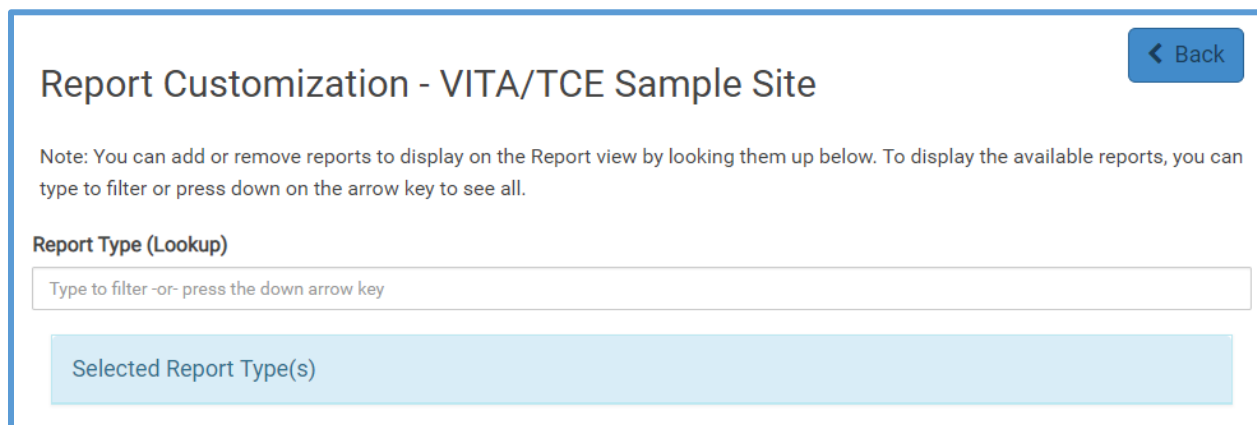
Report Customization
Customize Reporting Display

Security Templates
Create and assign user permissions

Tags
Create and edit return tags

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

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



Report Customization - VITA/TCE Sample Site

Note: You can add or remove reports to display on the Report view by looking them up below. To display the available reports, you can type to filter or press down on the arrow key to see all.

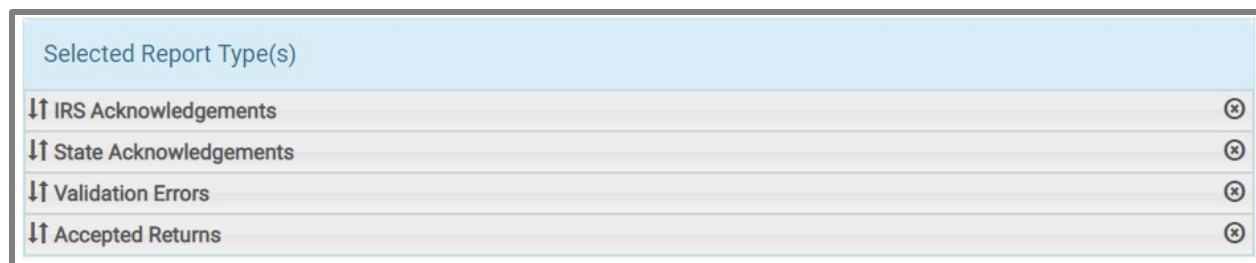
Report Type (Lookup)

Type to filter -or- press the down arrow key

Selected Report Type(s)

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)**.



Selected Report Type(s)	
↕ IRS Acknowledgements	✕
↕ State Acknowledgements	✕
↕ Validation Errors	✕
↕ Accepted Returns	✕

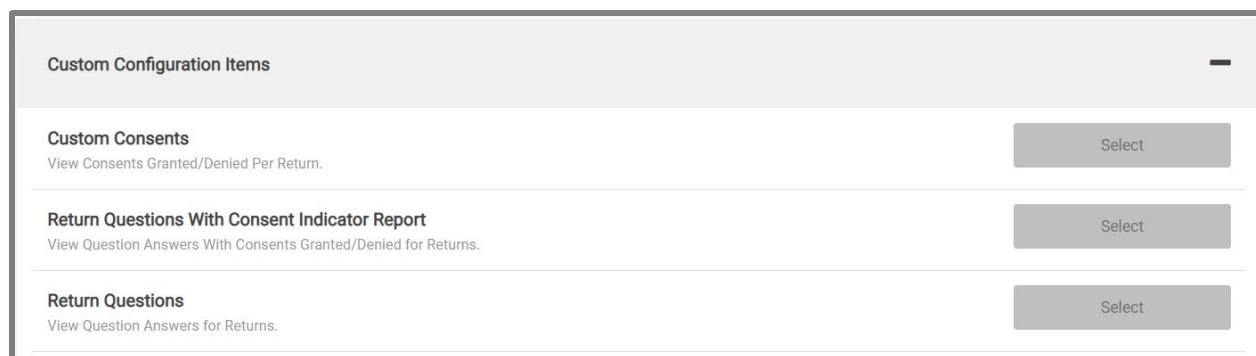
5. Drag the reports to display in the order you want.

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.



Custom Configuration Items	
Custom Consents View Consents Granted/Denied Per Return.	Select
Return Questions With Consent Indicator Report View Question Answers With Consents Granted/Denied for Returns.	Select
Return Questions View Question Answers for Returns.	Select

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.

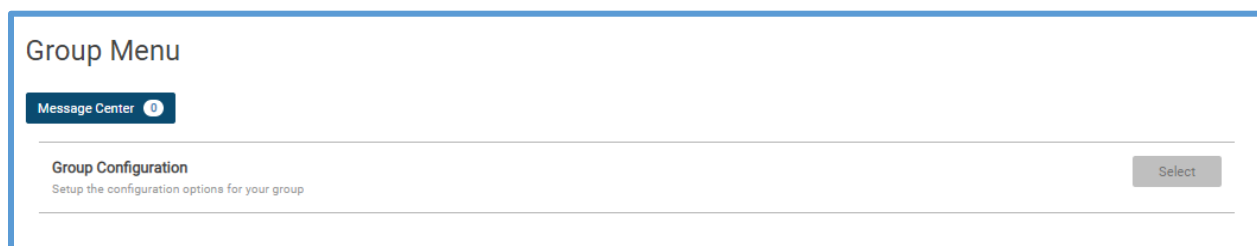
To see a video of what you just learned, go to [Working with Reports](#). Note that videos are updated each Fall. Use the information in this user guide for the most current steps.

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.

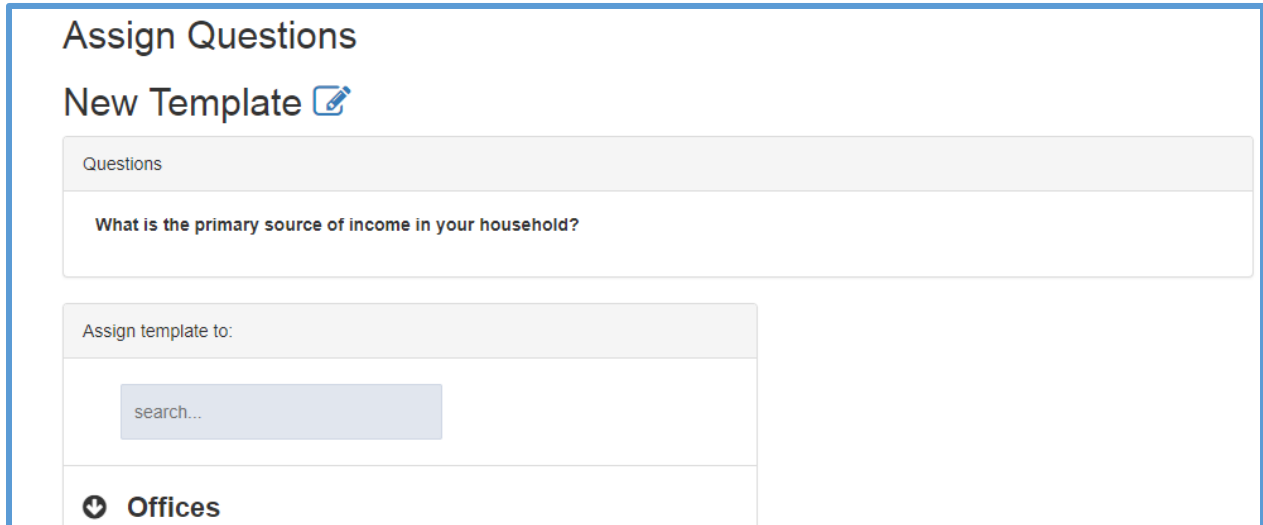
Assigning Settings to Offices

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.



The screenshot displays the 'Assign Questions' interface. At the top, there is a section titled 'New Template' with a pencil icon. Below this, a question is listed: 'What is the primary source of income in your household?'. Underneath the question, there is a section titled 'Assign template to:' which contains a search bar with the placeholder text 'search...'. At the bottom of this section, there is a dropdown menu labeled 'Offices' with a downward arrow icon.

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:

The screenshot shows the 'Client Search' form. The 'Search By:' dropdown menu is open, displaying options: SSN, SSN, Name - First or Last, Phone, Preparer - First or Last, EFIN, and Office (highlighted in blue). The 'Date From:' and 'Date To:' fields are set to 'mm/dd/yyyy'. The 'Show By Return Tag' dropdown is set to 'Any Tag'. The 'Show By Status:' dropdown is empty. A green 'Search >' button is visible on the right.

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

The screenshot shows the search results for 'Office'. The 'Search By:' dropdown is set to 'Office'. The 'Date From:' and 'Date To:' fields are set to 'mm/dd/yyyy'. The 'Show By Return Tag' dropdown is set to 'Any Tag'. The 'Show By Status:' dropdown is empty. A green 'Search >' button is visible. Below the search criteria, there are two results:

Return ID	Client	Sample	Phone	Status	Tools	Action
001-00-0001	CB	SampleA	(508) 444-6050	In Progress	Tools	Select
001-00-0002	CBCAP	CaseA	(508) 444-6050	In Progress	Tools	Select

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:

Office(s)

Search By:

View Inactive ☐

OFFICE NAME	LOCATION	EFIN		STATUS		
██████████	Avon, CT	██████		Active	Access	Edit
██████████	Berlin, CT	██████		Active	Access	Edit
██████████	Berlin, CT	██████		Active	Access	Edit
██████████ Cente	Bristol, CT	██████		Active	Access	Edit

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:

Welcome to VITA/TCE Sample Site

Message Center 0

Rejected Clients

Start New Tax Return Create a brand new tax return for a client.	Select
Client Search Edit returns you previously started.	Select
Review Returns * Returns that are currently waiting to be reviewed	Select
Configuration Setup the configuration options for your office.	Select
Reports Print acks, mailing labels, bank reports, and old reports.	Select
Transmissions Transmit returns to IRS.	Select

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.

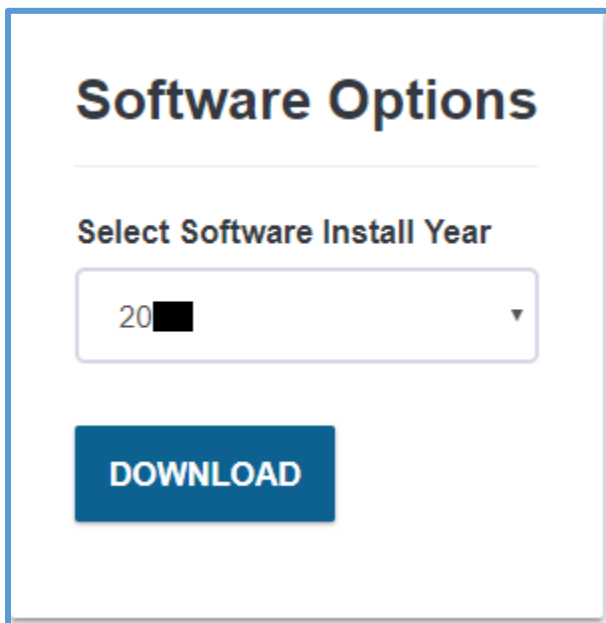
TaxSlayer Pro

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.

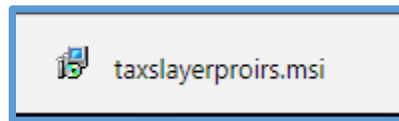
Site Administrators can download the desktop application. To do so, use the following steps:

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



The screenshot shows a web form titled "Software Options". Below the title is a label "Select Software Install Year" followed by a dropdown menu. The dropdown menu currently displays "20" and has a small downward arrow on the right. Below the dropdown menu is a blue button with the word "DOWNLOAD" in white capital letters.

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.

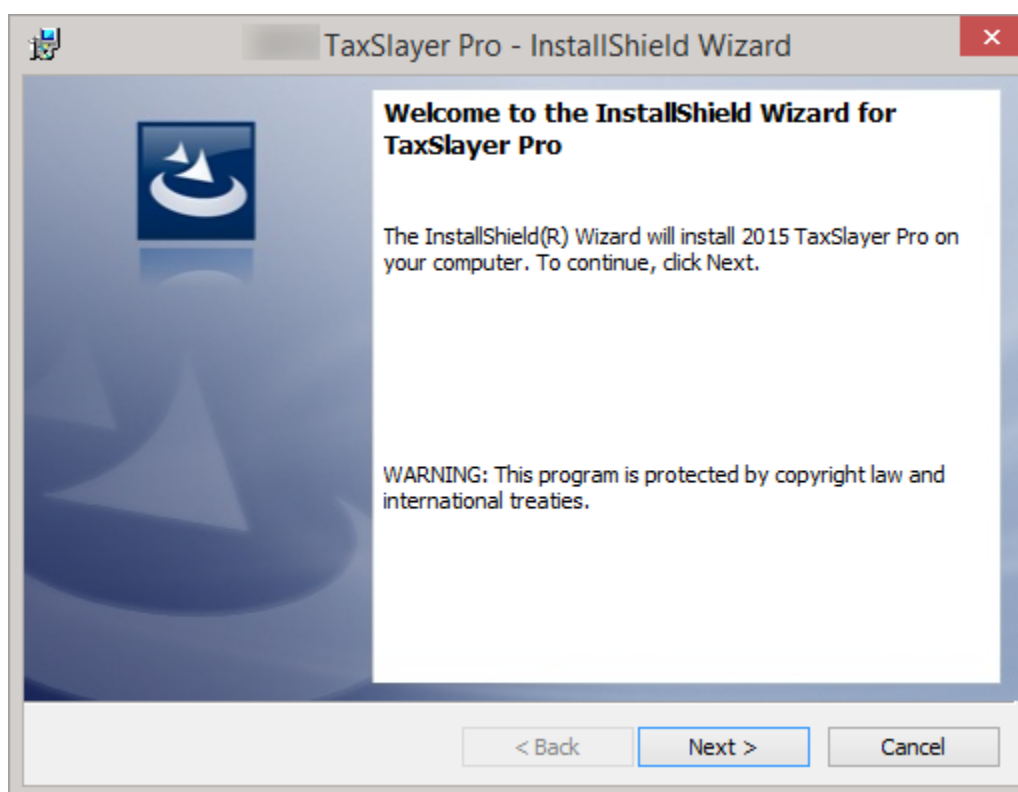
Installation

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:



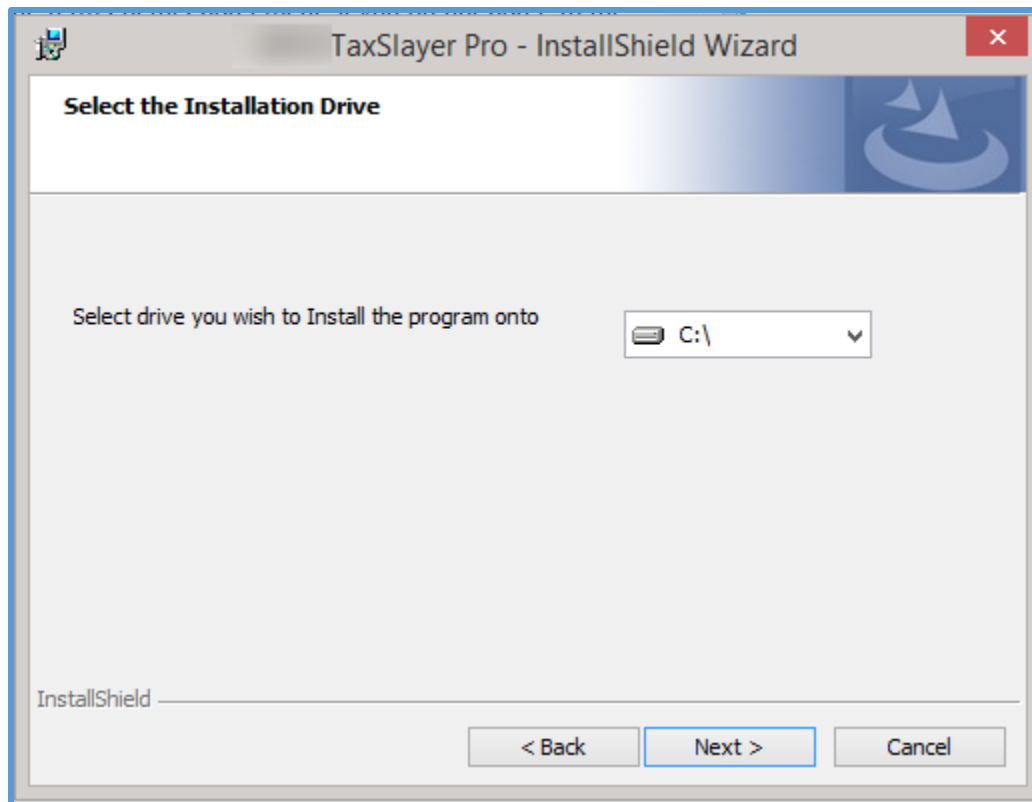
2. Click **Next**.

InstallShield Wizard displays the license agreement:



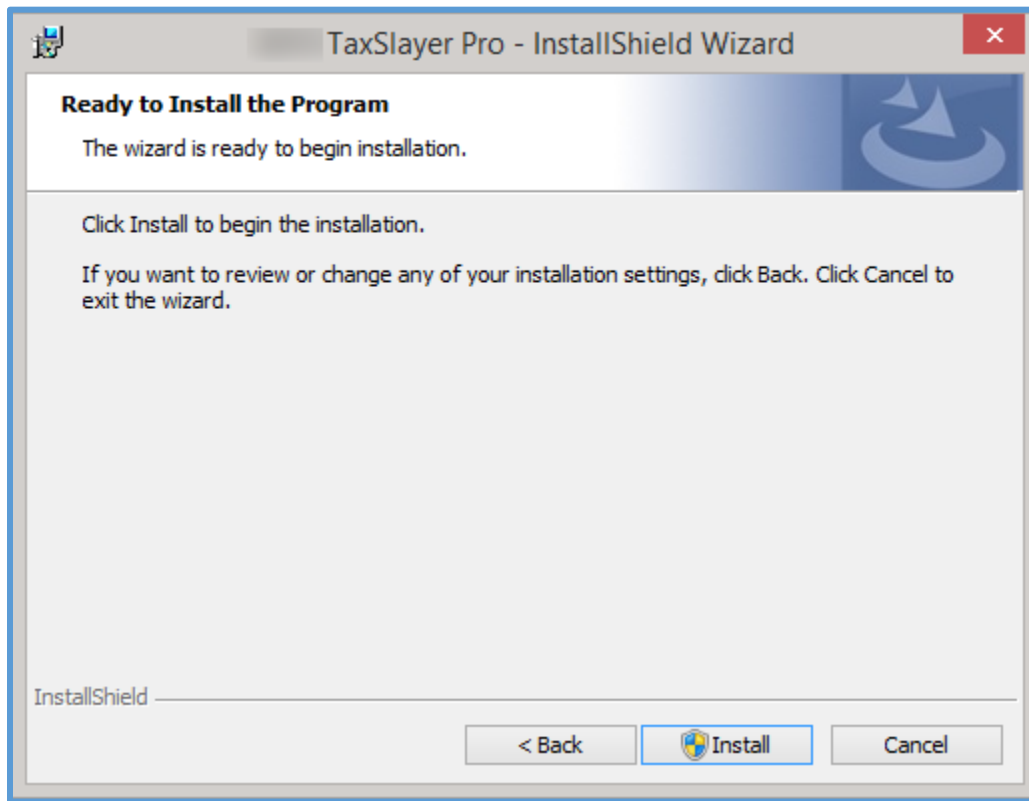
3. Read the license agreement and select **I accept the terms in the license agreement**.
4. Click **Next**.

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



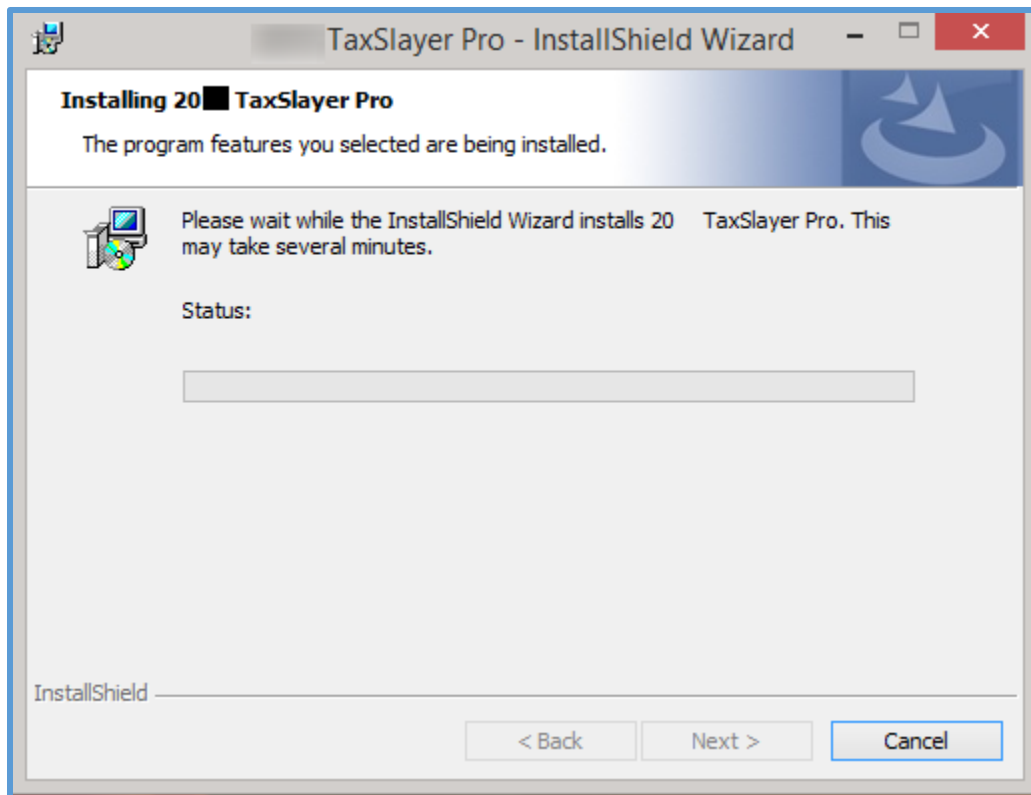
5. Leave the setting at default, which is your C drive, or change the drive using the drop-down list.
6. Click **Next**.

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



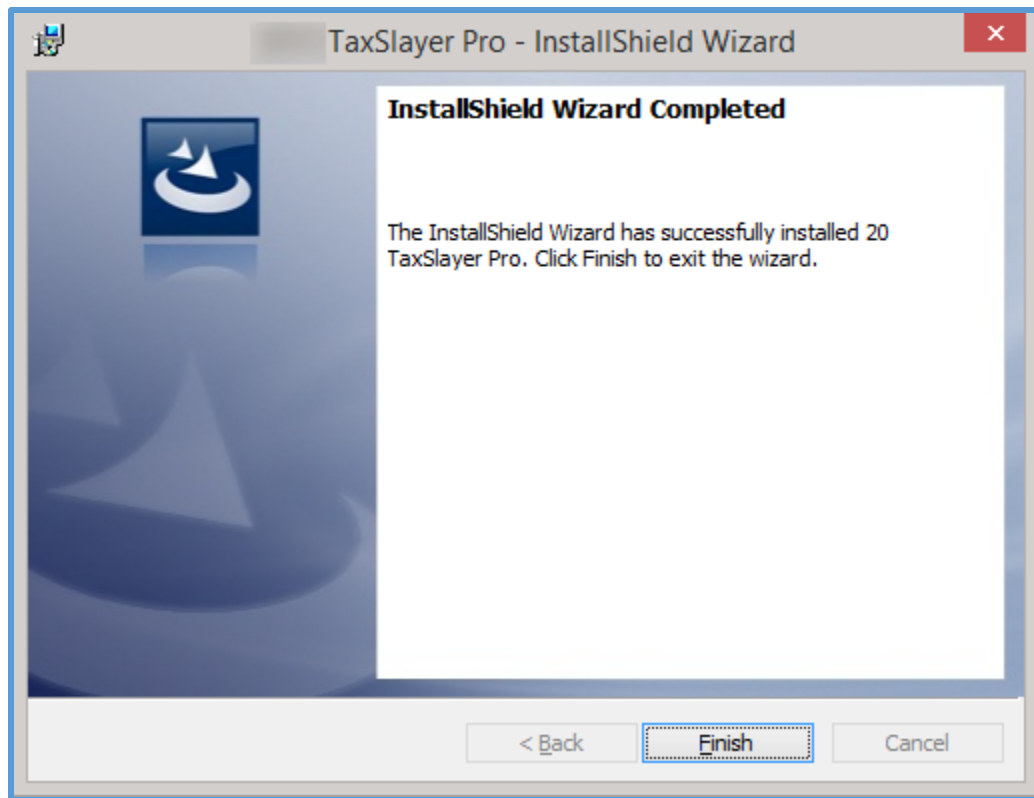
7. Click **Install** to begin installation.

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:

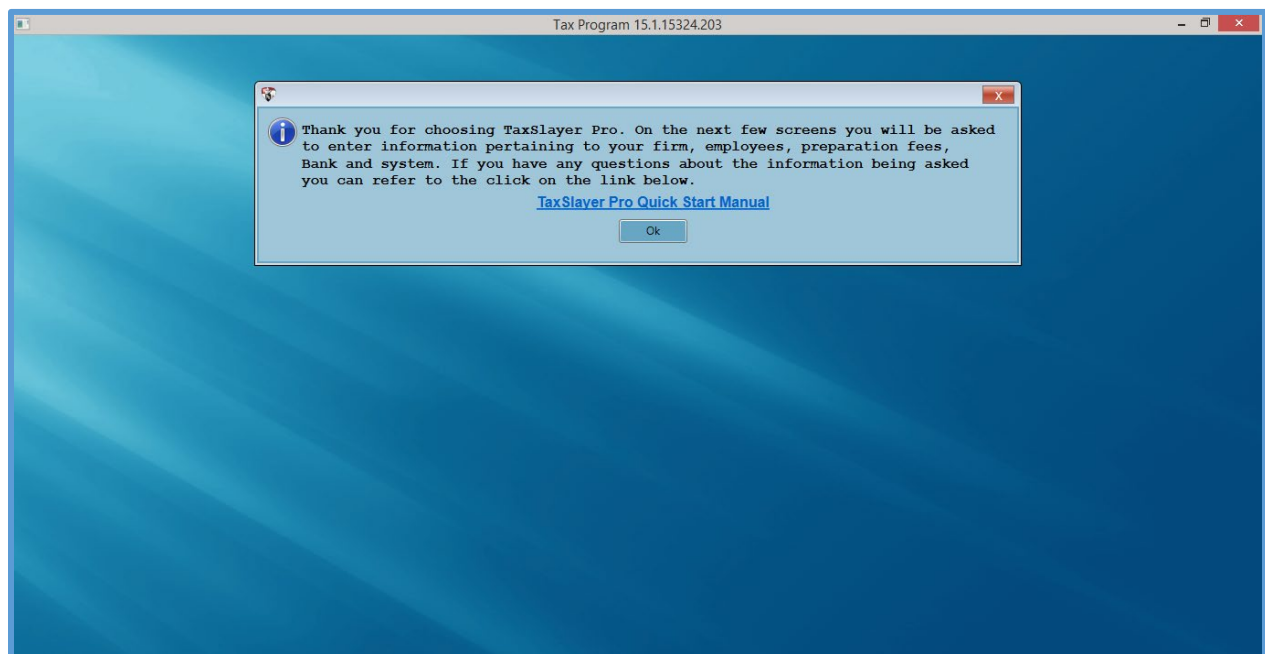
- Verify that your network is set up properly.
- Set the TaxSlayer Pro folder to allow everyone on the network at least **Modify** privileges.
- Enable file and printer sharing in your operating system and in your antivirus software.

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

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

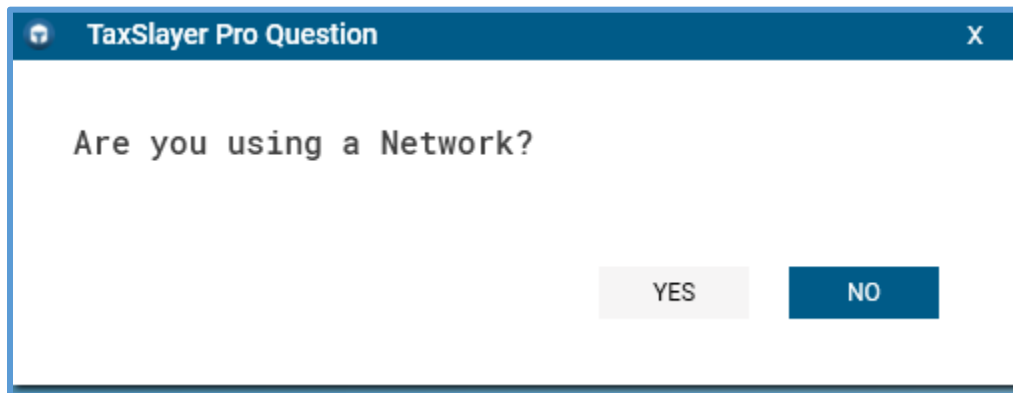
1. Double-click the TaxSlayer Pro icon on your desktop.

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



2. Click **Ok**.

TaxSlayer Pro displays the **Network** question:



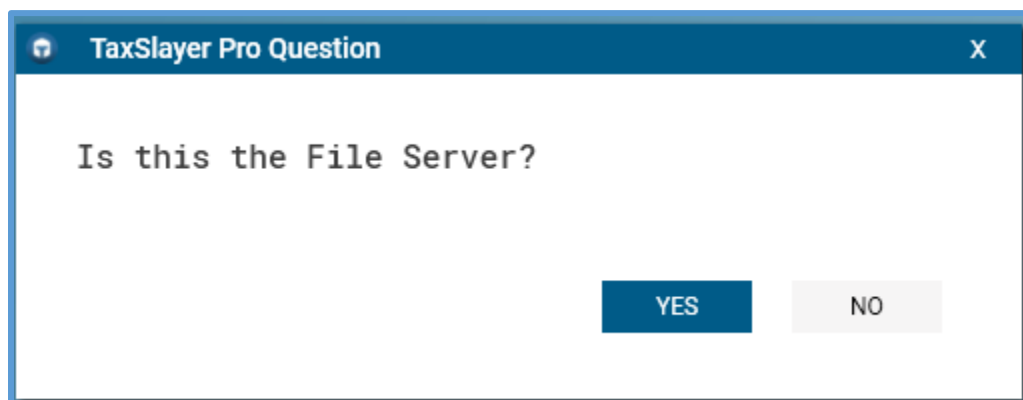
A screenshot of a software dialog box titled "TaxSlayer Pro Question". The dialog box has a blue header bar with a close button (X) on the right. The main content area is white and contains the text "Are you using a Network?". At the bottom right, there are two buttons: a light gray "YES" button and a dark blue "NO" button.

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:

If you select 'Yes' your configuration settings will be altered to reflect the correct setup.

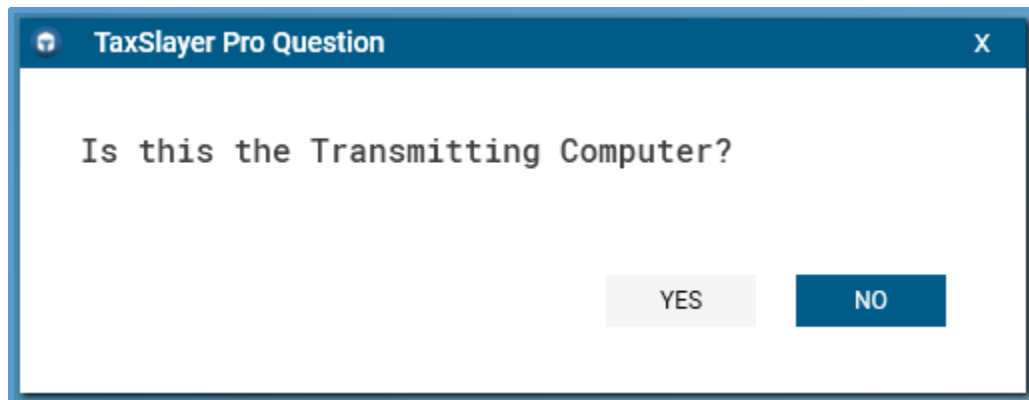


A screenshot of a software dialog box titled "TaxSlayer Pro Question". The dialog box has a blue header bar with a close button (X) on the right. The main content area is white and contains the text "Is this the File Server?". At the bottom right, there are two buttons: a dark blue "YES" button and a light gray "NO" button.

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

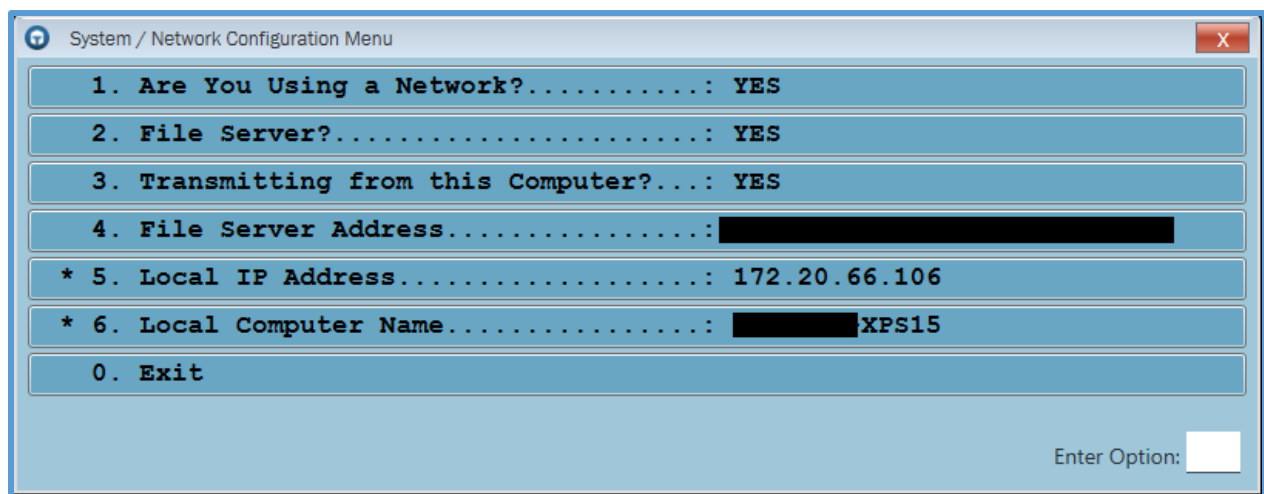
Note: Remember to install and set up the transmitting computer first. For instructions on setting up computers other than the file server, see the next section in this lesson.

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.

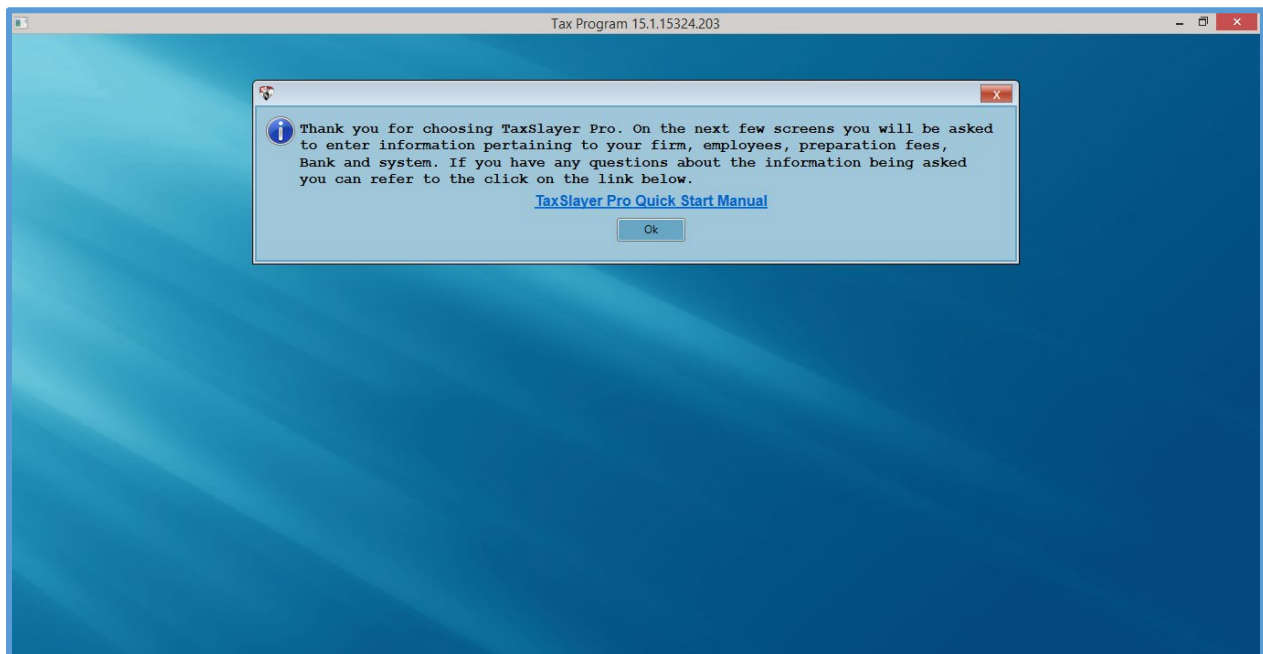
- c. Review the answers to the questions. If you need to change an answer, click it to toggle the answer to **NO**.
- d. Verify the name of the computer.
- e. Click **Share TaxSlayer Pro to the Network** or type the corresponding number to share TaxSlayer Pro to the network.
- f. Click **Exit** to exit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

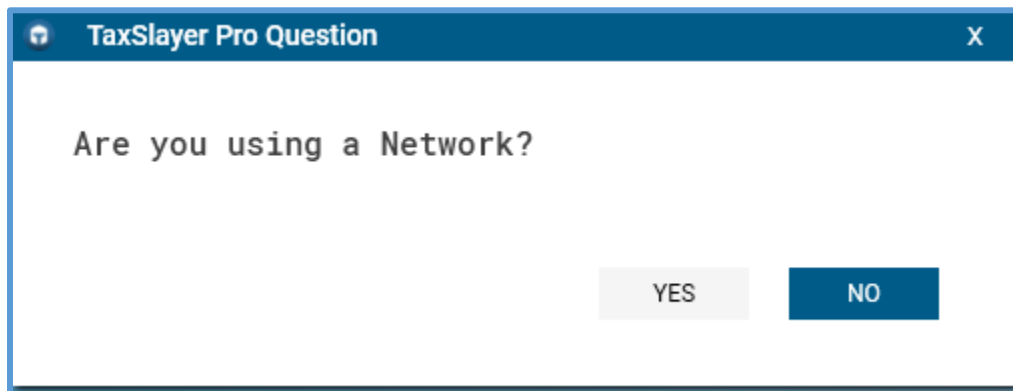
1. Install TaxSlayer Pro on the workstation using the steps discussed earlier in this lesson.
2. Double-click the TaxSlayer Pro icon on your desktop.

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



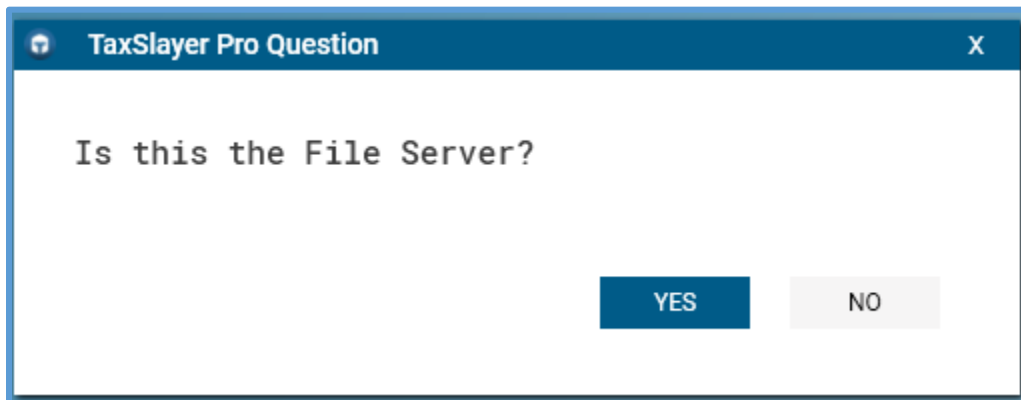
3. Click **Ok**.

TaxSlayer Pro displays the **Network** question:



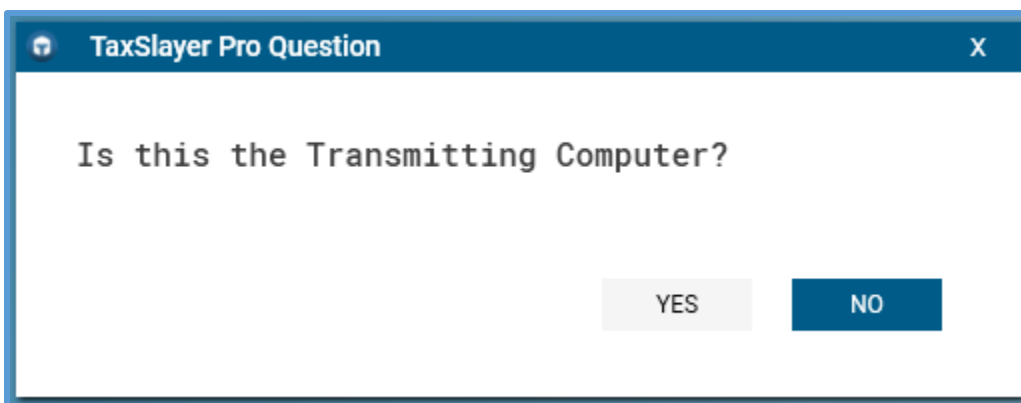
4. Click **Yes**.

TaxSlayer Pro displays the next question:



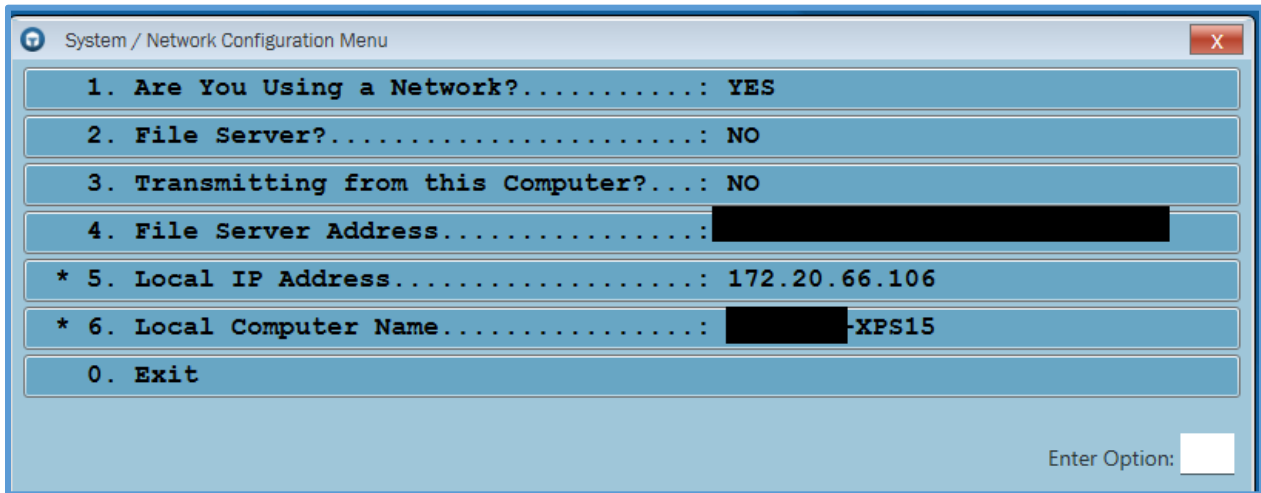
5. Click **No** to show that this computer is not the file server.

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**:



The screenshot shows a window titled "System / Network Configuration Menu". It contains a list of configuration options, each with a number and a description, followed by the current value. The options are:

- 1. Are You Using a Network?.....: YES
- 2. File Server?.....: NO
- 3. Transmitting from this Computer?...: NO
- 4. File Server Address.....: [REDACTED]
- * 5. Local IP Address.....: 172.20.66.106
- * 6. Local Computer Name.....: [REDACTED]-XPS15
- 0. Exit

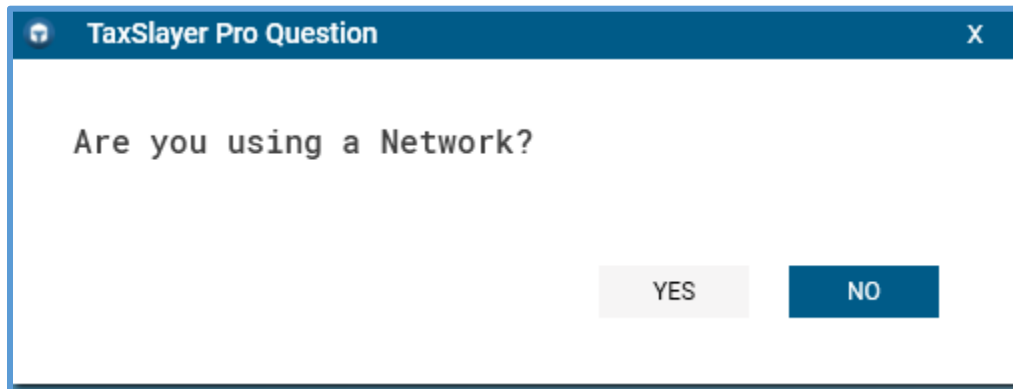
At the bottom right, there is a label "Enter Option:" followed by a small text input field.

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:



The screenshot shows a dialog box titled "TaxSlayer Pro Question". It contains the question "Are you using a Network?". Below the question are two buttons: "YES" (light gray) and "NO" (dark blue).

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

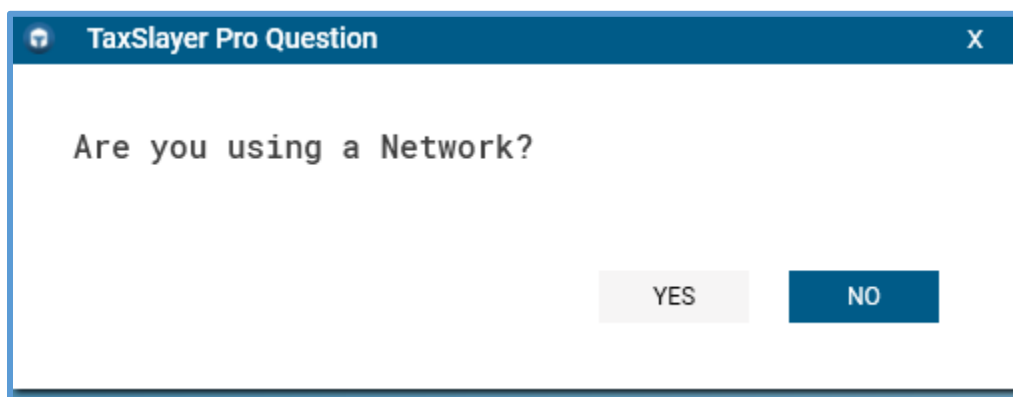
Before you begin using TaxSlayer Pro, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carryover to tax return so that you only have to type this information once. This includes items such as the firm/site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

To configure TaxSlayer Pro, use the following steps:

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

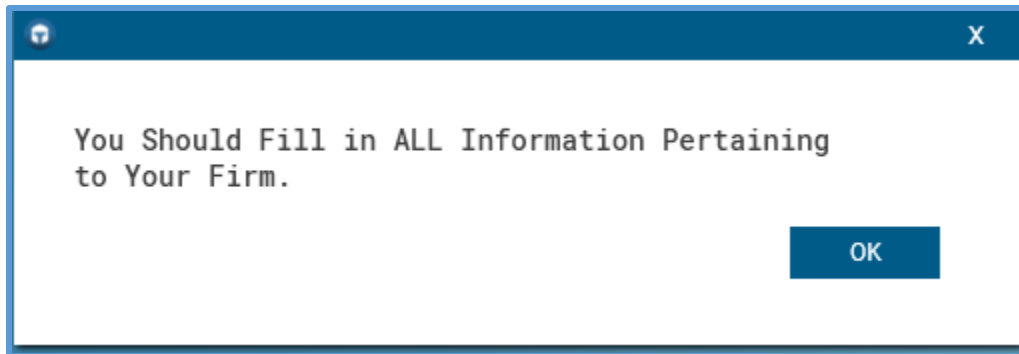
Networking

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**.

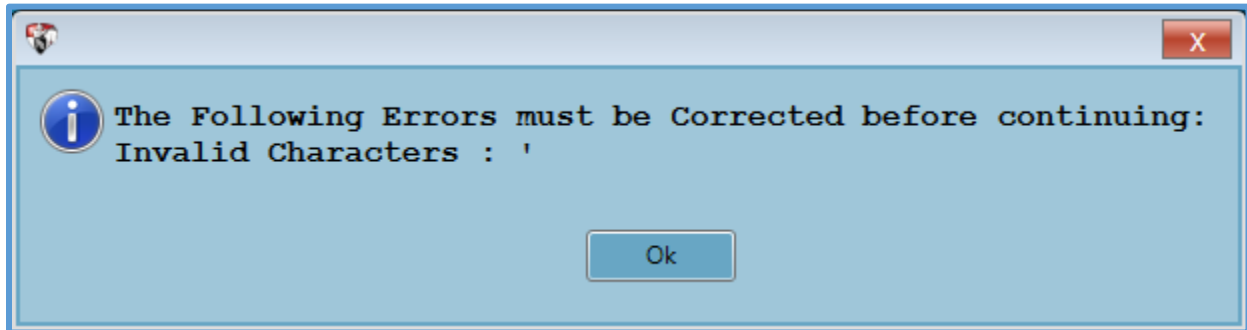
Adding Firm Information

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

A screenshot of the "Firm Information Menu" window. The window has a light blue background and a title bar with a red close button. The form contains the following fields and controls:

- SIDN: [Text Input]
- SIDN Confirm: [Text Input]
- Firm Name: [Text Input]
- Contact Name: [Text Input]
- U.S. Address: [Text Input]
- Check for Foreign Address: ☐
- Street Address: [Text Input]
- Zip Code: [Text Input]
- City/Post Office: [Text Input]
- State: [Text Input]
- Phone Number: [Text Input] () -
- Fax Number: [Text Input] () -
- EFIN: [Text Input]
- Firm EIN: (Do not enter SSN) [Text Input]
- Efin Validation Code: [Text Input]
- Ok: [Button]

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 Hub** 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**:

Firm Information Setup Menu

1. Name of Firm.....	EXAMPLE FIRM
2. Office Identifier....	
3. Name of Contact.....	CONTACT
4. Street Address.....	10 MAIN STREET
5. City, State, Zip.....	ATLANTA, GA 30389
6. Phone Number.....	(770) 555-4241
7. Fax Number.....	() -
8. Employer ID Number...	-
9. Firm EFIN.....	
10. SIDN.....	
11. Group Code.....	
0. Exit	

Enter Option:

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:

A default ADMIN Account is used to manage preparer usernames, passwords, and security roles. The ADMIN account will have limited access to any other part of the program. The default username is ADMIN. This username cannot be changed. Please create a strong password, security question and answer for the ADMIN Account.

A strong password must contain between 8 and 30 characters, and:

Use upper and lower case letters (Example: AaBb)

Use a number (Example: 123)

Use a special character (Example: @!#\$)

New Password:

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:

A default ADMIN Account is used to manage preparer usernames, passwords, and security roles. The ADMIN account will have limited access to any other part of the program. The default username is ADMIN. This username cannot be changed. Please create a strong password, security question and answer for the ADMIN Account.

A strong password must contain between 8 and 30 characters, and:

Use upper and lower case letters (Example: AaBb)

Use a number (Example: 123)

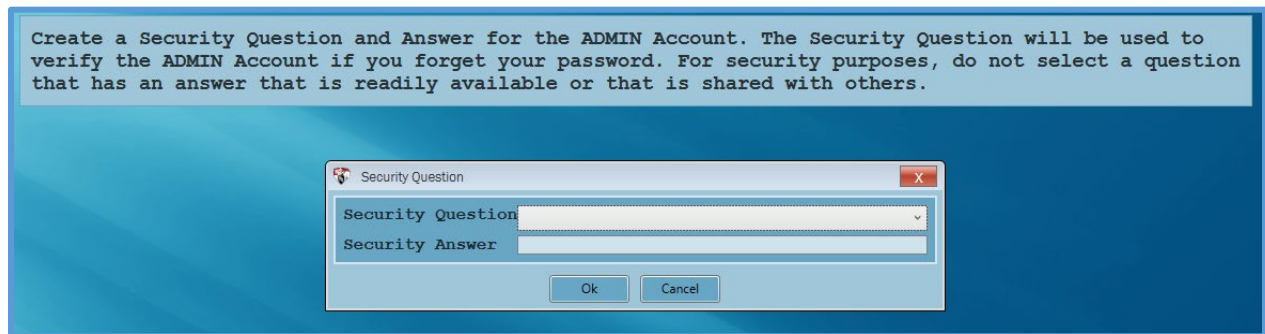
Use a special character (Example: @!#\$)

Confirm New Password:

14. Type the new password again for verification.

15. Press Enter.

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



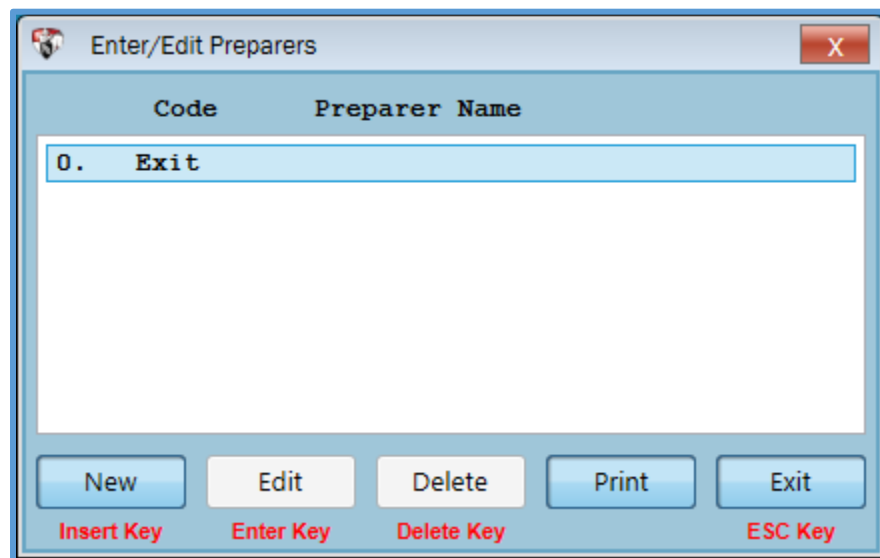
16. Select a security question from the list.

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**.

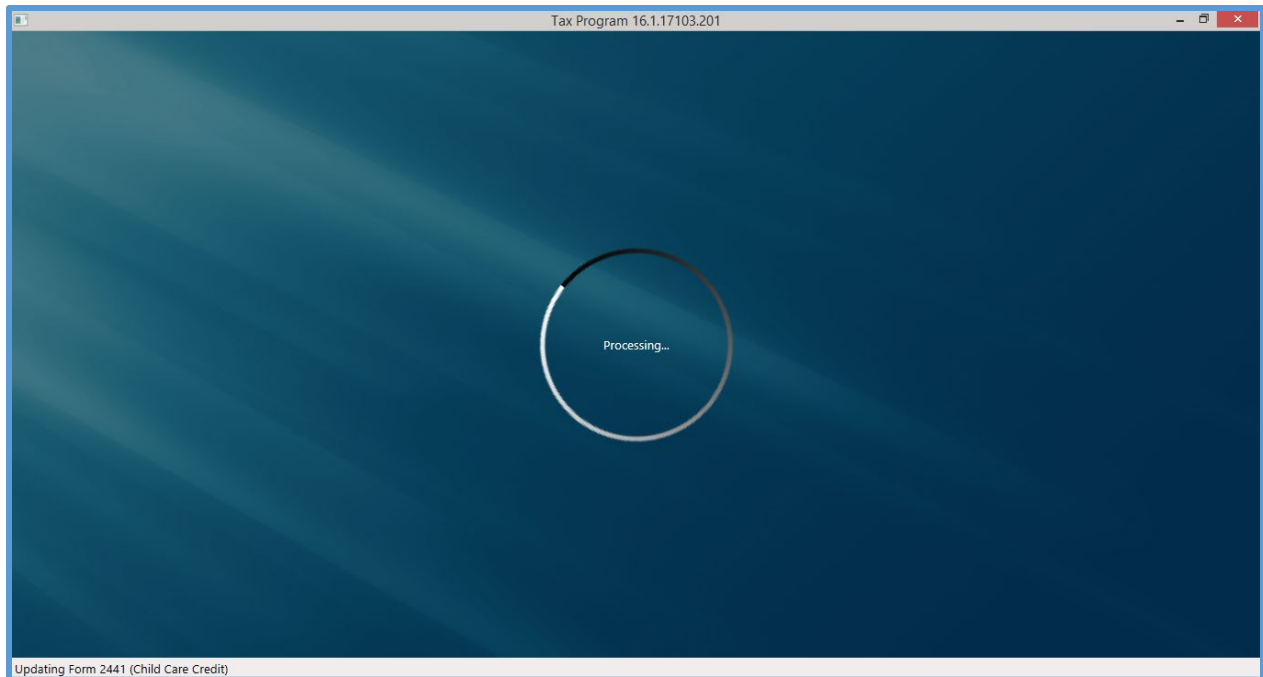
TaxSlayer Pro displays the **Enter/Edit Preparers** window:



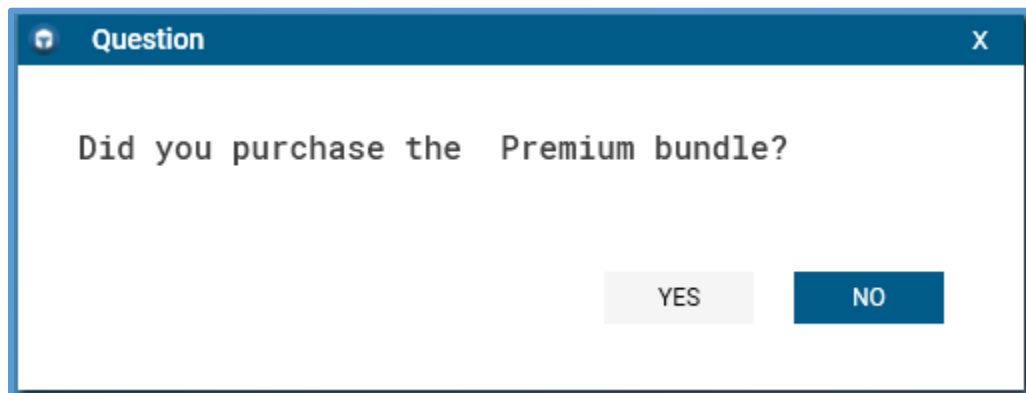
19. Click **Exit**.

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:

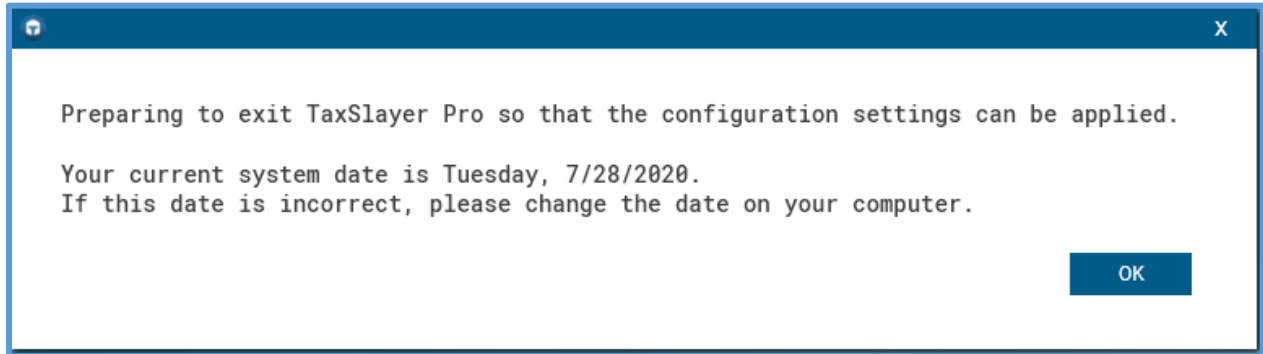


TaxSlayer Pro displays a question asking whether you purchased the premium bundle:



20. Click **NO**.

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



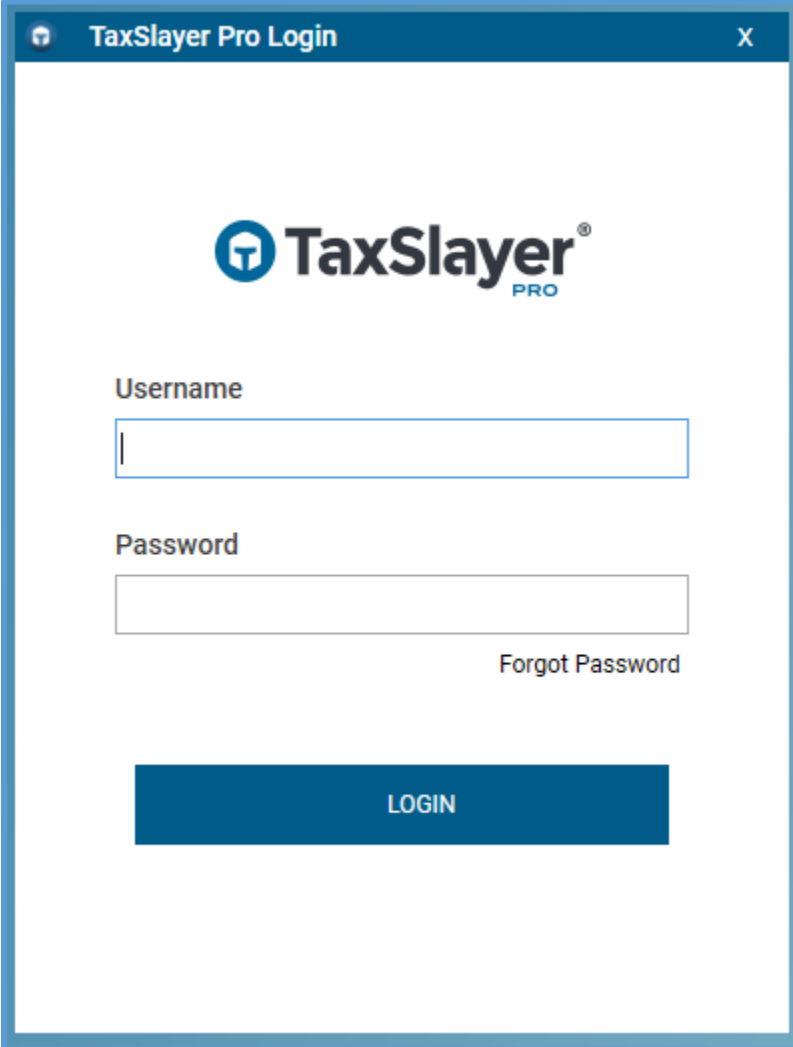
TaxSlayer Pro Online exits the program to apply the new settings.

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.

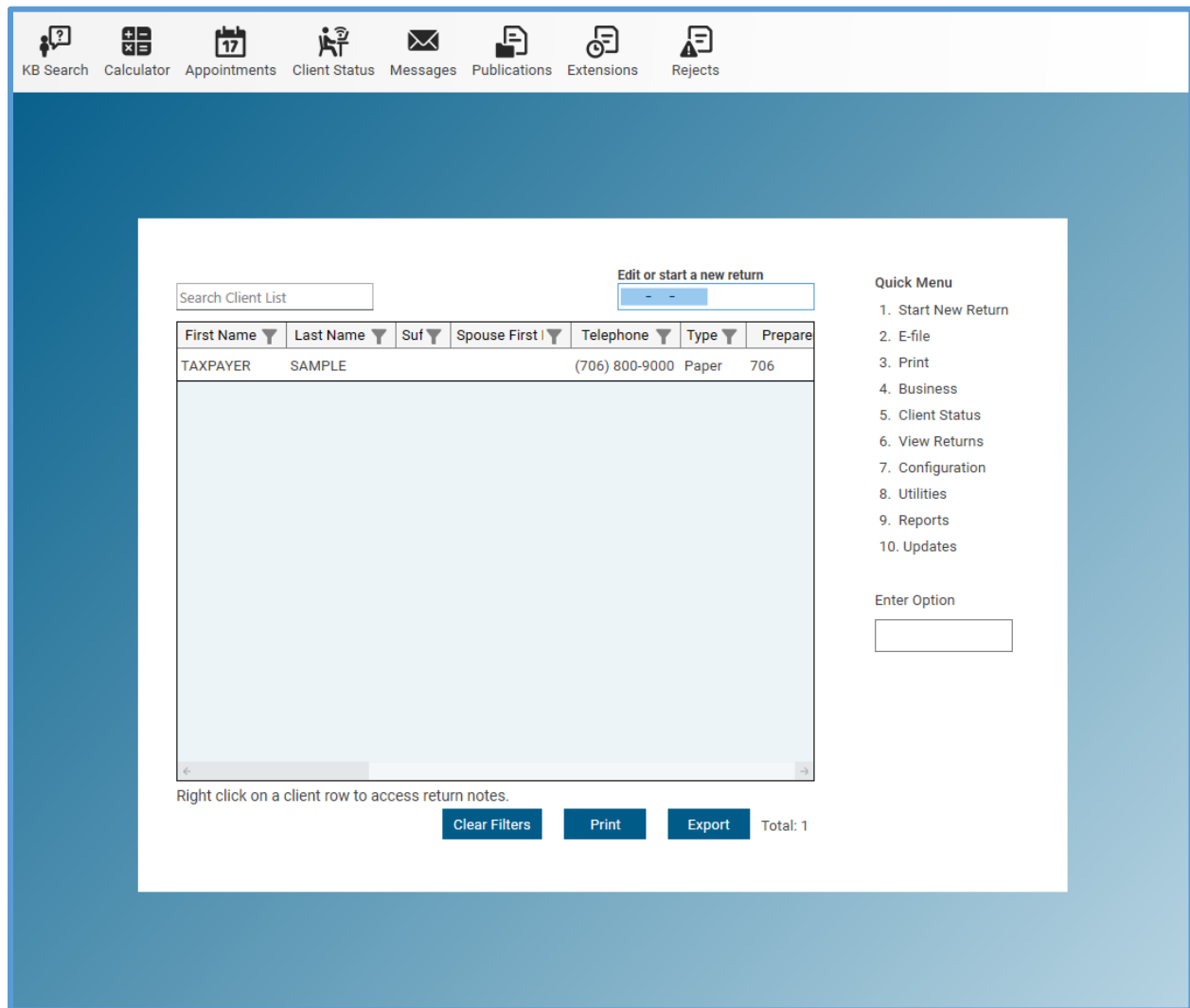
TaxSlayer Pro displays the **TaxSlayer Pro Login** window:



The screenshot shows a standard Windows-style login window. The title bar is dark blue with the text 'TaxSlayer Pro Login' and a close button. The main area is white. The TaxSlayer PRO logo is centered at the top. Below it, the 'Username' label is above a text input field. The 'Password' label is above another text input field. To the right of the password field is a 'Forgot Password' link. At the bottom, there is a prominent blue 'LOGIN' button.

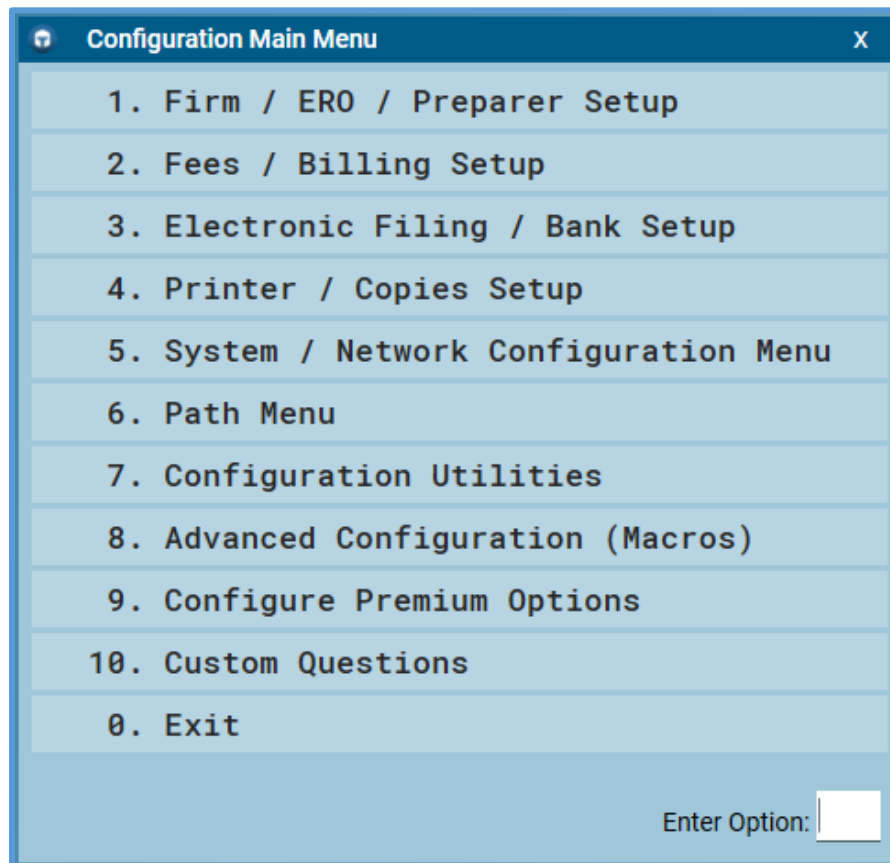
2. Type the user name and password you created in Configuration.
3. Click **Ok**.

TaxSlayer Pro displays the main window:



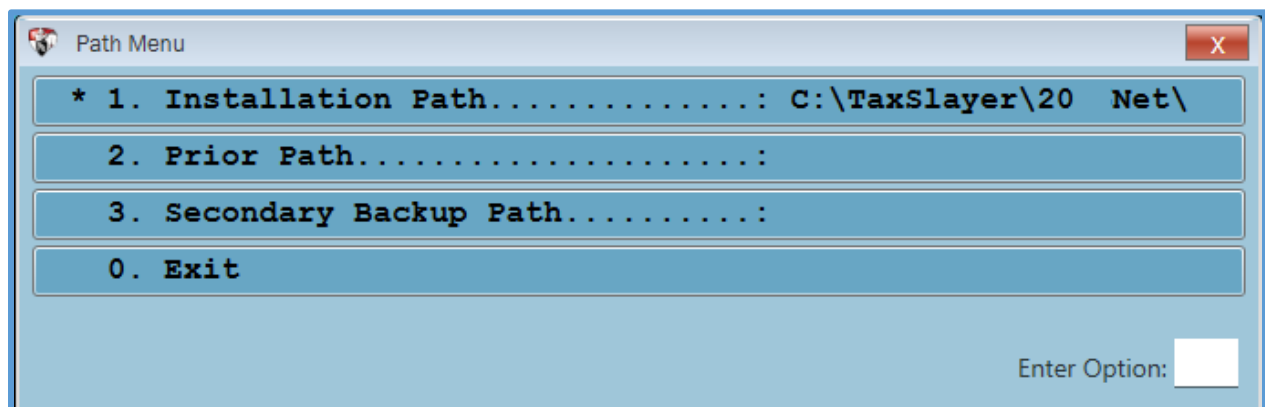
4. Click **Configuration** or type the corresponding number.

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



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

TaxSlayer Pro displays the **Path Menu**:

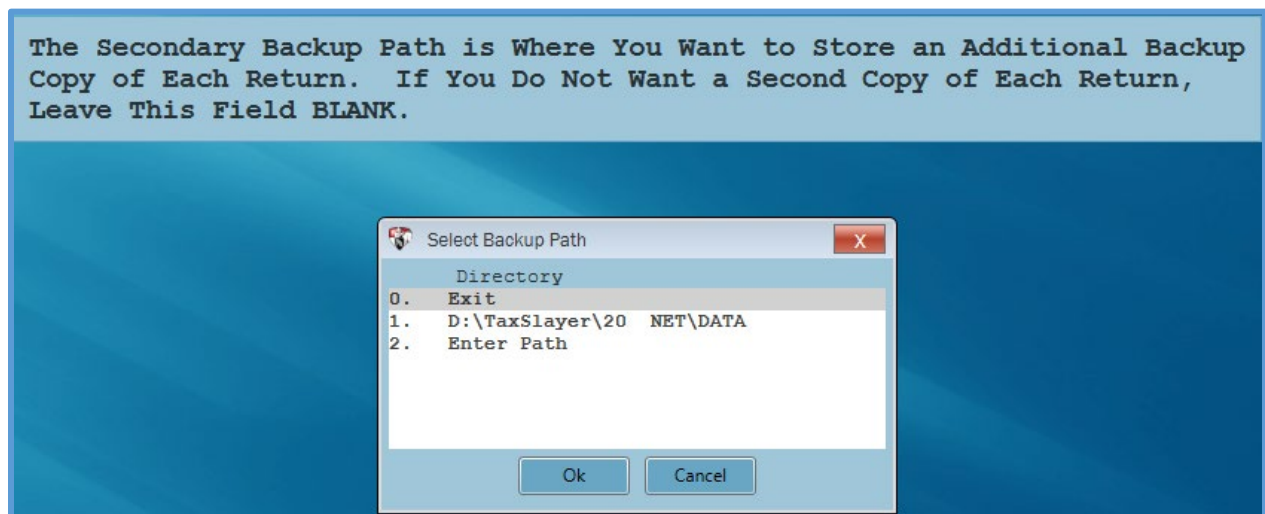


6. Leave the installation and prior path as displayed.

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.

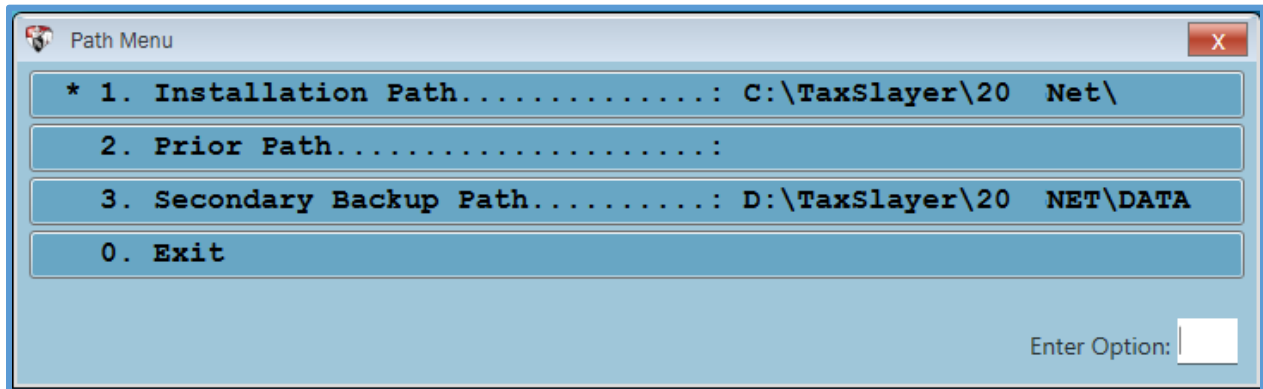
TaxSlayer Pro displays the **Select Backup Path** window with any external storage locations listed:



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**:



Path Menu

- * 1. Installation Path.....: C:\TaxSlayer\20 Net\
- 2. Prior Path.....:
- 3. Secondary Backup Path.....: D:\TaxSlayer\20 NET\DATA
- 0. Exit

Enter Option:

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	
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**:

The screenshot shows a window titled "Keystroke (Macro) Saver Setup Menu" with a list of 15 options, each in a blue button-like box. The options are numbered 1 through 14, followed by 0. At the bottom right, there is a label "Enter Option:" followed by a small white text input box.

- 1. Default State on W2s & 1099-Rs.....:
- 2. Default Locality on W2s & 1099-Rs....:
- 3. W2 Employers/1099R Payers
- 4. K-1 Entities
- 5. Child Care Providers
- 6. Interest/Dividend Payers
- 7. Charitable Organizations
- 8. Banks
- 9. Print MACRO's
- 10. Phone Descriptions
- 11. State Locality Menu
- 12. Depreciation Categories
- 13. Return Status Tags
- 14. Referral Options
- 0. Exit

Enter Option:

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

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

The screenshot shows a window titled "Most Common Employers". At the top left, there is a "Search By:" label followed by a text input box. At the top right, it says "Total: 0". Below this is a table with six columns: EIN, Name, Address, City, State, and Zip. The table is currently empty. At the bottom, there are five buttons: "New", "Edit", "Delete", "Other", and "Exit". Below each button is a red text label: "Insert Key", "Enter Key", "Delete Key", and "ESC Key" (under the Exit button).

EIN	Name	Address	City	State	Zip
-----	------	---------	------	-------	-----

New Edit Delete Other Exit
Insert Key Enter Key Delete Key ESC Key

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**:

Configuration Main Menu X

1. Firm / ERO / Preparer Setup
2. Fees / Billing Setup
3. Electronic Filing / Bank Setup
4. Printer / Copies Setup
5. System / Network Configuration Menu
6. Path Menu
7. Configuration Utilities
8. Advanced Configuration (Macros)
9. Configure Premium Options
10. Custom Questions
0. Exit

Enter Option:

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.

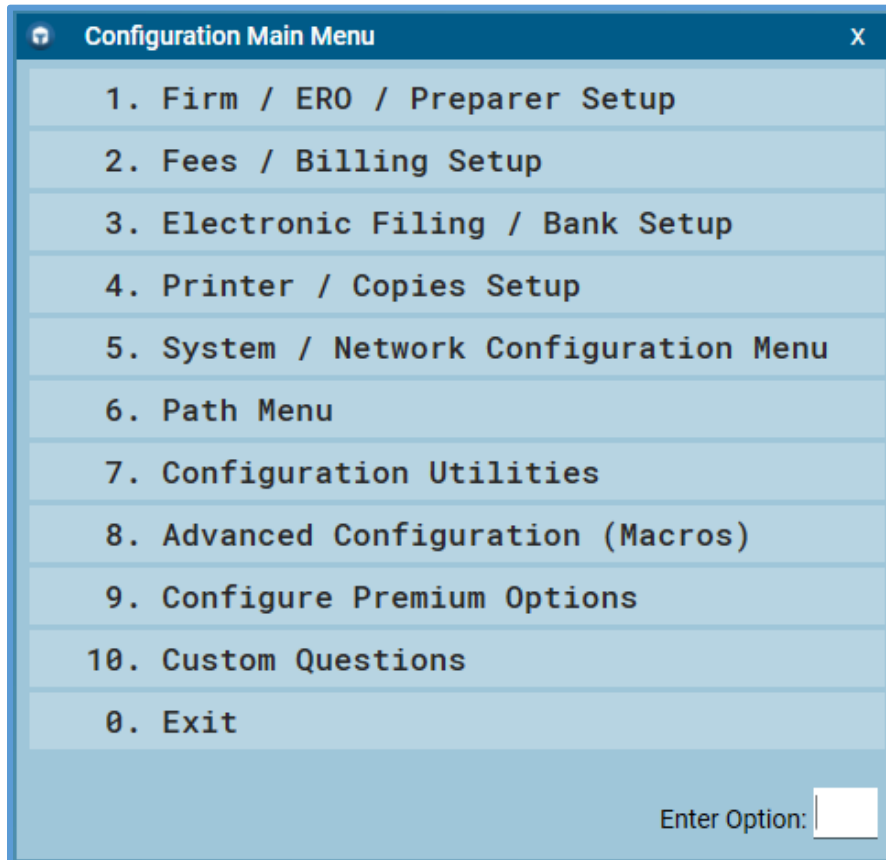
TaxSlayer Pro Tip: You cannot add the predefined Administrator role to users, and you cannot edit that role.

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**:

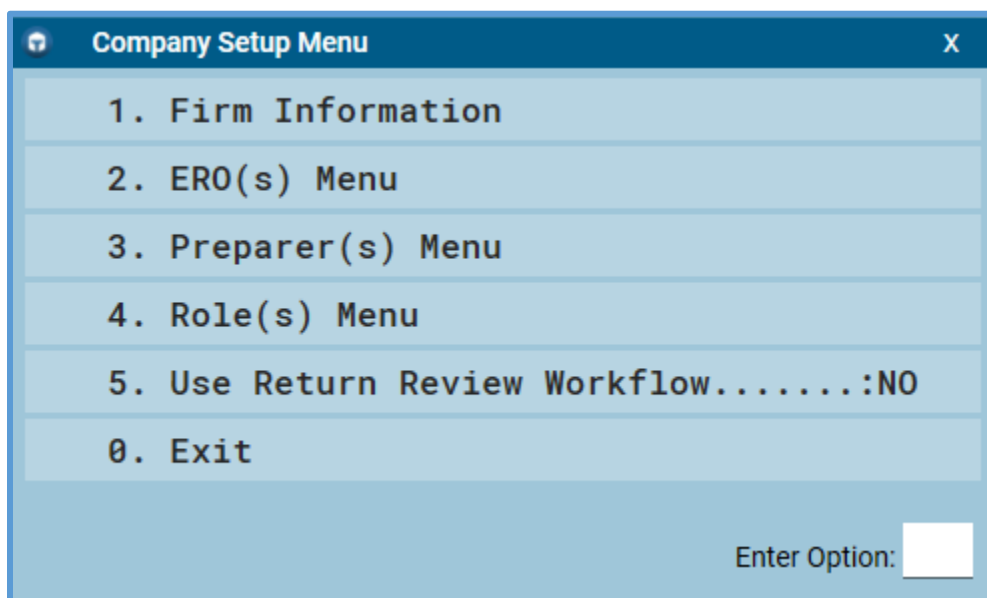


Configuration Main Menu	
1.	Firm / ERO / Preparer Setup
2.	Fees / Billing Setup
3.	Electronic Filing / Bank Setup
4.	Printer / Copies Setup
5.	System / Network Configuration Menu
6.	Path Menu
7.	Configuration Utilities
8.	Advanced Configuration (Macros)
9.	Configure Premium Options
10.	Custom Questions
0.	Exit

Enter Option:

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

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

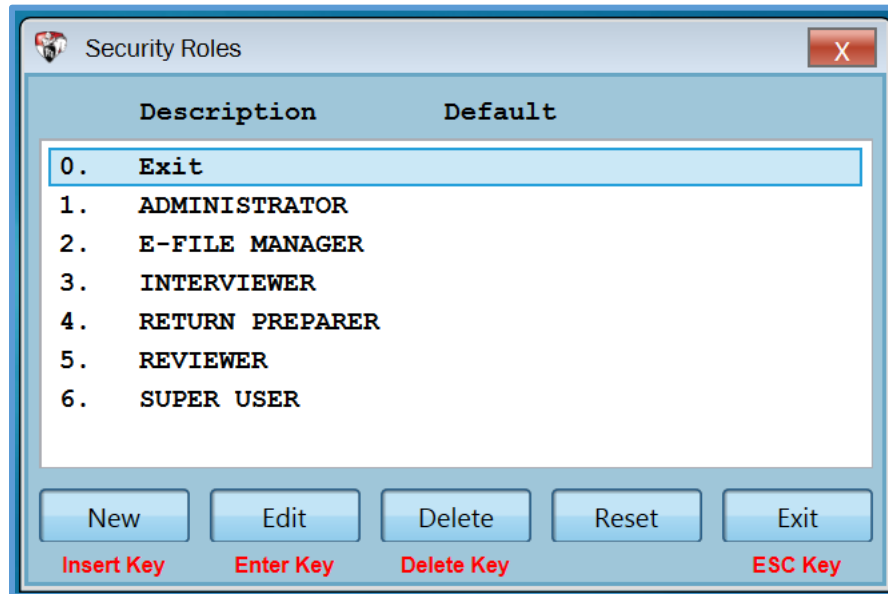


Company Setup Menu	
1.	Firm Information
2.	ERO(s) Menu
3.	Preparer(s) Menu
4.	Role(s) Menu
5.	Use Return Review Workflow.....:NO
0.	Exit

Enter Option:

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:

Role Name:

5. Type the name of the role you want to create.

6. Press Enter.

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

Preparer Security Menu	
>>1. Role Name.....: SAMPLE	>>11. Papercut Security
>>2. Main Menu Options	>>12. E-File Menu Security
3. Print from View.....: YES	13. Print Checks.....: YES
4. Mark E-File.....: YES	14. Remove Clients.....: YES
5. Mark Complete.....: YES	15. Fees Configuration.....: YES
6. Change Return Preparer...: YES	16. Firm/Preparer Cfg.....: YES
7. Quick Calc.....: YES	17. Roles Cfg.....: YES
8. Automatic Extension.....: YES	18. Import Users From App...: YES
9. Client Retention.....: YES	19. Export Data.....: YES
10. Appointments.....: YES	20. Tax Returns Access.....: Unlimited
0. Exit Menu	
Enter Option: <input type="text"/>	

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:

Description

- 0. Exit
- 1. Preparer has Access
- 2. Preparer does not have Access

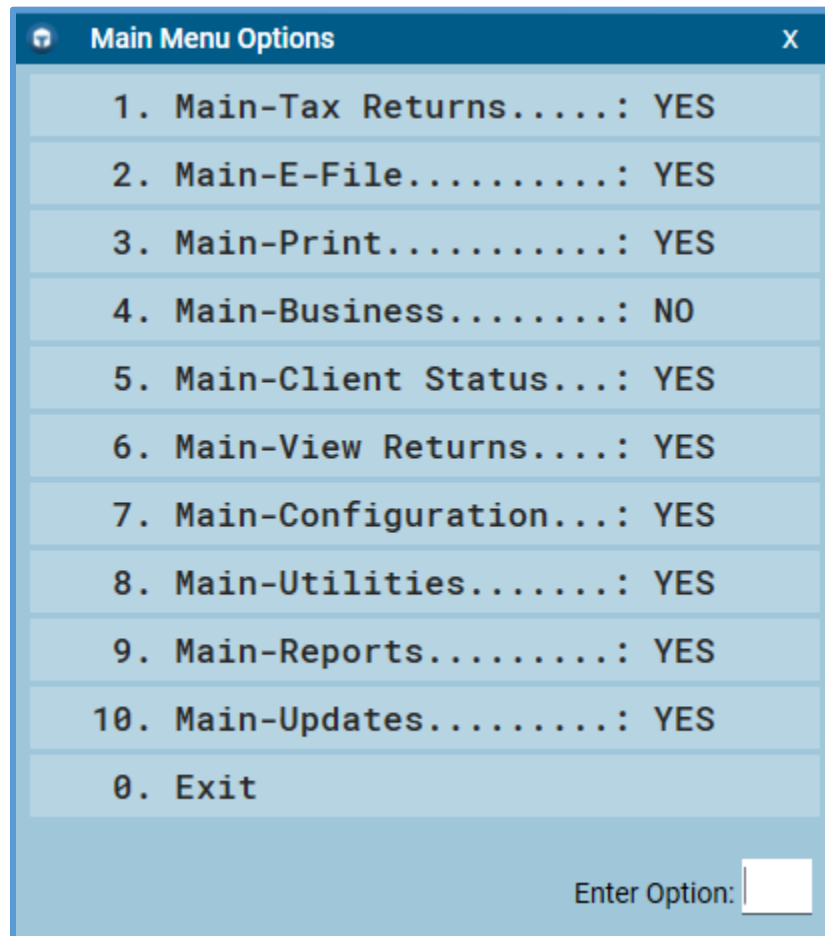
Ok Cancel

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:



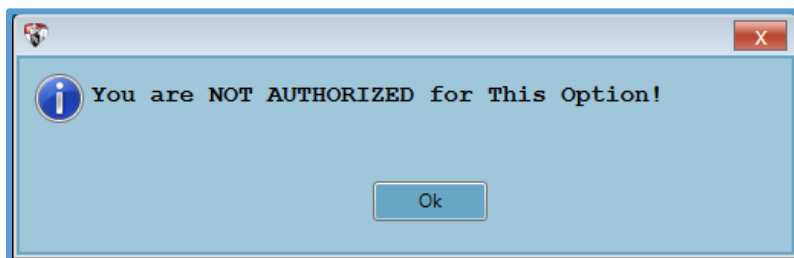
The 'Main Menu Options' dialog box is a light blue window with a title bar containing a gear icon, the text 'Main Menu Options', and a close button 'X'. It contains a list of ten options, each with a number and a status (YES or NO). At the bottom right, there is a text input field labeled 'Enter Option:'.

Option	Status
1. Main-Tax Returns.....	YES
2. Main-E-File.....	YES
3. Main-Print.....	YES
4. Main-Business.....	NO
5. Main-Client Status...	YES
6. Main-View Returns....	YES
7. Main-Configuration...	YES
8. Main-Utilities.....	YES
9. Main-Reports.....	YES
10. Main-Updates.....	YES
0. Exit	

Enter Option:

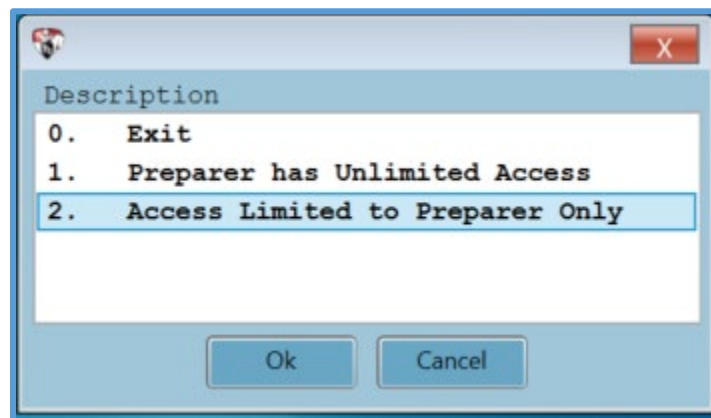
11. Click the options you want to toggle to **NO** so that users in this role cannot access the option on the TaxSlayer Pro main window.

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



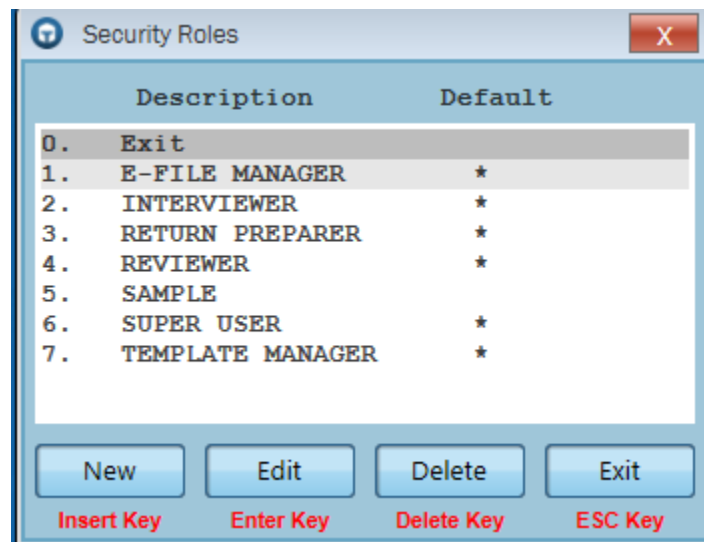
12. Click **Exit** or type the corresponding option.
13. Do **not** adjust the following permissions. VITA/TCE sites do not use these:
 - a. Quick Calc
 - b. Client Retention
 - c. Default Retention Password
 - d. Appointments
 - e. Papercut Security
 - f. Print Checks
 - g. Fees Configuration (If your 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**:

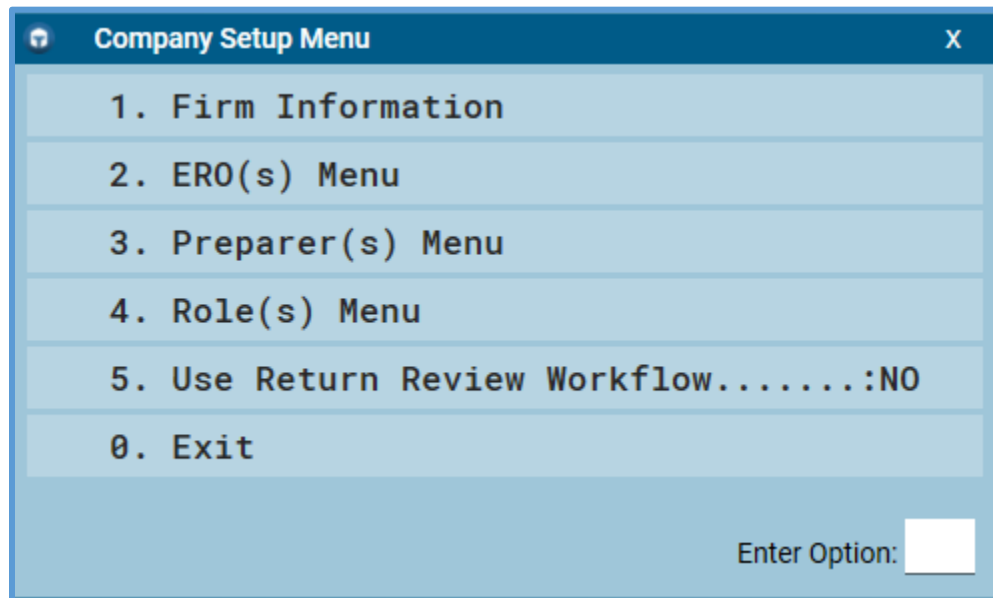
Configuration Main Menu X

1. Firm / ERO / Preparer Setup
2. Fees / Billing Setup
3. Electronic Filing / Bank Setup
4. Printer / Copies Setup
5. System / Network Configuration Menu
6. Path Menu
7. Configuration Utilities
8. Advanced Configuration (Macros)
9. Configure Premium Options
10. Custom Questions
0. Exit

Enter Option:

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

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



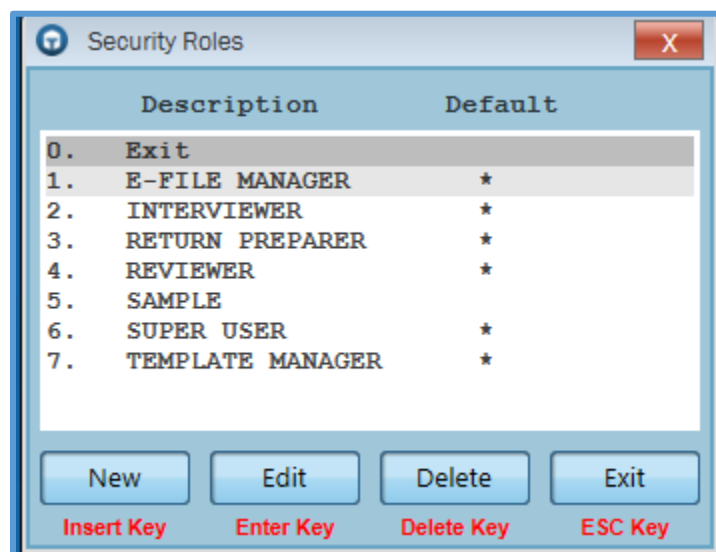
The 'Company Setup Menu' dialog box has a title bar with a close button (X). It contains a list of options:

- 1. Firm Information
- 2. ERO(s) Menu
- 3. Preparer(s) Menu
- 4. Role(s) Menu
- 5. Use Return Review Workflow.....:NO
- 0. Exit

At the bottom right, there is a label 'Enter Option:' followed by a text input field.

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

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



The 'Security Roles' dialog box has a title bar with a close button (X). It contains a table with two columns: 'Description' and 'Default'.

	Description	Default
0.	Exit	
1.	E-FILE MANAGER	*
2.	INTERVIEWER	*
3.	RETURN PREPARER	*
4.	REVIEWER	*
5.	SAMPLE	
6.	SUPER USER	*
7.	TEMPLATE MANAGER	*

At the bottom, there are four buttons: 'New', 'Edit', 'Delete', and 'Exit'. Below each button is a red text label: 'Insert Key' under 'New', 'Enter Key' under 'Edit', 'Delete Key' under 'Delete', and 'ESC Key' under 'Exit'.

4. Click the name of the role you want to change.

5. Click **Edit**.

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

Preparer Security Menu	
>>1. Role Name.....: SAMPLE	>>11. Papercut Security
>>2. Main Menu Options	>>12. E-File Menu Security
3. Print from View.....: YES	13. Print Checks.....: YES
4. Mark E-File.....: YES	14. Remove Clients.....: YES
5. Mark Complete.....: YES	15. Fees Configuration.....: YES
6. Change Return Preparer...: YES	16. Firm/Preparer Cfg.....: YES
7. Quick Calc.....: YES	17. Roles Cfg.....: YES
8. Automatic Extension.....: YES	18. Import Users From App...: YES
9. Client Retention.....: YES	19. Export Data.....: YES
10. Appointments.....: YES	20. Tax Returns Access.....: Unlimited
0. Exit Menu	
Enter Option: <input type="text"/>	

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

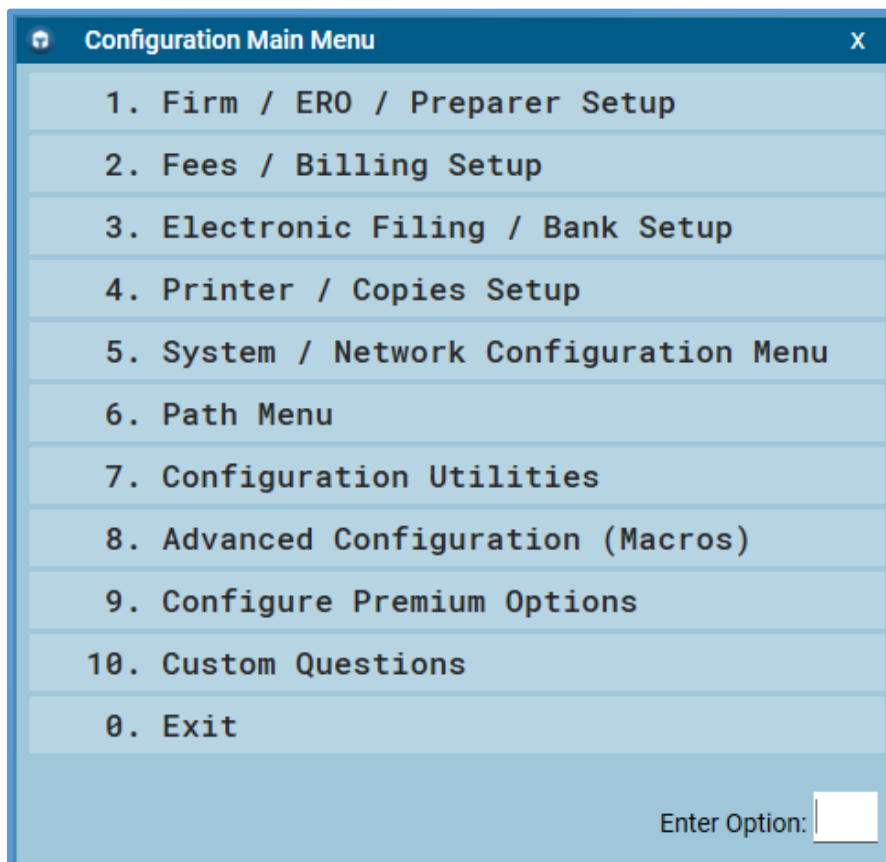
After you configure the information for the office and set up security templates, you need to add preparers. Add each preparer in your office.

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**:



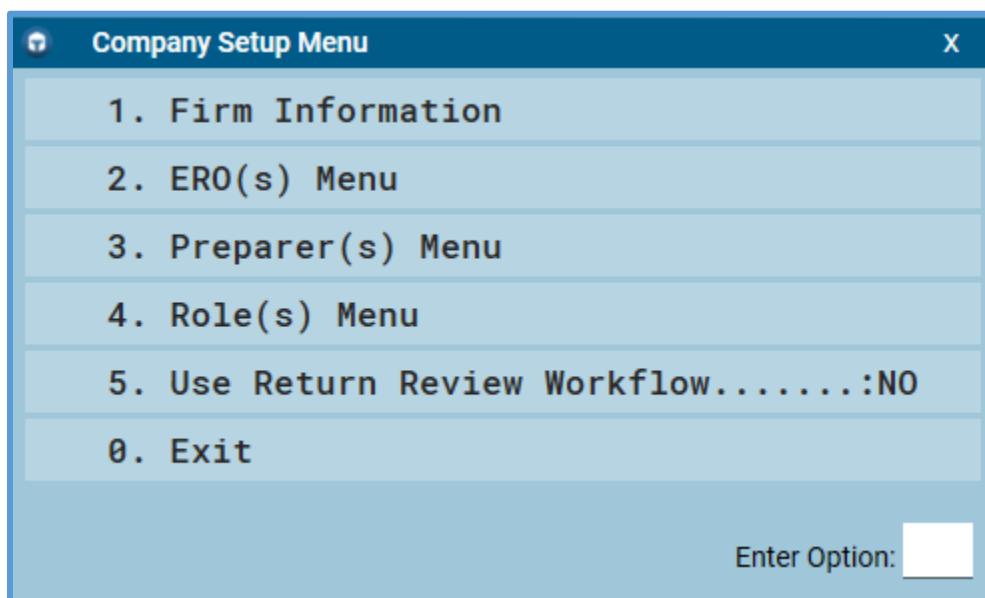
The screenshot shows a window titled "Configuration Main Menu" with a close button (X) in the top right corner. The window contains a list of ten numbered options:

1. Firm / ERO / Preparer Setup
2. Fees / Billing Setup
3. Electronic Filing / Bank Setup
4. Printer / Copies Setup
5. System / Network Configuration Menu
6. Path Menu
7. Configuration Utilities
8. Advanced Configuration (Macros)
9. Configure Premium Options
10. Custom Questions
0. Exit

At the bottom right of the window, there is a label "Enter Option:" followed by a small text input field.

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

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



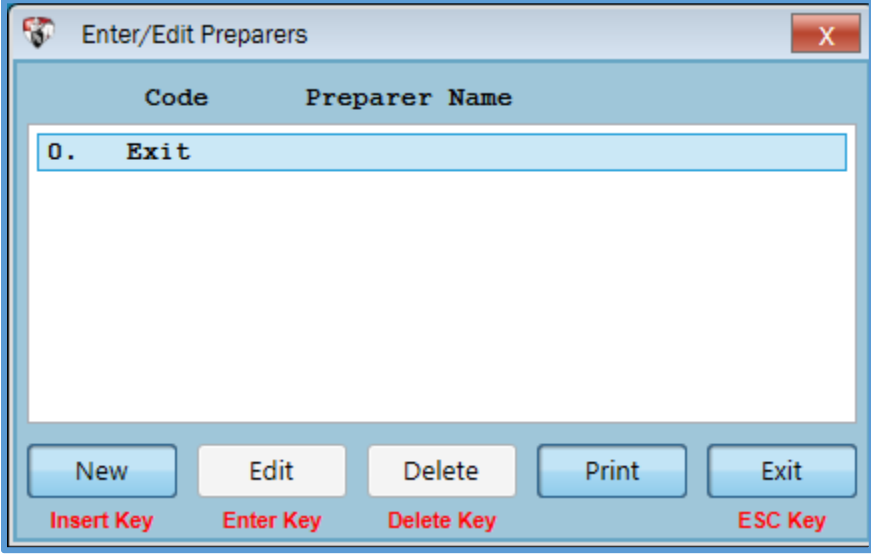
The screenshot shows a window titled "Company Setup Menu" with a close button (X) in the top right corner. The window contains a list of six numbered options:

1. Firm Information
2. ERO(s) Menu
3. Preparer(s) Menu
4. Role(s) Menu
5. Use Return Review Workflow.....:NO
0. Exit

At the bottom right of the window, there is a label "Enter Option:" followed by a small text input field.

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

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



The "Enter/Edit Preparers" window is a standard Windows-style dialog box. It has a title bar with a small icon, the text "Enter/Edit Preparers", and a close button (X). The main area contains a table with two columns: "Code" and "Preparer Name". The first row of the table is highlighted in blue and contains the text "0. Exit". Below the table, there are five buttons: "New", "Edit", "Delete", "Print", and "Exit". Each button has a corresponding keyboard shortcut displayed below it in red text: "Insert Key" for New, "Enter Key" for Edit, "Delete Key" for Delete, and "ESC Key" for Exit. The Print button does not have a keyboard shortcut listed.

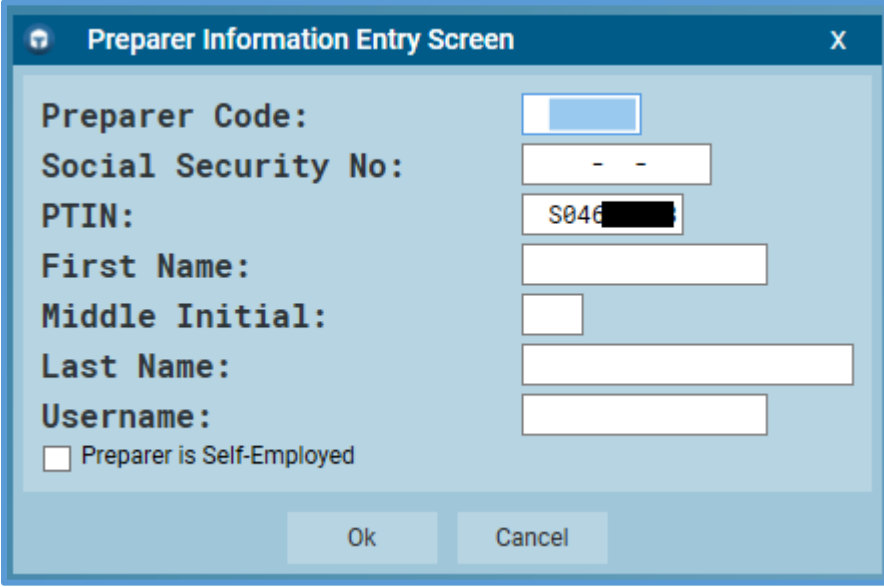
Code	Preparer Name
0.	Exit

New Edit Delete Print Exit

Insert Key Enter Key Delete Key ESC Key

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

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



The "Preparer Information Entry Screen" is a dialog box with a dark blue title bar containing a small icon, the text "Preparer Information Entry Screen", and a close button (X). The main area is light blue and contains several labeled text input fields: "Preparer Code:", "Social Security No:", "PTIN:", "First Name:", "Middle Initial:", "Last Name:", and "Username:". The "Social Security No:" field contains two dashes "--". The "PTIN:" field contains "S046" followed by a blacked-out area. Below these fields is a checkbox labeled "Preparer is Self-Employed". At the bottom of the dialog are two buttons: "Ok" and "Cancel".

Preparer Code: []

Social Security No: [--]

PTIN: [S046]

First Name: []

Middle Initial: []

Last Name: []

Username: []

☐ Preparer is Self-Employed

Ok Cancel

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**:

Preparer Edit Menu	
1. Preparer Code.....:	706
2. Social Security Number.....:	- -
3. PTIN.....:	[redacted]
4. Name (First,Middle,Last).....:	[redacted]
5. E-Mail Address.....:	
6. Self Employment Indicator.....:	NO
7. Preparer Practitioner Pin.....:	98765
8. Preparer Hourly Rate.....:	0.00
9. Preparer Prep Fee Commission %.....:	0.00
10. Preparer E-file Fee Commission %.....:	0.00
11. Preparer Doc Prep Fee Commission %...:	0.00
12. 2848 / Acceptance Agent Information	
13. Supervised Preparer.....:	NO
14. Change Firm Information.....:	[redacted]
15. Preparer Security	
0. Exit	

Enter Option:

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:

The screenshot shows a window titled "Preparer Security Menu" with a list of 22 numbered options. The options are arranged in two columns. The first column contains options 1 through 11, and the second column contains options 12 through 22. Option 12 is "Appointments.....: YES". Option 13 is "Papercut Security". Option 14 is "E-File Menu Security". Option 15 is "Print Checks.....: YES". Option 16 is "Remove Clients.....: NO". Option 17 is "Fees Configuration.....: YES". Option 18 is "Firm/Preparer Cfg.....: NO". Option 19 is "Roles Cfg.....: NO". Option 20 is "Import Users From App...: YES". Option 21 is "Export Data.....: YES". Option 22 is "Tax Returns Access.....: Limited". At the bottom of the window, there is a button labeled "0. Exit Menu" and a text input field labeled "Enter Option:".

1. Username.....: JANEDOE	12. Appointments.....: YES
2. Password/Security Question...: Not Completed	>>13. Papercut Security
3. Role.....: RETURN PREPARER	>>14. E-File Menu Security
>>4. Main Menu Options	15. Print Checks.....: YES
5. Print from View.....: YES	16. Remove Clients.....: NO
6. Mark E-File.....: YES	17. Fees Configuration.....: YES
7. Mark Complete.....: YES	18. Firm/Preparer Cfg.....: NO
8. Change Return Preparer.....: NO	19. Roles Cfg.....: NO
9. Quick Calc.....: YES	20. Import Users From App...: YES
10. Automatic Extension.....: YES	21. Export Data.....: YES
11. Client Retention.....: YES	22. Tax Returns Access.....: Limited

0. Exit Menu

Enter Option:

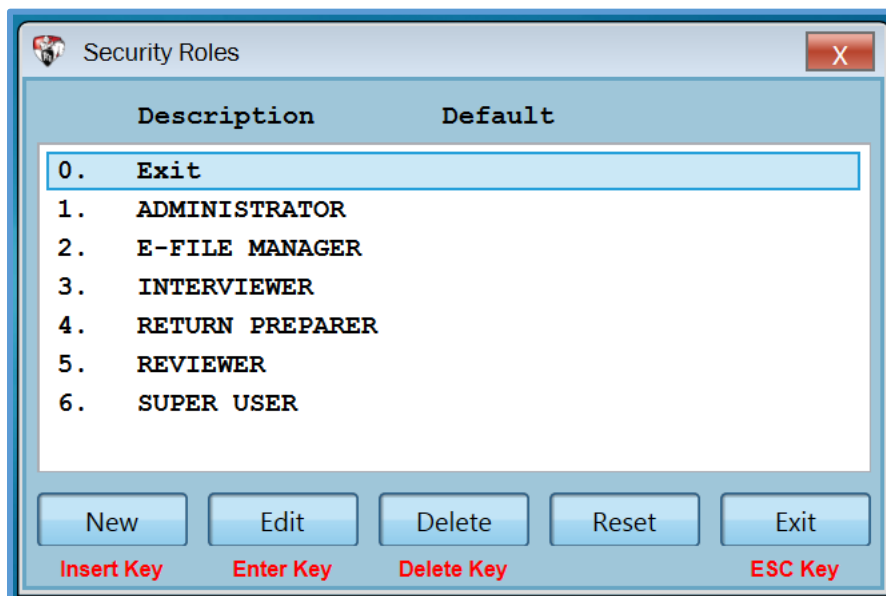
Assigning Security Templates

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:

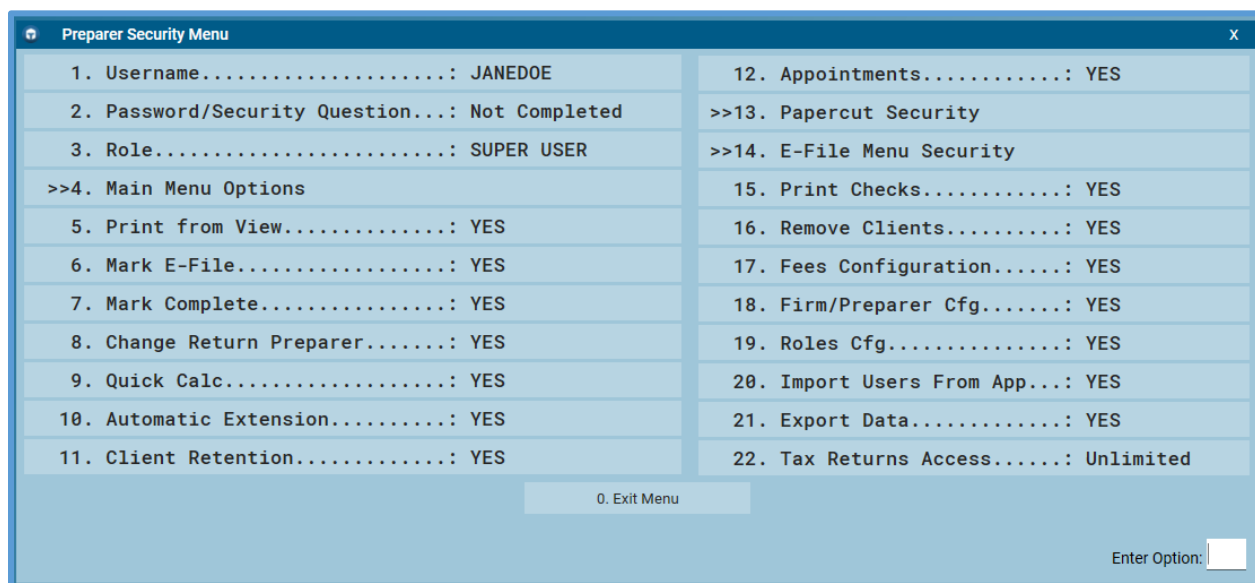
1. Click **Role** or type the corresponding number.

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.

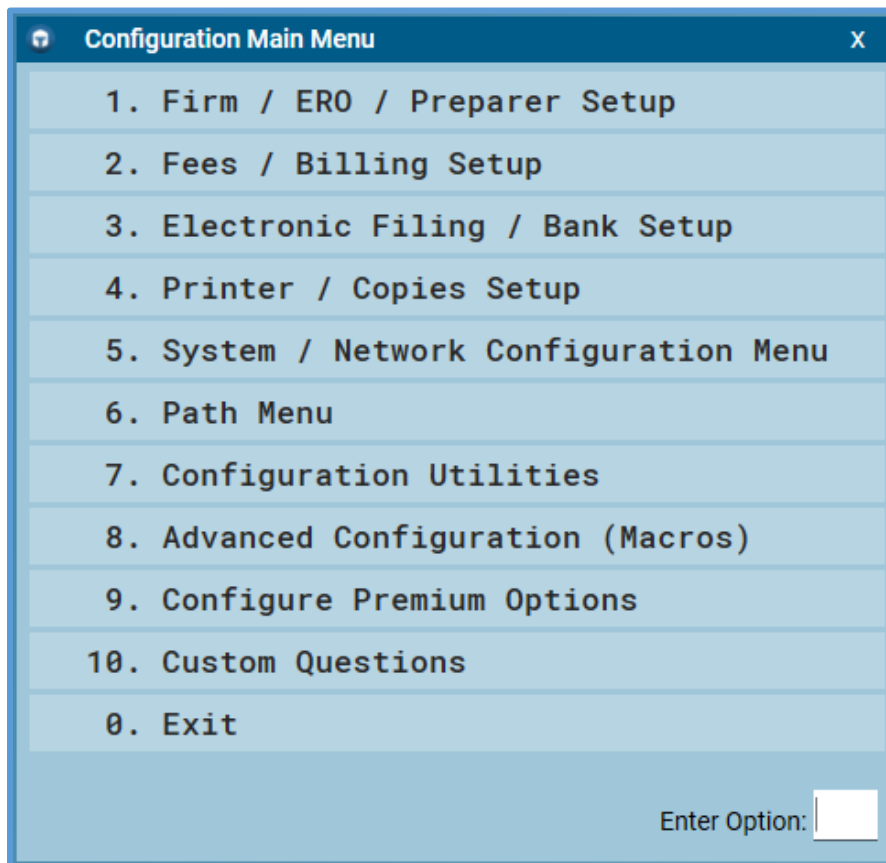
TaxSlayer Pro allows you to set up custom questions that preparers should answer while interviewing a taxpayer. You can use only the predefined questions or add more questions.

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**:

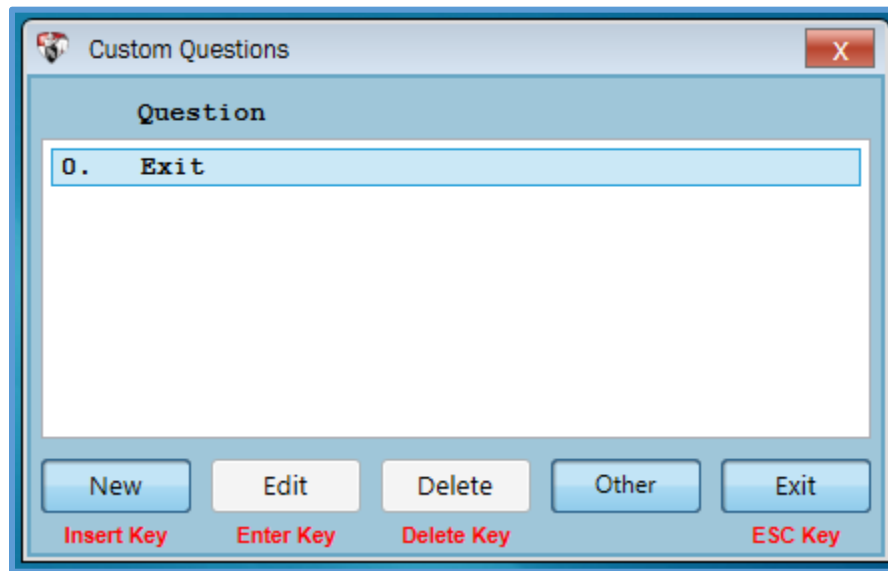


Configuration Main Menu	
1.	Firm / ERO / Preparer Setup
2.	Fees / Billing Setup
3.	Electronic Filing / Bank Setup
4.	Printer / Copies Setup
5.	System / Network Configuration Menu
6.	Path Menu
7.	Configuration Utilities
8.	Advanced Configuration (Macros)
9.	Configure Premium Options
10.	Custom Questions
0.	Exit

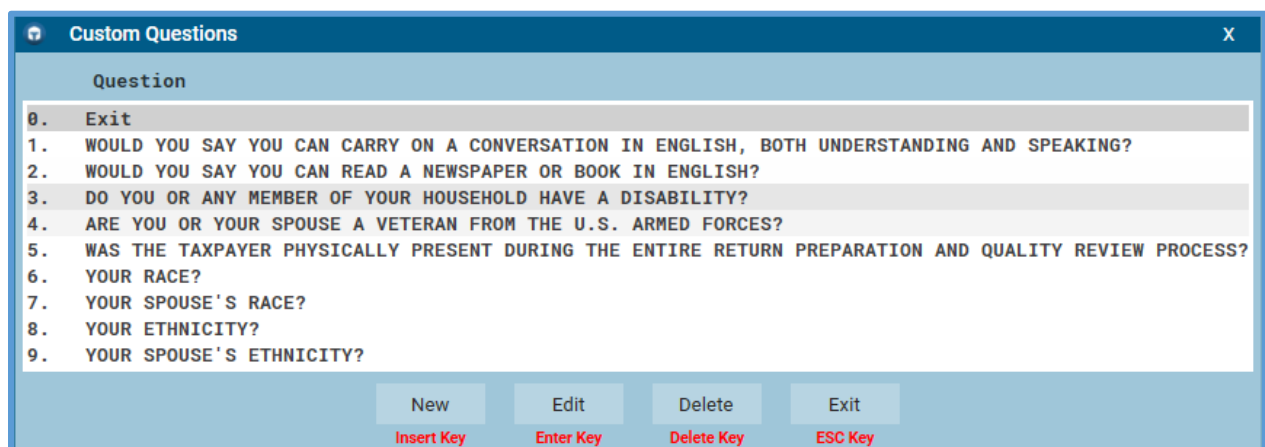
Enter Option:

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**.

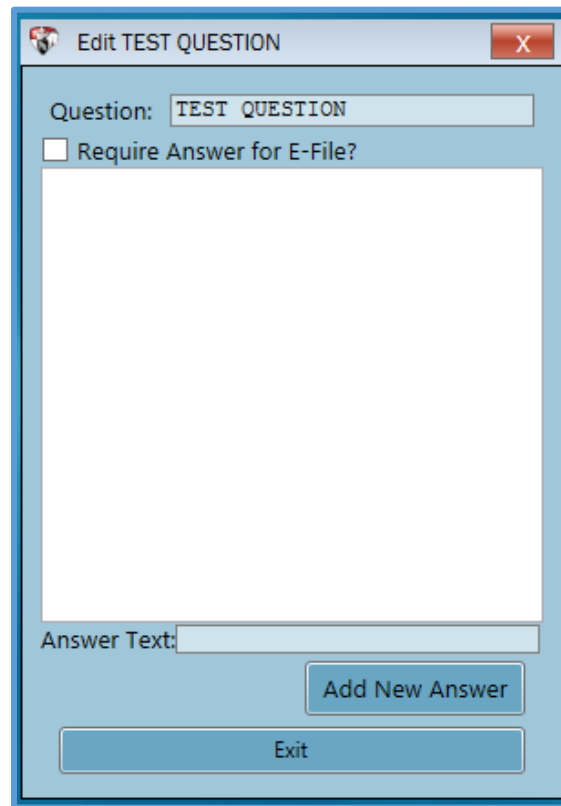
TaxSlayer Pro displays the **Question** box:

A screenshot of the 'Question' box in TaxSlayer Pro. It consists of a label 'Question:' followed by a large text input field.

4. Type the question.

5. Press Enter.

TaxSlayer Pro displays the **Edit...** menu:



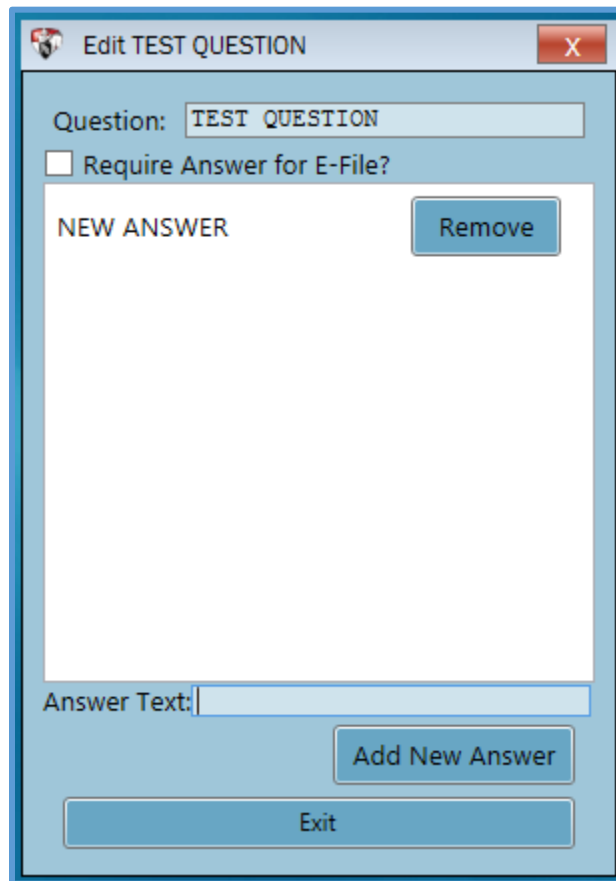
The screenshot shows a dialog box titled "Edit TEST QUESTION" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the dialog, there is a text input field labeled "Question:" containing the text "TEST QUESTION". Below this is a checkbox labeled "Require Answer for E-File?". A large, empty rectangular area occupies the center of the dialog, likely for a list of answers. At the bottom, there is a text input field labeled "Answer Text:". To the right of this field is a button labeled "Add New Answer". Below the "Answer Text:" field is a wide button labeled "Exit".

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:



Question: TEST QUESTION

☐ Require Answer for E-File?

NEW ANSWER Remove

Answer Text:

Add New Answer

Exit

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:

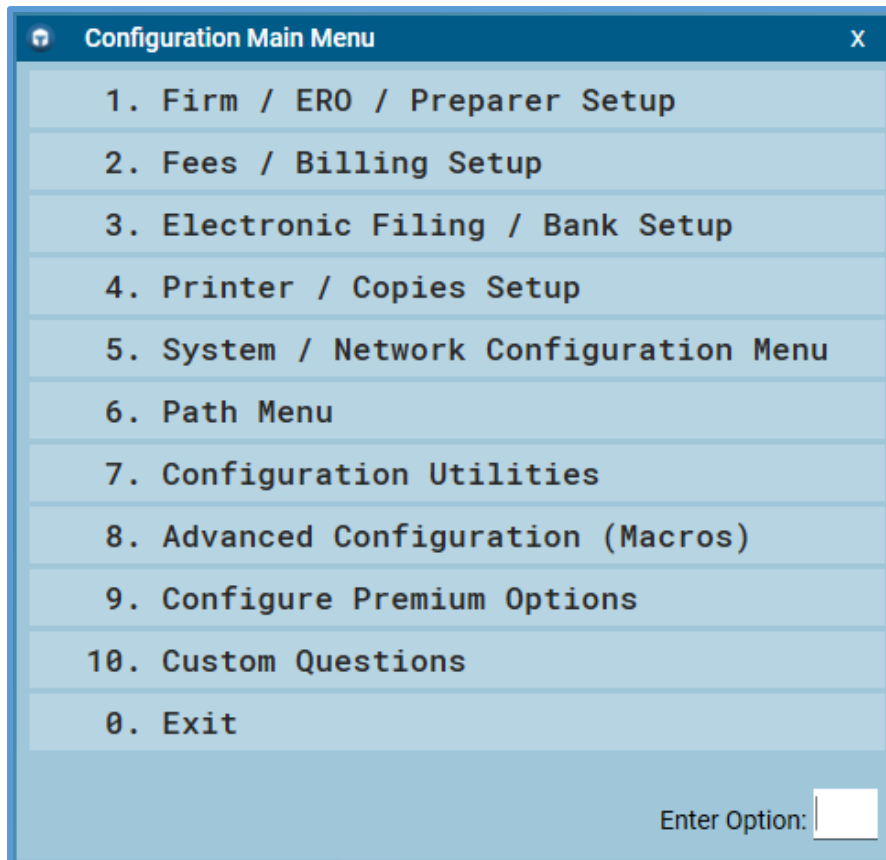
- List the predefined print sets.
- Determine which print set to use for the taxpayer.
- Change the number of copies to print.

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**:

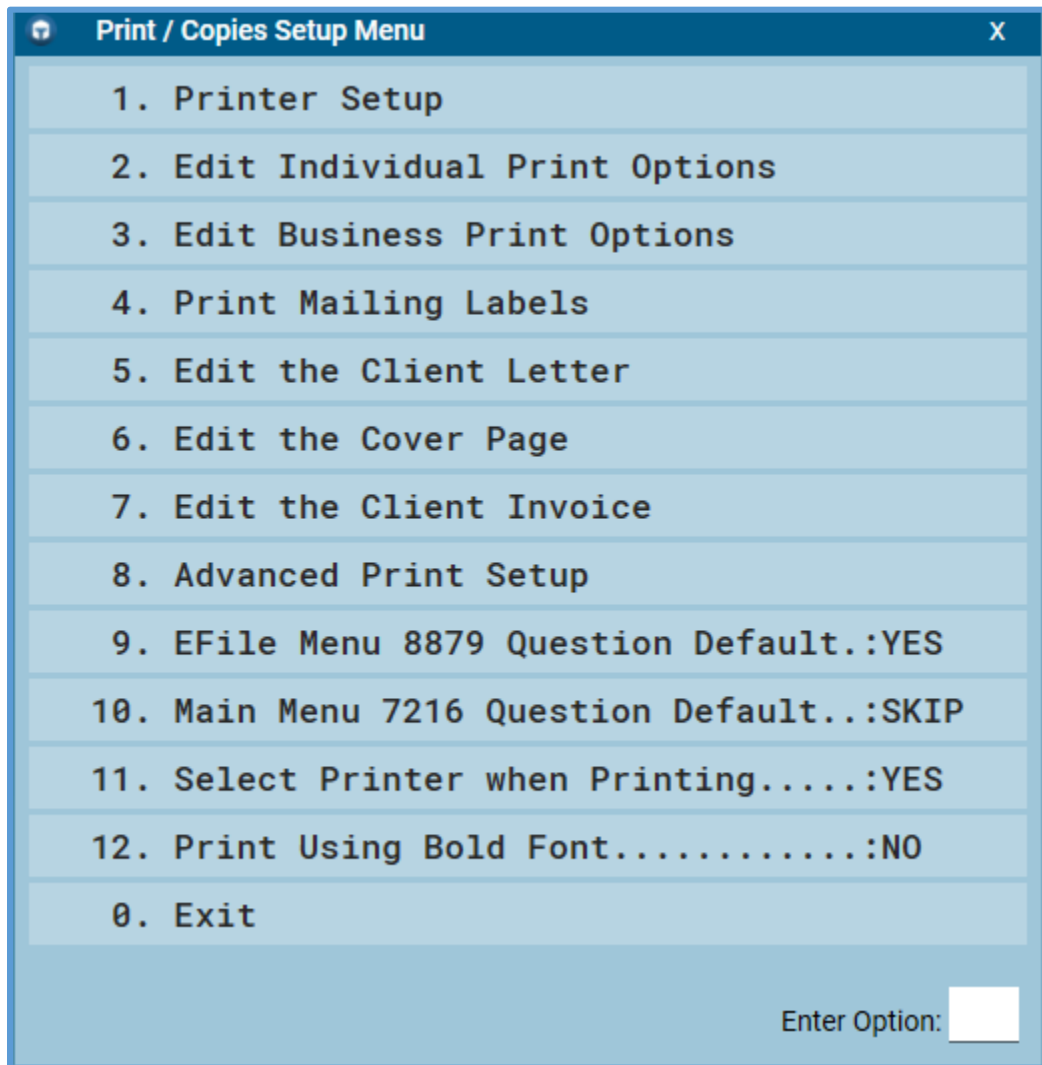


Configuration Main Menu	
1.	Firm / ERO / Preparer Setup
2.	Fees / Billing Setup
3.	Electronic Filing / Bank Setup
4.	Printer / Copies Setup
5.	System / Network Configuration Menu
6.	Path Menu
7.	Configuration Utilities
8.	Advanced Configuration (Macros)
9.	Configure Premium Options
10.	Custom Questions
0.	Exit

Enter Option:

2. Click **Printer/Copies Setup** or type the corresponding number.

TaxSlayer Pro displays the **Print/Copies Setup Menu**:

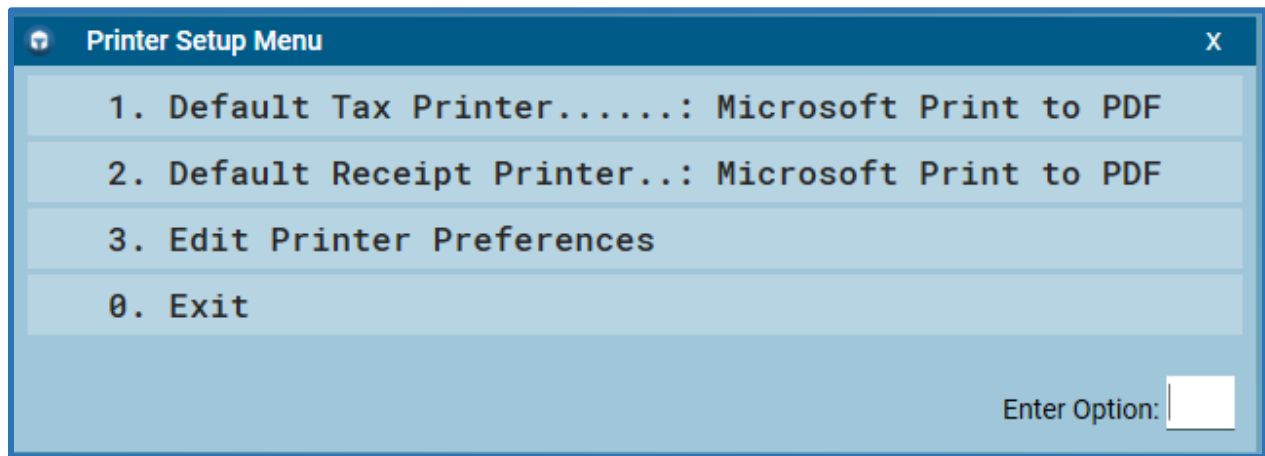


Print / Copies Setup Menu	
1.	Printer Setup
2.	Edit Individual Print Options
3.	Edit Business Print Options
4.	Print Mailing Labels
5.	Edit the Client Letter
6.	Edit the Cover Page
7.	Edit the Client Invoice
8.	Advanced Print Setup
9.	EFile Menu 8879 Question Default.:YES
10.	Main Menu 7216 Question Default...:SKIP
11.	Select Printer when Printing.....:YES
12.	Print Using Bold Font.....:NO
0.	Exit

Enter Option:

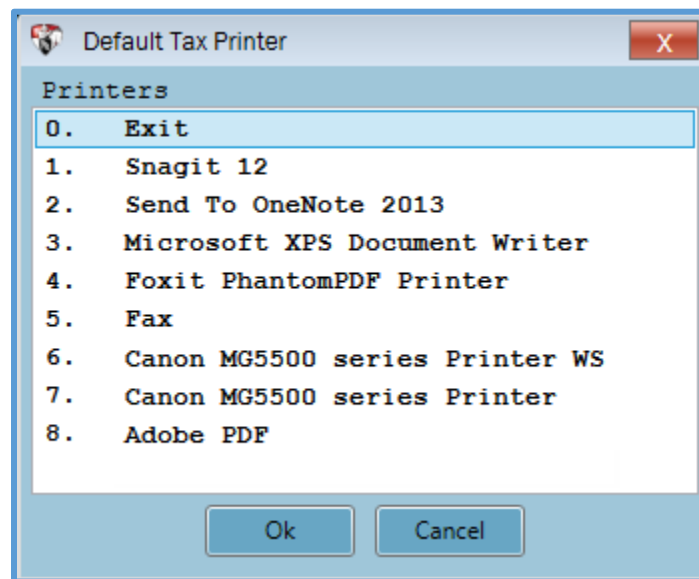
3. Click **Printer Setup** or type the corresponding number.

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:



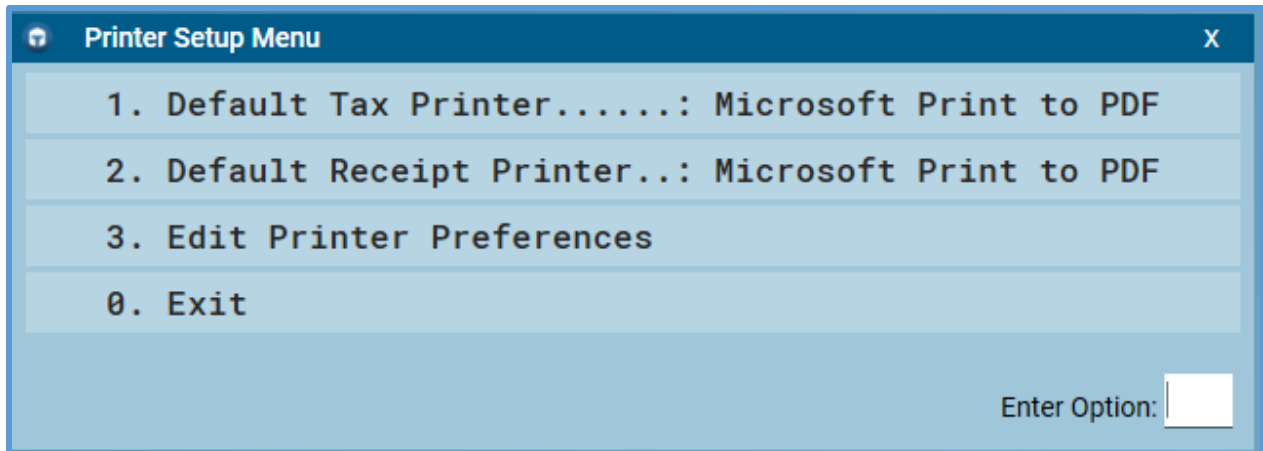
4. Verify that the listed printer is the one you want to use for TaxSlayer Pro. If you want to change the printer, click **Default Tax Printer**.

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:



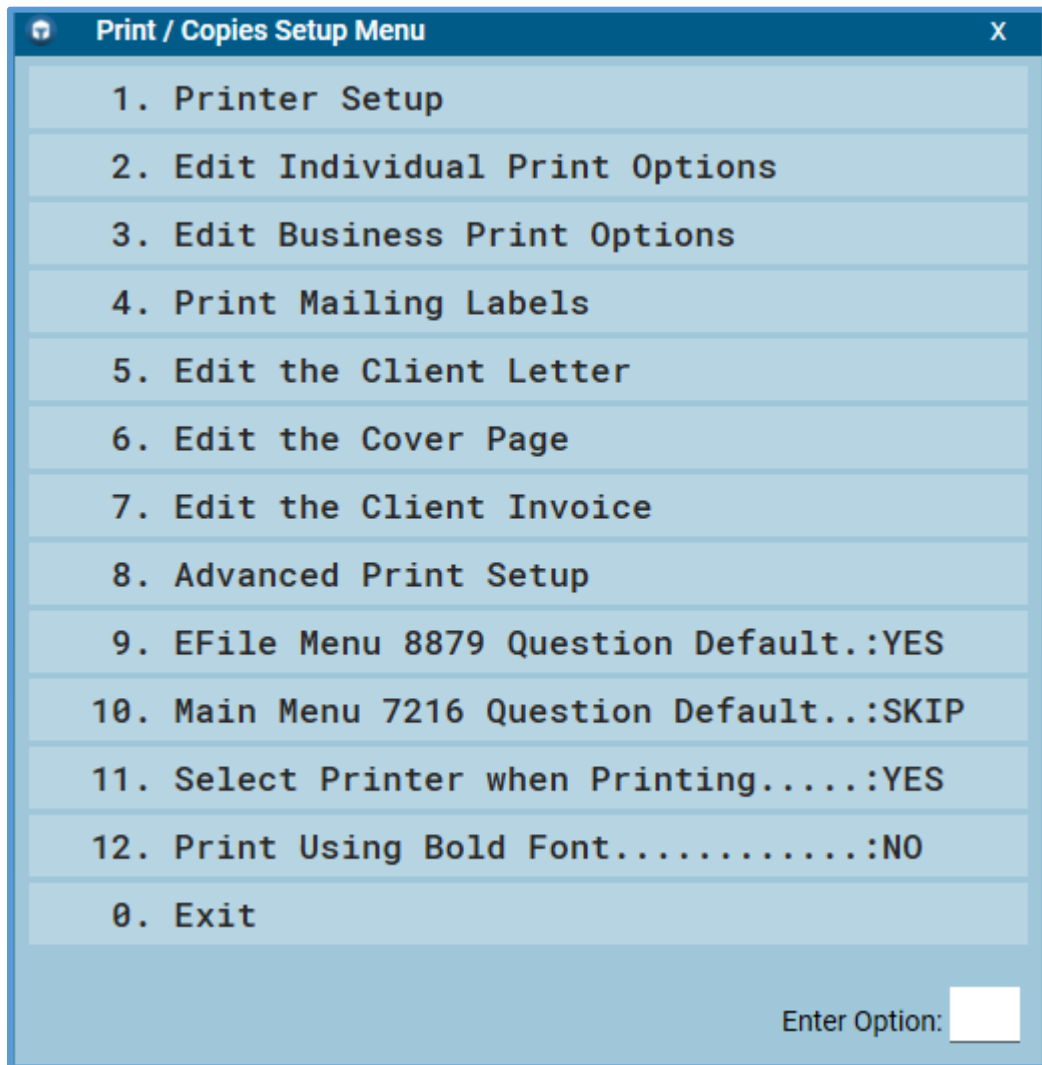
The screenshot shows a dialog box titled "Printer Setup Menu" with a close button (X) in the top right corner. The dialog contains a list of four options:

- 1. Default Tax Printer.....: Microsoft Print to PDF
- 2. Default Receipt Printer...: Microsoft Print to PDF
- 3. Edit Printer Preferences
- 0. Exit

At the bottom right of the dialog, there is a label "Enter Option:" followed by a small text input field.

7. Click **Exit** or type the corresponding number.

TaxSlayer Pro displays the **Print/Copies Setup Menu**:



Print / Copies Setup Menu	
1.	Printer Setup
2.	Edit Individual Print Options
3.	Edit Business Print Options
4.	Print Mailing Labels
5.	Edit the Client Letter
6.	Edit the Cover Page
7.	Edit the Client Invoice
8.	Advanced Print Setup
9.	EFile Menu 8879 Question Default.:YES
10.	Main Menu 7216 Question Default...:SKIP
11.	Select Printer when Printing.....:YES
12.	Print Using Bold Font.....:NO
0.	Exit

Enter Option:

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**:

Copy Menu

Double-Click Text Box to Edit Print Title

ONE COPY FEDERAL AND STATE

☐ File Copy Print Option

☐ Collate Print Option

☒ All Forms ☐ Federal Forms ☐ State Forms

No.	Fed/St	Form/Schedule Name	Num. Copies
1	FD	Cover Page	1
2	FD	Client Letter	1
3	FD	Privacy Letter	0
4	FD	Client Invoice	1
5	FD	Form 1040	1
6	FD	Form 1040 A	1
7	FD	Form 1040 EZ	1
8	FD	Form 1040 NR (Nonresident Alien)	1
9	FD	Form 1040 NR-EZ (Nonresident Alien)	1
10	FD	Form 1040 PR (SE Tax for PR)	1
11	FD	Form 1040 SS (SE Tax for PR)	1
12	FD	Form 1040 X	1
13	FD	Form 1040 V	1
14	FD	Form 1040 Estimates	1
15	FD	Form 1040 NR Estimates	1
16	FD	Form 1045 (Tentative Refund Application)	1
17	FD	Dependents Standard Deduction Wks	1
18	FD	Schedule A (Itemized Deductions)	1
19	FD	Overflow Schedule A	1
20	FD	Schedule A Medical Breakdown	1
21	FD	Schedule A Mortgage Interest Wks	1
22	FD	Schedule A Mortgage Insurance Wks	1

Reset Set Range Done

- 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.

No.	Fed/St	Form/Schedule Name	Num. Copies
1	FD	Cover Page	0
2	FD	Client Letter	0
3	FD	Privacy Letter	0
4	FD	Client Invoice	0
5	FD	Form 1040	1
6	FD	Form 1040 Schedule 1 (Additional Income and Adjustr	1
7	FD	Form 1040 Schedule 2 (Tax)	1
8	FD	Form 1040 Schedule 3 (Nonrefundable Credits)	1
9	FD	Form 1040 Schedule 4 (Other Taxes)	1
10	FD	Form 1040 Schedule 5 (Other Payments and Refundab	1
11	FD	Form 1040 Schedule 6 (Foreign Address/Third Party D	1
12	FD	Client Copy 1040	0
13	FD	Form 1040 NR (Nonresident Alien)	1
14	FD	Form 1040 NR-EZ (Nonresident Alien)	1

Changing the Number of Copies

To change the number of copies for an individual form, use the following steps:

- Click the **Num. Copies** column for the form.

No.	Fed/St	Form/Schedule Name	Num. Copies
1	FD	Cover Page	1

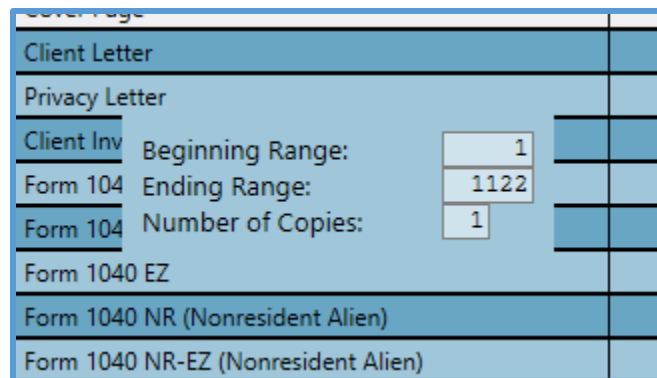
- Type the number of copies you want to print.

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:



Cover Page		
Client Letter		
Privacy Letter		
Client Inv	Beginning Range:	1
Form 104	Ending Range:	1122
Form 104	Number of Copies:	1
Form 1040 EZ		
Form 1040 NR (Nonresident Alien)		
Form 1040 NR-EZ (Nonresident Alien)		

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:

Num.	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

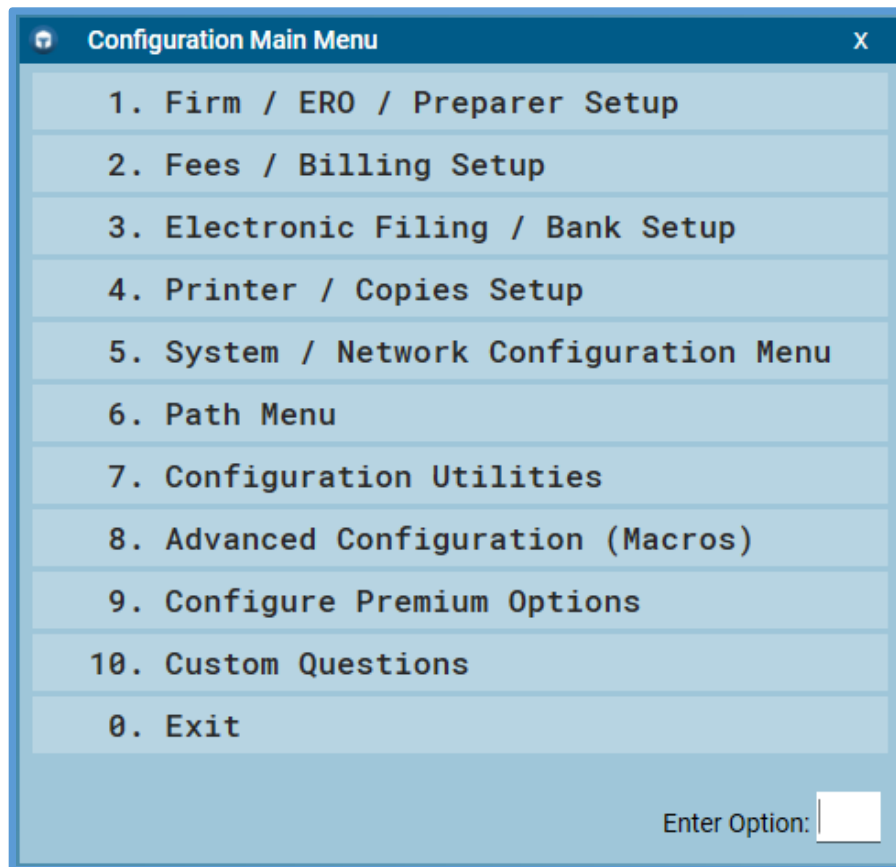
TaxSlayer Pro allows you to set up return tags to manage your returns. With return tags, you can designate a customized status.

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**:



Configuration Main Menu

- 1. Firm / ERO / Preparer Setup
- 2. Fees / Billing Setup
- 3. Electronic Filing / Bank Setup
- 4. Printer / Copies Setup
- 5. System / Network Configuration Menu
- 6. Path Menu
- 7. Configuration Utilities
- 8. Advanced Configuration (Macros)
- 9. Configure Premium Options
- 10. Custom Questions
- 0. Exit

Enter Option:

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

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

Advanced Configuration Menu	
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:

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

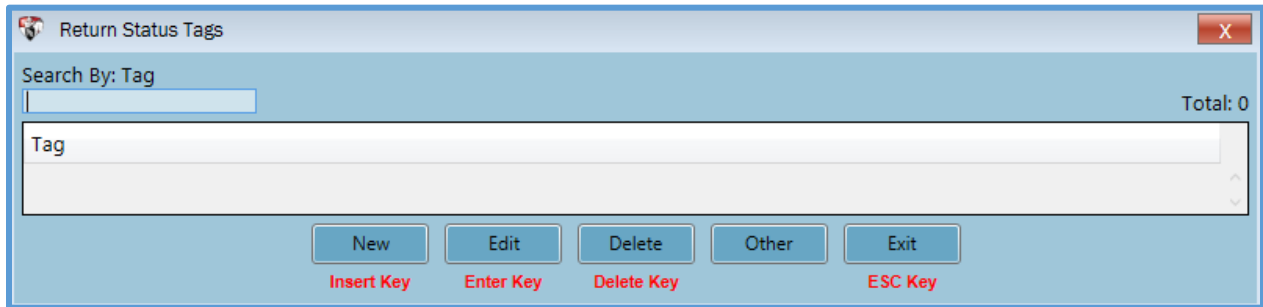
TaxSlayer Pro displays the **Keystroke (Macro) Saver Setup Menu**:

Keystroke (Macro) Saver Setup Menu		X
1.	Default State on W2s & 1099-Rs.....:	GA
2.	Default Locality on W2s & 1099-Rs....:	
3.	W2 Employers/1099R Payers	
4.	K-1 Entities	
5.	Child Care Providers	
6.	Interest/Dividend Payers	
7.	Charitable Organizations	
8.	Banks	
9.	Print MACRO's	
10.	Phone Descriptions	
11.	State Locality Menu	
12.	Depreciation Categories	
13.	Return Status Tags	
14.	Referral Options	
0.	Exit	

Enter Option:

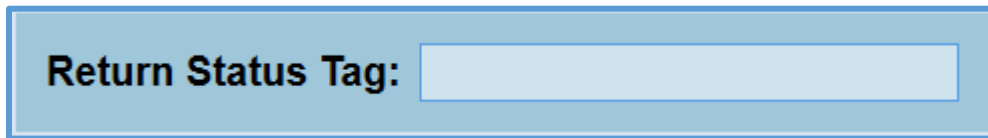
4. Click **Return Status Tags** or type the corresponding number.

TaxSlayer Pro displays the **Return Status Tags** menu:



5. To add a new return tag, click **New**.

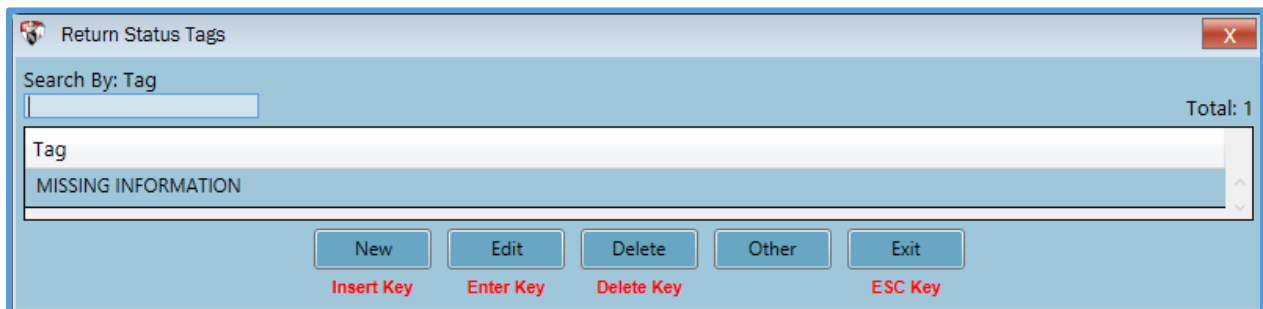
TaxSlayer Pro displays the **Return Status Tag** box:



6. Type the name of the return tag you want to use.

7. Press Enter.

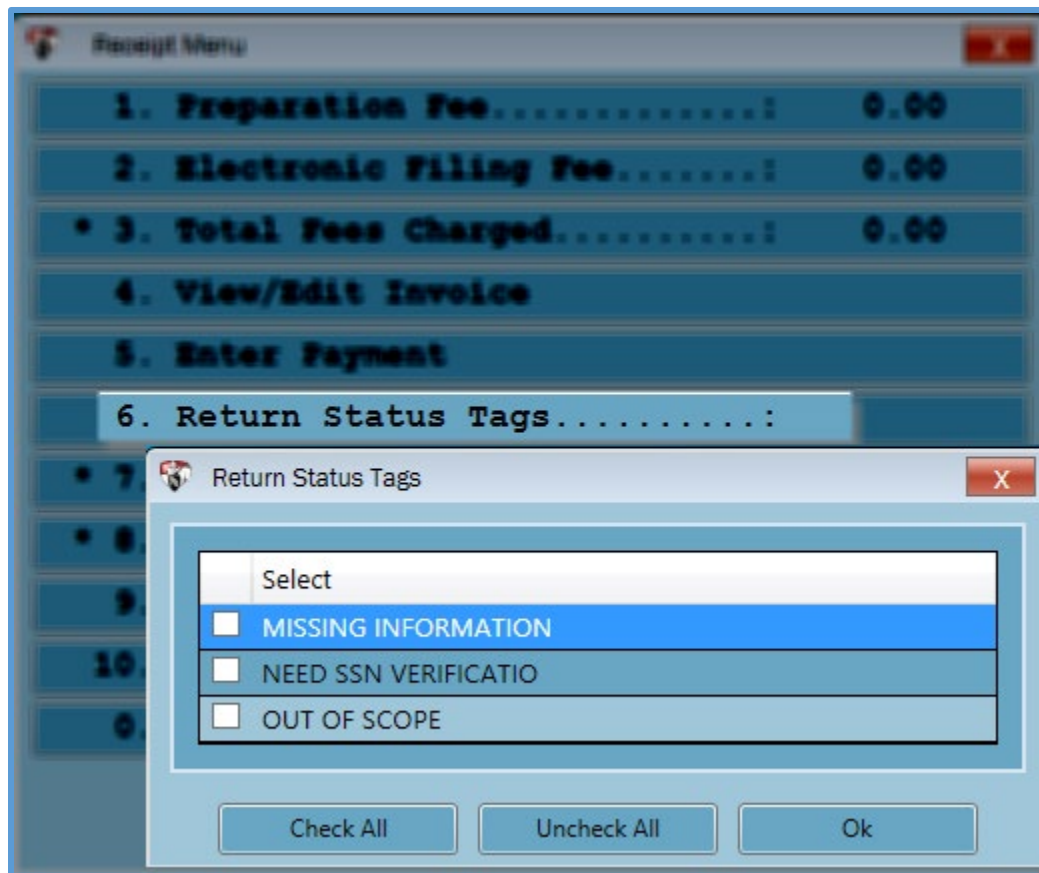
TaxSlayer Pro displays the **Return Status Tags** menu with the new return tag listed:



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:

Search Client List

Edit or start a new return

First Name	Last Name	Suf	Spouse First	Telephone	Type	Preparer	Complete	Refund/	Return Tags
SCHEDULE	TAXPAYER		SPOUSE	() -	Paper	706	<input checked="" type="checkbox"/>	1568	READY TO FILE
FORM	EIGHTYSIXFIFTE		SPOUSE	() -	Paper	706	<input type="checkbox"/>	1413	
NONRESIDENT	ALIEN			(706) 898-9787	Paper	706	<input type="checkbox"/>	101	
TAXPAYER	SAMPLE			() -	Paper	706	<input type="checkbox"/>	655	
TESTING	NONRESIDENT /		SPOUSE	() -	Paper	706	<input type="checkbox"/>	0	

Right click on a client row to access return notes.

☐ Mask SSN

Clear Filters Print Export Total: 5

Quick Menu

1. Start New Return
2. E-file
3. Print
4. Business
5. Client Status
6. View Returns
7. Configuration
8. Utilities
9. Reports
10. Updates


Enter Option

2. Scroll to the far right of the list.

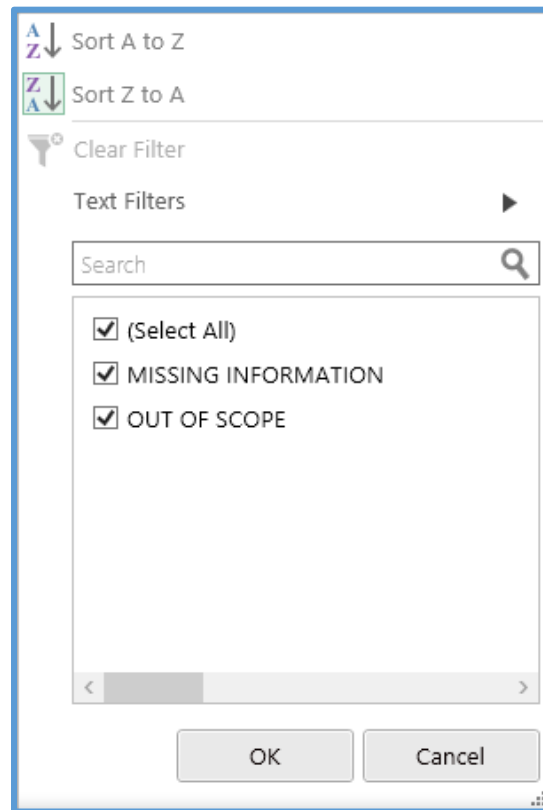
TaxSlayer Pro displays the **Return Tags** column:

Refund/	Return Tags
1568	READY TO FILE
1413	

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

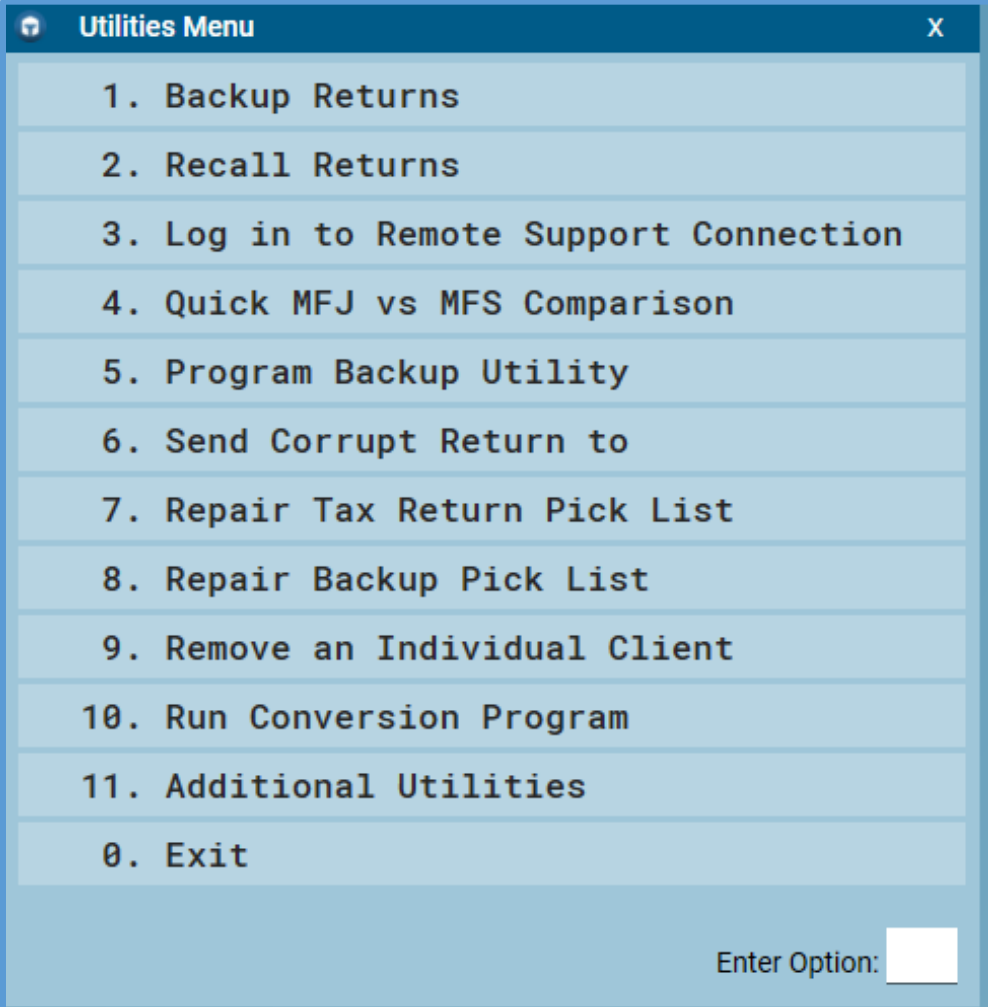
In rare events, you may need to delete a return. You can do this with the utilities in TaxSlayer Pro.

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**:

A screenshot of a software window titled "Utilities Menu" with a close button (X) in the top right corner. The window contains a list of 11 numbered options: 1. Backup Returns, 2. Recall Returns, 3. Log in to Remote Support Connection, 4. Quick MFJ vs MFS Comparison, 5. Program Backup Utility, 6. Send Corrupt Return to, 7. Repair Tax Return Pick List, 8. Repair Backup Pick List, 9. Remove an Individual Client, 10. Run Conversion Program, 11. Additional Utilities, and 0. Exit. At the bottom right of the window, there is a label "Enter Option:" followed by a small white text input box.

Utilities Menu
1. Backup Returns
2. Recall Returns
3. Log in to Remote Support Connection
4. Quick MFJ vs MFS Comparison
5. Program Backup Utility
6. Send Corrupt Return to
7. Repair Tax Return Pick List
8. Repair Backup Pick List
9. Remove an Individual Client
10. Run Conversion Program
11. Additional Utilities
0. Exit

Enter Option:

2. Click **Remove an Individual Client** or type the corresponding number.

TaxSlayer Pro displays the **Remove Client** menu:

Selected	SSN	First Name	Last Name	Suffix
<input type="checkbox"/>	123-00-1234	JANE	DOE	
<input type="checkbox"/>	111-11-1111	TEST	RETURN	

Buttons: Check All, Uncheck All, Ok. Total: 0

3. Select the check box for the client(s) you want to delete.
4. Click **Ok**.

TaxSlayer Pro displays the **Question** confirmation box:

Are you sure you want to remove 1 return(s)?

Buttons: Yes, No

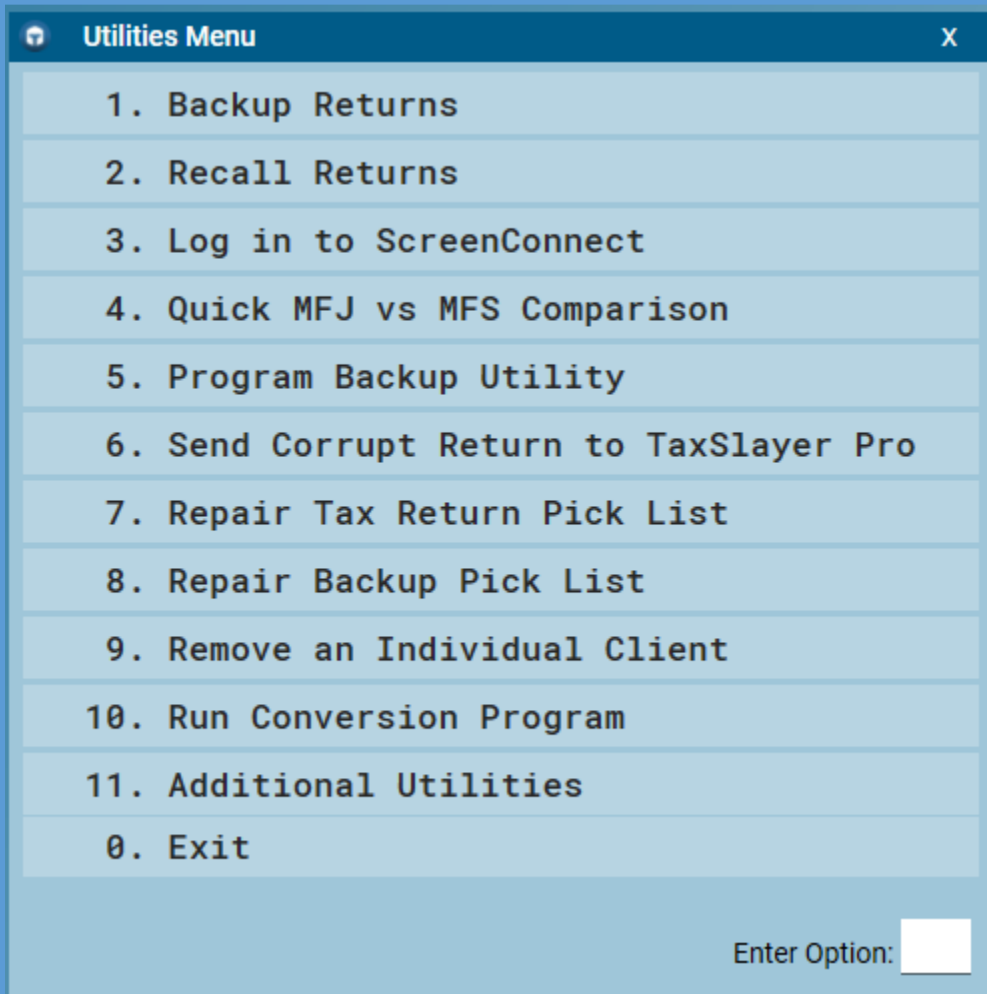
5. Click **Yes**.

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**:

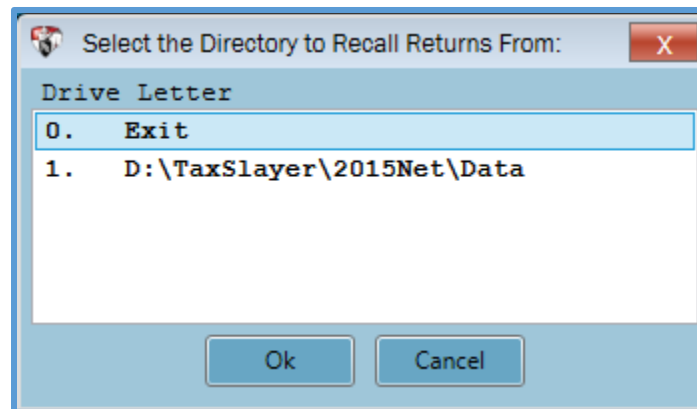
A screenshot of the 'Utilities Menu' window in TaxSlayer Pro. The window has a dark blue title bar with a small icon on the left and an 'X' on the right. Below the title bar is a list of 11 numbered options, each on a light blue background. The options are: 1. Backup Returns, 2. Recall Returns, 3. Log in to ScreenConnect, 4. Quick MFJ vs MFS Comparison, 5. Program Backup Utility, 6. Send Corrupt Return to TaxSlayer Pro, 7. Repair Tax Return Pick List, 8. Repair Backup Pick List, 9. Remove an Individual Client, 10. Run Conversion Program, 11. Additional Utilities, and 0. Exit. At the bottom right of the window, there is a label 'Enter Option:' followed by a small white text input box.

Utilities Menu	
1.	Backup Returns
2.	Recall Returns
3.	Log in to ScreenConnect
4.	Quick MFJ vs MFS Comparison
5.	Program Backup Utility
6.	Send Corrupt Return to TaxSlayer Pro
7.	Repair Tax Return Pick List
8.	Repair Backup Pick List
9.	Remove an Individual Client
10.	Run Conversion Program
11.	Additional Utilities
0.	Exit

Enter Option:

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:

Selected	SSN	First Name	Last Name	Suffix
<input type="checkbox"/>	123-00-1234	JANE	DOE	
<input type="checkbox"/>	111-11-1111	TEST	RETURN	

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

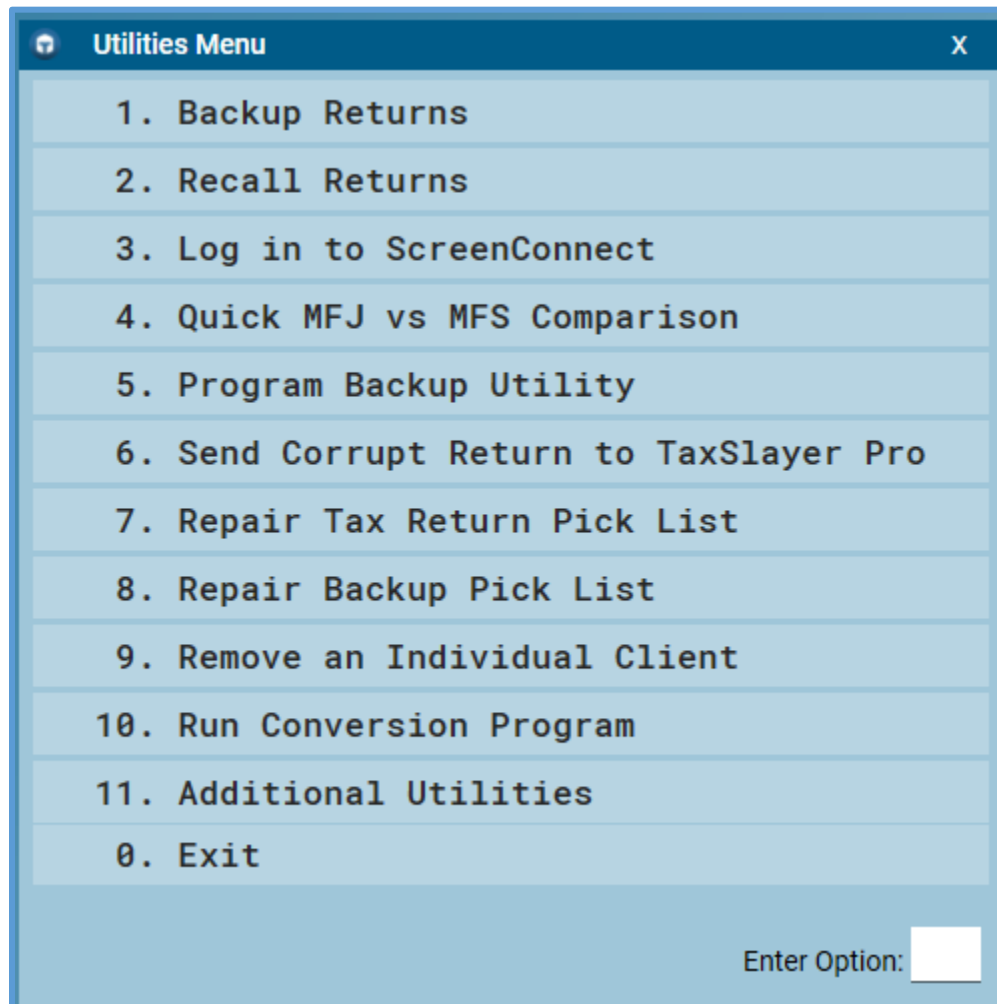
When you are ready to back up returns on a non-networked computer, first make sure that your USB drive or other external storage device is connected to the computer.

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:

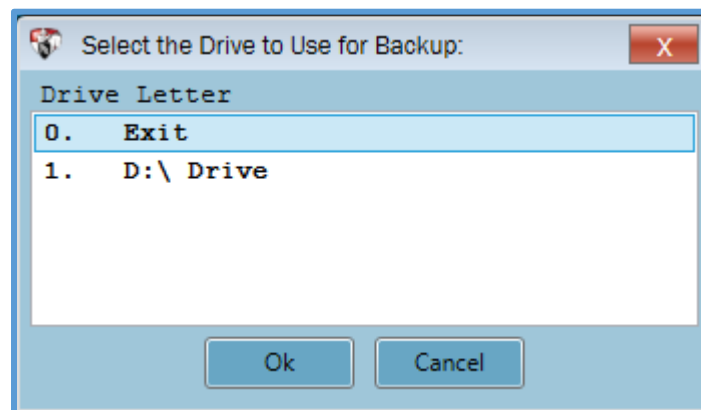
1. Click **Utilities** or type the corresponding number.

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:

Selected	SSN	First Name	Last Name	Suffix
<input type="checkbox"/>	123-00-1234	JANE	DOE	
<input type="checkbox"/>	111-11-1111	TEST	RETURN	

Check All Uncheck All Ok Total: 0

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.

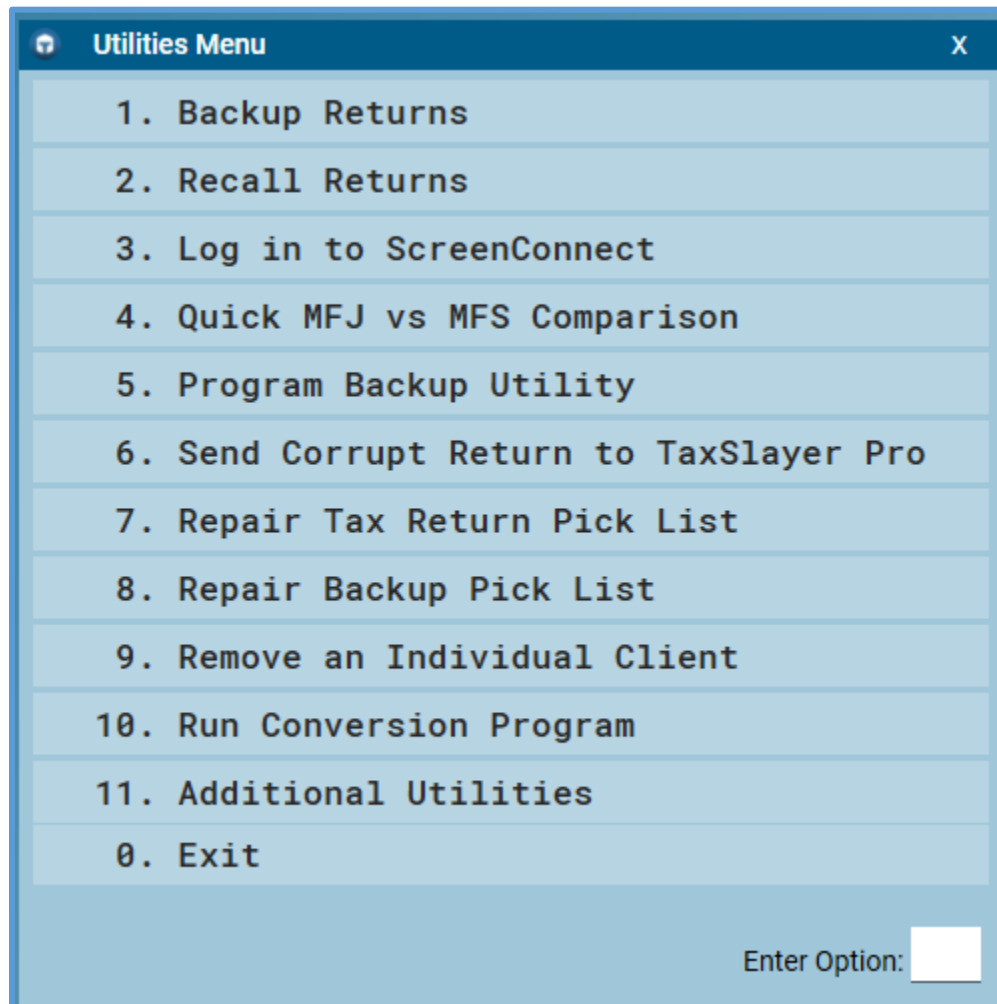
Recalling Returns

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:

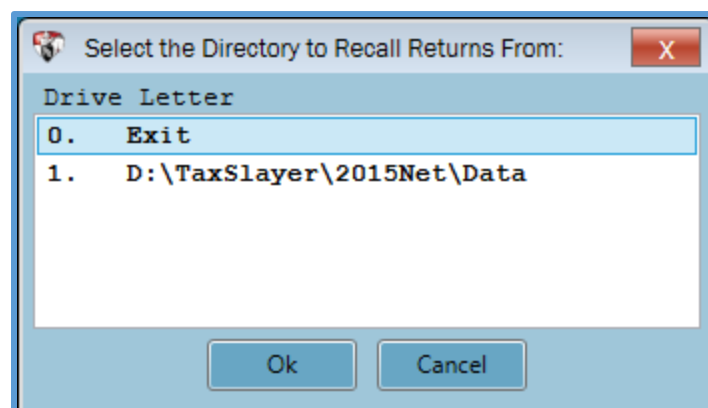
1. Click **Utilities** or type the corresponding number.

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:

Selected	SSN	First Name	Last Name	Suffix
<input type="checkbox"/>	123-00-1234	JANE	DOE	
<input type="checkbox"/>	111-11-1111	TEST	RETURN	

Buttons: Check All, Uncheck All, Ok

Overwrite Existing Returns ☐ Total: 0

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.

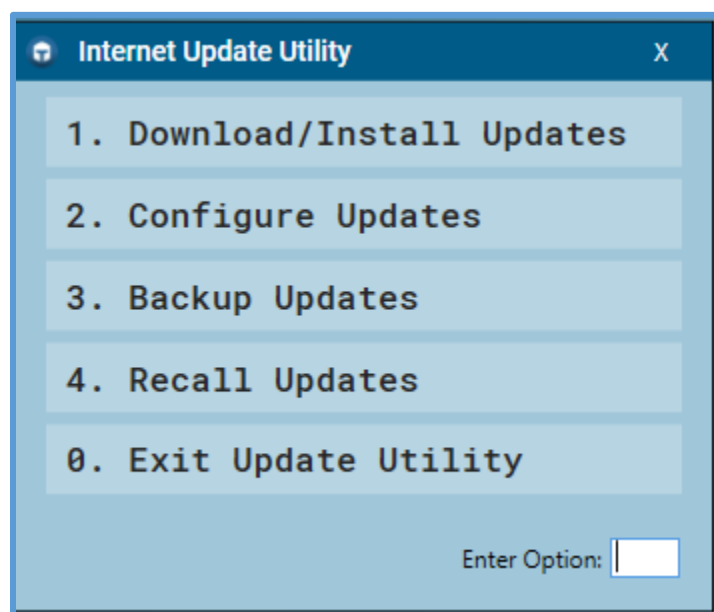
Managing Updates

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:

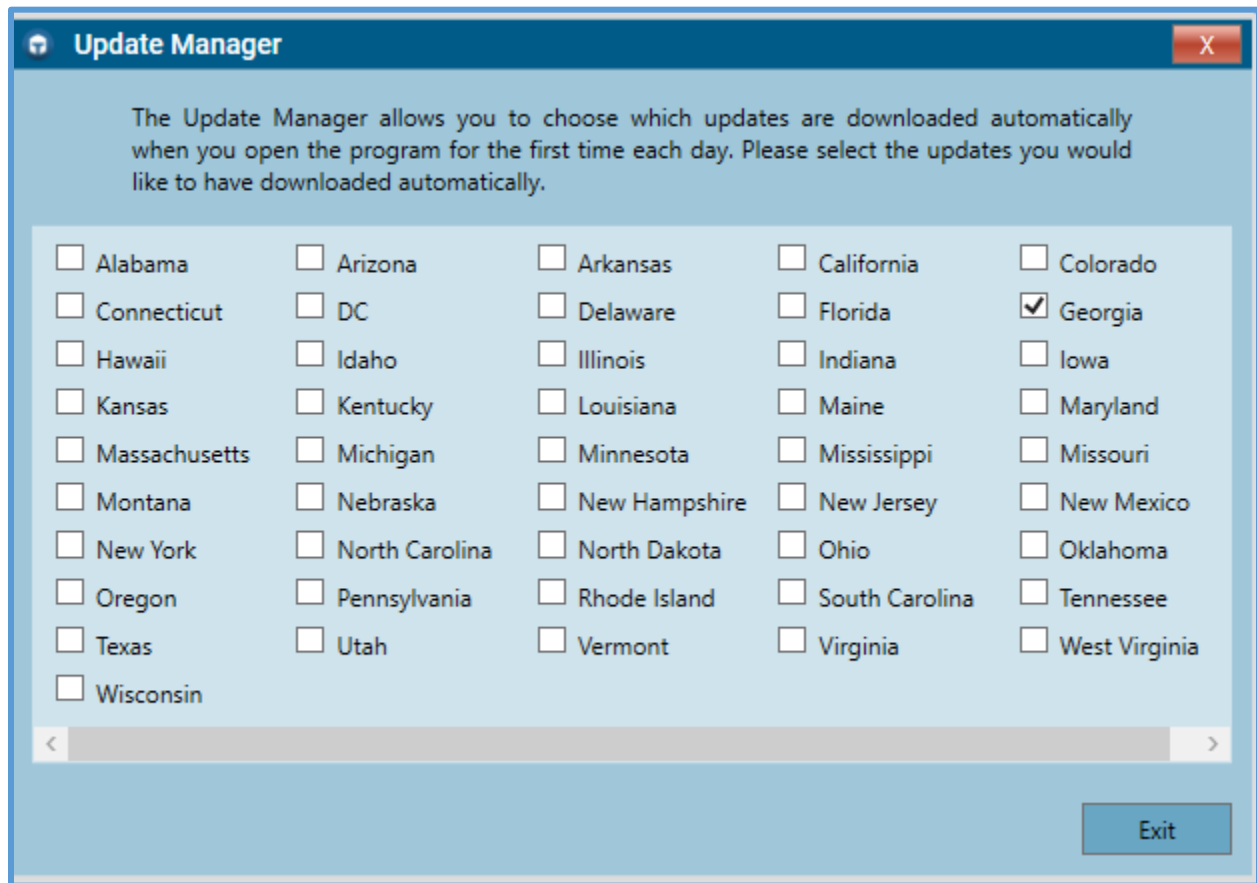
1. Click **Updates** or type the corresponding number.

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:

Individual Business Transfer

Federal Individual

Individual1040 03/17

Miscellaneous

No Updates Available

State Individual

AL 03/02	ID 03/03	MS 03/16	PA 03/16
AR 03/11	IL 03/15	MT 03/10	RI 03/02
AZ 03/10	IN 03/15	NC 03/15	SC 03/15
CA 03/10	KS 03/03	ND 03/16	TN 03/15
CO 03/11	KY 03/14	NE 03/15	UT 02/25
CT 03/03	LA 03/10	NH 03/03	VA 03/17
DC 02/26	MA 03/17	NJ 03/15	VT 03/16
DE 03/15	MD 03/17	NM 03/03	WI 03/11
FL 02/29	ME 03/08	NY 03/16	WV 03/03

Hover Mouse Over an Update to View Version Number

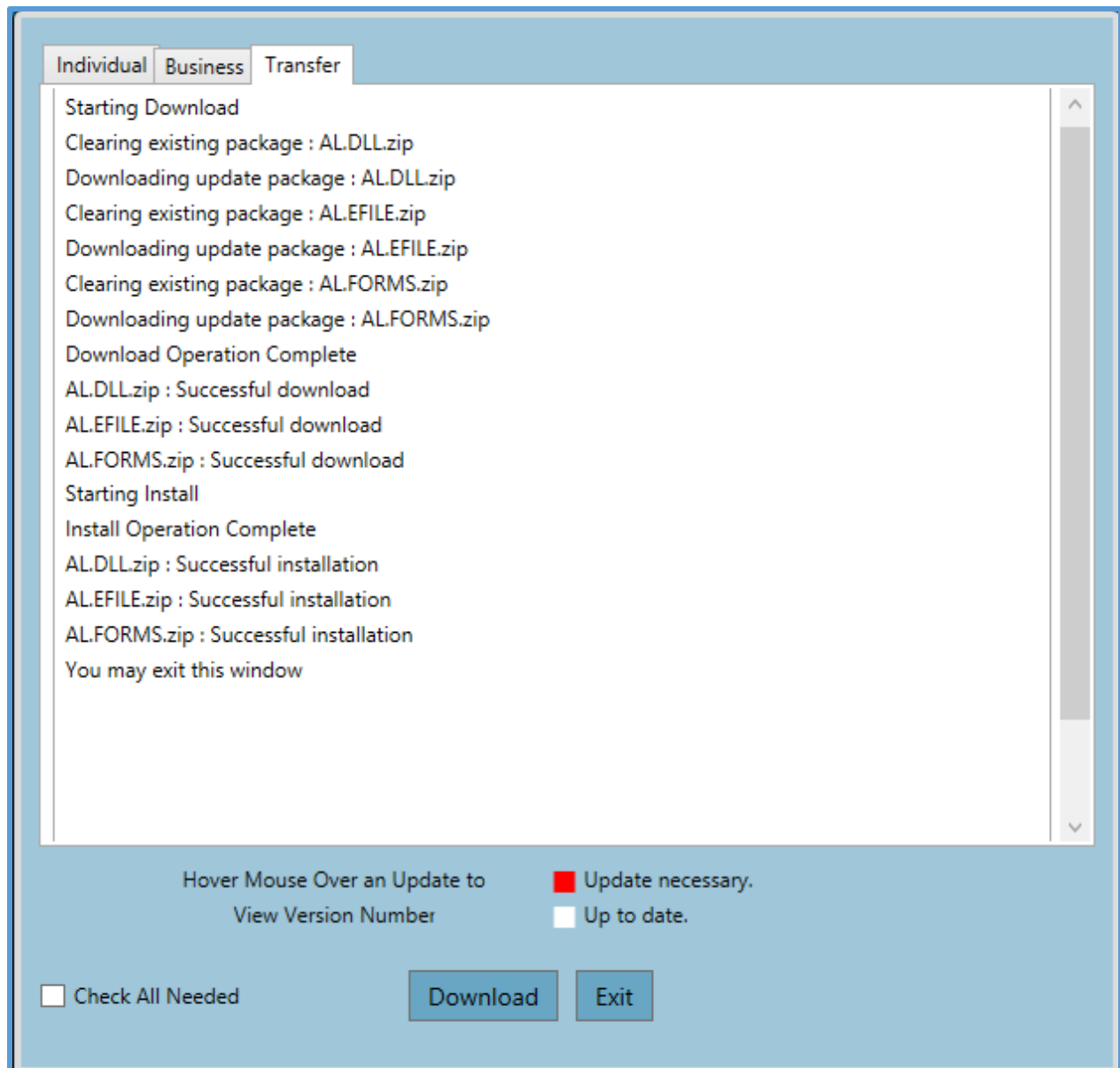
Update necessary.
Up to date.

☐ Check All Needed

Download Exit

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:

The screenshot shows the TaxSlayer Pro main window. At the top is a toolbar with icons for KB Search, Calculator, Appointments, Client Status, Messages, Publications, Extensions, and Rejects. The main area features a search bar labeled 'Search Client List' and a button 'Edit or start a new return'. Below these is a table with columns: First Name, Last Name, Suf, Spouse First, Telephone, Type, and Prepare. The first row contains the text 'TAXPAYER', 'SAMPLE', and '(706) 800-9000 Paper 706'. To the right of the table is a 'Quick Menu' with 10 items: 1. Start New Return, 2. E-file, 3. Print, 4. Business, 5. Client Status, 6. View Returns, 7. Configuration, 8. Utilities, 9. Reports, and 10. Updates. Below the menu is an 'Enter Option' text box. At the bottom of the window, there is a note 'Right click on a client row to access return notes.' and three buttons: 'Clear Filters', 'Print', and 'Export'. A 'Total: 1' label is also present.

First Name	Last Name	Suf	Spouse First	Telephone	Type	Prepare
TAXPAYER	SAMPLE			(706) 800-9000	Paper	706

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

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

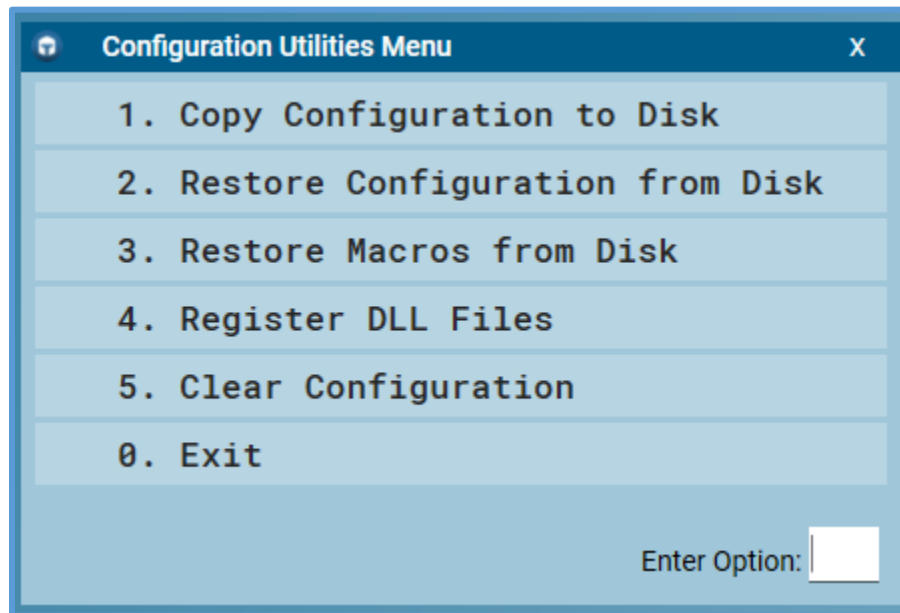
Configuration Main Menu X

- 1. Firm / ERO / Preparer Setup
- 2. Fees / Billing Setup
- 3. Electronic Filing / Bank Setup
- 4. Printer / Copies Setup
- 5. System / Network Configuration Menu
- 6. Path Menu
- 7. Configuration Utilities
- 8. Advanced Configuration (Macros)
- 9. Configure Premium Options
- 10. Custom Questions
- 0. Exit

Enter Option:

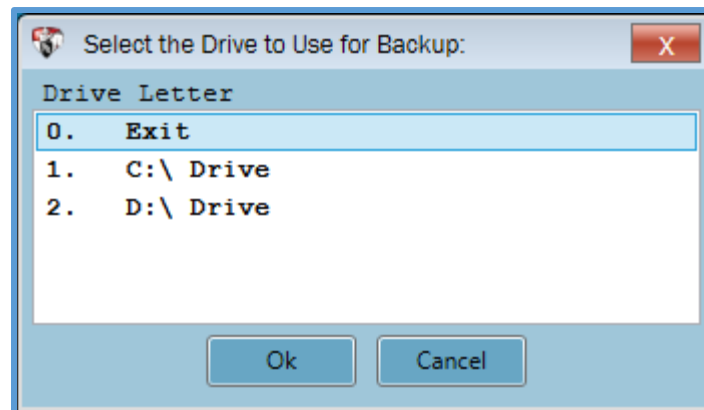
3. Click **Configuration Utilities** or type the corresponding number.

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:

The screenshot shows the TaxSlayer Pro main window. At the top is a toolbar with icons for KB Search, Calculator, Appointments, Client Status, Messages, Publications, Extensions, and Rejects. The main content area has a blue background. In the center is a white panel containing a 'Search Client List' input field, a table of client information, and a 'Quick Menu' on the right. The table has columns for First Name, Last Name, Suf, Spouse First, Telephone, Type, and Prepare. The first row shows 'TAXPAYER', 'SAMPLE', '(706) 800-9000', 'Paper', and '706'. Below the table are buttons for 'Clear Filters', 'Print', and 'Export', along with a 'Total: 1' indicator. A 'Quick Menu' on the right lists options: 1. Start New Return, 2. E-file, 3. Print, 4. Business, 5. Client Status, 6. View Returns, 7. Configuration, 8. Utilities, 9. Reports, 10. Updates. There is also an 'Enter Option' input field.

First Name	Last Name	Suf	Spouse First	Telephone	Type	Prepare
TAXPAYER	SAMPLE			(706) 800-9000	Paper	706

Quick Menu

1. Start New Return
2. E-file
3. Print
4. Business
5. Client Status
6. View Returns
7. Configuration
8. Utilities
9. Reports
10. Updates

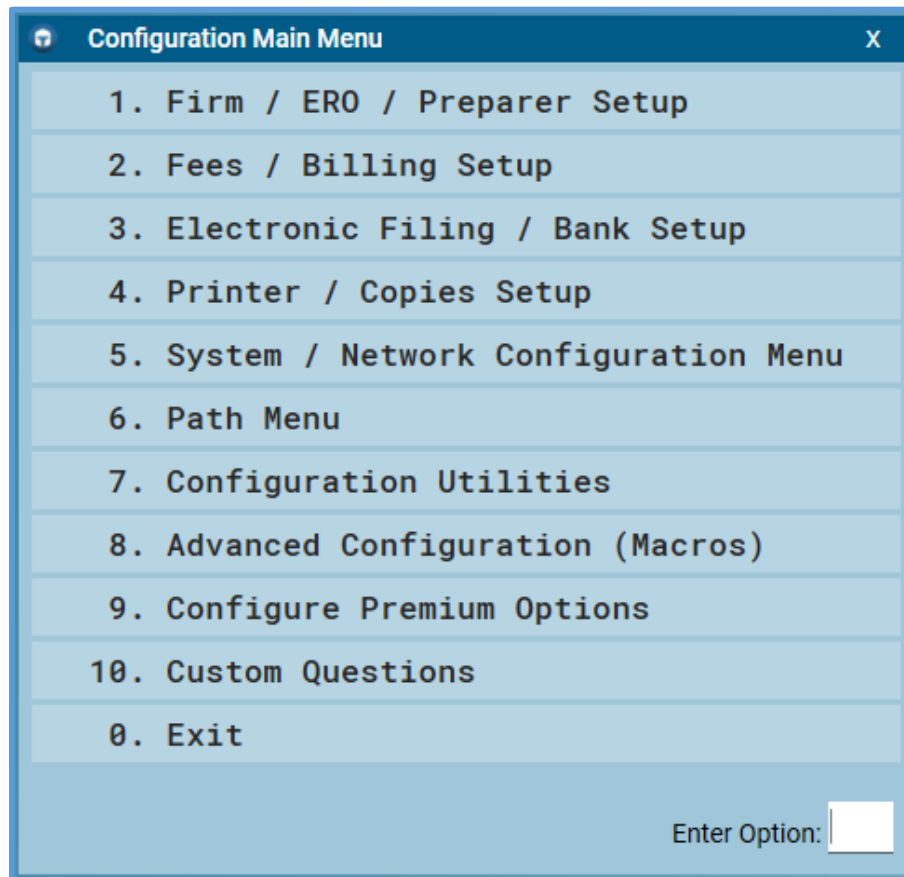
Enter Option

Right click on a client row to access return notes.

Clear Filters Print Export Total: 1

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

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



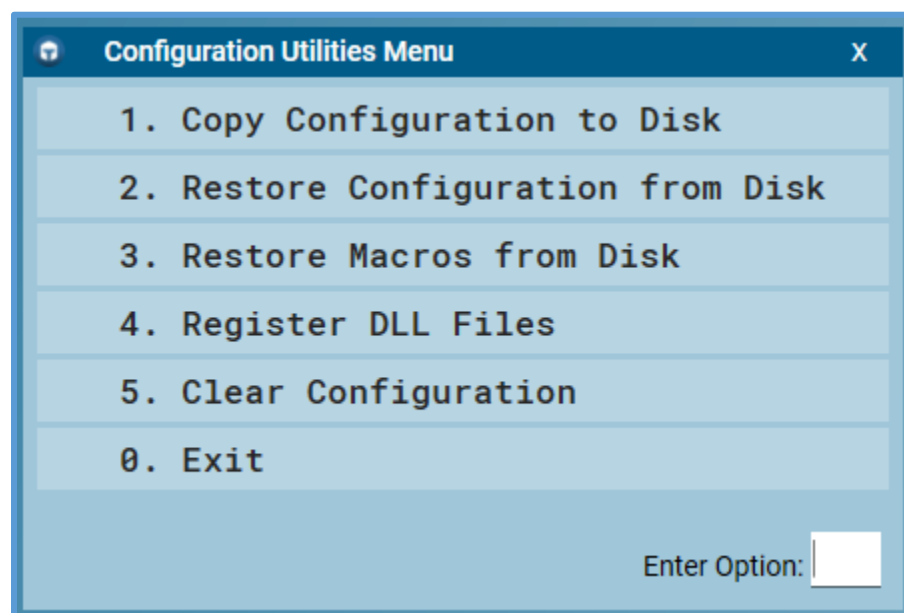
The screenshot shows a window titled "Configuration Main Menu" with a close button (X) in the top right corner. The window contains a list of ten numbered options, each on a separate line. At the bottom right, there is a label "Enter Option:" followed by a small white input box.

Option Number	Option Text
1.	Firm / ERO / Preparer Setup
2.	Fees / Billing Setup
3.	Electronic Filing / Bank Setup
4.	Printer / Copies Setup
5.	System / Network Configuration Menu
6.	Path Menu
7.	Configuration Utilities
8.	Advanced Configuration (Macros)
9.	Configure Premium Options
10.	Custom Questions
0.	Exit

Enter Option:

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

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



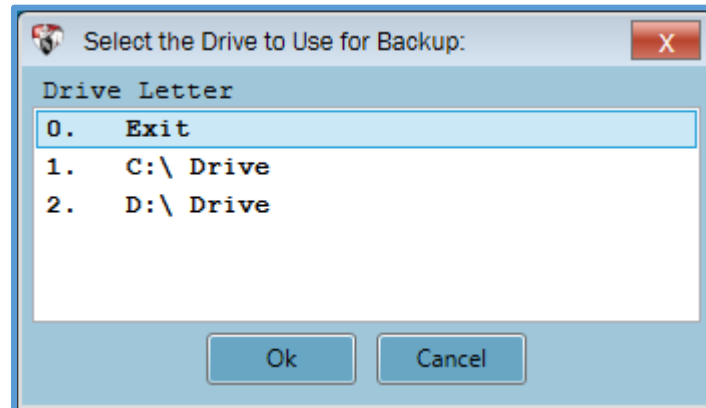
The screenshot shows a window titled "Configuration Utilities Menu" with a close button (X) in the top right corner. The window contains a list of six numbered options, each on a separate line. At the bottom right, there is a label "Enter Option:" followed by a small white input box.

Option Number	Option Text
1.	Copy Configuration to Disk
2.	Restore Configuration from Disk
3.	Restore Macros from Disk
4.	Register DLL Files
5.	Clear Configuration
0.	Exit

Enter Option:

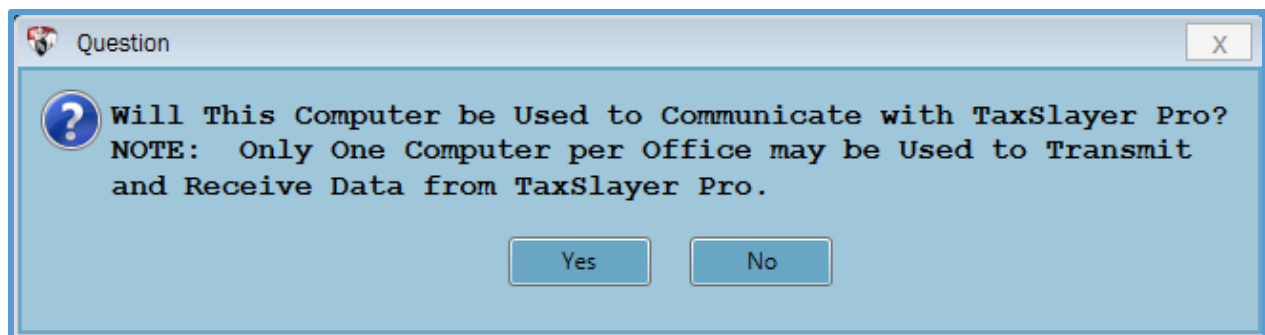
5. Click **Restore Configuration from Disk** or type the corresponding number.

TaxSlayer Pro displays the **Select the Drive to Use for Restore** menu:



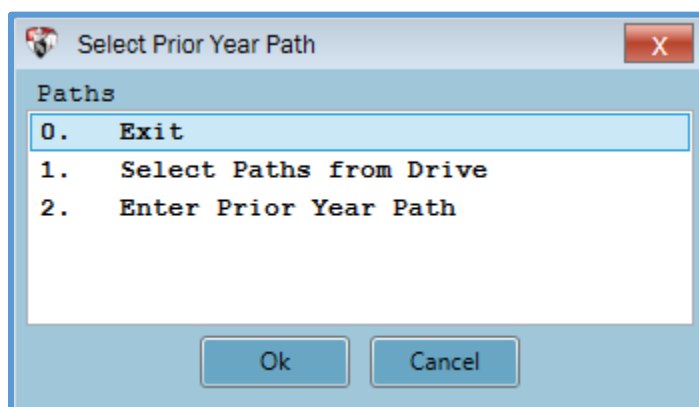
6. Click the drive to which you want to back up configuration.
7. Click **Ok**.

TaxSlayer Pro displays the **Question** box:



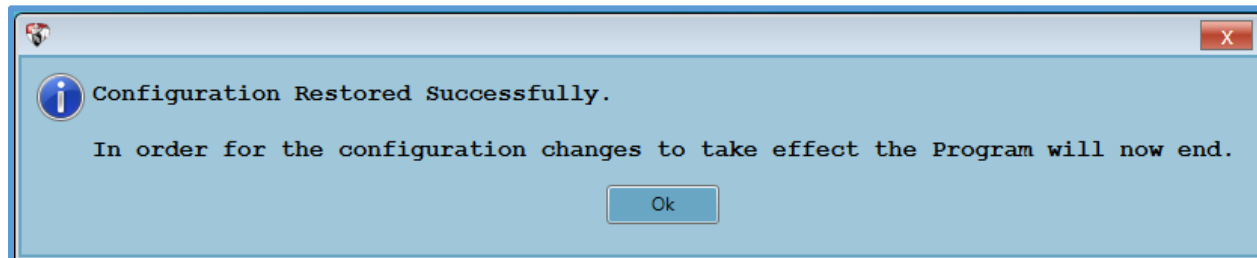
8. If you are restoring configuration to your transmitting computer, click **Yes**. Otherwise, click **No**.

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

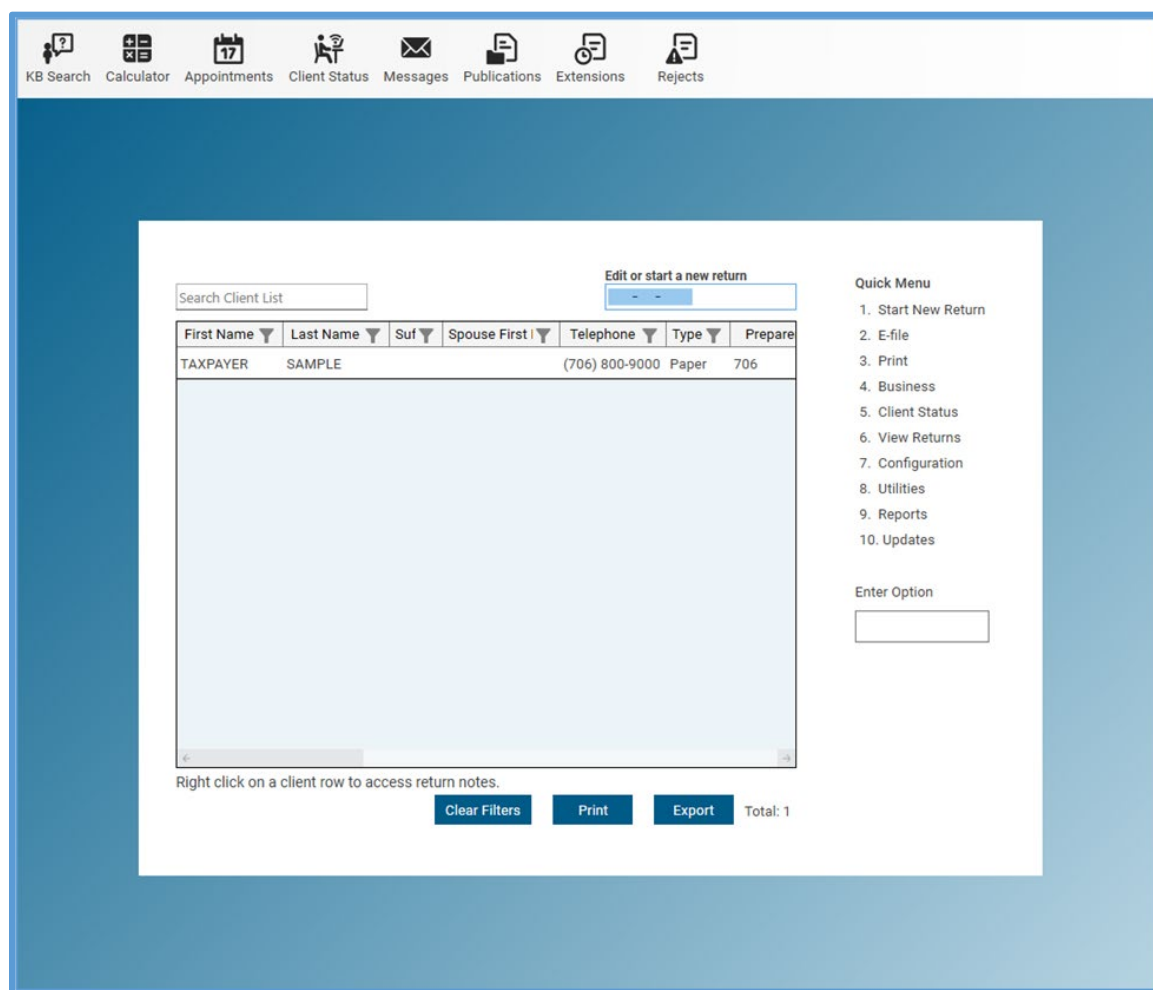
If you do not have a network for the computers at your site, you still need to update TaxSlayer Pro on each workstation. You can do this using a USB flash drive or other external media.

Save Updates

To save updates to external media, use the following steps:

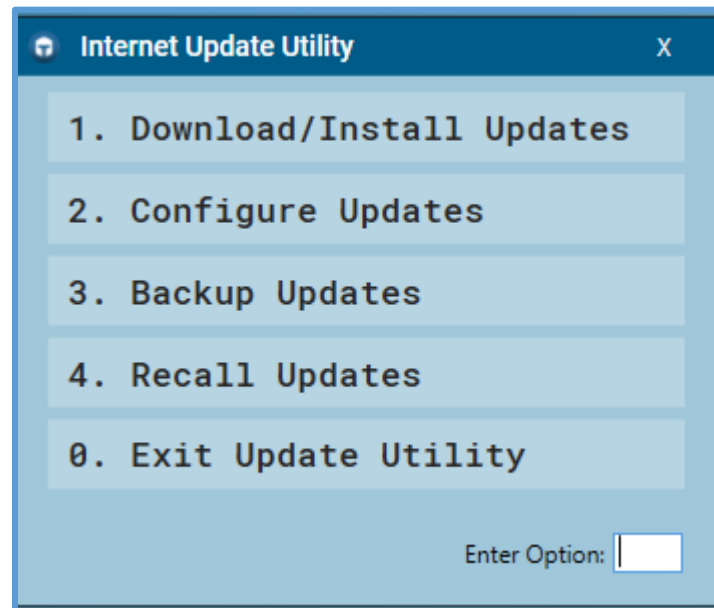
1. Open TaxSlayer Pro.

TaxSlayer Pro displays the main window:



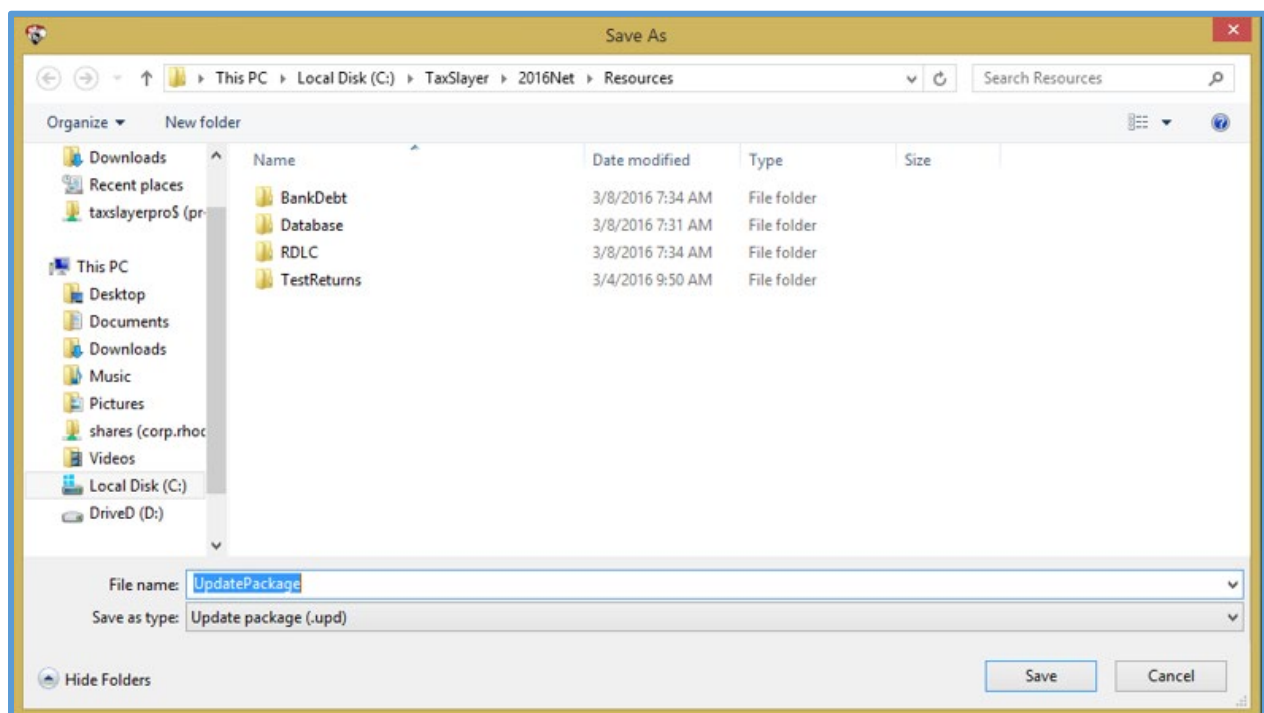
2. Click **Updates** or type the corresponding number.

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:

The screenshot shows the TaxSlayer Pro main window. At the top is a toolbar with icons for KB Search, Calculator, Appointments, Client Status, Messages, Publications, Extensions, and Rejects. The main area contains a search bar labeled 'Search Client List' and a button 'Edit or start a new return'. Below these is a table with columns: First Name, Last Name, Suf, Spouse First, Telephone, Type, and Prepare. The first row shows 'TAXPAYER', 'SAMPLE', '(706) 800-9000', 'Paper', and '706'. To the right of the table is a 'Quick Menu' with 10 items: 1. Start New Return, 2. E-file, 3. Print, 4. Business, 5. Client Status, 6. View Returns, 7. Configuration, 8. Utilities, 9. Reports, 10. Updates. Below the menu is an 'Enter Option' input field. At the bottom of the table area are buttons for 'Clear Filters', 'Print', and 'Export', along with a 'Total: 1' label.

First Name	Last Name	Suf	Spouse First	Telephone	Type	Prepare
TAXPAYER	SAMPLE			(706) 800-9000	Paper	706

Quick Menu

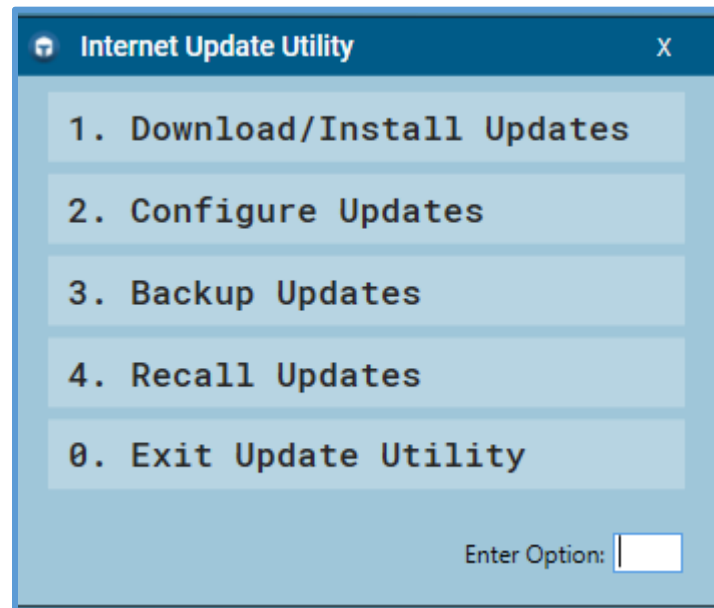
1. Start New Return
2. E-file
3. Print
4. Business
5. Client Status
6. View Returns
7. Configuration
8. Utilities
9. Reports
10. Updates

Enter Option

Clear Filters Print Export Total: 1

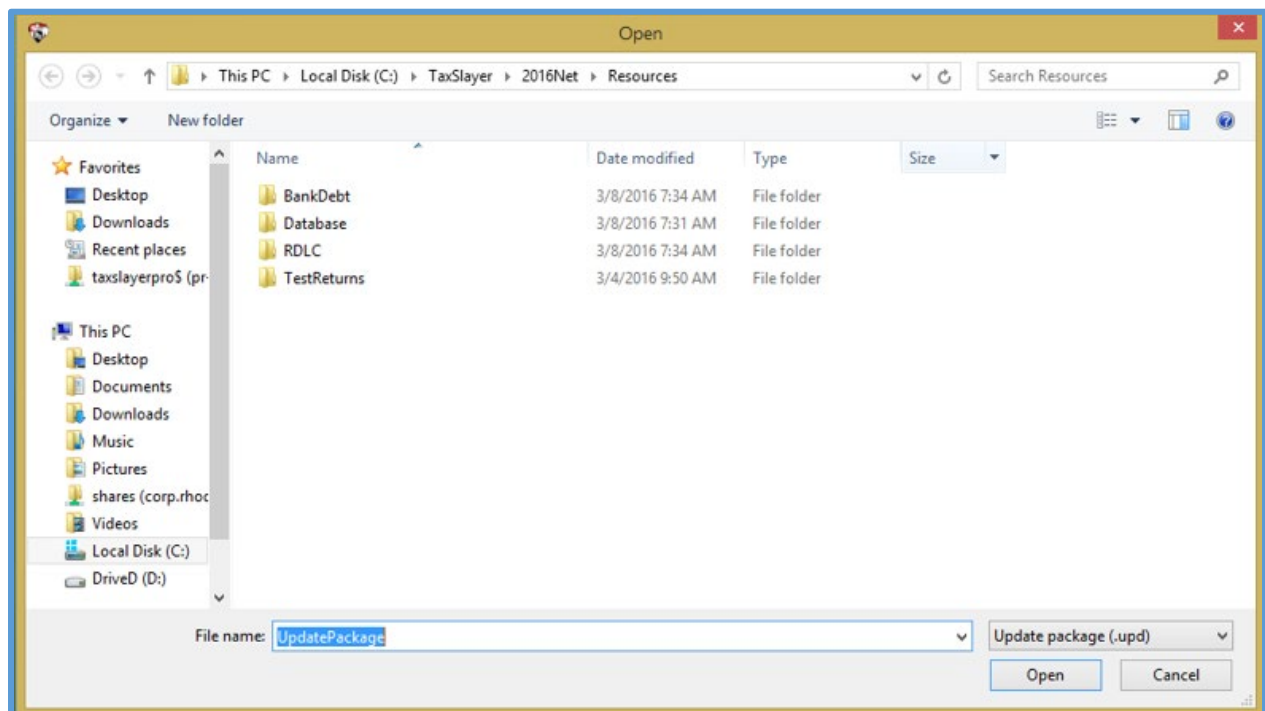
3. Click **Updates** or type the corresponding number.

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:

Individual Business Transfer

Federal Individual

Individual1040 03/07

Miscellaneous

No Updates Available

State Individual

AL 03/02	ID 03/03	MS 03/08	PA 03/07
AR 03/03	IL 03/08	MT 02/29	RI 03/02
AZ 03/04	IN 03/04	NC 03/03	SC 03/04
CA 02/29	KS 03/03	ND 03/03	TN 03/01
CO 03/07	KY 03/08	NE 03/03	UT 02/25
CT 03/03	LA 03/08	NH 03/03	VA 03/02
DC 02/26	MA 03/08	NJ 03/07	VT 03/03
DE 03/08	MD 03/07	NM 03/03	WI 03/03
FL 02/29	ME 03/08	NY 03/07	WV 03/03
GA 03/04	MI 03/04	OH 03/03	
HI 03/04	MN 02/29	OK 03/01	
IA 03/07	MO 03/03	OR 03/08	

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**:

Reports Menu	
1.	Master Report
2.	Client Reports
3.	E-File Summary
4.	Client Retention
5.	Referrals
6.	Returns/States/Extensions Not Accepted
7.	Print Form 9325
8.	Preparer Commission Report
9.	Receipts
10.	Tax Return Payments Report
11.	Custom Fees and Discounts Report
12.	Custom Question Reports
13.	Print List of Deleted Clients
14.	Check for Missing Returns on the Network
15.	IRS Reports Menu
16.	ITINs Report
17.	Amount Due Report
0.	Exit

Enter Option:

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:


Filter On	Description	Input
<input type="checkbox"/>	Personal: Age	
<input type="checkbox"/>	Personal: Taxpayer Birthday	
<input type="checkbox"/>	Personal: Spouse Birthday	
<input type="checkbox"/>	Personal: Filing Status	
<input type="checkbox"/>	Personal: Number of Dependents	
<input type="checkbox"/>	Personal: Zip Code	
<input type="checkbox"/>	Personal: Preparer	
<input type="checkbox"/>	Personal: New Clients	
<input type="checkbox"/>	Personal: Prior Clients	
<input type="checkbox"/>	Personal: Deceased Returns	
<input type="checkbox"/>	Personal: Foreign Address	
<input type="checkbox"/>	Personal: Dependent on Another Return	
<input type="checkbox"/>	Personal: Private Return	
<input type="checkbox"/>	Personal: Identity Protection Pin Return	
<input type="checkbox"/>	Income: Wages, Salaries, Tips, Etc.	

Generate Report Type: View/Print Report Connect Filters Using: AND

Load Report Save Report Reset View Exit


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:

From Income: Wages, Salaries, Tips, Etc. 

4. Type the starting data.
5. Press Enter.

TaxSlayer Pro displays a box requesting the ending point for the data you want to report:

To Income: Wages, Salaries, Tips, Etc. 

6. Type the ending data.
7. Press Enter.

TaxSlayer Pro displays the **Client Reports** window with the data you typed in the **Input** column:



Filter On	Description	Input
<input type="checkbox"/>	Personal Age	
<input type="checkbox"/>	Personal Taxpayer Birthday	
<input type="checkbox"/>	Personal Spouse Birthday	
<input type="checkbox"/>	Personal Filing Status	
<input type="checkbox"/>	Personal Number of Dependents	
<input type="checkbox"/>	Personal Zip Code	
<input type="checkbox"/>	Personal Preparer	
<input type="checkbox"/>	Personal New Clients	
<input type="checkbox"/>	Personal Prior Clients	
<input type="checkbox"/>	Personal Deceased Returns	
<input type="checkbox"/>	Personal Foreign Address	
<input type="checkbox"/>	Personal Dependent on Another Return	
<input type="checkbox"/>	Personal Private Return	
<input checked="" type="checkbox"/>	Income: Wages, Salaries, Tips, Etc.	From 0 To 50000

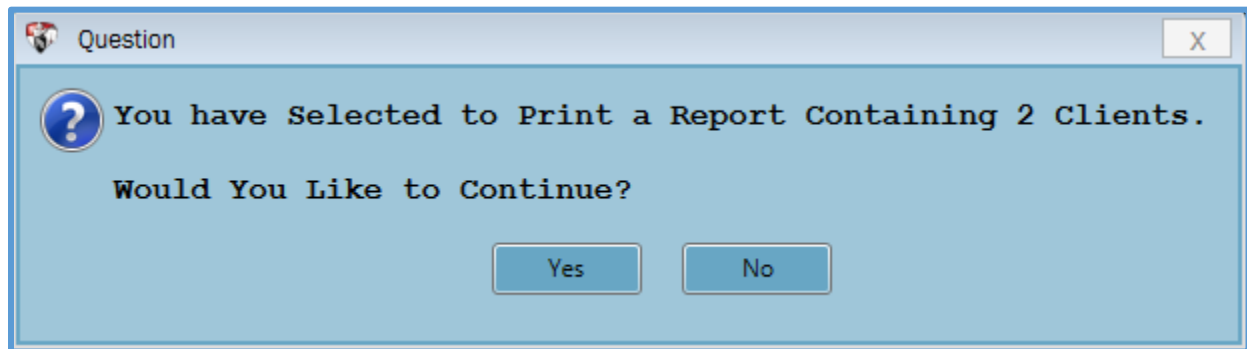
Generate Report Type: View/Print Report Connect Filters Using: AND

Load Report Save Report Reset View Exit

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.

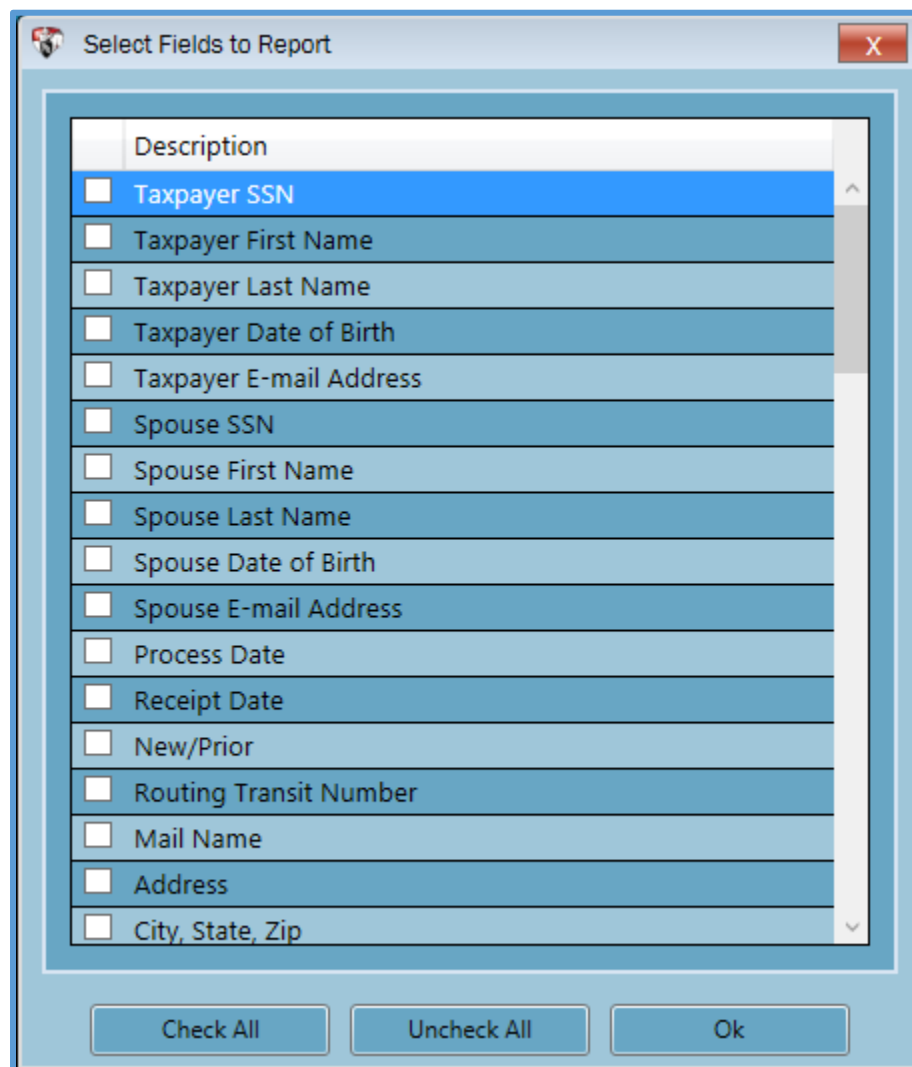
8. Click **View**.

TaxSlayer Pro displays a **Question** confirmation box:



9. Click **Yes**.

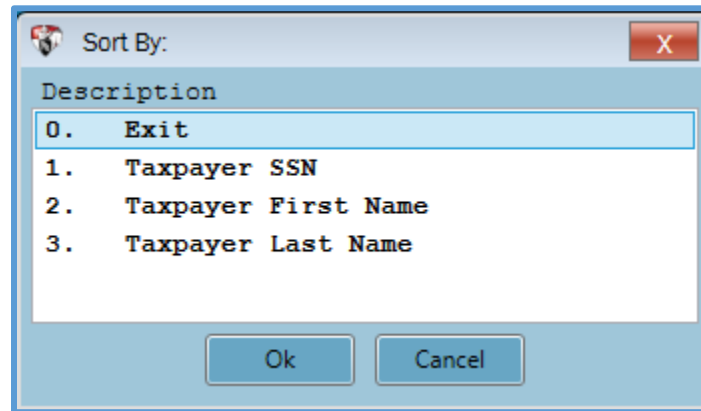
TaxSlayer Pro displays the **Select Fields to Report** window:



10. Select the check boxes for the data you want to include in the report.

11. Click **Ok**.

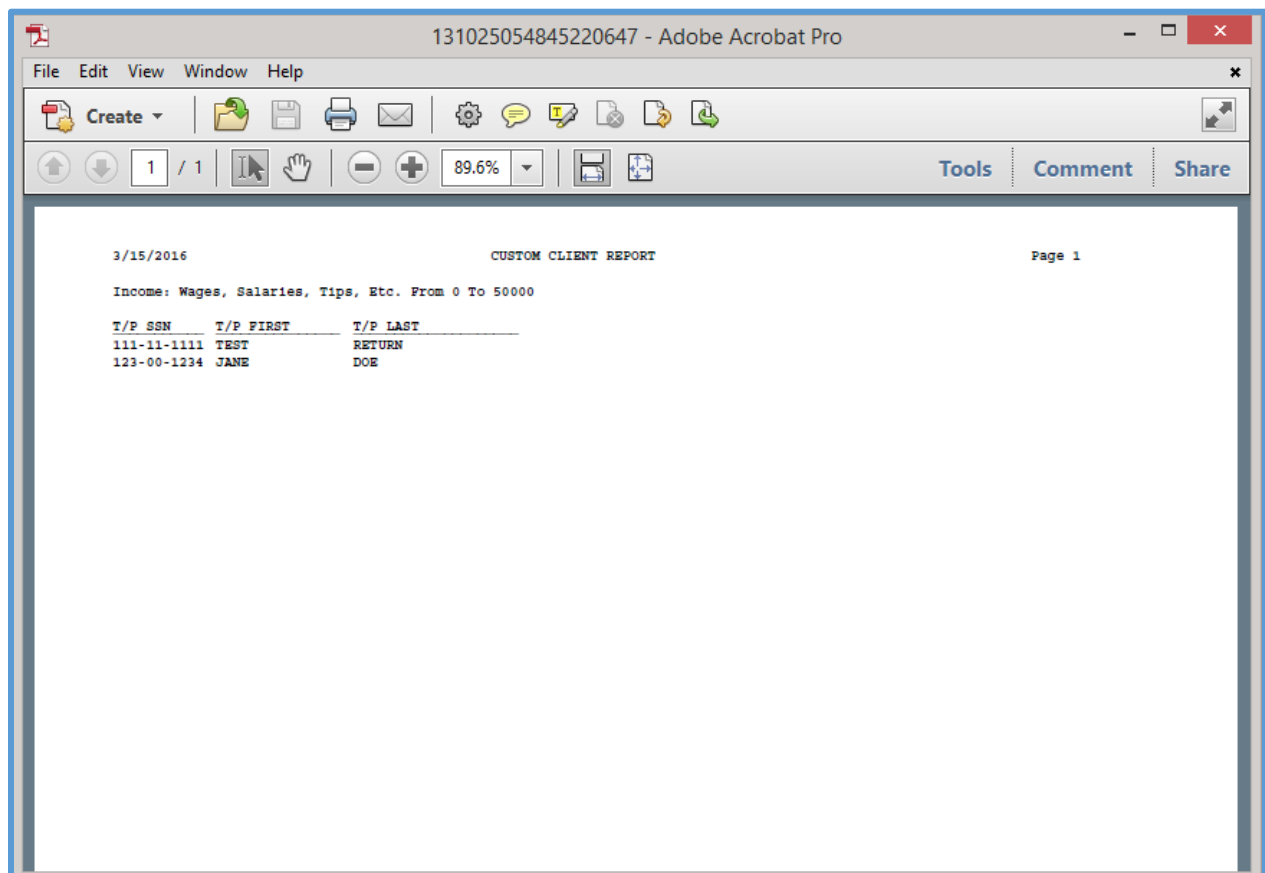
TaxSlayer Pro displays the **Sort By** menu:



12. Click the column description by which you want to sort the report.

13. Click **Ok**.

TaxSlayer Pro displays the report as a PDF:

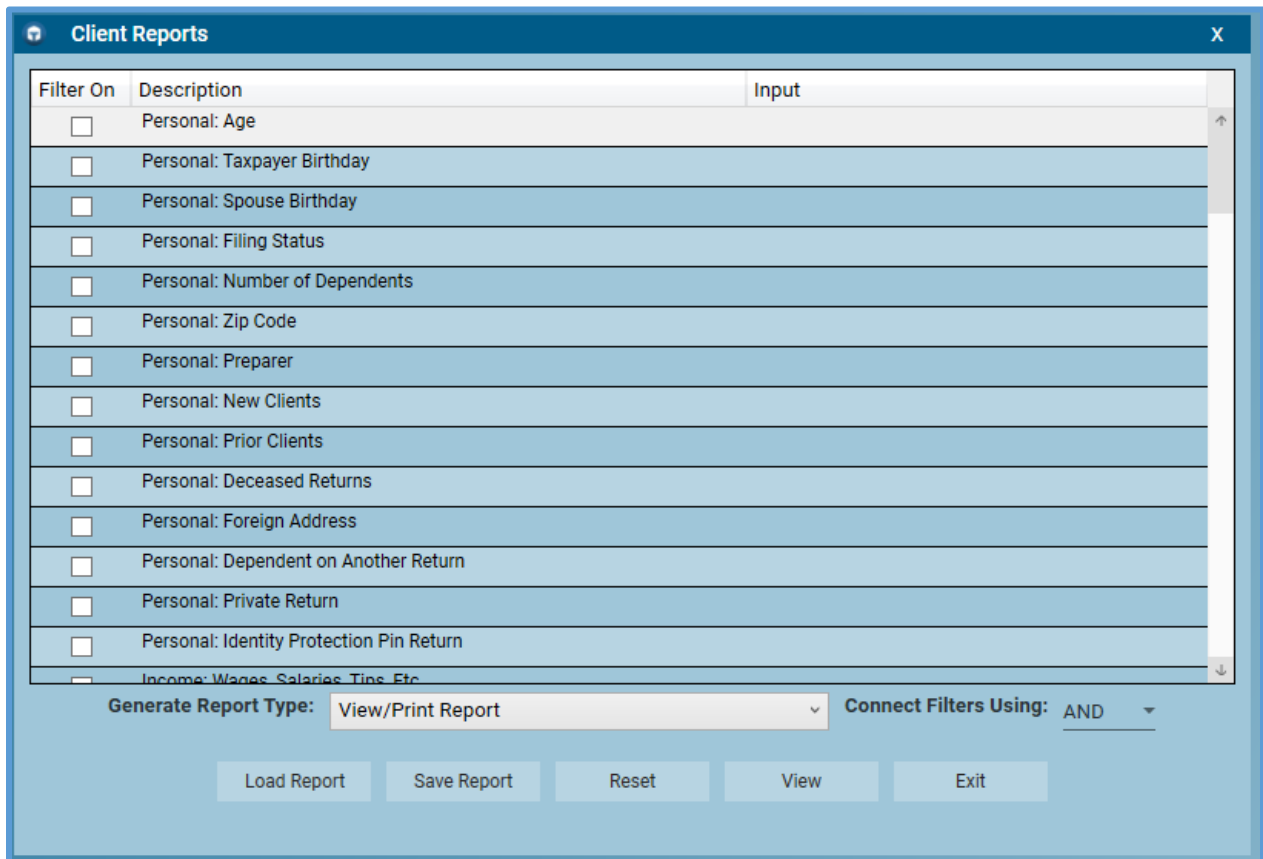


Exporting a Report

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:



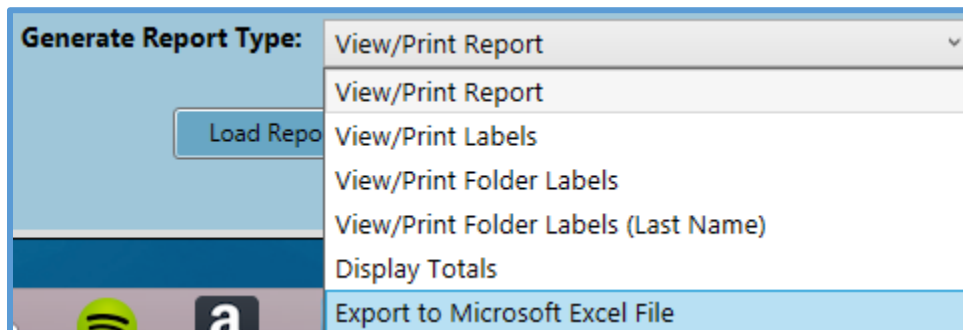
The screenshot shows the 'Client Reports' window. It features a table with columns 'Filter On', 'Description', and 'Input'. The 'Filter On' column contains checkboxes for various filters. The 'Description' column lists the filter categories, and the 'Input' column is currently empty. Below the table, there is a 'Generate Report Type:' dropdown menu set to 'View/Print Report', a 'Connect Filters Using:' dropdown set to 'AND', and a row of buttons: 'Load Report', 'Save Report', 'Reset', 'View', and 'Exit'.

Filter On	Description	Input
<input type="checkbox"/>	Personal: Age	
<input type="checkbox"/>	Personal: Taxpayer Birthday	
<input type="checkbox"/>	Personal: Spouse Birthday	
<input type="checkbox"/>	Personal: Filing Status	
<input type="checkbox"/>	Personal: Number of Dependents	
<input type="checkbox"/>	Personal: Zip Code	
<input type="checkbox"/>	Personal: Preparer	
<input type="checkbox"/>	Personal: New Clients	
<input type="checkbox"/>	Personal: Prior Clients	
<input type="checkbox"/>	Personal: Deceased Returns	
<input type="checkbox"/>	Personal: Foreign Address	
<input type="checkbox"/>	Personal: Dependent on Another Return	
<input type="checkbox"/>	Personal: Private Return	
<input type="checkbox"/>	Personal: Identity Protection Pin Return	
<input type="checkbox"/>	Income: Wages, Salaries, Tips, Etc.	

Generate Report Type: View/Print Report Connect Filters Using: AND

Load Report Save Report Reset View Exit

2. From the **Generate Report Type** drop-down list, select **Export to Microsoft Excel File**.



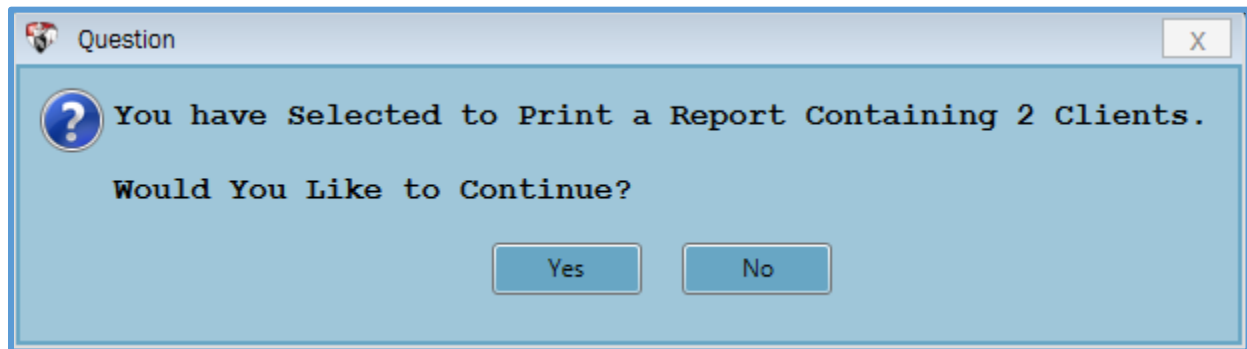
This close-up shows the 'Generate Report Type:' dropdown menu open. The menu lists several options: 'View/Print Report', 'View/Print Labels', 'View/Print Folder Labels', 'View/Print Folder Labels (Last Name)', 'Display Totals', and 'Export to Microsoft Excel File'. The 'Export to Microsoft Excel File' option is highlighted at the bottom of the list.

Generate Report Type: View/Print Report

- View/Print Report
- View/Print Labels
- View/Print Folder Labels
- View/Print Folder Labels (Last Name)
- Display Totals
- Export to Microsoft Excel File

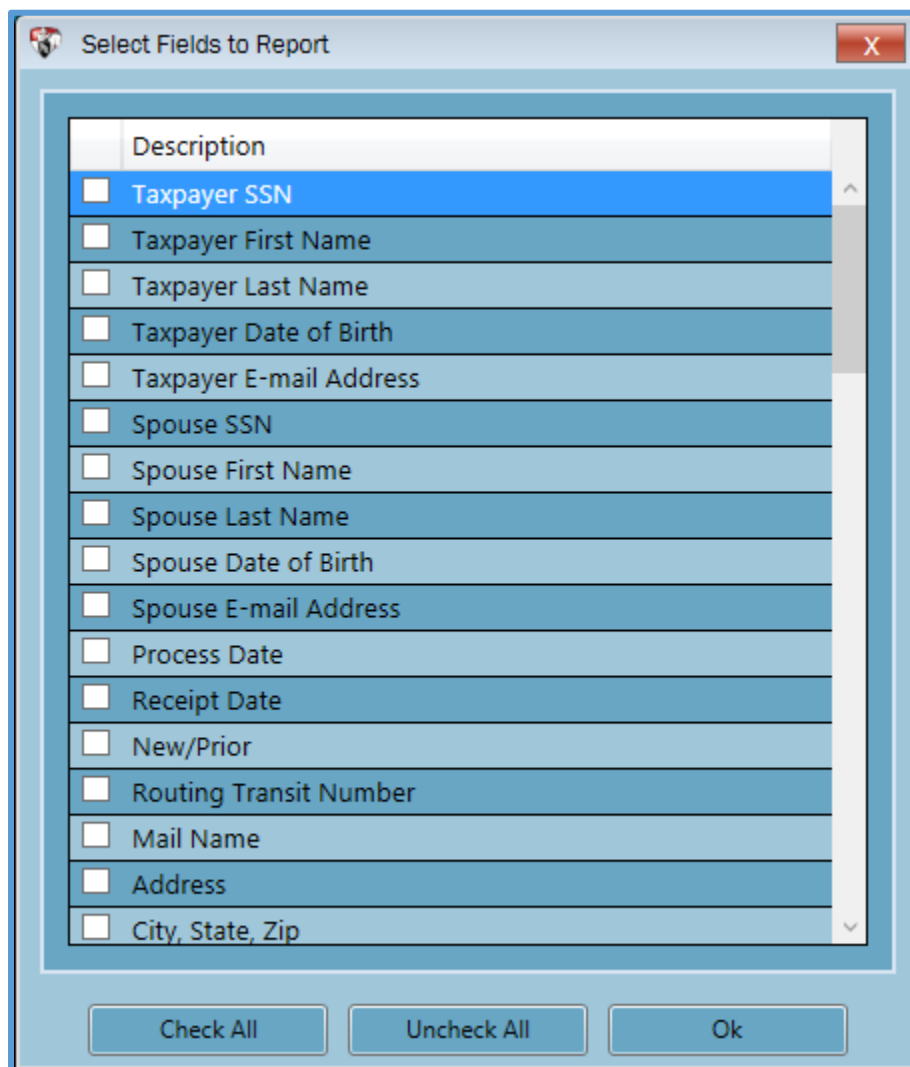
3. Click **View**.

TaxSlayer Pro displays a **Question** confirmation box:



4. Click **Yes**.

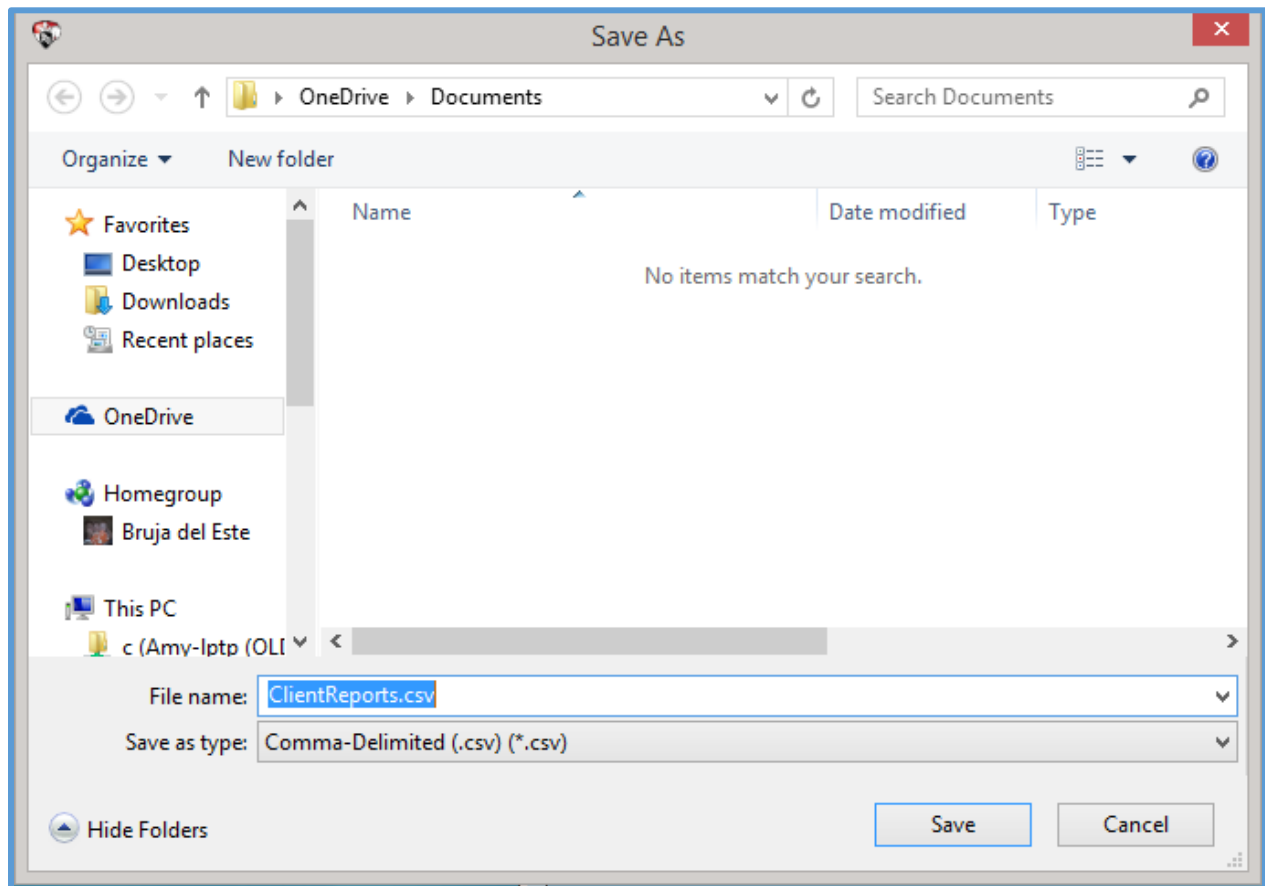
TaxSlayer Pro displays the **Select Fields to Report** window:



5. Select the check boxes for the data you want to include in the report.

6. Click **Ok**.

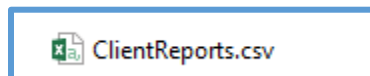
TaxSlayer Pro displays the **Save As** window:



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:

Welcome to The Practice Lab

Message Center 0 Rejected Clients 0

Start New [redacted] Tax Return Select
Create a brand new tax return for a client.

Client Search Select
Edit returns you previously started.

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:

Enter Social Security Number

Social Security Number

Confirm Social Security Number

Available Taxpayer Profiles

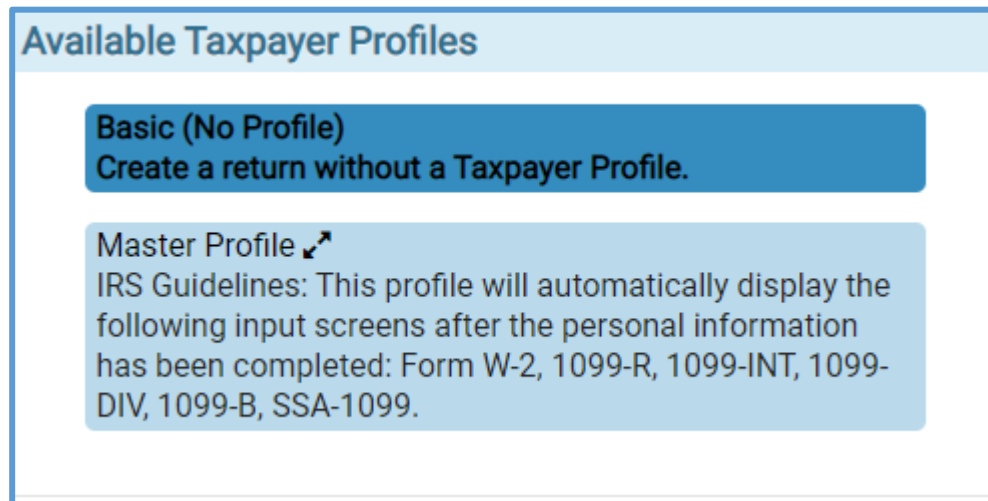
Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ✓
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Start Return

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:



Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

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:

What's your filing status?

☒ Single
☐ Married Filing Joint
☐ Married Filing Separate
☐ Head of Household
☐ Qualifying Widow(er) with Dependent Children
☐ Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

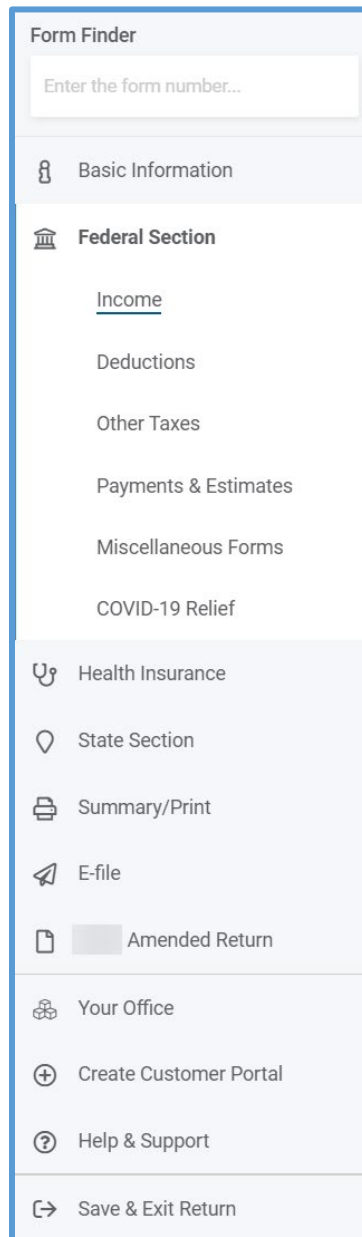
TIP: If you select the **Nonresident Alien** filing status, you cannot change back to a resident filing status (Single, etc.) on the tax return. In order to change to a resident filing status, you must deactivate the return and then reactivate the return using new return data. See the [Managing Returns](#) 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.



The screenshot shows the left navigation panel of the TaxSlayer software. At the top is a 'Form Finder' section with a search bar labeled 'Enter the form number...'. Below this is a list of navigation items, each with an icon and a label. The items are: 'Basic Information' (house icon), 'Federal Section' (capitol dome icon), 'Income' (underline icon), 'Deductions' (document icon), 'Other Taxes' (document icon), 'Payments & Estimates' (document icon), 'Miscellaneous Forms' (document icon), 'COVID-19 Relief' (document icon), 'Health Insurance' (key icon), 'State Section' (location pin icon), 'Summary/Print' (printer icon), 'E-file' (paper plane icon), 'Amended Return' (document icon with a grey highlight), 'Your Office' (gears icon), 'Create Customer Portal' (plus icon), 'Help & Support' (question mark icon), and 'Save & Exit Return' (exit arrow icon). The 'Amended Return' item is highlighted with a grey background.

Form Finder

Enter the form number...

Basic Information

Federal Section

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State Section

Summary/Print

E-file

Amended Return

Your Office

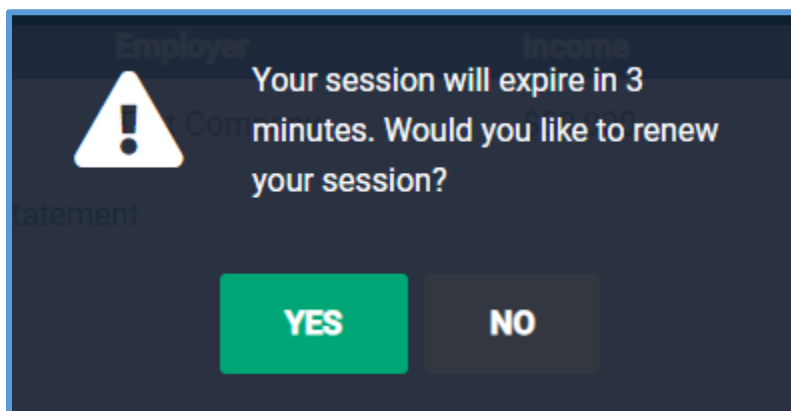
Create Customer Portal

Help & Support

Save & Exit Return

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:

A white rectangular box with a blue border. Inside, the text "Daytime Telephone Number *" is at the top. Below it is a text input field with a placeholder "(____) ____-____". At the bottom, there is a red warning icon (an exclamation mark inside a circle) followed by the text "Daytime Telephone Number is required." in red.

Click any warning to navigate to the error and correct it.

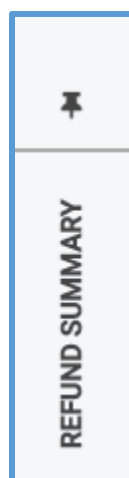
Federal AGI and Refund Amount

As you work through the return, TaxSlayer Pro displays the federal AGI, federal and state refund amount:

Collapse Menu >>	
REFUND SUMMARY	
AGI	\$49,589
Federal	\$209
State - GA	\$643

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:

The screenshot shows a web form titled "What's your filing status?". On the left, there is a list of filing status options, each with a radio button: "Single" (selected), "Married Filing Joint", "Married Filing Separate", "Head of Household", "Qualifying Widow(er) with Dependent Children", and "Nonresident Alien". On the right, there is a link that says "Need help determining your filing status?" above a button labeled "FILING STATUS WIZARD". At the bottom left is a "BACK" button, and at the bottom right is a "CONTINUE" button.

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**:

The screenshot shows a web form titled "Filing Status Wizard". The main question is "Were you considered married on December 31st of last year?". Below this is a note: "Note: You are considered married for tax purposes if your spouse passed away during 20[] and you did not remarry." At the bottom, there are three buttons: "EXIT WIZARD" on the left, and "NO" and "YES" on the right.

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:

Filing Status Wizard

Based on your answers, your filing status should be **Head of Household**.

PREVIOUS

FINISHED

3. Click **Finished**.


TaxSlayer Pro displays the **What's your filing status?** page with the answer from the filing status wizard:

What's your filing status?

☐ Single
☒ Married Filing Joint
☐ Married Filing Separate
☐ Head of Household
☐ Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

FILING STATUS WIZARD



Based on your answers, your filing status should be **Head of Household**.

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:

Personal Information

FILING STATUS**CANCEL****CONTINUE**

Taxpayer Information

Primary First Name *MI

Last Name *Suffix (Jr, Sr, etc.)

Social Security Number *

■

-

■

-0102

Date of Birth *

MM ▾

DD ▾

YYYY ▾

Occupation

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

Address and Phone Number

☐ Check here if Stateside Military address.

☐ Check here if foreign address

Address (Number and Street) *

Apartment

ZIP Code *

-

City, Town, or Post Office *

State *

Resident State as of 12/31/20 *

Daytime Telephone Number *

() -

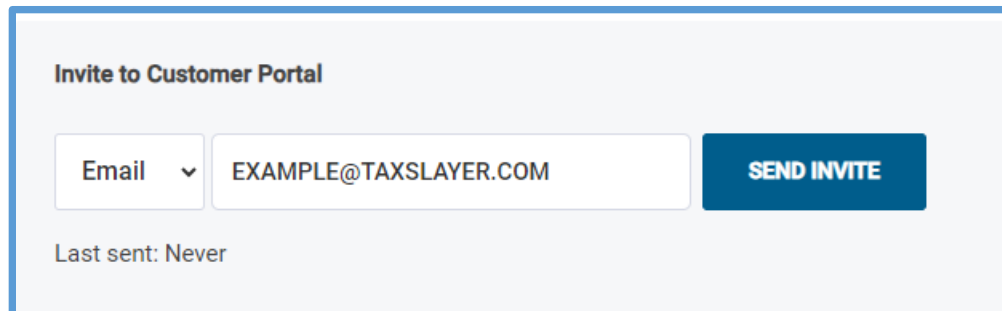
Secondary Telephone Number

() -

- 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.



Invite to Customer Portal

Email ▼ EXAMPLE@TAXSLAYER.COM

SEND INVITE

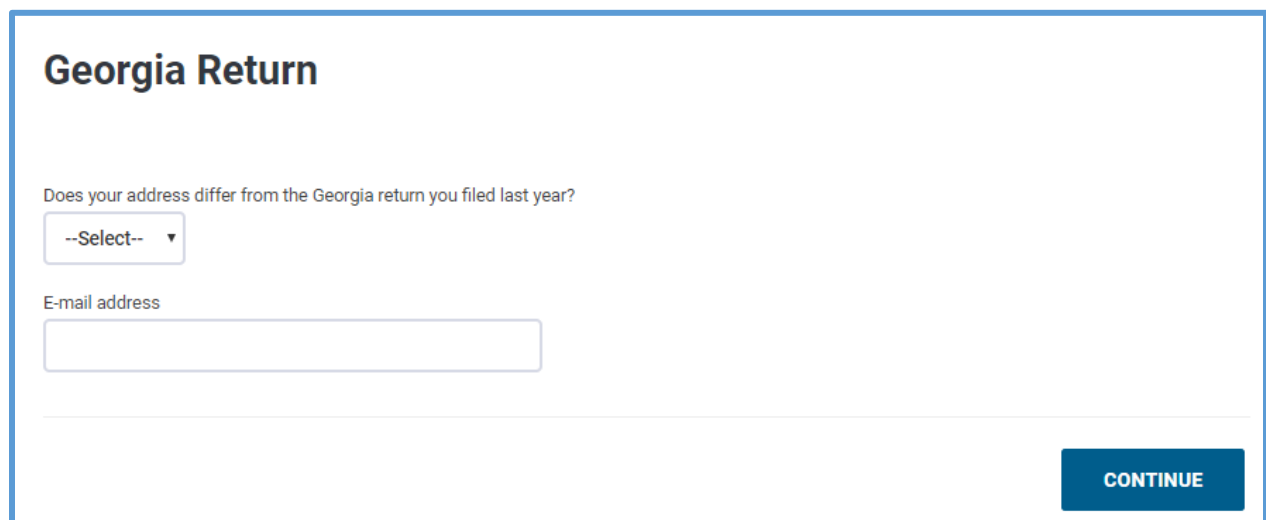
Last sent: Never

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:



Georgia Return

Does your address differ from the Georgia return you filed last year?

--Select-- ▼

E-mail address

CONTINUE

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:

Dependents or Qualifying Person(s)

Do you have any dependents or qualifying person(s) to claim on your return?

Individuals who rely on you for support and reside in your house generally qualify for dependent tax exemptions. However, there are situations when a child's exemption status is more complicated. The IRS has special rules for these situations.

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:

Dependent/Qualifying Child Information

First Name *

Middle

Last Name *

Date of Birth *

MM ▼

DD ▼

YYYY ▼

Social Security Number *

-

-

☐

Check box if the dependent does not have an SSN/ITIN/ATIN

Was this person a U.S. citizen, U.S. national, or U.S. resident alien? (See Pub. 519 for the definition of a U.S. national or U.S. resident alien) If they were not, you can't claim the child tax credit or the credit for other dependents for this person. *

☐ Yes

☐ No

Relationship *

- Please Select - ▼

Number of months this person lived in your home during 20

12 ▼

Note: If this dependent was born in 20

you must select 12 months

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:

Dependent or Qualifying Child

+ Add a Dependent or Qualifying Child

First Name	Last Name	Social Security Number	Relationship	Date of Birth	
Dependent	Sample	xxx-xx-1113	Son	07/07/2010	 

CONTINUE

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**:

Dependents Menu

Dependents / Qualifying Person	EDIT
Death Certificate	EDIT
CONTINUE	

14. Click **Continue**.

TaxSlayer Pro Online displays the **Basic Information** page:

The screenshot shows the 'Basic Information' page with a title bar at the top. Below the title bar, there are four rows of information, each with an 'EDIT' button to its right. The rows are: 'Filing Status' with an 'EDIT' button, 'Personal Information' with an 'EDIT' button, 'Dependents / Qualifying Person' with an 'EDIT' button, and 'IRS Identity Protection PIN' with a 'BEGIN' button. At the bottom of the page, there are two buttons: 'BACK' on the left and 'CONTINUE' on the right.

Basic Information	
Filing Status	EDIT
Personal Information	EDIT
Dependents / Qualifying Person	EDIT
IRS Identity Protection PIN	BEGIN
<div>BACK CONTINUE</div>	

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**.

The screenshot shows the 'Dependents Menu' page with a title bar at the top. Below the title bar, there are two rows of information, each with an 'EDIT' button to its right. The rows are: 'Dependents / Qualifying Person' with an 'EDIT' button, and 'Death Certificate' with an 'EDIT' button. At the bottom of the page, there is a 'CONTINUE' button.

Dependents Menu	
Dependents / Qualifying Person	EDIT
Death Certificate	EDIT
<div>CONTINUE</div>	

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:

The screenshot shows a web interface for a 'Death Certificate'. At the top, the title 'Death Certificate' is displayed. Below it is a large, light blue rectangular area with a dashed border, indicating a file upload zone. Inside this area, a small white box contains a green checkmark and the text 'f8332.pdf'. Below the upload area, a message states: 'You may upload 4 more PDF files (up to 5 MB each)'. In the bottom right corner of the interface, there is a blue button labeled 'ATTACHMENT LIST'.

4. Click **Attachment List**.

TaxSlayer Pro Online displays the list of attachments:

The screenshot shows a web interface for a 'Death Certificate'. At the top, the title 'Death Certificate' is displayed. Below it is a link that says 'Add PDF Attachment' with a plus icon. Below this is a table with one row. The table has a header 'File Name' and a data row with the value 'f8332.pdf'. To the right of the file name, there are two small icons: a pencil (edit) and a trash can (delete). In the bottom right corner of the interface, there is a blue button labeled 'CONTINUE'.

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.

IRS Identity Protection PIN

Enter an Identity Protection PIN for each person who received one from the IRS. Leave fields blank for individuals who did not receive a PIN from the IRS.

Taxpayer Sample (XXX-XX-1122)

Spouse Sample (XXX-XX-1112)

Dependent Sample (XXX-XX-1113)

[Recover a lost Identity Protection PIN](#)

CANCEL**CONTINUE**

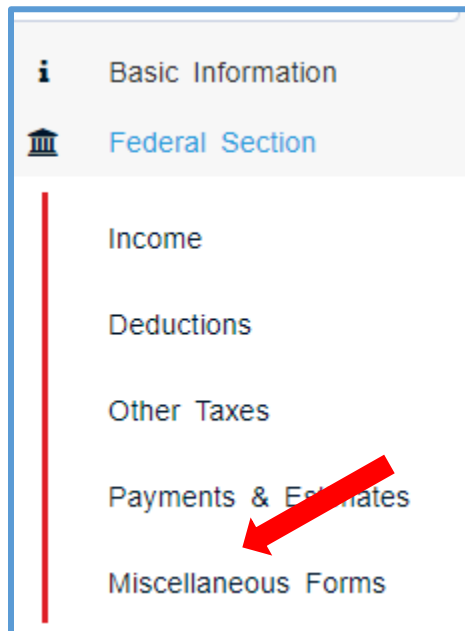
3. Click **CONTINUE**.
4. Click **CONTINUE** to move to the Federal Section.

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:

IRS Identity Protection PIN

Enter an Identity Protection PIN for each person who received one from the IRS. Leave fields blank for individuals who did not receive a PIN from the IRS.

Taxpayer Sample (XXX-XX-1122)

Spouse Sample (XXX-XX-1112)

Dependent Sample (XXX-XX-1113)

[Recover a lost Identity Protection PIN](#)

CANCEL

CONTINUE

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:

Office Client List

Client Tax Return List

Filter by Status
Any Status

Filter by Return Tag
Any Tag

☐ Do Not Show Deactivated Returns

☐ Do Not Show Accepted Returns

☐ Do Not Show Paper Returns

Date From:
yyyy/mm/dd

Date To:
yyyy/mm/dd

Date Type
Create Date

Search Client List

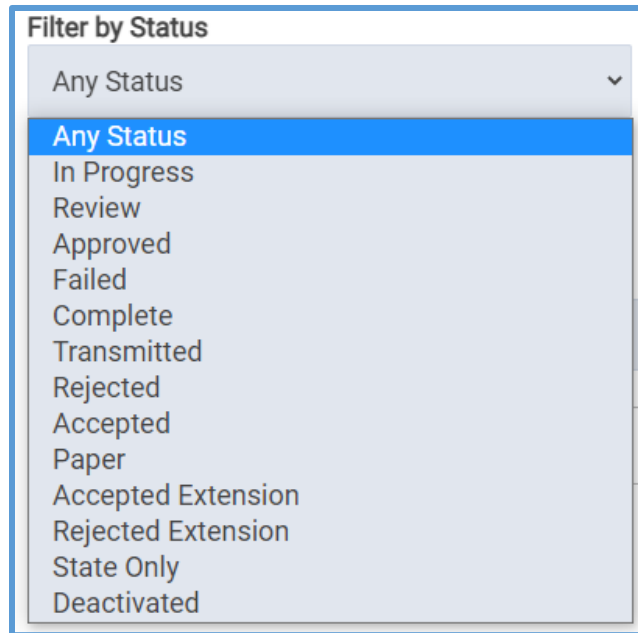
Show 100 entries

Previous 1

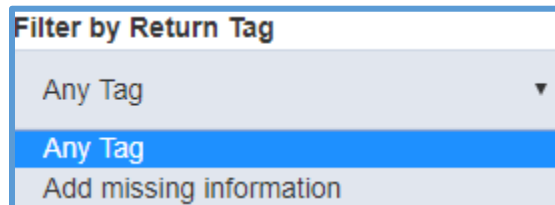
Showing 1 to 20 of 20 entries (filtered from 49 total entries)

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS	
300-00-		Radio Button	(706) 800-	Craig Smith	Rejected	MULTI ...	<div><div></div><div></div><div></div><div>Tools</div><div>Select</div></div>
355-56-		HADDEN	(773) 617-	Craig Smith	Rejected	MULTI ...	<div><div></div><div></div><div></div><div>Tools</div><div>Select</div></div>
700-00-		Teeter	(706) 800-	Craig Smith	Rejected	MULTI ...	<div><div></div><div></div><div></div><div>Tools</div><div>Select</div></div>

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:

Search Client List

Craig

Show

100

entries

Showing 1 to 24 of 24 entries (filtered from 102 total entries)

Previous

1

Next

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE	STATUS			
	skool	tax		Craig Smith	In Progress	PA	...			
	December	Webinar		Craig Smith	Rejected					
	April	TwentyTesting		Craig Smith	Rejected	AL	...			

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:

Search Client List

70000

Show

100

entries

Showing 1 to 18 of 18 entries (filtered from 102 total entries)

Previous

1

Next

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS			
111-77-0000	Ima	Testperson		Marc	Rejected	SC ...			
700-00-0320	April	TwentyTesting		Craig Smith	Rejected	AL ...			
700-00-1111	PULL	FORWARD		Craig Smith	In Progress	CO ...			
700-00-2221	Testing	Something		Craig Smith	In Progress				

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 ☒ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) with dependent child
Check only one box. 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 and birth date.

Your first name and middle initial Test	Last name TaxReturn	Age: 41	Your SSN 701
If joint return, spouse's first name and middle initial		Last name	Spouse's SSN

Home address (number and street). If you have a P.O. box, see instructions. 150 Forest Park		Apt. no.	President Check box to go to the next page.
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?

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):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for child tax credit
Child	TaxReturn	700 00 5858	Son	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

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:

Search Client List

70000

Show

100













entries

Showing 1 to 18 of 18 entries (filtered from 102 total entries)

Previous

1

Next

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS		
111-77-0000	Ima	Testperson		Marc	Rejected	SC ...	  	<div>Tools</div> <div>Select</div>
700-00-0320	April	TwentyTesting		Craig Smith	Rejected	AL ...	  	<div>Tools</div> <div>Select</div>
700-00-1111	PULL	FORWARD		Craig Smith	In Progress	CO ...	  	<div>Tools</div> <div>Select</div>
700-00-2221	Testing	Something		Craig Smith	In Progress		  	<div>Tools</div> <div>Select</div>

1. From the **Tools** drop-down list, select **Client Status**.

TaxSlayer Pro Online displays the **Client Status** page with detailed client and dependent information:

Client Status Information

Cancel

Return ID [REDACTED]
Office EFIN [REDACTED] Preparer Code [REDACTED] Preparer TIN [REDACTED] Preparer Name [REDACTED]

Client Information

Primary SSN [REDACTED]1234
Primary Name [REDACTED] return
Primary DOB [REDACTED]

Enter Return

[View Old Layout](#)

Federal Information

No Federal Return Information Available

Refund, Deposit, and Fees Overview

Federal Refund	\$0.00
State Refund	\$0.00
Total Refund	\$0.00
Federal Deposit Received	\$0.00
State Deposit Received	\$0.00
Total Deposit Received	\$0.00
All Fees	\$0.00
Net Refund	\$0.00

Dependent(s)

SSN	First Name	Last Name	Date of Birth	Relationship
[REDACTED]2874	JUSTIN	[REDACTED]	11/18/2015	SON

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	2/23/2018 5:31:20 PM	2/23/2017 5:40:39 PM	1036951	[REDACTED]	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:

Enter Social Security Number

Social Security Number


... - .. - 

Confirm Social Security Number

... - .. -

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile 
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Start Return

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:

The screenshot shows a web interface for entering a Social Security Number and selecting a taxpayer profile. The 'Enter Social Security Number' section has two rows of input fields. The first row is for the 'Social Security Number' and the second row is for the 'Confirm Social Security Number'. Each row has three input boxes separated by hyphens, with a small icon in the last box of the first row. Below this is the 'Available Taxpayer Profiles' section. It contains two options: 'Basic (No Profile)' with the description 'Create a return without a Taxpayer Profile.' and 'Master Profile' with a mouse cursor icon and the description 'IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.' At the bottom right of the form is a blue button labeled 'Start Return'.

Enter Social Security Number

Social Security Number

Confirm Social Security Number

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Start Return

9. Select a taxpayer profile.
10. Click **Start Return**.

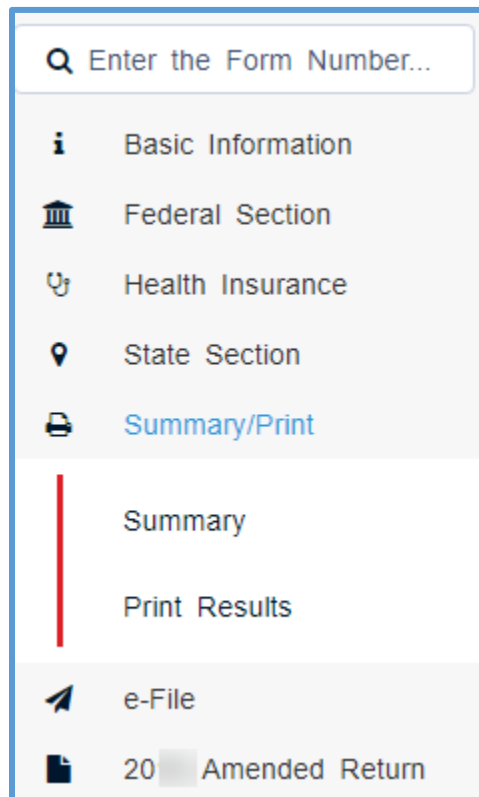
TIP: If you do not want to use a taxpayer profile for this return, you can choose **Basic (No Profile)** You can only select taxpayer profiles during **Start a New Return**.

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 **20** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
Check only one box.
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: Taxpayer: Last name: Sample Age: 42 Your social security number: 800
If joint return, spouse's first name and middle initial: Spouse: Last name: Sample Age: 41 Spouse's social security number: 800
Home address (number and street). If you have a P.O. box, see instructions. Apt. no.: 150 Forest Park
City, town, or post office. If you have a foreign address, also complete spaces below. State: GA ZIP code: 30809
Foreign country name: Foreign province/state/county: Foreign postal code: Presidential Election Campaign
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

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):
(1) First name Last name (2) Social security number (3) Relationship to you (4) Check the box if qualifies for (see instructions):
Child tax credit Credit for other dependents
Dependent Sample Age: 12
☒ ☐ ☐

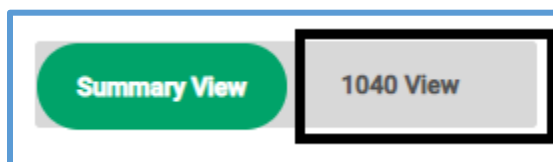
Income
1a Total amount from Form(s) W-2, box 1 (see instructions) 1a 0.00
b Household employee wages not reported on Form(s) W-2 1b 0.00
c Tip income not reported on line 1a (see instructions) 1c 0.00
d Medicaid waiver payments not reported on Form(s) W-2 (see instructions) 1d 0.00
e Taxable dependent 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

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

- 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:

W-2 Wage Statement

 Add a W-2 Wage Statement

Employee	Employer	Ein	Income	Tax Withheld	
Taxpayer	Test Employer	98-7654321	\$1	\$0	 

CANCEL

CONTINUE

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:

The screenshot shows a page titled "Let's look at the money you earned". Below the title is a paragraph: "Tell us about your W-2, interest and dividends, and retirement distributions. Follow our step-by-step guide to ensure accurate entry of your income. Or, enter the information on your own if you're familiar with the forms." There are two main buttons: "GUIDE ME" and "ENTER MYSELF", separated by "-OR-". At the bottom, there are two buttons: "BACK" and "SKIP INCOME".

Let's look at the money you earned

Tell us about your W-2, interest and dividends, and retirement distributions. Follow our step-by-step guide to ensure accurate entry of your income. Or, enter the information on your own if you're familiar with the forms.

GUIDE ME -OR- **ENTER MYSELF**

BACK **SKIP INCOME**

6. Click **Guide Me**.

TaxSlayer Pro Online displays the **Income Guide** page:

The screenshot shows a page titled "Income Guide". Below the title is a question: "First up. Do you have any W-2s to enter?". There is a paragraph of text: "Your employer should send you a W-2 by Jan. 31 with wages earned, taxes paid, and information on certain payroll deductions. You should receive a W-2 from each employer in the past year. The information will appear on Form 1040, 1040A, or 1040EZ." At the bottom, there are three buttons: "BACK", "Restart/Exit Income Guide", and "NO" and "YES".

Income Guide

First up. Do you have any W-2s to enter?

Your employer should send you a W-2 by Jan. 31 with wages earned, taxes paid, and information on certain payroll deductions. You should receive a W-2 from each employer in the past year. The information will appear on Form 1040, 1040A, or 1040EZ.

BACK [Restart/Exit Income Guide](#) **NO** **YES**

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:

Income	
Form W-2 Wage and Tax Statement	EDIT
Form 1099-G Box 2 State or local income tax refunds, credits, or offsets	BEGIN
Schedule B - Forms 1099-INT, DIV, OID Interest income, dividends, and distributions	BEGIN
Form 1099-R, RRB, SSA Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
Form 8915-F Qualified Disaster Retirement Plan Distributions and Repayments	BEGIN
Form 1099-G Box 1 Unemployment Compensation	BEGIN
1099-MISC Miscellaneous income	BEGIN
1099-NEC Nonemployee compensation	BEGIN
Schedule C Profit or Loss from Business	BEGIN

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:

W-2

CANCEL **SAVE & ENTER ANOTHER** **CONTINUE**

☒ This is a standard W-2
☐ This is a corrected W-2
☐ This is a substitute W-2
☐ This is a railroad W-2

Control Number is not needed for e-filing

Employee

Whose W-2 is this? *

☐ SAMPLE RETURN
☐ SPOUSE RETURN
☐ Check here if foreign address

Address (Number and Street) *
123 VITA TCE WAY

Employer

Note: Information entered below must match the IRS Master File. **Please Verify.**

b EIN *
-

c Employer Name *

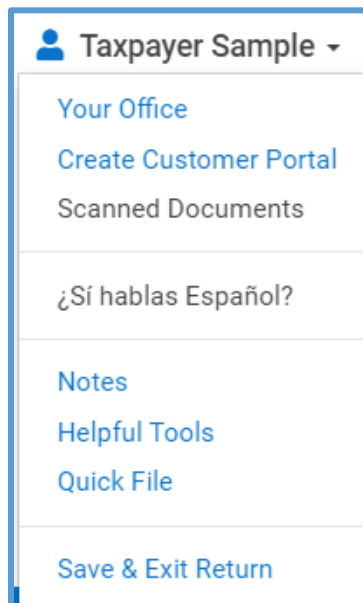
2. Type the information from the taxpayer's Form W-2 on the TaxSlayer Pro Online form.

Quick File

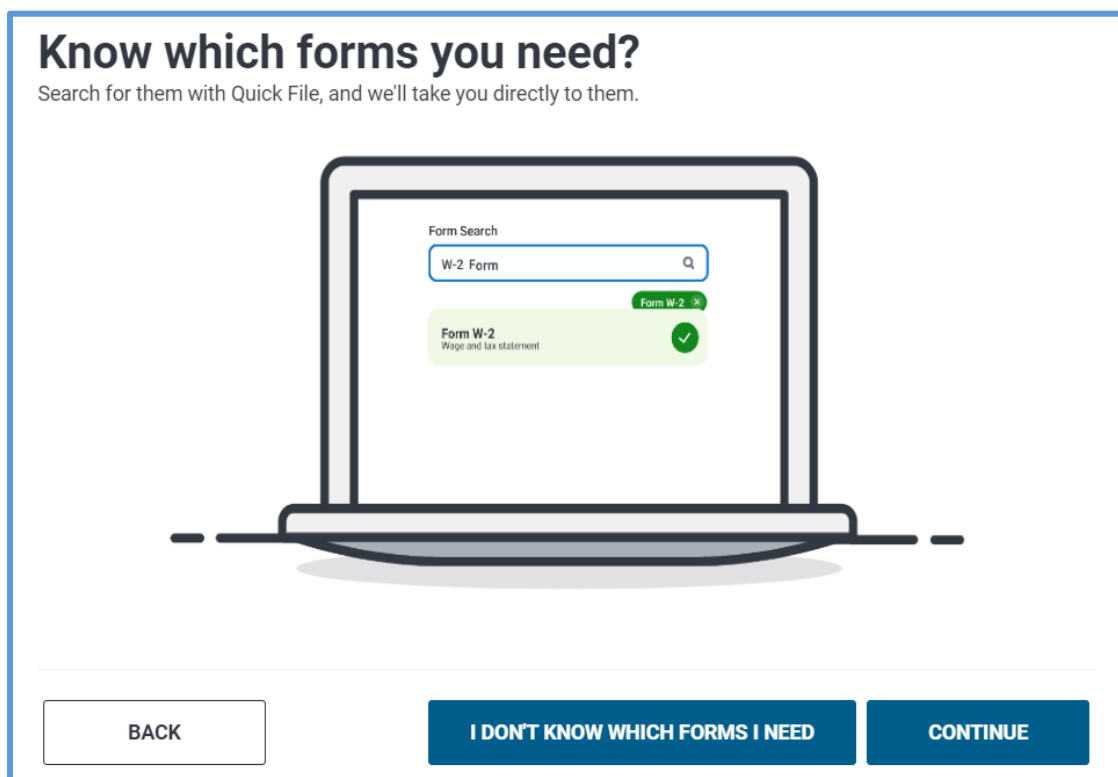
In TaxSlayer Pro Online, you can create a Quick File list to automatically display income and adjustment entry pages based on the information given to you by the taxpayer after completing the Basic Information section. When you do this, you save time in the return. You can still add additional information 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.


Select your forms

Search for all of the forms that you need. Don't see your form? No worries! You'll have a chance to enter more later!

Form Search

W-2
Wages and Salaries

W-2G
Gambling Income



No forms currently selected


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.


Form Finder


Form

 Go to Personal Information now


 Go to Form W-2, Wage and Tax Statement now

 Go to Form 1099-G, Certain Government Payments now


 Go to Form 1099-INT, Interest Income now



Go to Form 1099-DIV, Dividends and Distributions now



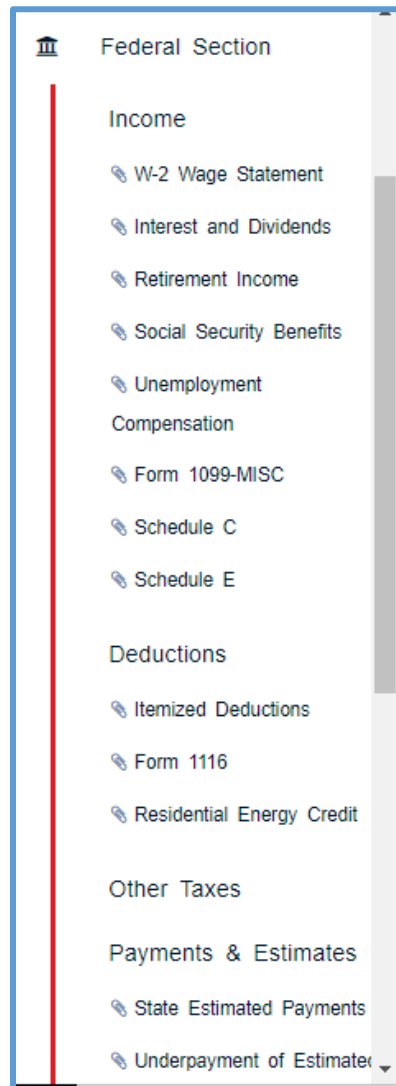
Go to Schedule B (Form 1040-A or 1040), Interest and Ordinary Dividends now



Go to Schedule C (Form 1040), Profit or Loss From Business now

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:

Income	
Form W-2 Wage and Tax Statement	EDIT
Form 1099-G Box 2 State or local income tax refunds, credits, or offsets	BEGIN
Schedule B - Forms 1099-INT, DIV, OID Interest income, dividends, and distributions	BEGIN
Form 1099-R, RRB, SSA Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
Form 8915-F Qualified Disaster Retirement Plan Distributions and Repayments	BEGIN
Form 1099-G Box 1 Unemployment Compensation	BEGIN
1099-MISC Miscellaneous income	BEGIN
1099-NEC Nonemployee compensation	BEGIN
Schedule C Profit or Loss from Business	BEGIN

1. Click the **Form W-2** line to start adding Forms W-2.

TaxSlayer Pro Online displays the **W-2** page:

W-2

CANCEL

SAVE & ENTER ANOTHERCONTINUE

☒ This is a standard W-2

☐ This is a corrected W-2

☐ This is a substitute W-2

☐ This is a railroad W-2

Control Number is not needed for e-filing

Employee

Whose W-2 is this? *

☐ SAMPLE RETURN

☐ SPOUSE RETURN

☐ Check here if foreign address

Address (Number and Street) *

123 VITA TCE WAY

Employer

Note: Information entered below must match the IRS Master File. **Please Verify.**

b EIN *

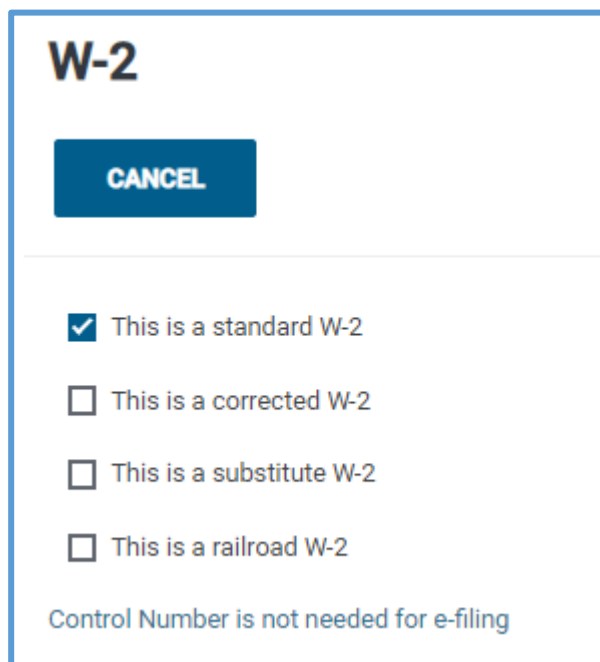
-

c Employer Name *

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



The screenshot shows a dialog box titled "W-2" with a blue "CANCEL" button. Below the button, there are four radio button options: "This is a standard W-2" (selected), "This is a corrected W-2", "This is a substitute W-2", and "This is a railroad W-2". At the bottom, a note states "Control Number is not needed for e-filing".

- 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

Employee

Whose W-2 is this?
Taxpayer

☐ Check here if foreign address

Address (Number and Street) *

3205 GARDEN LAKES BLVD

ZIP Code *

30165 -

City, Town, or Post Office *

Rome

State *

Georgia ▼

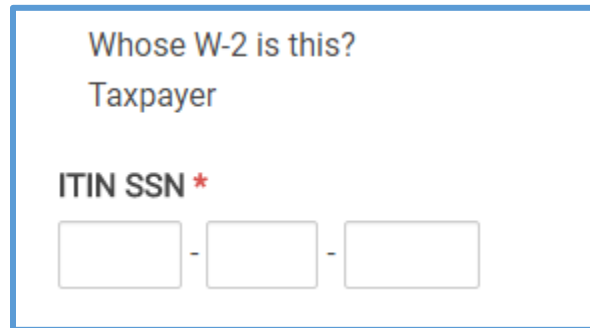
- If the taxpayer is not married, TaxSlayer Pro Online defaults to the taxpayer for the question, **Whose W-2 is this?**, as shown in the screenshot above. If the taxpayer is married, select whether the Form W-2 is for the taxpayer or spouse, as shown below:

Whose W-2 is this? *

☐ SAMPLE RETURN

☐ SPOUSE RETURN

- 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:



Whose W-2 is this?
Taxpayer

ITIN SSN *

- -

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	13
Code Amount	<input type="checkbox"/> Statutory Employee
a <input type="text"/> \$	<input type="checkbox"/> Retirement Plan
+ add another row	<input type="checkbox"/> Third Party Pay
14	<input type="checkbox"/> Do you want to include Medicaid Waiver payments in the calculation of earned income?
Code Amount	<u>Medicaid Waiver Payment</u>
<input type="text"/> \$	\$
+ add another row	
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)**.

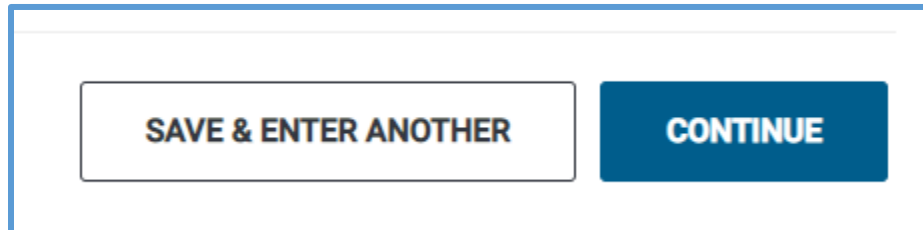
State Information

State Information [Clear](#)

15 State	Employers state ID number
<div>-- Please Select --</div>	<div></div>
16 State wages, tips, etc.	17 State income tax
<div>\$</div>	<div>\$</div>
18 Local wages, tips, etc.	19 Local income tax
<div>\$</div>	<div>\$</div>
20 Locality name	
<div></div>	
<div>+ Add another state</div>	

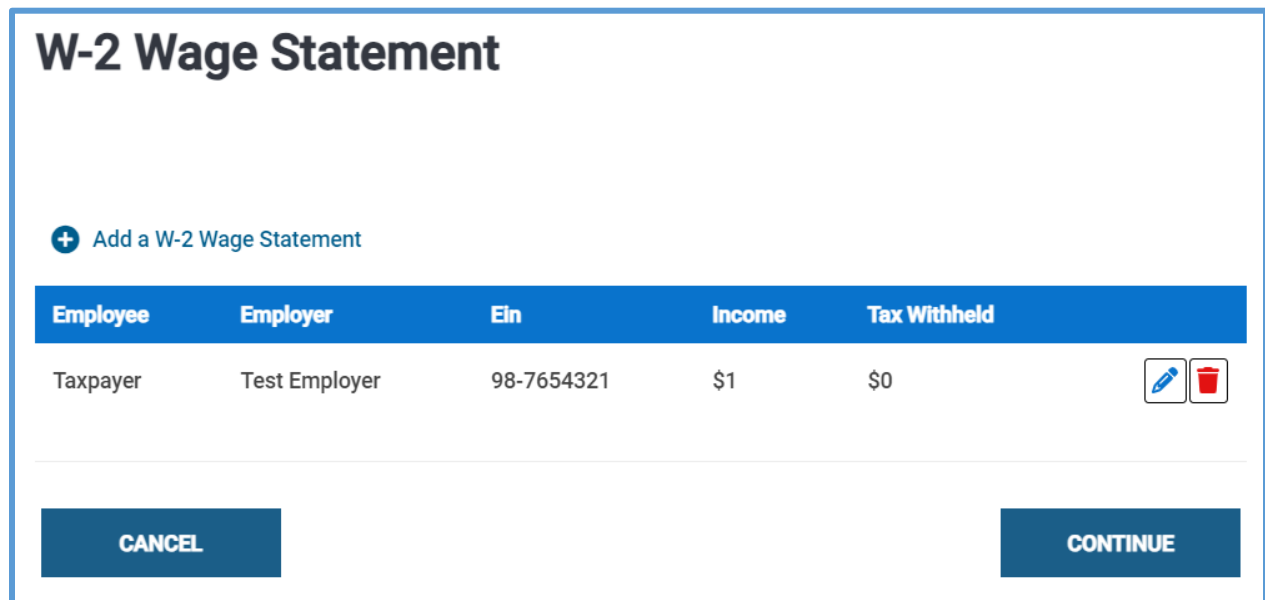
- Select a state name from the drop-down list.
- When you select the state, TaxSlayer Pro Online completes Box 16 based on the information you typed in Box 1. If the state wages are different on the employee's Form W-2, change the amount in that box.
- Complete Boxes 15-20 using the information on the 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**.





A screenshot showing two buttons side-by-side. The left button is white with a black border and contains the text 'SAVE & ENTER ANOTHER' in blue. The right button is solid blue and contains the text 'CONTINUE' in white.

TaxSlayer Pro Online displays the **W-2 Wage Statement** page with the new Form W-2 listed:



A screenshot of the 'W-2 Wage Statement' page. At the top, there is a heading 'W-2 Wage Statement'. Below it is a link '+ Add a W-2 Wage Statement'. Underneath is a table with the following data:

Employee	Employer	EIn	Income	Tax Withheld	
Taxpayer	Test Employer	98-7654321	\$1	\$0	 

At the bottom of the page, there are two buttons: 'CANCEL' on the left and 'CONTINUE' on the right.

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 and Dividend Income

Interest or Dividend Income	Begin
Did you have interest in a foreign bank account?	Begin
Exclusion of Interest from Series EE & I US Savings Bonds	Begin
Continue	

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:

1099 Description Schedule B

Choose the type of Interest or Dividend item you want to enter:

☐ Interest Income, Form 1099-INT, (including interest income < 1,500)

☐ Original Issue Discount, Form 1099-OID

☐ Dividend Income, Form 1099-DIV

☐ Seller Financed Interest Income

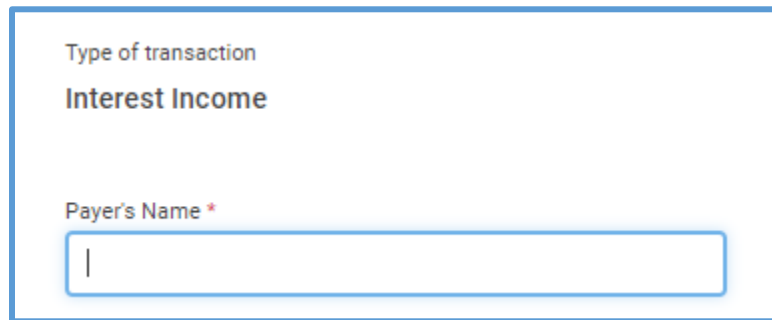
CANCEL

CONTINUE

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.

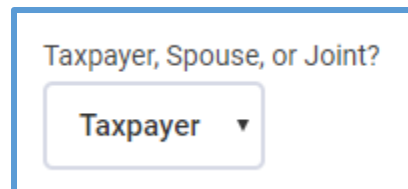
4. Type the payer's name in the appropriate box.



Type of transaction
Interest Income

Payer's Name *

Note: If the taxpayer is married, select whether the interest income is for the taxpayer, spouse, or joint, as shown below:



Taxpayer, Spouse, or Joint?

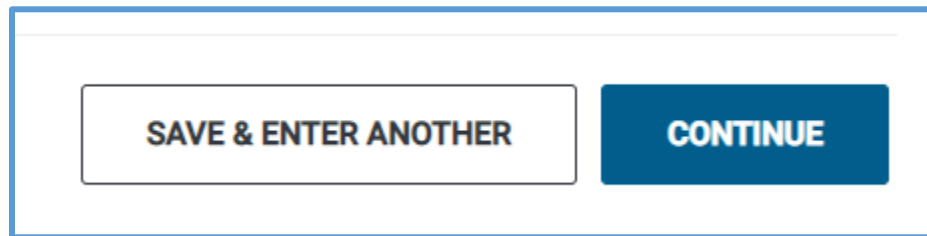
Taxpayer ▼

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.

Interest Income (Box 1)
\$
Early Withdrawal Penalty (Box 2)
\$
Interest on U.S. Savings Bonds and Treasury obligations (Box 3) (Note: Enter Taxable amount only)
\$
Federal Tax Withheld (Box 4)
\$
Investment Expenses (Box 5)
\$
Foreign Tax Withheld (Box 6)
\$
Tax Exempt Interest (Box 8)
\$
Specified Private Activity Bond (Box 9)
\$
Market Discount (Box 10)
\$
Bond Premium (Box 11)
\$



6. When you finish typing information, verify that you typed the correct information and do one of the following:
- Click **Save & Enter Another** to display a blank **Interest Income** page.
 - 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:

Interest and Dividends

+ Add Interest and Dividends

Type	Payer	Owner	Amount	
Interest Income	Interest Income	Taxpayer	\$100.00	 

CONTINUE

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:

- Click **Add** to enter additional interest and dividend income.

TaxSlayer Pro Online displays the **1099 Description Schedule B** page:

1099 Description Schedule B

Choose the type of Interest or Dividend item you want to enter:

- ☐ Interest Income, Form 1099-INT, (including interest income < 1,500)
- ☐ Original Issue Discount, Form 1099-OID
- ☐ Dividend Income, Form 1099-DIV
- ☐ Seller Financed Interest Income

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:

Federal Tax Withheld (Box 4)

\$

Investment Expenses (Box 5)

\$

Foreign Tax Withheld (Box 6)

\$

Tax Exempt Interest (Box 8)

\$

Specified Private Activity Bond (Box 9)

\$

Market Discount (Box 10)

\$

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:

Tax Exempt Interest (Box 8)

\$

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:

Taxable State Interest Item

State *

- Please Select - ▼

Owner

Taxpayer ▼

Amount

\$

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:

Taxable State Interest

+ Add Taxable State Interest

State	Owner	Taxable Amount	
Georgia	Taxpayer	50.00	 

CONTINUE

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:

Interest Income

CANCEL

SAVE & ENTER ANOTHER

CONTINUE

Type of transaction
Interest Income

Payer's Name *

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:

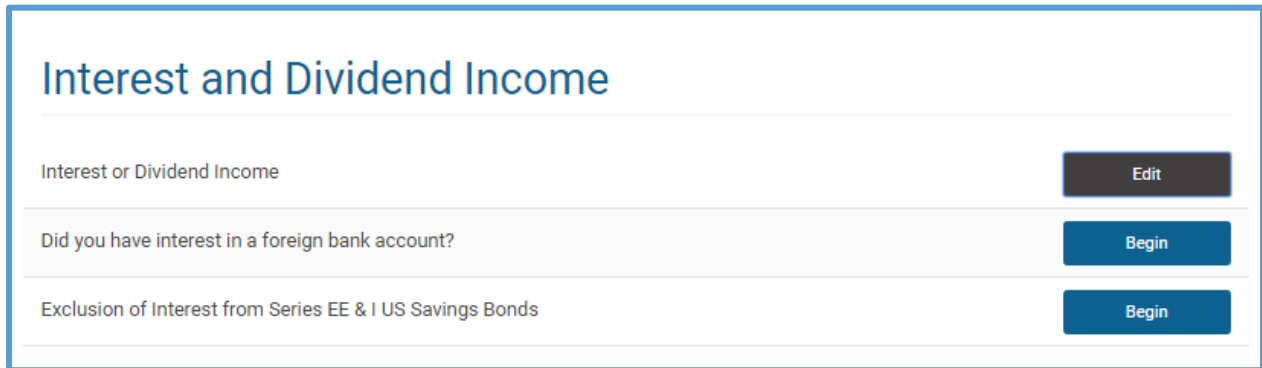
Interest and Dividends				
+ Add an Interest and Dividends				
Type	Payer	Owner	Amount	
Dividend Income	Dividend Payer	Taxpayer	\$125.00	 
Interest Income	Interest Payer	Taxpayer	\$150.00	 

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:

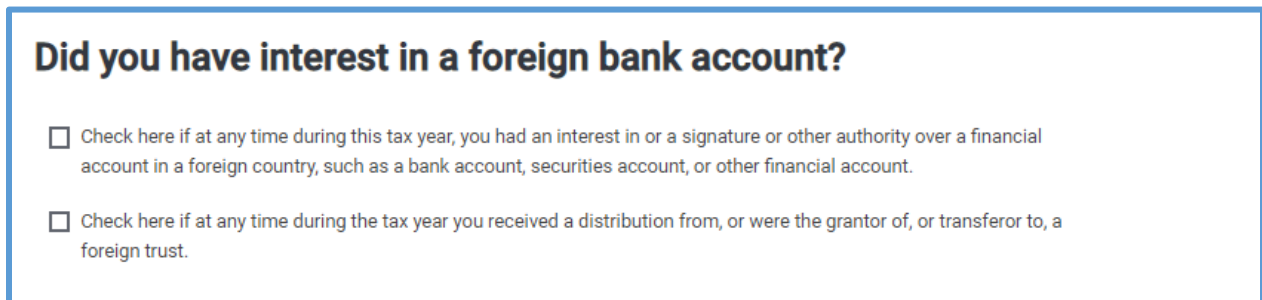


Interest and Dividend Income	
Interest or Dividend Income	Edit
Did you have interest in a foreign bank account?	Begin
Exclusion of Interest from Series EE & I US Savings Bonds	Begin

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:



Did you have interest in a foreign bank account?

☐ Check here if at any time during this tax year, you had an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account.

☐ Check here if at any time during the tax year you received a distribution from, or were the grantor of, or transferor to, a foreign trust.

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:

Interest and Dividend Income

Interest or Dividend Income	Edit
Did you have interest in a foreign bank account?	Edit
Exclusion of Interest from Series EE & I US Savings Bonds	Begin

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.

Schedule B - Forms 1099-INT, DIV, OID

Interest income, dividends, and distributions

 Print

EDIT

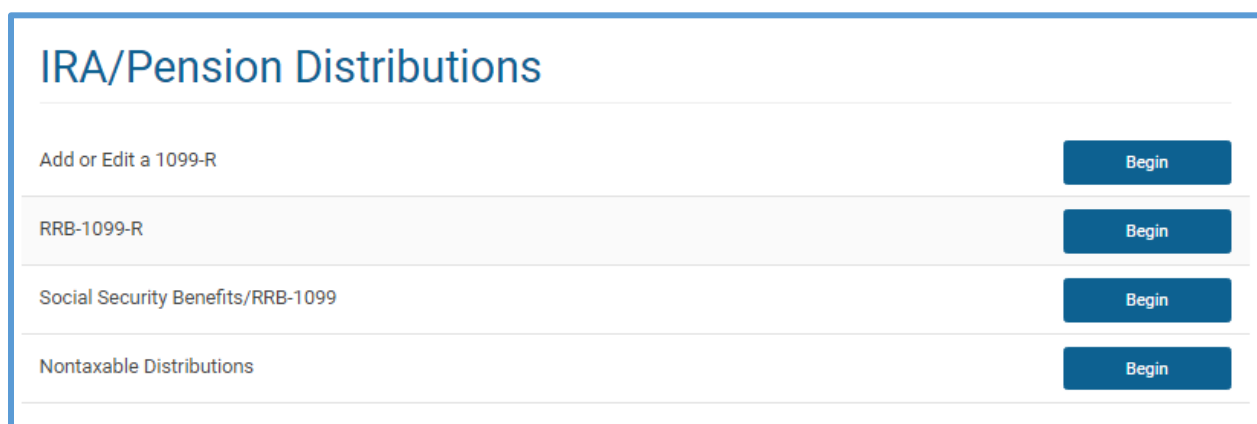
Entering Basic Retirement Income

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:



IRA/Pension Distributions	
Add or Edit a 1099-R	Begin
RRB-1099-R	Begin
Social Security Benefits/RRB-1099	Begin
Nontaxable Distributions	Begin

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:

Form 1099-R

CANCELSAVE & ENTER ANOTHERCONTINUE

☒ Check here if this is a standard 1099-R.
☐ Check here if this is a substitute 1099-R.

!

Only the amount entered in box 2a will be considered taxable.

Whose 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 *

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

\$

- 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

Payer Information

Payer's ID *

-

Payer Name *

☐ Check here if foreign address

Address (Number and Street) *

ZIP Code *

-

City, Town, or Post Office *

State *

- Please Select -

▼

3. Type the payer's information as shown on Form 1099-R.

Recipient Information

Recipient Information

☐ Check here if foreign address

Address (Number and Street) *

18 PINE STREET

ZIP Code *

30389

-

City, Town, or Post Office *

Atlanta

State *

Georgia



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 yearsNot 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:

Calculate Taxable Amount

Simplified Method Worksheet	BEGIN
Public Safety Officers Distribution	BEGIN

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**:

Simplified Method Worksheet

CANCEL

CONTINUE

Gross distribution amount (from 1099-R)
\$2,500.00

Plan cost at annuity start date
\$

Starting date of annuity *
MM DD YYYY

☐ Check here if this is a Joint or Survivor Annuity.

Death benefit exclusion
\$

Age of recipient at start date *
If joint or survivor annuity, add ages of recipients

Number of months paid in 2017 *

Amounts previously recovered
\$

Public Safety Officer Exclusion
\$

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**.

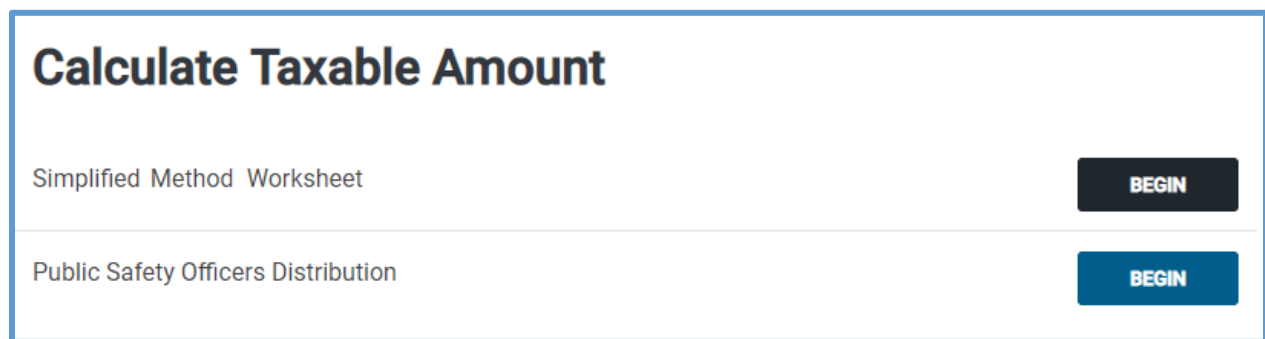
TIP: TaxSlayer Pro Online displays the calculated taxable amount from the Simplified Method worksheet in Box 2a. Select the **Worksheet** link to change or delete the worksheet.

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.

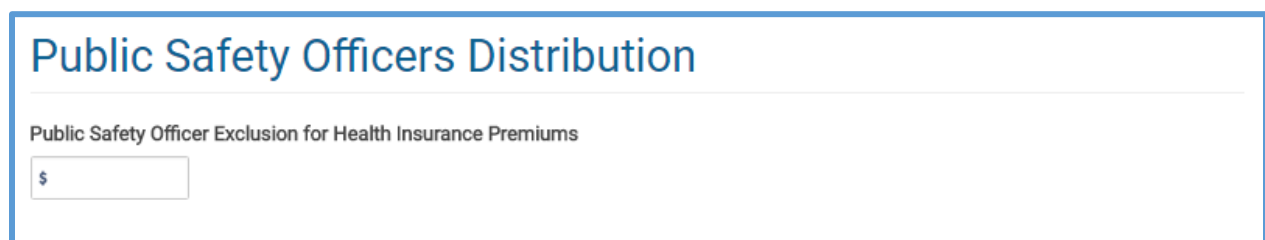
TaxSlayer Pro Online displays the **Calculate Taxable Amount** page:



Calculate Taxable Amount	
Simplified Method Worksheet	BEGIN
Public Safety Officers Distribution	BEGIN

2. Select **Begin** on the **Public Safety Officers Distribution** line.

TaxSlayer Pro Online displays the **Public Safety Officers Distribution** page:



Public Safety Officers Distribution
Public Safety Officer Exclusion for Health Insurance Premiums
\$ <input type="text"/>

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

Rollover or Disability

☐ Check here if all/part of the distribution was rolled over, and enter the rollover amount.

☐ Check here to report on Form 1040, Line **1h** (Distribution code must be a "3")

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

State/Local Information 1			
Tax W/H	13a State	13b ID	
\$	- Please Select - ▼		
14 State Distr	15 Local Tax	16 Locality Name	17 Local Distr
\$	\$		\$

State/Local Information 2			
Tax W/H	13a State	13b ID	
\$	- Please Select - ▼		
14 State Distr	15 Local Tax	16 Locality Name	17 Local Distr
\$	\$		\$

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:

 **We have some concerns with your Form 1099-R.**

The taxable amount entered is less than the gross distribution. If this distribution was part of an annuity plan where part of the total distribution is not taxable, then please select "Continue" below.

If you rolled over all or part of the gross distribution into another qualifying plan, please select "Cancel", check the box under "Rollover or Disability" and enter the rollover amount.

If these are correct, please select Continue below. If not correct, please select Cancel.

CANCELCONTINUE



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

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

Recipient Information

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:

Social Security SSA-1099/RRB-1099 Tier I

Taxpayer's Social Security Benefit (Generally Box 5 of Form SSA-1099)

\$|

Taxpayer's Federal Tax Withheld (Amount from Box 6 of Form SSA-1099)

\$

Taxpayer's Medicare Premiums

\$

Lump-Sum Payments

BEGIN WORKSHEET

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:

Social Security Lump-Sum Payment

Year the lump sum payment was made for

2015 ▼

Filing Status in Earlier Year *

- Please Select - ▼

SSA Payments received in Earlier Year

\$

Portion of this years SSA for Earlier year *

\$

Modified Adjusted Gross Income for Earlier Year *

\$

Taxable Benefits Reported in Earlier Year

\$

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:

SSA Lump-Sum Payment

+ Add a SSA Lump-Sum Payment

Year	Status	PRIOR SSA	SSA	Prior AGI	Taxable SSA
2020	Sin...	\$0.00	\$5,000.00	\$10,000.00	\$0.00

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:

Social Security SSA-1099/RRB-1099 Tier I

Taxpayer's Social Security Benefit (Generally Box 5 of Form SSA-1099)

\$|

Taxpayer's Federal Tax Withheld (Amount from Box 6 of Form SSA-1099)

\$

Taxpayer's Medicare Premiums

\$

Lump-Sum Payments

BEGIN WORKSHEET

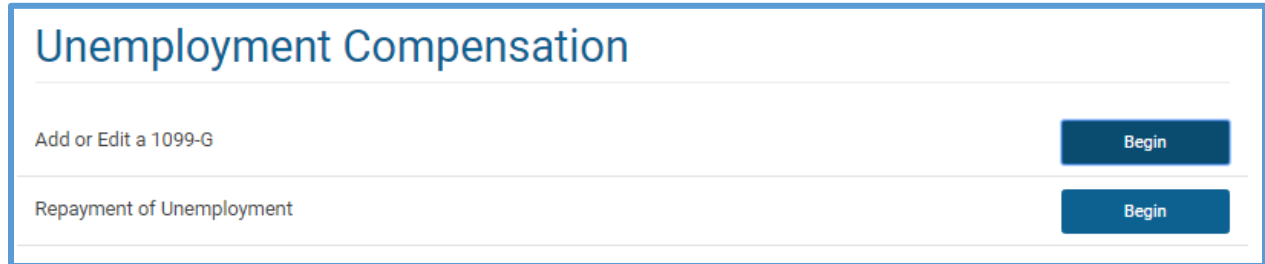
11. Click **Continue** to return to the **Income** page.

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:



Unemployment Compensation	
Add or Edit a 1099-G	Begin
Repayment of Unemployment	Begin

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	1099-G Information
Payer Federal ID number (or TIN) * <input type="text"/> - <input type="text"/>	Unemployment compensation * \$ <input type="text"/>
Payer's name * <input type="text"/>	Federal tax withheld \$ <input type="text"/>
Address (street number & name) * <input type="text"/>	Taxable grants * \$ <input type="text"/>
ZIP code * <input type="text"/> - <input type="text"/>	State Information
City, town, or post office * <input type="text"/>	State - Please Select - <input type="text"/>
State * - Please Select - <input type="text"/>	State ID no. <input type="text"/>
Phone () - <input type="text"/>	State tax withheld \$ <input type="text"/>

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:

Unemployment Statement

+ Add an Unemployment Statement

Recipient	Payer	Federal Withheld	State	State Withheld	
Taxpayer	GA DOL	\$0.00	N/A	\$0.00	 

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:

Unemployment Compensation

Add or Edit a 1099-G

Edit

Repayment of Unemployment

Begin


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:

Repayment of Unemployment



If you received unemployment benefits that were later denied, or you received *more* benefits than you or your spouse were entitled to, you'll have to repay those benefits. The amount will be subtracted from the amount of unemployment compensation entered on your 1099-G.

Repayment of Current Year Unemployment

Taxpayer's repayment of any current year unemployment payments

\$

Repayment of Prior Year Unemployment [Publication 525](#)

If the repayment was less than \$3,000 [click here](#) to go to your Schedule A and enter the amount on the line "Repayment under claim of right".
If the repayment was more than \$3,000 please look at Publication 525.

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:

Unemployment Compensation	
Add or Edit a 1099-G	Edit
Repayment of Unemployment	Edit

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.

Schedule E Supplemental Income and Loss from Rents and Royalties	BEGIN
Schedule D/Form 8949 Capital Gains and Losses	BEGIN
Schedule F Profit or Loss from Farming	BEGIN
Alimony Received Payments from a former spouse under a legal agreement	BEGIN
Other Income K-1 earnings, gambling winnings, cancellation of debt, etc.	BEGIN

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.

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

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.

Winnings Information

Gross Winnings *

\$

Gambling Losses (losses are limited to winnings entered above)



\$

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:

W-2G Gambling Winning

+ Add a W-2G Gambling Winning

Winner	Payer	Gross Winnings	Federal Tax Withheld	
Taxpayer	Winner Winner	\$100.00	\$0.00	 

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:

Other Compensation

Scholarships and Grants	BEGIN
Fringe Benefits	BEGIN
Household Employee Income	BEGIN
Prisoner Earned Income	BEGIN
Foreign Earned Compensation	BEGIN
Section 933 Excluded Income from Puerto Rico	BEGIN

2. Click the **Scholarships and Grants** line.

TaxSlayer Pro Online displays the **Scholarships and Grants** page:

Scholarships and Grants

Taxpayer's scholarships and grants

\$|

3. Type the amount of taxable scholarships and grants.
4. Click **Continue**.

TaxSlayer Pro Online displays the **Other Compensation** page:

Other Compensation	
Scholarships and Grants	BEGIN
Fringe Benefits	BEGIN
Household Employee Income	BEGIN
Prisoner Earned Income	BEGIN
Foreign Earned Compensation	BEGIN
Section 933 Excluded Income from Puerto Rico	BEGIN

5. Click **Continue** to return to the **Less Common Income** page.

Cancellation of Debt Form 1099-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.

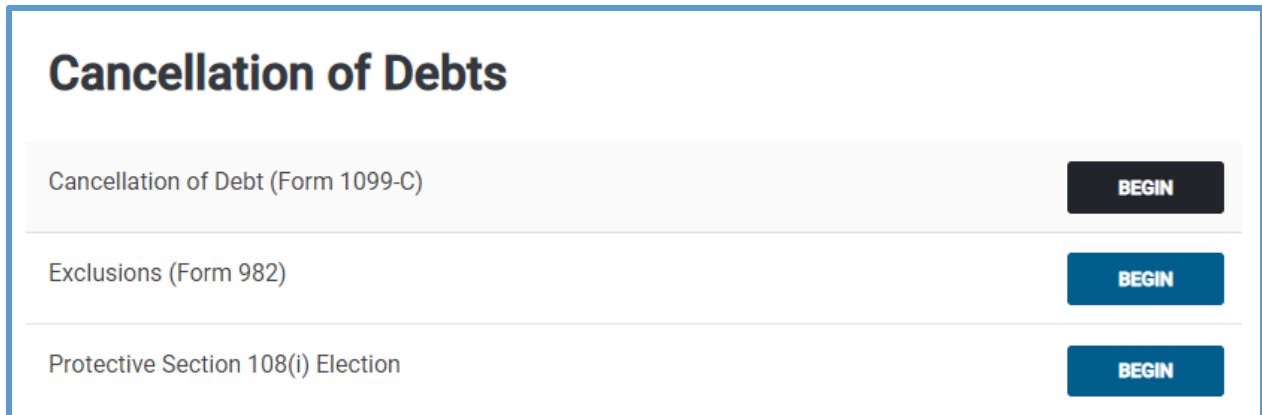
TIP: Make sure that you only prepare returns that are in scope of the VITA/TCE Programs (COD-Nonbusiness credit card debt and COD-

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.

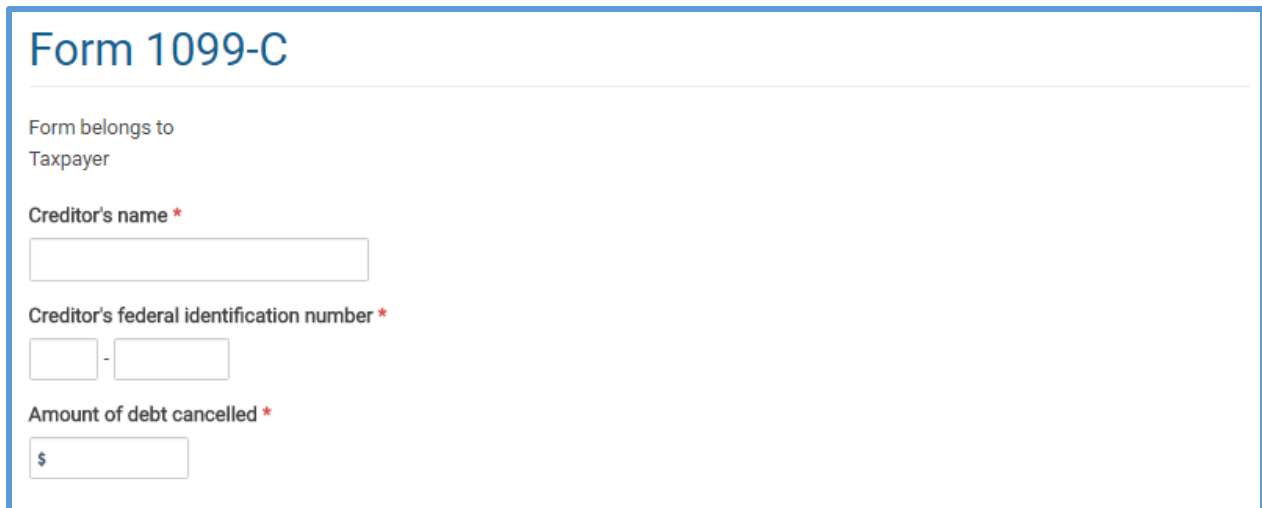
TaxSlayer Pro Online displays the **Cancellation of Debts** page:



Cancellation of Debts	
Cancellation of Debt (Form 1099-C)	BEGIN
Exclusions (Form 982)	BEGIN
Protective Section 108(i) Election	BEGIN

2. Click the **Cancellation of Debt (Form 1099-C)** line.

TaxSlayer Pro Online displays the **Form 1099-C** page:



Form 1099-C

Form belongs to
Taxpayer

Creditor's name *

Creditor's federal identification number *



Amount of debt cancelled *

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:

Form 1099C - Cancellation of Debt

+ Add a Form 1099C - Cancellation of Debt

Belongs To	Creditor	Debt Cancelled	
Taxpayer	Navy Fed Credit Union	\$5,000	 

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:

Cancellation of Debts

Cancellation of Debt (Form 1099-C)	BEGIN
Exclusions (Form 982)	BEGIN
Protective Section 108(i) Election	BEGIN

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:

Deductions

Adjustments Educator expenses, medical savings accounts, student loan interest, etc.	BEGIN
Standard Deduction Flat amount based on filing status	BEGIN
Itemized Deductions Charitable contributions, mortgage interest, property taxes, etc.	BEGIN
Credits Child and dependent care credit, education credits, mortgage interest credit, etc.	BEGIN
Qualified Business Income Deduction Deduct qualified income paid by a pass-through business and/or acquired qualified assets	BEGIN
Compare Deductions Compare your total deduction amounts	BEGIN

2. Click the **Adjustments** line.

TaxSlayer Pro Online displays the **Adjustments** landing page:

DEDUCTIONS

Adjustments

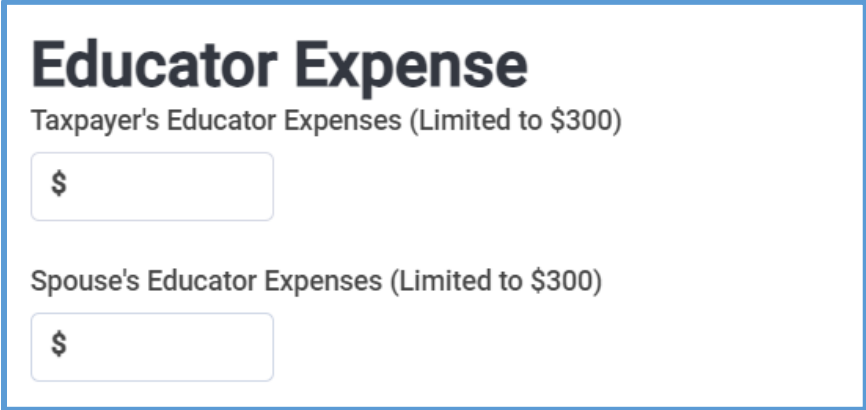
Archer MSAs and Long-Term Care Insurance Contracts Report contributions and distributions; usually reported to you on Form 1099-SA or Form 5498-SA	BEGIN
Educator Expenses Report unreimbursed business expenses (professional development, classroom supplies, etc.)	BEGIN
Armed Forces reservists, qualified 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:



Educator Expense

Taxpayer's Educator Expenses (Limited to \$300)

\$

Spouse's Educator Expenses (Limited to \$300)

\$

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:

Form 2106 Information

CANCEL

Personal Information

Form belongs to *

☐ SAMPLE RETURN

☐ SPOUSE RETURN

Occupation *

☒ Check here if you are a member of a Reserve Component of the United States, including National Guard and reserves, a performing artist, or qualifying government employee.

☐ Check here to Prorate Expenses for Minister/Clergy.

Other Expenses

Entry of auto expenses will be available once you "Continue"

Parking fees, tolls, and transportation, including train, bus, etc., that **did not** involve overnight travel or commuting to and from work

\$

Travel expense while away from home overnight, including lodging, airplane, car rental, etc. **Do not** include meals

\$

Business expenses not included above or in vehicle expenses. **Do not** include meals

\$

-
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:

Form 2106

Currently Editing: Taxpayer (with Occupation: Military Reservist)

2106 Information	Edit
View/Edit Vehicles	Begin
Vehicle Questions	Begin

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:

Form 2106 Vehicle Information

CANCEL

Vehicle Description *

Date the vehicle was placed in service *

MM ▼

DD ▼

YYYY ▼

Acquired before 09/28/2017? *

☐ Yes

☒ No

Total miles the vehicle was driven during 2018 *

Business miles driven *

Average daily roundtrip commuting distance

Commuting miles included in total miles above

Is your vehicle eligible for the Standard Mileage Rate? *

☐ Yes

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:

The screenshot shows the 'Form 2106 Vehicle' summary page. At the top, there is a title 'Form 2106 Vehicle' and a link 'Add Another Vehicle'. Below this is a section titled 'Description' with a blue header. Under the header, the text 'Vehicle: 'Truck' (driven 2000 total miles)' is displayed. To the right of this text are two icons: a pencil and a trash can. At the bottom right of the page is a blue button labeled 'CONTINUE'.

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:

The screenshot shows the 'Vehicle Questions' page. It has a title 'Vehicle Questions' in blue. Below the title are four checkboxes with corresponding text: 'Check here if you (or your spouse) have another vehicle available for personal use.', 'Check here if your vehicle was available for personal use during off-duty hours.', 'Check here if you have evidence to support your deduction.', and 'Check here if the evidence is written.'.

13. Read each check box carefully and select any that apply.

14. Click **Continue**.



TaxSlayer Pro Online displays the **Form 2106** summary page:

The screenshot shows the 'Form 2106' summary page. It has a title 'Form 2106' in blue. Below the title, it says 'Currently Editing: Taxpayer (with Occupation: Military Reservist)'. There are three rows, each with a label on the left and an 'Edit' button on the right: '2106 Information', 'View/Edit Vehicles', and 'Vehicle Questions'.

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.

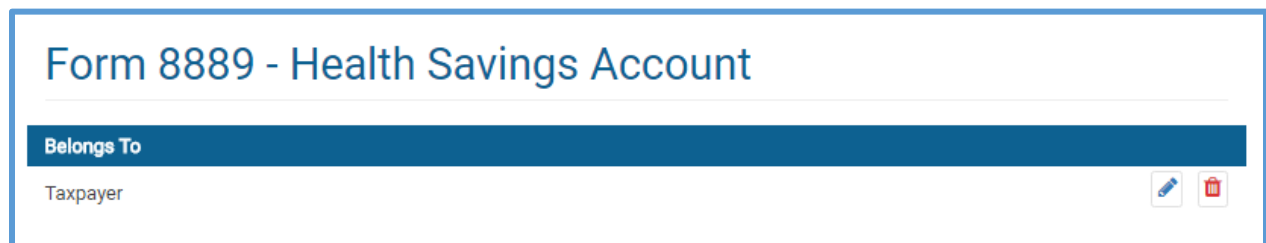
TaxSlayer Pro Online displays the **Form 8889 – Health Savings Account** page:

The screenshot shows the 'Form 8889 Health Savings Accounts' page in the TaxSlayer Pro Online interface. At the top, there are 'CANCEL' and 'CONTINUE' buttons. Below them, a link says 'See more instructions for completing this section [here](#).' The form identifies the user as the 'Taxpayer' and asks for the 'Type of coverage under high deductible health plan *'. A dropdown menu is set to 'Self-only'. The next section is 'HSA Contributions (Form 5498-SA)', with instructions to enter 2021 contributions (including 2022 contributions made for 2021) and to exclude employer contributions. There is a dollar amount input field. Below this is a dropdown for the 'Number of months during this tax year that you were an eligible individual', currently set to '- Please Select -'. The next section asks for the 'Amount you and your employer contributed to your Archer MSAs for 2021', with instructions to include family coverage and spouse's Archer MSA. This also has a dollar amount input field. Following is the 'Adjustment to Box 12 Code W' section, which is only required if the amount in box 12 of Form W-2 contains contributions for the previous or following tax year, with a dollar amount input field. The final section is 'Qualified HSA funding distributions from an IRA or Roth IRA', with a dollar amount input field.

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)

CANCELCONTINUE

 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**.

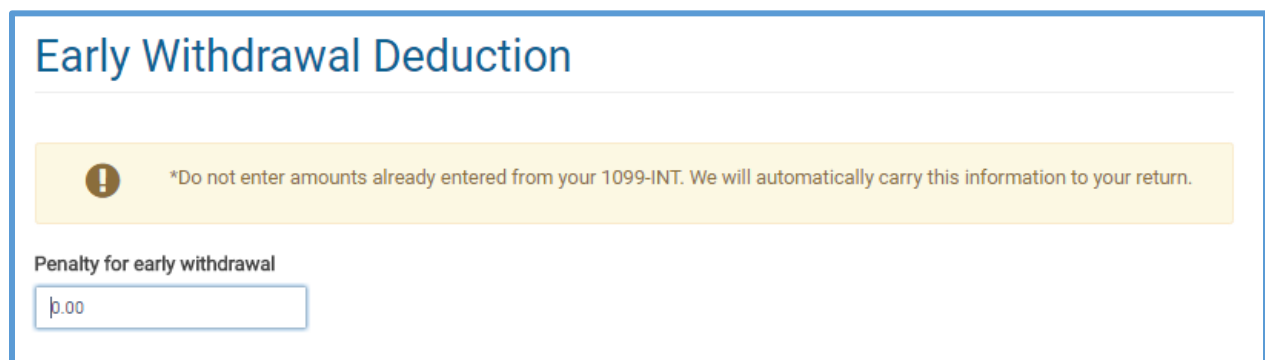
Entering an Adjustment for Penalty on Early Withdrawal of Savings

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:



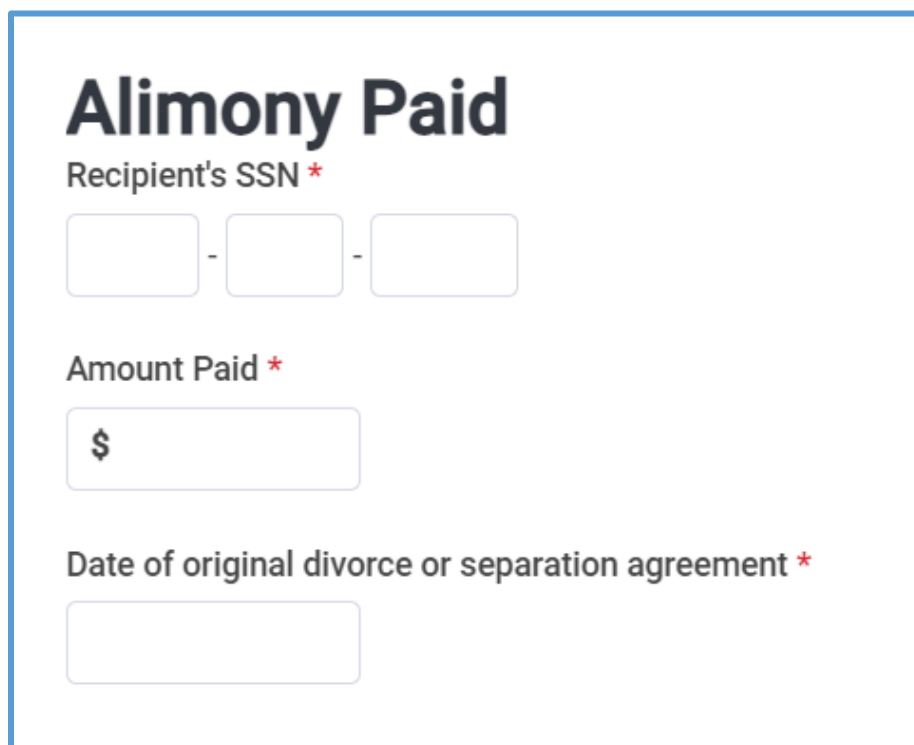
2. Type the amount of any penalty for early withdrawal of savings that you did **not** include when entering interest income.
3. Click **Continue**.

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:



The screenshot shows the 'Alimony Paid' form. At the top, the title 'Alimony Paid' is in a large, bold, dark blue font. Below it, the label 'Recipient's SSN *' is in a smaller, dark blue font. There are three input boxes for the SSN, separated by hyphens. Below that, the label 'Amount Paid *' is in a smaller, dark blue font. There is a single input box for the amount, with a dollar sign (\$) to its left. Below that, the label 'Date of original divorce or separation agreement *' is in a smaller, dark blue font. There is a single input box for the date.

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:

Alimony Paid

+ Alimony Paid

Recipient's SSN	Amount Paid	
xxx-xx-5555	2000.00	 

CONTINUE

- If the taxpayer paid alimony to more than one former spouse, click **Add** and enter the information for each recipient.
- 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:

- From the **Adjustments** page, click the **Student Loan Interest** line.

TaxSlayer Pro Online displays the **Student Loan Interest Deduction** page:

Student Loan Interest Deduction

Total interest paid on qualified student loans

\$

- Type the total amount of qualified student loan interest in the box.
- 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:

Other Adjustments

CANCEL**CONTINUE**

Add amounts for adjustments

Authorization Deduction for Reforestation Costs

\$

Trade Readjustment Allowance

\$

Jury Duty Pay

\$

Personal Property Rental Expenses

\$

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:

Deductions

Adjustments Educator expenses, medical savings accounts, student loan interest, etc.	BEGIN
Standard Deduction Flat amount based on filing status	BEGIN
Itemized Deductions Charitable contributions, mortgage interest, property taxes, etc.	BEGIN
Credits Child and dependent care credit, education credits, mortgage interest credit, etc.	BEGIN
Qualified Business Income Deduction Deduct qualified income paid by a pass-through business and/or acquired qualified assets	BEGIN
Compare Deductions Compare your total deduction amounts	BEGIN

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:

Compare Standard vs Itemized Deduction

Based on the information that you have entered, the following shows the comparison between the Standard Deduction vs. Itemized Deduction. We will automatically use the larger of the two deductions for your return. If you would like to, or are required to, use the Itemized Deductions you can select "Use Standard or Itemized Deduction" from the Itemized Deductions menu and select "Force to use Itemized Deduction."

Standard Deduction	Itemized Deductions
\$9,300.00	\$250.00

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:

Itemized Deductions	
Use Standard or Itemized Deduction	BEGIN
Medical and Dental Expenses	BEGIN
Mortgage Interest and Expenses	BEGIN
Taxes You Paid	BEGIN
Gifts to Charity	BEGIN
Unreimbursed Employee Business Expense	BEGIN
Job-Related Travel Expenses Form 2106	BEGIN
Miscellaneous Deductions	BEGIN
Less Common Deductions	BEGIN

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:

Schedule A - Taxes You Paid

[CANCEL](#)[CONTINUE](#)

State and Local Tax amounts are automatically pulled from W-2, 1099, W-2G, and Estimates.
PLEASE DO NOT include any of these amounts in any of the boxes below or your calculations will NOT be correct.

Taxes Paid

Additional State and Local Income Tax
(DO NOT INCLUDE AMOUNTS FROM W-2, 1099, W-2G or Estimates.)

\$

State and Local Sales Tax Paid

[ADD SALES TAX WORKSHEET](#)

Prior Year 4th Quarter State Estimates paid after 12/31/2021

\$

☐ I want to deduct my state sales taxes instead of my state income taxes.

You may want to do this if your state sales tax amount is more than your state income taxes withheld/paid in 2021 or if your state does not have income taxes.

Real Estate Taxes (Non-Business Property)
Real Estate Taxes entered here will overwrite any real estate taxes paid already entered.

\$

Personal Property (ex: Car Registration)
Enter in your Ad Valorem tax, exclude amount paid for actual car tags.

\$

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:

The screenshot shows the 'Sales Tax Deduction' page in TaxSlayer Pro Online. At the top, a light blue banner contains an information icon and text: 'To calculate your sales tax deduction, complete the information below. If you would rather enter the deduction amount from your receipts, select the 'Override' button below.' A dark blue 'OVERRIDE' button is on the right. Below the banner, the 'ZIP Code *' field is empty. The 'Number Of days lived in ZIP Code. *' field is also empty. A second light blue banner contains an information icon and text: 'Leave rates blank for the system to use default rates. Enter a value to override your percentage.' Below this, the 'Local general sales tax percent' and 'State general sales tax percent' fields are empty. A yellow banner contains a warning icon and text: 'The calculation using the IRS tables do not take into account sales tax paid on large purchases such as a car or boat. Enter the sales tax amount paid on single purchases such as cars, trucks, RV's, and boats.' At the bottom, the 'General sales taxes paid' field is empty, with a dollar sign icon to its left.

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:

Sales Taxes Deduction

[+ Add a Sales Taxes Deduction](#)

State	ZIP code	Number of days in the locality	
Georgia	30809	365	 

CONTINUE

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.

Modified Adjusted Gross Income

Calculated Modified Adjusted Gross Income (MAGI)

\$45450

Amount to Adjust the Calculated MAGI by

\$

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:

Schedule A Interest: Mortgage Interest and Expenses	
Home Mortgage Loan(s) used to Buy/Build/Improve Home	EDIT
Mortgage Interest Reported on - Form 1098	BEGIN
Mortgage Interest Not Reported on - Form 1098	BEGIN
Mortgage Points Not Reported on - Form 1098	BEGIN

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:

Home Mortgage Loan(s) used to Buy/Build/Improve Home

Did you use all of your home mortgage loan(s) to buy, build or improve your home? *

☐ Yes

☒ No

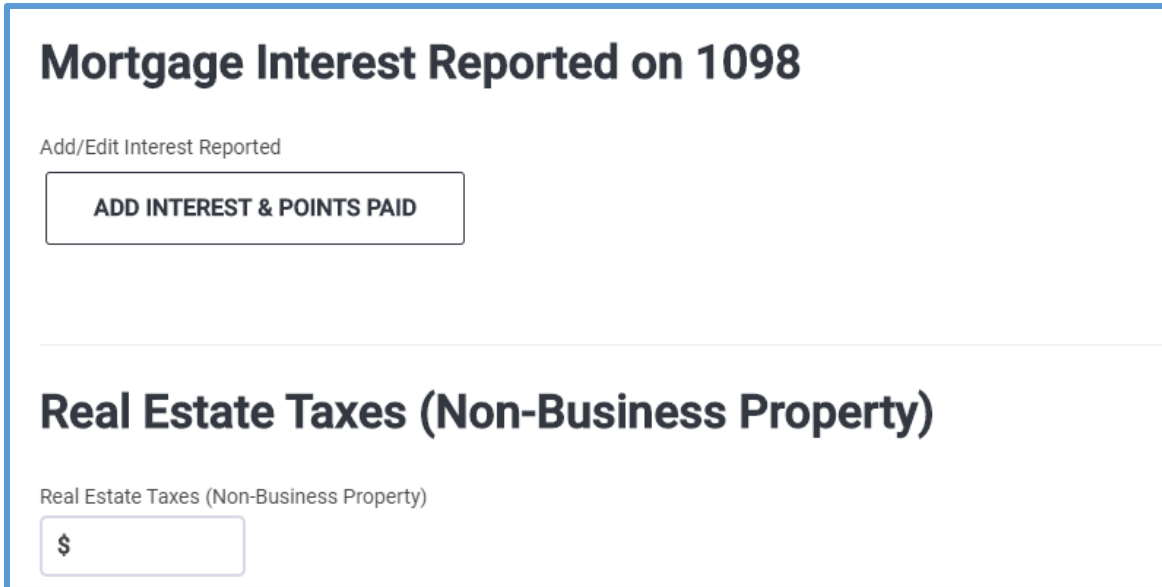
3. Read the question and select the appropriate answer.
4. Click **CONTINUE**.

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.

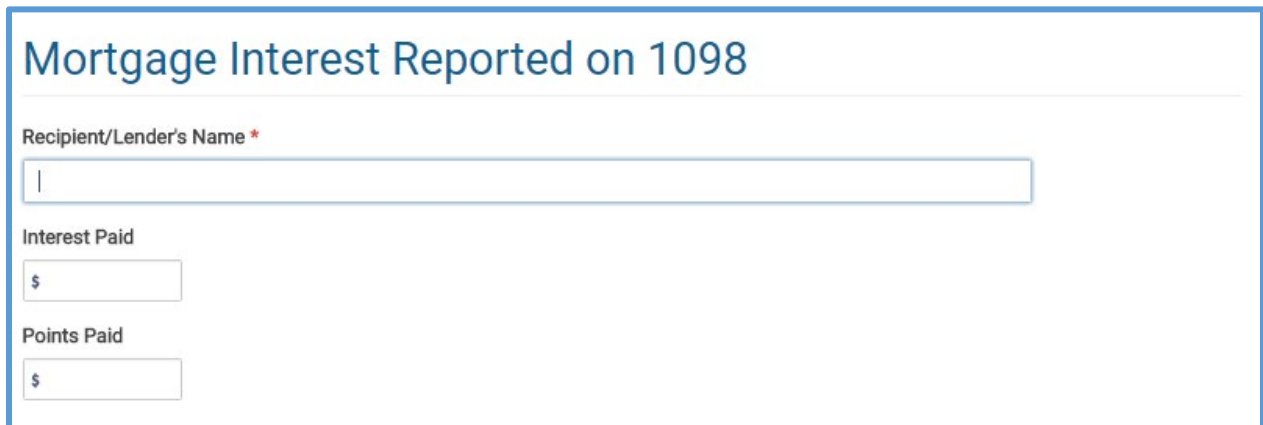
TaxSlayer Pro Online displays the **Mortgage Interest Reported on 1098** page:



The screenshot shows the 'Mortgage Interest Reported on 1098' page. At the top, there is a link 'Add/Edit Interest Reported' and a button labeled 'ADD INTEREST & POINTS PAID'. Below this is a section titled 'Real Estate Taxes (Non-Business Property)' with a sub-label 'Real Estate Taxes (Non-Business Property)' and a text input field starting with a dollar sign '\$'.

4. Click **Add Interest and Points Paid**.

TaxSlayer Pro Online displays the **Mortgage Interest Reported on 1098** page:



The screenshot shows the 'Mortgage Interest Reported on 1098' page with input fields. The title 'Mortgage Interest Reported on 1098' is in blue. Below it is a form with the following fields: 'Recipient/Lender's Name' with a red asterisk and a text input field; 'Interest Paid' with a text input field starting with a dollar sign '\$'; and 'Points Paid' with a text input field starting with a dollar sign '\$'.



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:

Schedule A Interest

[+ Add a Schedule A Interest](#)

Recipient/Lender's Name	Amount	
Truist	\$6,000.00	 

[CONTINUE](#)

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:

Mortgage Interest Reported on 1098

Add/Edit Interest Reported

[EDIT INTEREST & POINTS PAID](#)

Real Estate Taxes (Non-Business Property)

Real Estate Taxes (Non-Business Property)

\$|

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:

Schedule A Interest: Mortgage Interest and Expenses	
Home Mortgage Loan(s) used to Buy/Build/Improve Home	EDIT
Mortgage Interest Reported on - Form 1098	BEGIN
Mortgage Interest Not Reported on - Form 1098	BEGIN
Mortgage Points Not Reported on - Form 1098	BEGIN

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:

Points Not Reported On Form 1098	
If you did not receive a Form 1098 please use the following section to report your mortgage points.	
Total amortizable points deductible this year	
\$	
Other points NOT reported on Form 1098	
\$	

17. Type the amounts in the appropriate boxes.
18. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule A Interest** page:

Schedule A Interest: Mortgage Interest and Expenses

Home Mortgage Loan(s) used to Buy/Build/Improve Home

EDIT

Mortgage Interest Reported on - Form 1098

BEGIN

Mortgage Interest Not Reported on - Form 1098

BEGIN

Mortgage Points Not Reported on - Form 1098

BEGIN

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:

Gifts to Charity

Cash Gifts to Charity

BEGIN

Non-Cash Gifts to Charity

BEGIN

Non-Cash Donations (more than \$500)

BEGIN

Limitation on Charitable Contributions Deduction

BEGIN

Declaration of Appraiser

BEGIN

Contributions of Motor Vehicles, Boats, and Airplanes

BEGIN

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:

Charity Cash Contributions

CANCEL

CONTINUE

Do you want to group all your cash contributions into one single entry? Select the "Override" button below.

Override

Charity Name *

Description

Date of Donation *

MM

DD

YYYY

Amount Donated *

\$

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:

Gifts to Charity

Cash Gifts to Charity

BEGIN

Non-Cash Gifts to Charity

BEGIN

Non-Cash Donations (more than \$500)

BEGIN

Limitation on Charitable Contributions Deduction

BEGIN

Declaration of Appraiser

BEGIN

Contributions of Motor Vehicles, Boats, and Airplanes

BEGIN

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:

Schedule A Gifts to Charity Information

Charitable Miles

Non-Cash Less Than or Equal to \$500

Carryover from Prior Year

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:

Gifts to Charity

Cash Gifts to Charity

BEGIN

Non-Cash Gifts to Charity

BEGIN

Non-Cash Donations (more than \$500)

BEGIN

Limitation on Charitable Contributions Deduction

BEGIN

Declaration of Appraiser

BEGIN

Contributions of Motor Vehicles, Boats, and Airplanes

BEGIN

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.

Itemized Deductions

Charitable contributions, mortgage interest, property taxes, etc.

 Print

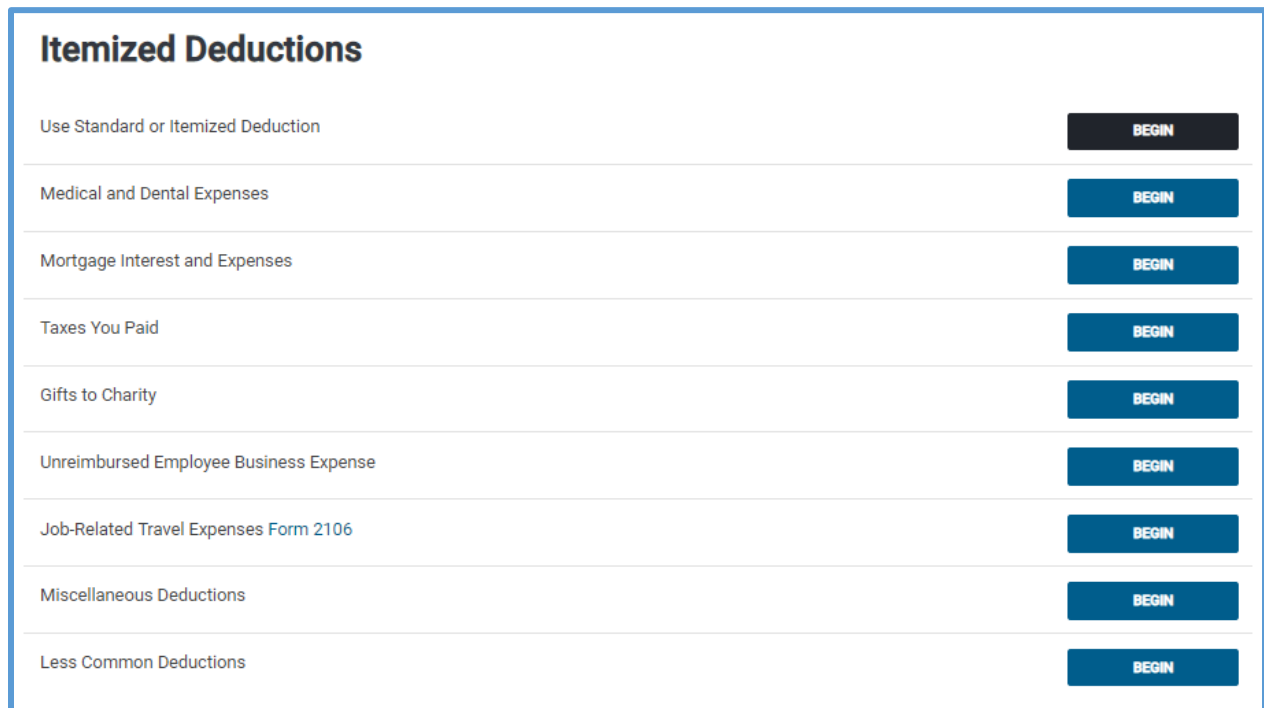
EDIT

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:



Itemized Deductions	
Use Standard or Itemized Deduction	BEGIN
Medical and Dental Expenses	BEGIN
Mortgage Interest and Expenses	BEGIN
Taxes You Paid	BEGIN
Gifts to Charity	BEGIN
Unreimbursed Employee Business Expense	BEGIN
Job-Related Travel Expenses Form 2106	BEGIN
Miscellaneous Deductions	BEGIN
Less Common Deductions	BEGIN

2. Click **Begin** on the **Use Standard or Itemized Deduction** line.

TaxSlayer Pro Online displays the **Force Itemized Deduction Instead of Standard Deduction** page:

Force Itemized Deduction Instead of Standard Deduction

Please choose one:

☒ Use better of standard deduction or itemized deduction.

☐ Force to use itemized deduction.

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.

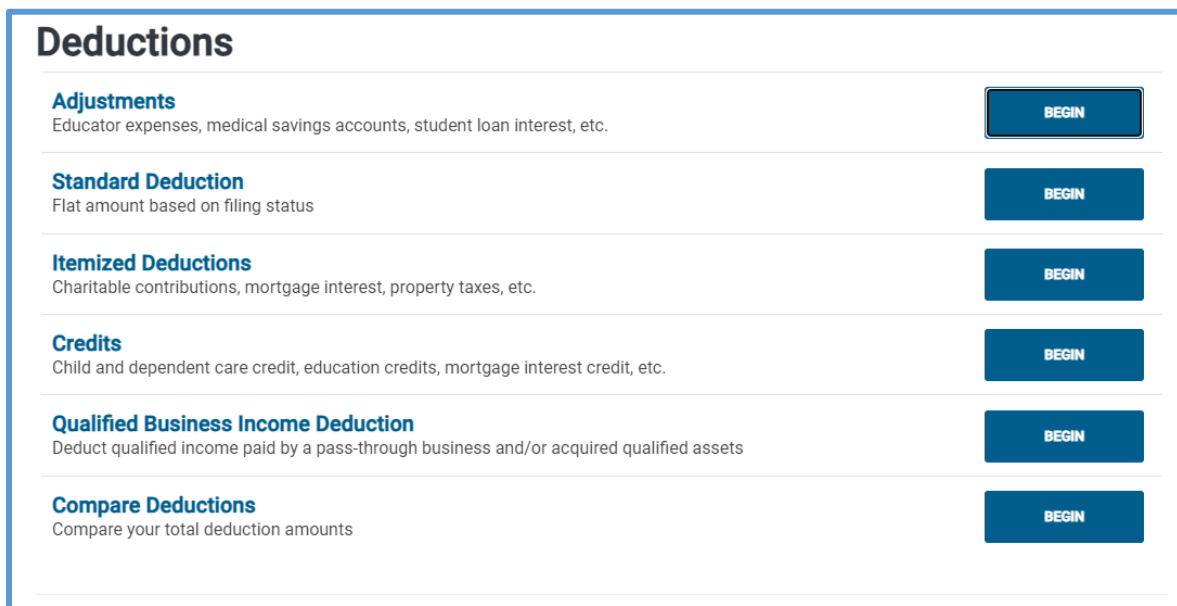
Basic Credits

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:



Deductions	
Adjustments Educator expenses, medical savings accounts, student loan interest, etc.	BEGIN
Standard Deduction Flat amount based on filing status	BEGIN
Itemized Deductions Charitable contributions, mortgage interest, property taxes, etc.	BEGIN
Credits Child and dependent care credit, education credits, mortgage interest credit, etc.	BEGIN
Qualified Business Income Deduction Deduct qualified income paid by a pass-through business and/or acquired qualified assets	BEGIN
Compare Deductions Compare your total deduction amounts	BEGIN

3. Click the **Credits Menu** line.

TaxSlayer Pro Online displays the **Credits** landing page:

Credits	
Foreign Tax Credits Used to offset income taxes paid to foreign countries by U.S. citizens and residents who earn income abroad	BEGIN
Child and Dependent Care Credit For expenses paid to care for a qualifying individual to enable you to work or actively look for work	BEGIN
Education Credits Credits for higher education expenses; usually reported to you on Form 1098-T	BEGIN
Credit for Qualified Retirement Savings Contributions Also known as the Saver's Credit	BEGIN
Residential Energy Credits Complete Form 5695 to claim the nonbusiness energy property credit and residential energy efficient property credit	BEGIN
Adoption Credit Figure your adoption credit and any employer-provided adoption benefits you can exclude from your income	BEGIN
Mortgage Interest Credit For those who were issued a qualified Mortgage Credit Certificate (MCC) by a state or local governmental unit or agency	BEGIN
Claiming Certain Credits after Disallowance Only for those who received a federal rejection related to the Earned Income Tax Credit, Child Tax Credit, or Advanced Child Tax Credit	BEGIN
EIC Check-list Due diligence form claiming EIC	BEGIN
Credit for the Elderly or the Disabled For taxpayers age 65 and older, or those who retired due to permanent or total disability and have taxable disability income	BEGIN
Alternative Motor Vehicle Credit For vehicles with fuel cells purchased in 2021 and placed in service in 2022	BEGIN
Alternative Fuel Vehicle Refueling Figure your credit for alternative fuel vehicle refueling property you placed in service during your tax year	BEGIN
Qualified Plug-In Electric Drive Motor Vehicle Credit Individuals who purchased a new vehicle that runs on electricity drawn from a plug-in rechargeable battery may be eligible	BEGIN
Small Employer Health Insurance Premiums Eligible small businesses use Form 8941 to figure the credit amount as part of the general business credit	BEGIN
Credit for Federal Tax Paid on Fuels Complete Form 4136 to claim the credit for federal tax paid on fuels.	BEGIN
Prior Year Minimum Tax Credit Form 8801	BEGIN
Qualified Electric Vehicle Credit Form 8834	BEGIN
Less Common Credits	BEGIN

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 and Dependent Care Expenses

[BACK](#)[CONTINUE](#)

Did you pay expenses for the care of a qualifying dependent or individual so that you or your spouse could work or actively look for work? *

☐ Yes

☐ No

[BACK](#)[CONTINUE](#)

Child Care Providers

2. Select **YES** and **click Continue**, if applicable.

TaxSlayer Pro Online displays the **Child Care Provider Information** page:

Care Provider Information

[BACK](#)[CONTINUE](#)

Let's get started with some basic information about the care provider.

Please select the provider's type of tax ID number *

☐ SSN/ITIN

☒ Employer identification number (EIN)

Provider's tax ID Number *

Provider's Name *

Provider's Address

Country *

United States ▼

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:

Recipient(s) of Care from We Do Child Care

BACK

CONTINUE

How much did you pay for the care provided to each individual?

Dependents

Select all dependents who received care from We Do Child Care and enter how much you paid for each individual.

☐ Dependent Single

[Don't see who you're looking for? Add a dependent here](#)

Qualified Individuals (Not Listed on Form 1040)

Select all qualifying individuals who received care from We Do Child Care and enter how much you paid for each individual.

[Don't see who you're looking for? Add/edit qualifying individuals](#)

7. Select the box next to the dependent who received child care from this provider.

TaxSlayer Pro Online displays the **Amount Paid** box:

Recipient(s) of Care from We Do Child Care

BACK

CONTINUE

How much did you pay for the care provided to each individual?

Dependents

Select all dependents who received care from We Do Child Care and enter how much you paid for each individual.

☒ Dependent Single

Amount Paid

\$6000

[Don't see who you're looking for? Add a dependent here](#)

Qualified Individuals (Not Listed on Form 1040)

Select all qualifying individuals who received care from We Do Child Care and enter how much you paid for each individual.

[Don't see who you're looking for? Add/edit qualifying individuals](#)

8. Type the expenses paid in the box.
9. When you finish, click **CONTINUE**.

TaxSlayer Pro Online displays the **Additional Care Providers** page:

Additional Care Providers

[BACK](#)[CONTINUE](#)

Did you have any additional care providers to report at this time? You may add more providers later if needed.

☐ Yes

☐ No

[BACK](#)[CONTINUE](#)



10. When you finish adding child care providers, click **No**.

11. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Child and Dependent Care Provider Summary**:

Child and Dependent Care Provider Summary

[+ Add a provider](#)

We Do Child Care 12-3456789	\$6,000	\$0	 
---------------------------------------	---------	-----	---

[BACK](#)[CONTINUE](#)

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:

Dependent Care Benefits

[BACK](#)[CONTINUE](#)

Did you receive any dependent care benefits from your employer that are not reported on your W-2?

☐ Yes

☒ No

[BACK](#)[CONTINUE](#)

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**.

Dependent Care Benefits

[BACK](#)[CONTINUE](#)

Please enter the amounts for the appropriate fields below.

* Do not include amounts from W-2s.

Employer-paid dependent care benefits

\$0.00

Forfeited employer-paid benefits

\$0.00

Carryover employer-paid benefits

\$0.00

Benefits received from sole proprietorship or partnership

\$0.00

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:

Disabled or Full-Time Student Exception

[BACK](#)[CONTINUE](#)

Were you or your spouse unable to work due to being disabled or enrolled as a full-time student?

☐ Yes

☐ No

[BACK](#)[CONTINUE](#)

15. If applicable, select **Yes** and click **Continue**.

16. Enter the number of months the taxpayer or spouse was unable to work.

Disabled or Full-Time Student Exception

[BACK](#)[CONTINUE](#)

Please enter how many months of 2022 that you were unable to work.



Months unable to work

[BACK](#)[CONTINUE](#)

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:

Child and Dependent Care Credit Summary

Tax Credit Amount \$900	\$3,000	\$0	 
-----------------------------------	---------	-----	---


[How is this number calculated?](#)

BACK

CONTINUE

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.

Child and Dependent Care Credit
For expenses paid to care for a qualifying individual to enable you to work or actively look for work
 Print

ADD/EDIT

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:

EDUCATION GUIDE

Select a Student

CANCEL **CONTINUE**

Please select the student you wish to explore education credits for:

☐ Dependent Single xxx-xx-5000

☐ Test Single 400-00-0451

+ Don't see who you're looking for? Add a dependent or spouse here

CANCEL **CONTINUE**

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:

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:

Add an Institution

CANCEL**CONTINUE**

Institution Name *

Country *

United States ▼

Address (Number and Street) *

ZIP Code

City, Town, or Post Office *

State *

Employer identification number (EIN) *

6. Enter the details of the educational institution.
7. Click **Continue**.

TaxSlayer Pro Online displays the **Form 1098-T Information** page:

Form 1098-T Information — Augusta University

CANCEL

CONTINUE

If you paid expenses for higher education in 2022, enter the amounts in the corresponding fields to determine the amount eligible for an education tax credit.

Tuition Paid

\$0.00

Grants

\$0.00

Other Qualified Expenses

\$0.00

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:

Institutions for Student

[+ Add Another Institution](#)

Augusta University

\$6,000.00



CONTINUE

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:

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:

We recommend the Lifetime Learning Credit

[CANCEL](#)[CONTINUE](#)

We've calculated each option you're eligible for to best reduce your taxes owed or maximize your refund. If you don't want to claim the Lifetime Learning Credit, you can make another selection below.

(Recommended)

No Credit or Deduction

Don't claim a credit or deduction

\$0

Lifetime Learning Credit

Claim the Lifetime Learning Credit.

Decrease the amount I owe by/Increase my refund by

\$0

American Opportunity Tax Credit

Not available to claim.

[CANCEL](#)[CONTINUE](#)

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:

Retirement Savings Contributions Credits

CANCEL**CONTINUE**

TAXPAYER

Enter Any Qualifying Retirement Distributions in 2016, or 2015 (current year distributions reported are already included)

\$|

Enter as a negative number any current year distributions reported as income that should not be included on Line 4 of the 8880. For example, Military Retirement should be entered as a negative number here.

\$

Enter Any Current Year Traditional or ROTH IRA Contributions (Do not re-enter Traditional IRA contributions already reported in the IRA Deduction menu)

\$

Elective Deferrals from W-2(s)

\$0.00

Enter any Elective Deferrals to a 401(k) or other Qualified Plan not reported on a W-2

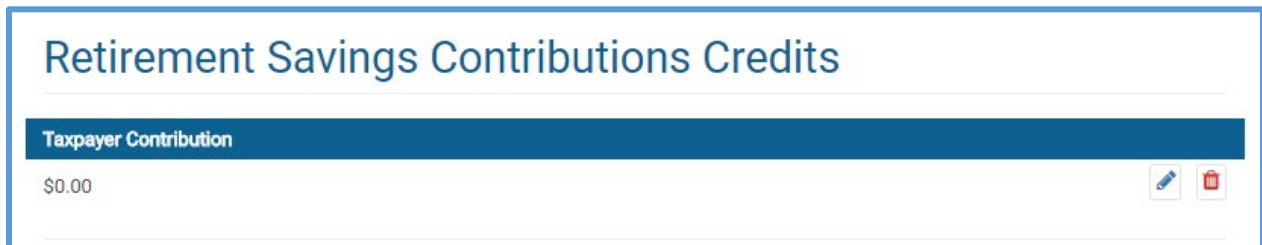
\$

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:

Information to Claim Certain Refundable Credits After Disallowance

Claim EIC After Disallowance **BEGIN**

Claim CTC/ACTC After Disallowance **BEGIN**

CONTINUE

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:

Claiming Certain Credits after Disallowance

Information to Claim Certain Credits after Disallowance **BEGIN**

Not Eligible for EIC **BEGIN**

CONTINUE

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:

Information to Claim Certain Refundable Credits After Disallowance

Claim EIC After Disallowance	BEGIN
Claim CTC/ACTC After Disallowance	BEGIN

5. Click the **Claim EIC After Disallowance** line.

TaxSlayer Pro Online displays the **Form 8862 – EIC – Earned Income Credit** page:

Form 8862 - EIC - Earned Income Credit

CANCELCONTINUE

CAUTION!
Only complete this form if your Earned Income Credit was disallowed in a previous year, or you have received a reject code of F1040-164-01.

☐ Check here if the only reason your EIC was reduced or disallowed in the earlier year was because you incorrectly reported your earned income or investment income.

☐ Child One - Child TaxReturn

Number of days this child lived with you in the US during the tax year *

6. Do one of the following:


- 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:


Form 8862 - EIC - Earned Income Credit

CANCEL

CONTINUE

**CAUTION!**
Only complete this form if your Earned Income Credit was disallowed in a previous year, or you have received a reject code of F1040-164-01.

☒ Check here if the only reason your EIC was reduced or disallowed in the earlier year was because you incorrectly reported your earned income or investment income.

Based upon your answers, you have completed Form 8862.

b. Select a qualifying child.

TaxSlayer Pro Online displays the **Form 8862** information to be completed for the qualifying child:

☐ Child One - child one CHECKLIST

Number of days this child lived with you in the US during the tax year *

☐ Child One died during this tax year.

Enter the address where you and the child lived together during the tax year.
[Use my main address](#)

Address (Number and Street)

ZIP Code

City, Town, or Post Office

State

☐ Check here if any other person (except your spouse, if filing jointly, and your dependents under age 19) lived with child one or child two for more than half the year, and then enter their information below.

- 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:

Form 8862 - EIC - Earned Income Credit

Income Was Misrepresented

Yes

8. Click **Continue**.

TaxSlayer Pro Online displays the **Claiming Certain Credits after Disallowance** page:

Claiming Certain Credits after Disallowance

Information to Claim Certain Credits after Disallowance

BEGIN

Not Eligible for EIC

BEGIN

CONTINUE

Not Eligible

- 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:

Not Eligible for EIC

☐ Check here if this return is NOT eligible to receive the Earned Income Tax Credit (EITC)

☐ I understand that checking the box above determines whether this return might be able to receive the Earned Income Tax Credit (EITC), and if the box is checked this return will not receive EITC.

- Select both the check boxes after reading them carefully to determine that the taxpayer agrees to not claim earned income credit on this return.
- 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:

Form 1116 - Foreign Tax Credit

In order to claim a credit for any foreign taxes paid without filing Form 1116, you must answer Yes to all of the following questions:

- Is all of your gross foreign source income Passive Category Income such as interest and dividends?
- Was all of that interest and dividend income reported to you on Form 1099-INT, Form 1099-DIV, or Schedule K-1?
- If you had dividend income from shares of stock, did you hold those shares for at least 16 days?
- Is the total of your foreign taxes less than or equal to \$300
- Were all of your taxes:
 - A. Legally owed and not eligible for a refund; AND
 - B. Paid to countries that are recognized by the United States; AND
 - C. Paid to countries that do not support terrorism?

Foreign tax credit not over \$300

 Note: Only enter an amount if you answered Yes to all the questions above.

If you are needing to file Form 1116 because you are not making the election above, complete Form 1116 Foreign Tax Credit.

[Go to Form 1116](#)

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:

Other Taxes	
Self-Employment Tax Reported on Schedule SE	BEGIN
Alternative Minimum Tax Reported on Form 6251	BEGIN
Tax on Unreported Tip Income Reported on Form 4137	BEGIN
Recapture of Investment Credit Reported on Form 4255	BEGIN
Tax on Early Distribution Reported on Form 5329	BEGIN
Household Employment Tax Schedule H	BEGIN
Repayment of First-Time Homebuyer Credit Reported on Form 5405	BEGIN
Tax For Certain Children Who Have Unearned Income Reported on Form 8615	BEGIN
Child's Interest/Dividend Earnings Reported on Form 8814	BEGIN
Recapture of Federal Mortgage Subsidy Reported on Form 8828	BEGIN
Net Investment Income Tax (Individuals, Estates, & Trusts) Reported on Form 8960	BEGIN
Uncollected Social Security and Medicare Tax on Wages Reported on Form 8919	BEGIN

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:

Form 4137 Social Security and Medicare Tax on Unreported Tip Income

CANCEL

CONTINUE

Form belongs to
Test Single

Total cash and charge tips you **received** including unreported tips
\$0.00

Total cash and charge tips **reported** to your employer and included on Form(s) W-2
\$0.00

Cash and charge tips you received but did not report to your employer because the total was less than \$20 in a calendar month

Tips received as a Federal, State or Local Government Employee

CANCEL

CONTINUE



-
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:

Tax on Unreported Tip Income (Form 4137)

Belongs To

Taxpayer



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 Distributions 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.

☒ Check here to claim a waiver on your additional tax for failure to take a Required Minimum Distribution.

Waiver for Additional Tax

\$



Explanation for Waiver

TaxSlayer Pro Online displays the **Tax on Early Distribution (Form 5329)** page:

Tax on Early Distribution (Form 5329)

Belongs To

Taxpayer



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:

Form 5405 - First-Time Homebuyer Credit and Repayment

 Married Filing Joint customers are required to file two separate 5405 forms with individual repayment amounts.

Form belongs to
Taxpayer

Did the home stop being your primary residence? *

☒ Yes


☐ No

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:

Form 5405 - First-Time Homebuyer Credit and Repayment

 Married Filing Joint customers are required to file two separate 5405 forms with individual repayment amounts.

Form belongs to
Taxpayer

Did the home stop being your primary residence? *

☒ Yes
☐ No

Disposition or Change of Main Home

Date Ceased to be Main Home *

MM ▼ DD ▼ YYYY ▼

Are you (or your spouse if married) a member of the uniformed services, Foreign Service, or an employee of the intelligence community and the home was sold or ceased to be the main home in connection with Government orders for qualified official extended duty service?

☐ Yes
☐ No

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:

Form belongs to *
☒ Taxpayer Sample
☐ Spouse Sample

Did the home stop being your primary residence during the current year? *
☐ Yes
☒ No

Repayment of Credit
☐ Check here if you purchased your home in 2008.

 For Jointly filed tax returns, you must enter yours and your spouse's portion of the credit separately. For example, if you received the \$7500 credit on a joint tax return. Each Spouse would be responsible for 1/2 of the credit and repayment amount. Enter \$3750 in the credit received ($1/2 * 7500$).

Please enter **1/2 of the full** credit amount you claimed on Form 5405 for 2008. (This amount would have been 10% of the purchase price up to either \$7,500 or \$8,000) *

Enter **1/2 of 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 override the amount that is already calculated, enter that amount here

*[Click here](#) to visit the IRS First Time Homebuyer credit account look-up tool.

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:



The screenshot shows the 'Form 8814 Child's Interest and Dividends' page. At the top, it says 'Select an Eligible Child *' with a dropdown menu showing '- Please Select -'. Below this are five input fields, each with a dollar sign icon and a label: 'Child's interest', 'Child's tax-exempt interest', 'Child's ordinary dividends', 'Child's qualified dividends', and '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:

Form 8814 Report Childs Interest and Dividend

+ Add a Form 8814 Report Child's Interest and Dividend

Child SSN	Taxable Interest	Taxable Dividend	
xxx-xx-5858	\$600.00	\$0.00	 
<div>CONTINUE</div>			

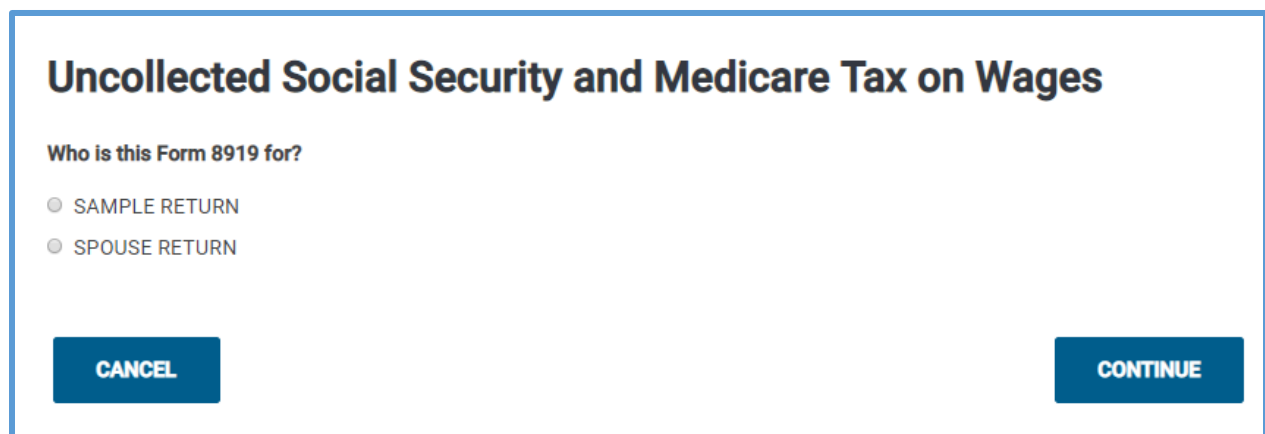
5. If the taxpayer has more children for which you need to enter interest and dividends, click **Add** and use the same steps to add each child's investment income.
6. When you finish adding children's investment income, click **Continue**.

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:



Uncollected Social Security and Medicare Tax on Wages

Who is this Form 8919 for?

☐ SAMPLE RETURN

☐ SPOUSE RETURN

CANCEL **CONTINUE**

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:

Uncollected Social Security and Medicare Tax on Wages

[+ Add New Form 8919](#)

Owner	Wages	
Taxpayer	4000.00	 
<div>CONTINUE</div>		

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:

Payments and Estimates	
Amount Paid with Extension Amount paid with Form 4868	BEGIN
Apply Overpayment to Next Year's Taxes Option to apply all or part of your refund to next year's taxes	BEGIN
Federal Estimated Tax Payments Federal tax payments already made for 2022	BEGIN
IRC 1341 Repayment Amount Claim of Right related tax credit	BEGIN
Other Federal Withholdings Federal withholdings you haven't already entered	BEGIN
Other State Withholdings State withholdings you haven't already entered	BEGIN
State Estimated Payments State tax payments already made for 2022	BEGIN
Underpayment of Estimated Tax Determine if you owe a penalty for underpayment of estimated tax and next steps	BEGIN
Vouchers for 2023 Estimated Tax Payments Print vouchers for estimated tax payments	BEGIN
BACK	CONTINUE

2. Click the **Federal Estimated Tax Payments** line.

TaxSlayer Pro Online displays the **Payments – Estimated Payments** page:

Payments - Estimated Payments

Amount Applied from Prior Year Refund

\$|

Estimated Federal Tax Paid(4/15/20)

\$

Estimated Federal Tax Paid(6/15/20)

\$

Estimated Federal Tax Paid(9/15/20)

\$

Estimated Federal Tax Paid(1/15/20)



\$

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:

Payments and Estimates

Total Payments	Prior Year
\$400.00	\$0.00



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:

Payments - State Estimated Payments

Amount Applied from Prior Year Refund

\$

Estimated State Tax Paid on(4/15/20)

\$

Estimated State Tax Paid on(6/15/20)

\$

Estimated State Tax Paid on(9/15/20)

\$

Estimated State Tax Paid ON or BEFORE(12/31/20)

\$

Estimated State Tax Paid AFTER(12/31/20)

\$

State Name *



- Please Select - ▼

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:

State Estimated Payment

+ Add a State Estimated Payment

State	Total Payments	Prior Year	
GA	\$0.00	\$900.00	 

CONTINUE

- 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.
- 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:

- Click the **Other Federal Withholdings** line.

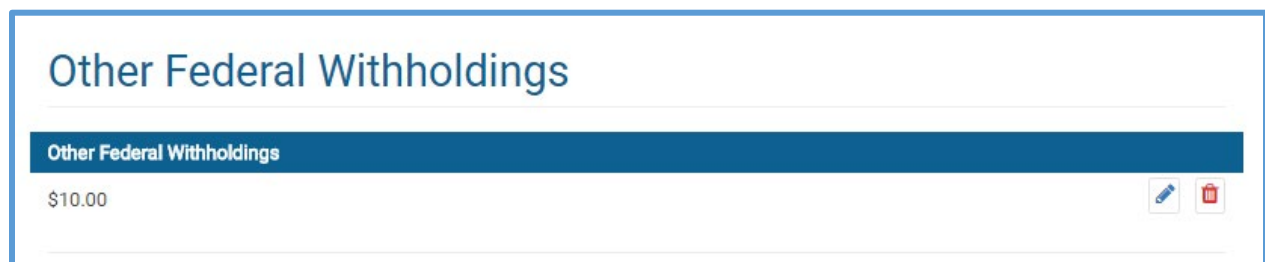
TaxSlayer Pro Online displays the **Other Federal Withholdings** page:



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:

Estimated Payments for Next Year

First Quarter(April 15, 20)

\$

Second Quarter(June 15, 20)

\$

Third Quarter(September 15, 20)

\$

Fourth Quarter(January 15, 20)

\$

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:

Miscellaneous Forms	
Explanations Preparer notes, election explanations, and regulatory explanations	BEGIN
Form 1310 Claim a Refund Due to a Deceased Taxpayer	BEGIN
Form 2848 Power of Attorney and Declaration of Representative	BEGIN
Form 4868 Application for Extension	BEGIN
Form 8379 Injured Spouse	BEGIN
Form 8857 Innocent Spouse	BEGIN
Form 8938 Statement of Specified Foreign Financial Assets	BEGIN
Form 8958 Married Filing Separately Allocations	BEGIN
Form 9465 Installment Agreement Request	BEGIN
Form W-7 Application for ITIN	BEGIN
IRS Identification PIN PIN needed if you were issued a CP01A notice from the IRS	BEGIN

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:

IRS Identity Protection Pin

If you have received a notice from the IRS containing an Identity Theft Pin please enter the Pin here in order to ensure that your tax return is processed without delay.

SAMPLE RETURN (XXX-XX-0102)

SPOUSE RETURN (XXX-XX-1122)



CHILD ONE RETURN (XXX-XX-0525)

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:

IRS Identity Protection Pin

+ Add an IRS Identity Protection Pin

Name	SSN	IRS Identity Protection Pin	
Test TaxReturn	(XXX-XX-8888)	XXX654	 

CONTINUE

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**.

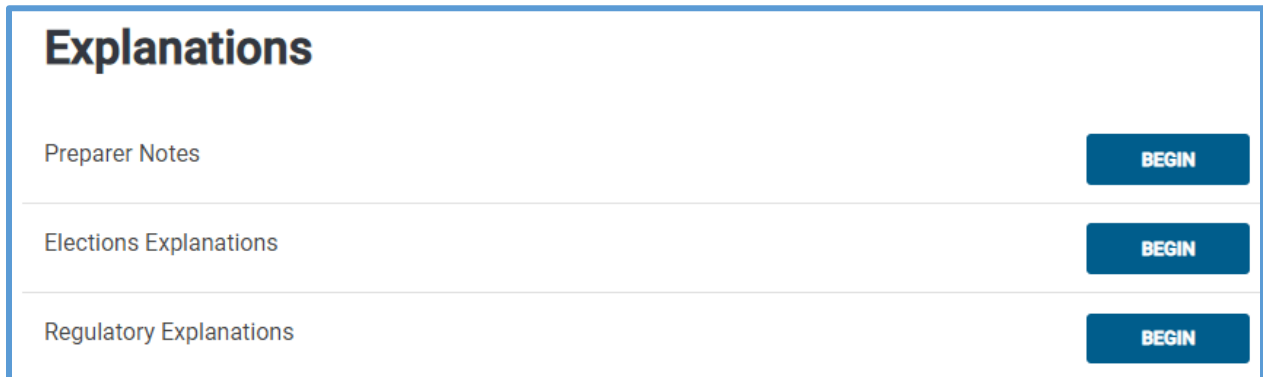
NOTE: You can also click **Miscellaneous Forms** in the left navigation panel.

TaxSlayer Pro Online displays the **Miscellaneous Forms** page:

Miscellaneous Forms	
Explanations Preparer notes, election explanations, and regulatory explanations	BEGIN
Form 1310 Claim a Refund Due to a Deceased Taxpayer	BEGIN
Form 2848 Power of Attorney and Declaration of Representative	BEGIN
Form 4868 Application for Extension	BEGIN
Form 8379 Injured Spouse	BEGIN
Form 8857 Innocent Spouse	BEGIN
Form 8938 Statement of Specified Foreign Financial Assets	BEGIN
Form 8958 Married Filing Separately Allocations	BEGIN
Form 9465 Installment Agreement Request	BEGIN
Form W-7 Application for ITIN	BEGIN
IRS Identification PIN PIN needed if you were issued a CP01A notice from the IRS	BEGIN

2. Click the **Explanations** line.

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

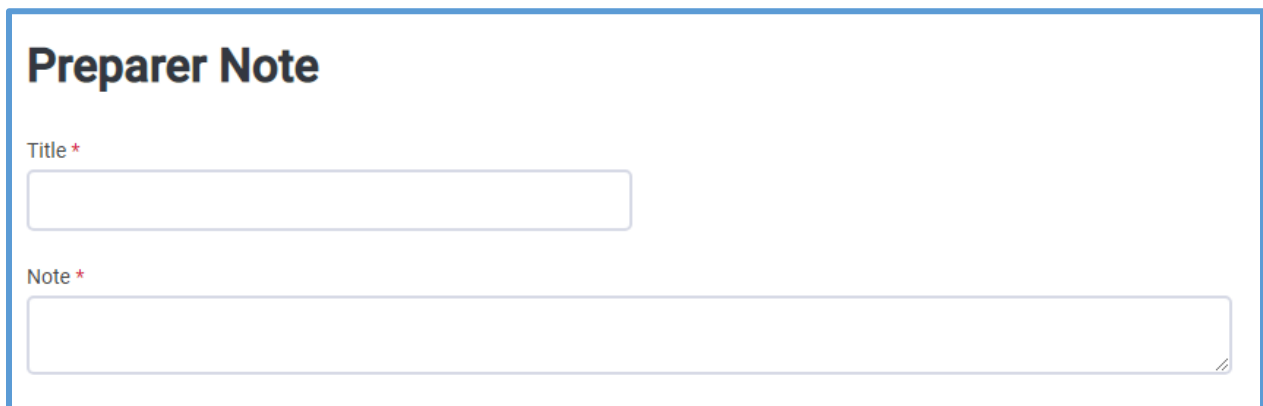


Explanations	
Preparer Notes	BEGIN
Elections Explanations	BEGIN
Regulatory Explanations	BEGIN

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:



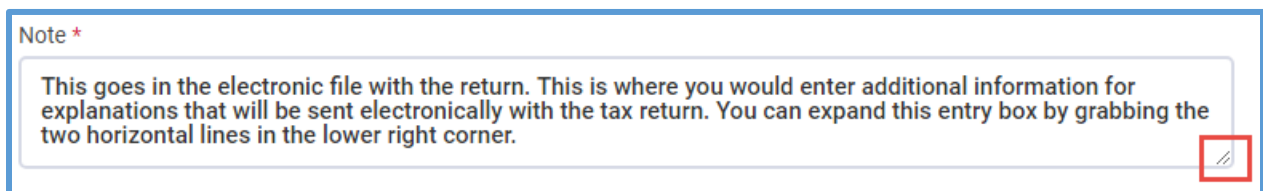
Preparer Note

Title *

Note *

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:



Note *

This goes in the electronic file with the return. This is where you would enter additional information for explanations that will be sent electronically with the tax return. You can expand this entry box by grabbing the two horizontal lines in the lower right corner.

6. Click **CONTINUE**.

TaxSlayer Pro Online displays the **Preparer Notes** summary page:

Preparer Notes

+ Add a Preparer Note

Title
Preparer Note Test



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**:

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2021? *

If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

☒ Yes

☐ No


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:

Verify Your Household Members




If you have additional family members that are neither a spouse nor a dependent, click ["Add a New Household Member."](#)

If you need to add or remove dependents, [click here to go to Personal Information.](#)

 Household Member

Name	SSN	Date of Birth
<div></div>	<div>5550</div>	2/4/1959
<div></div>	<div>5523</div>	6/6/2010

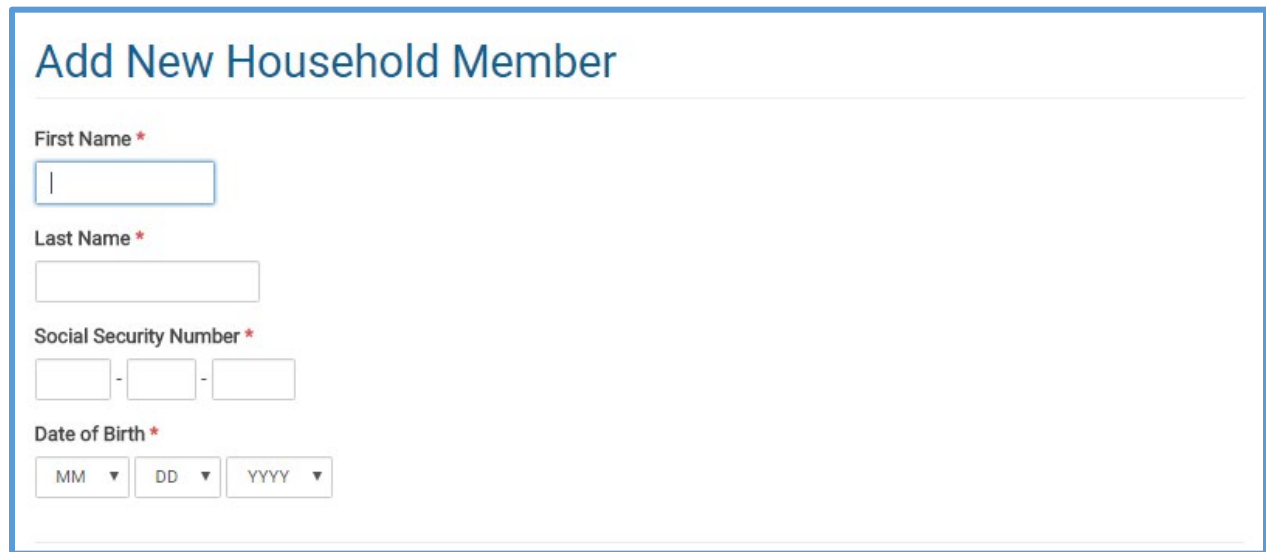


If you wish to override the calculated Tax Family Size please [click here.](#)

CONTINUE

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:



The screenshot shows a web form titled "Add New Household Member" in a blue header. Below the title, there are four required fields, each marked with a red asterisk:

- First Name ***: A single-line text input field.
- Last Name ***: A single-line text input field.
- Social Security Number ***: A field with three separate input boxes separated by hyphens (e.g., [] - [] - []).
- Date of Birth ***: Three dropdown menus labeled "MM", "DD", and "YYYY" for selecting the month, day, and year.

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:

Advanced Premium Tax Credit (1095-A)

BACK

CONTINUE

Are you allocating policy amounts with another taxpayer or do you want to use the alternative calculation for year of marriage?

☐ Allocate policy amounts (8962, Part IV)

☐ Alternative calculation for year of marriage (8962, Part V)

☒ None of the above

Are you required to repay all of the APTC received? In most cases, the answer is NO. ONLY answer YES if you were not considered lawfully present in the U.S. or you meet the Health Coverage Tax Credit criteria. Note: We'll automatically calculate a full repayment of APTC when modified adjusted gross income (MAGI) is greater than 400 percent of—aka more than 4x higher than—the federal poverty line.

☐ Yes

☐ No

Is your household income below 100% of the Federal poverty line, and do you meet all of the requirements under either "Estimated household income at least 100% of the Federal poverty line" or "Alien lawfully present in the United States"?

☐ Yes

☐ No

Do all Forms 1095-A include coverage for January through December, with no changes in monthly amounts? (Remember—if any family members are under different health insurance plans, you'll have more than one form.)

☐ Yes

☐ No

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 SLSP (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 SLSP (Form 1095-A, Part III, Column B)	Monthly Advance Payment of PTC (Form 1095-A, Part III, Column C)
January	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
February	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
March	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
April	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
May	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
June	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
July	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
August	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
September	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
October	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
November	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
December	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

3. Click **Continue**.

TaxSlayer Pro Online displays the **Dependents' Modified AGI** page:

Household Income

Dependents' Modified AGI (if filing requirement)

Enter the AGI for your dependents from Form 1040, line 11; and Form 1040NR, line 11

\$

Enter any tax-exempt interest for your dependents from Form 1040, line 2a; and Form 1040NR, line 2a

\$

Enter any amounts for your dependents from Form 2555, lines 45 and 50, and Form 2555-EZ, line 18

\$

Enter for each of your dependents the difference, if any, between Form 1040, lines 6a and 6b

\$

BACK

CONTINUE

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:

Your Federal Return is Complete!

Congratulations! You have completed your Federal Return.
We're ready to add your state return. We'll automatically transfer all the necessary information into your state return for you.

Please choose from the following options:

- Add a State Return to your account.

The following states do not have state income tax returns that can be filed through TaxSlayer Pro:
Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming
- Skip the State Return process and Continue to the Summary.
- Return to the Federal Section to review or make changes to your Federal Return.

RETURN TO FEDERAL SECTION

ADD STATE RETURN(S)

CONTINUE TO SUMMARY

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:

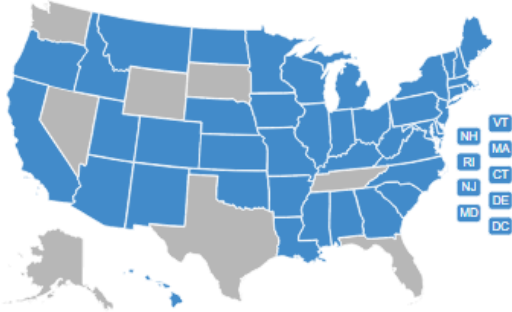
1. Click **Add State Return(s)**.

TaxSlayer Pro Online displays the **Select your State Return** page:

Select your State Return

Please select the state that you would like to complete below.

Only states that accept tax returns for which you have not already created a state tax return are listed here. The following states **do not** have individual income tax returns:
Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming



Choose State

- Please Select - ▼

VT

NH

MA

RI

CT

NJ

DE

MD

DC

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:

Select your Georgia Return Residency

CANCEL

CONTINUE

Please choose a return type

☐ **Resident:** You are a Resident of Georgia if you have resided in the state for 183 days or more, have a permanent home and/or resides within the state on Income Tax Day (December 31)

☐ **Part Year:** You are a Part-Year Resident of Georgia if you moved into or out of Georgia during the year and established residence elsewhere.

☐ **Non-Resident:** You are a Nonresident of Georgia if you did not live or reside in the state for more than 183 days.

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:

Georgia Return

Basic Information Residency and other personal information	BEGIN
Additions to Income Adjustments due to federal tax changes and income taxed by Georgia but not the federal government	BEGIN
Subtractions from Income Retirement Income Exclusion and income taxed by the federal government but not Georgia	BEGIN
Itemized Deductions Automatically pulled from federal return if you itemized (other state-specific info required)	BEGIN
Credits Georgia-specific tax credits and others pulled from federal return	BEGIN
Contributions Option to donate a portion of your refund to various Georgia funds	BEGIN
Payments Confirm that all Georgia income tax withholding is entered and choose if you want any of your state refund to go toward next year's tax return	BEGIN
Miscellaneous Forms Application for extension, deceased taxpayer refund check claim, underpayment of estimated tax, etc.	BEGIN

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:

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			

- 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:

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	  

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:

Are you sure that you want to delete this State Return?

Georgia State Return

You will have to re-enter this information if you later decide to include this on your return.

CANCEL

DELETE


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:

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	<div></div>

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. 06/22/17) **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
1. SAMPLE

MI

YOUR SOCIAL SECURITY NUMBER

LAST NAME
RETURN

SUFFIX

SPOUSE'S FIRST NAME
SPOUSE

MI

SPOUSE'S SOCIAL SECURITY NUMBER

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:

Form 1099-NEC

CANCEL

Payer Information

Payer's name *

☐ Check here if foreign address

Address (street number & name) *

ZIP code * City, town, or post office * State *

-

- Please Select ▼

☐ Use payer's SSN as ID

Payer's TIN *

Also may be found in the box labeled Payer's Federal Identification Number

-

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:

Transferring 1099-NEC to Schedule

Income recorded on a 1099-NEC is reported as either business income (on a Schedule C) or as farm income (on Schedule F).

How would you like to report this income? *

☐ Schedule C - Business Income

☐ Schedule F - Farm Income

BACK

SKIP

CONTINUE

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:

Schedule C - Income

Income

Total Income from Form 1099-NEC

This value will be automatically added in. Do not include it on this form.

Gross receipts or sales (including income reported on Form 1099-K)

\$1,000.00

\$

Income reported to you on Form W-2 as Statutory Employee

\$

Returns and allowances

\$

Other Income

\$

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:

Form 1099-NEC

+ Add another Form 1099-NEC

Payer	Owner	Carried To	
TEST COMPANY	Taxpayer	Schedule C	<div><div></div><div></div></div>

CONTINUE

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**.

Transferring 1099-NEC to Schedule

Income recorded on a 1099-NEC is reported as either business income (on a Schedule C) or as farm income (on Schedule F).

How would you like to report this income? *

- ☒ Schedule C - Business Income
- ☐ Schedule F - Farm Income

Where would you like to report this income? *

- ☐ Create a new Schedule C to report this business income
- ☒ Report this income on a Schedule C that I already created for my business

Report this income on the following Schedule C:

Rooming boarding ▾

Profit or Loss from a Business

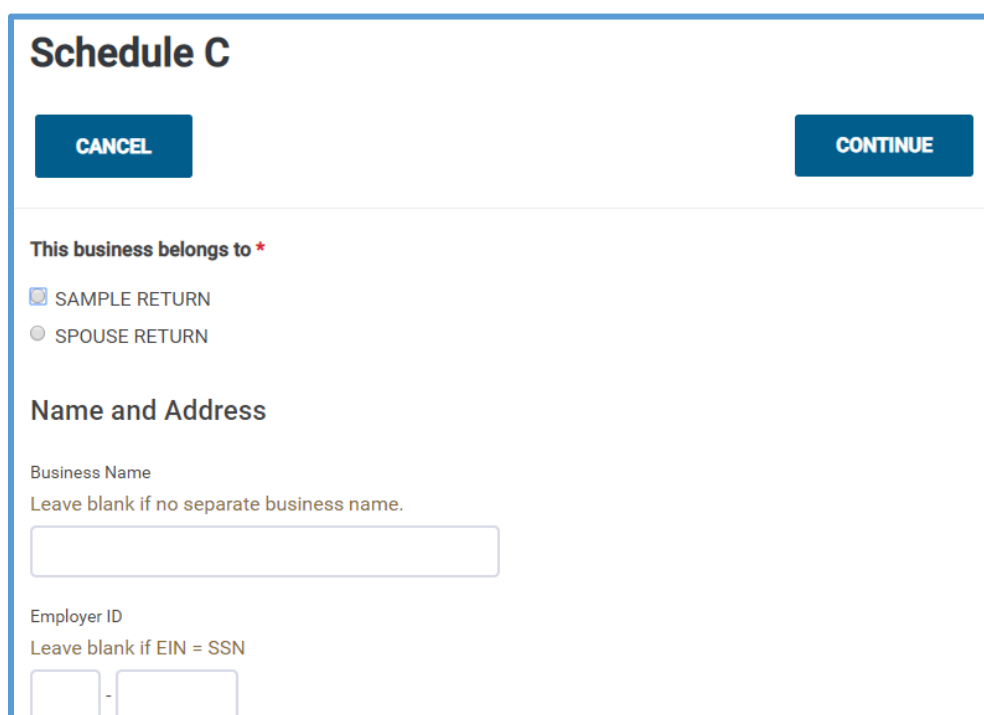
If a taxpayer is self-employed, you need to complete Schedule C for that taxpayer.

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:



The screenshot shows the 'Schedule C' page in TaxSlayer Pro Online. At the top, there are two buttons: 'CANCEL' and 'CONTINUE'. Below these buttons, the text 'This business belongs to *' is followed by two radio button options: 'SAMPLE RETURN' (which is selected) and 'SPOUSE RETURN'. Underneath, the section 'Name and Address' is displayed. It includes a 'Business Name' label with a text input box below it, and a note 'Leave blank if no separate business name.' Below the business name section, there is an 'Employer ID' label with a text input box, and a note 'Leave blank if EIN = SSN'.

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. 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:

Schedule C	
Basic Information About Your Business	EDIT
Questions About the Operation of Your Business	BEGIN
Income	BEGIN
Cost of Goods Sold	BEGIN
General Expenses	BEGIN
Car And Truck Expenses	BEGIN
Depreciation	BEGIN
Other Expenses	BEGIN
Qualified Business Income Deduction	BEGIN
Expenses for Business Use of Your Home	BEGIN
Restart Schedule C Guide	BEGIN

4. Click the **Questions About the Operation of Your Business** line.

TaxSlayer Pro Online displays the **Schedule C Questions** page:

Schedule C Questions

Questions about your Business

Accounting Method *

☒ Cash

☐ Accrual

☐ Other

Method used to value closing inventory *

☒ Cost


☐ Lower of cost or market

☐ Not Applicable

☐ Check here if there were any changes in determining inventory.

☐ Check here if this is the first Sch. C filed by you for this business.

☒ Check here if you "materially participated" in the operation of this business during the tax year.

 This box must be checked to allow a net loss on your return.

Prior year unallowed loss (ONLY enter an amount if current year's activity is a net profit.)

\$

☐ Check here if you made any payments in 2016 that would require you to file Form(s) 1099.

☐ Check here for Qualified Joint Venture. (Ownership between Taxpayer and Spouse must be 50/50. If you are filing Business Use of Home deductions or using the Clergy Worksheet, you will need to file separate Schedule C forms, one for each spouse)

☐ Check here to Prorate Expenses for Minister/Clergy.

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:

Schedule C	
Basic Information About Your Business	EDIT
Questions About the Operation of Your Business	BEGIN
Income	BEGIN
Cost of Goods Sold	BEGIN
General Expenses	BEGIN
Car And Truck Expenses	BEGIN
Depreciation	BEGIN
Other Expenses	BEGIN
Qualified Business Income Deduction	BEGIN
Expenses for Business Use of Your Home	BEGIN
Restart Schedule C Guide	BEGIN

7. Click the **Income** line.





TaxSlayer Pro Online displays the **Schedule C – Income** page:

Schedule C - Income	
Income	
Gross receipts or sales (including income reported on Form 1099-K)	\$
Income reported to you on Form W-2 as Statutory Employee	\$
Returns and allowances	\$
Other Income	\$

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.

Gross receipts or sales (including income reported on Form 1099-K)
+ Add Gross receipts or sales (including income reported on Form 1099-K)

Description	Amount	
Customer A	\$1,500.00	 
Customer B	\$500.00	 

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:

Schedule C - Expenses

CANCEL**CONTINUE**

Advertising	\$	
Contract Labor	\$	
Commission and fees	\$	
Depletion	\$	
Employee benefit programs	\$	
Health Insurance (will carry automatically to worksheet)	\$	
Insurance (other than health)	\$	
Mortgage interest	\$	

11. Complete the information based on answers from the taxpayer, using the following tips:
- 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:

Schedule C Income from Business

<small>TOTAL INCOME</small> \$90.00	<small>TOTAL EXPENSES</small> \$0.00	<small>TOTAL NET INCOME</small> \$90.00
---	--	---

[+ Add a Schedule C Income from Business](#)

Business	Owner	Income	Expenses	Net Income	
Business service	Taxpayer	\$90.00	\$0.00	\$90.00	

CONTINUE

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:

Schedule D Capital Gains	
Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc. Form 1099-B or broker statements	BEGIN
Other Capital Gains Distributions Capital gains that are not reported on the other forms	BEGIN
Capital Loss Carryover Unused prior year capital loss	BEGIN
Sale of Main Home Worksheet 1099-S/closing documents	BEGIN
1099-B Transactions with No Adjustments	BEGIN
PDF Attachments	BEGIN

2. Click the **Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc.** line.

TaxSlayer Pro Online displays the **Capital Gains Transaction** page:

Capital Gains Transaction

CANCELSAVE & ENTER ANOTHERCONTINUE

Form belongs to
Taxpayer

Description of Property *

Date Acquired

☐ * **Alternate Option:** If Date Acquired is not known, leave the date blank and select an option here

MM

DD

YYYY

Date Sold

☐ * **Alternate Option:**

☐ Check here if a short sale.

MM

DD

YYYY

Sales Price

☐ * **Alternate Option:** If Sale Price is Expired, leave the sales price blank and select an option here

\$

Select cost basis type *


- Please Select -

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.

Pro Online: Entering Basic Income

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- 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:



Form 1099-B

Capital Gain/Loss Summary

TOTAL PROCEEDS \$500.00	TOTAL COST BASIS \$250.00	TOTAL GAIN/LOSS \$250.00
----------------------------	------------------------------	-----------------------------

+ Add a Capital Gains Transaction

DELETE ALL


Owner/Description	Date Acquired	Date Sold	Sales Amount	Purchase Amount	
Test Single/ABC Stock	05/05/2002	12/30/2022	\$500.00	\$250.00	 

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.

Schedule D/Form 8949

Capital Gains and Losses

 Print

EDIT

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:

Sale of Home

CANCELCONTINUE

Basic Info about the Sale

Date of purchase *

MM

DD

YYYY

Purchase price *

\$

Date of sale *

MM

DD

YYYY

Sale price *

\$

Allowable Depreciation related to the business use or rental of the home

\$

Depreciation taken after 05/06/1997

\$

Info about your home

How many days in the last 5 years was the home your main home?

How many days in the last 5 years did you own your home?

How many days since your previous exclusion?

Note: This is the number of days between the date of the most recent sale of another home on which you excluded gain and the date of sale of this home.

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:

Adjustments

Fees you may have paid when you bought your home

Legal fees

Surveys

Title Insurance

Fees that the seller owed that you agreed to pay

Other fees

General Adjustments

Selling expenses

Cost of additions and improvements that you made to your home

Tax assessments that you paid for sidewalks, streets, and other local improvements

Other increases to your basis

Decreases to your basis

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:

Sale of Home Worksheet

Basic Information about Your Home	Edit
Adjustments to the Sale	Begin

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	
\$	<input type="text"/>
Adjust 28% Gain	
\$	<input type="text"/>
Short Term Loss Carryover from 20 (enter as a positive number)	
\$	<input type="text"/>
Long Term Loss Carryover from 20 (enter as a positive number)	
\$	<input type="text"/>

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:

Schedule D/Form 8949 Transaction



Drag and Drop PDF here, or
click to upload

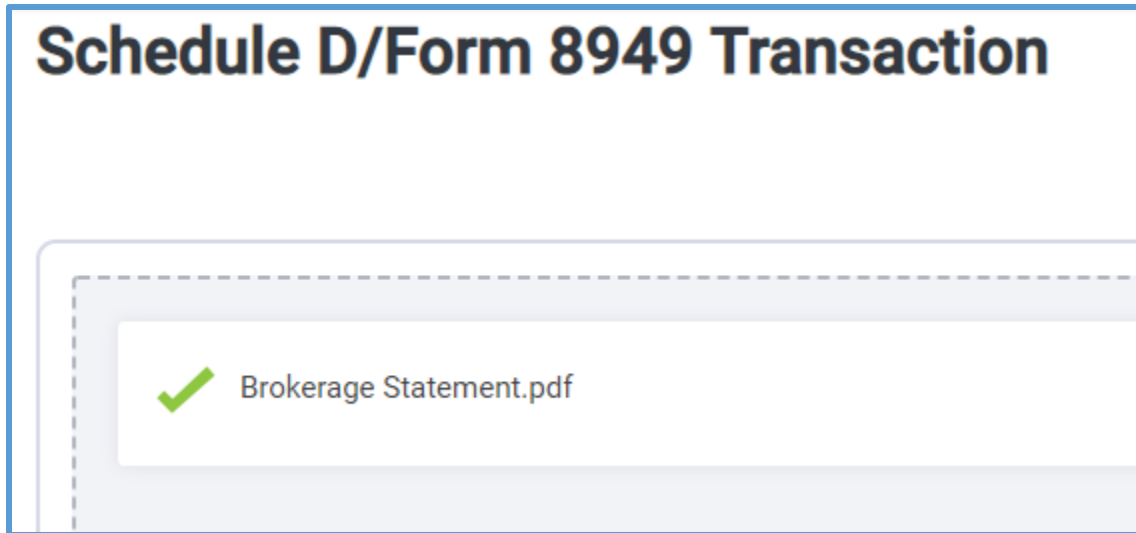
You may upload 5 more PDF files (up to 5 MB each).

ATTACHMENT LIST

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.

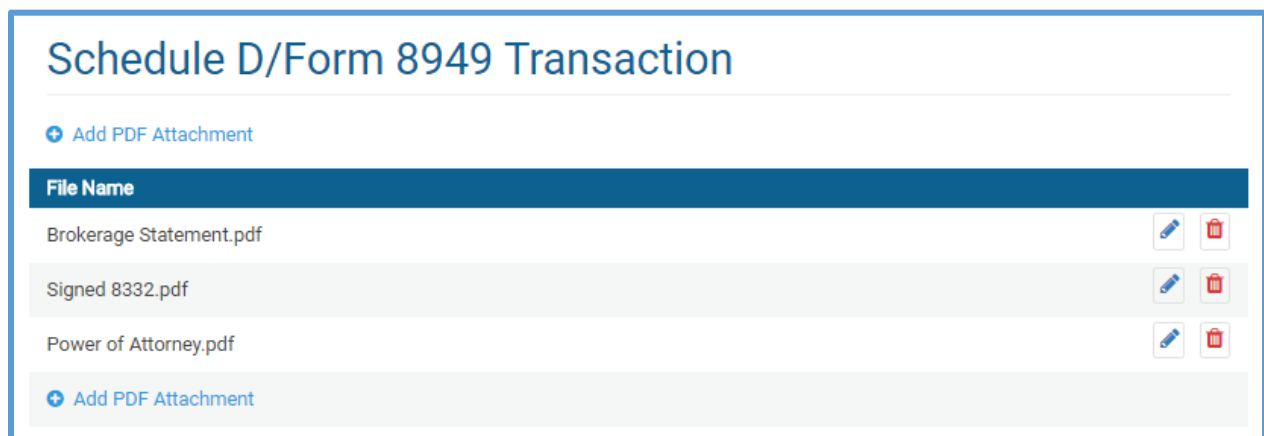
Note: There is a 5 MB limitation for each PDF attachment.

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:

Schedule E Required Information

☐ Check here if you made any payments in 2018 that would require you to file Form(s) 1099.

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:

The screenshot shows the 'Schedule E Rent and Royalty Information' form. It includes the following fields and options:

- Type ***: A dropdown menu with '--Select--' as the current selection.
- Description ***: A text input field.
- ☐ Check here if foreign address
- Address (Number and Street) ***: A text input field.
- ZIP Code ***: Two text input fields separated by a hyphen.
- City, Town, or Post Office ***: A text input field.
- State ***: A dropdown menu with '- Please Select -' as the current selection.
- ☐ Check if personal use
- Percent of ownership ***: A text input field with '100' and a percentage symbol (%) next to it.
- Rental Payments Received (including rental income reported on Form 1099-K)**: A text input field with a dollar sign (\$) next to it.

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:

Schedule E Rentals and Royalties

Currently Editing: Vacation House

Rent and Royalty Basic Information	EDIT
Depreciation	BEGIN
Expenses	BEGIN
Car and Truck Expenses	BEGIN
Qualified Business Income Deduction	BEGIN

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:

Schedule E Rental/Royalty Expense

Advertising
\$

Travel
\$

Cleaning
\$

Commission
\$

Insurance
\$

Legal Fees
\$

Management Fees
\$

Mortgage Interest
\$

Other Interest
\$

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:

Schedule E Rental/Royalty Other Expense

Description *

Amount *

\$



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:

Schedule E Rental/Royalty Other Expense

[+ Add Another Other Expense](#)

Description	Amount	
HOA Dues	500.00	 

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:

Schedule E Rental/Royalty Expense

Advertising

Travel

Cleaning

Commission

Insurance

Legal Fees

Management Fees

Mortgage Interest

Other Interest

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:

The screenshot shows the 'Schedule E Rentals and Royalties' landing page. At the top, it says 'Currently Editing: Vacation House'. Below this, there is a table with five rows, each representing a different section of the schedule. The first row is 'Rent and Royalty Basic Information' with an 'EDIT' button. The next four rows are 'Depreciation', 'Expenses', 'Car and Truck Expenses', and 'Qualified Business Income Deduction', each with a 'BEGIN' button.

Schedule E Rentals and Royalties	
Currently Editing: Vacation House	
Rent and Royalty Basic Information	EDIT
Depreciation	BEGIN
Expenses	BEGIN
Car and Truck Expenses	BEGIN
Qualified Business Income Deduction	BEGIN

9. If the taxpayer has standard mileage for a vehicle, click the **Car and Truck Expenses** line.

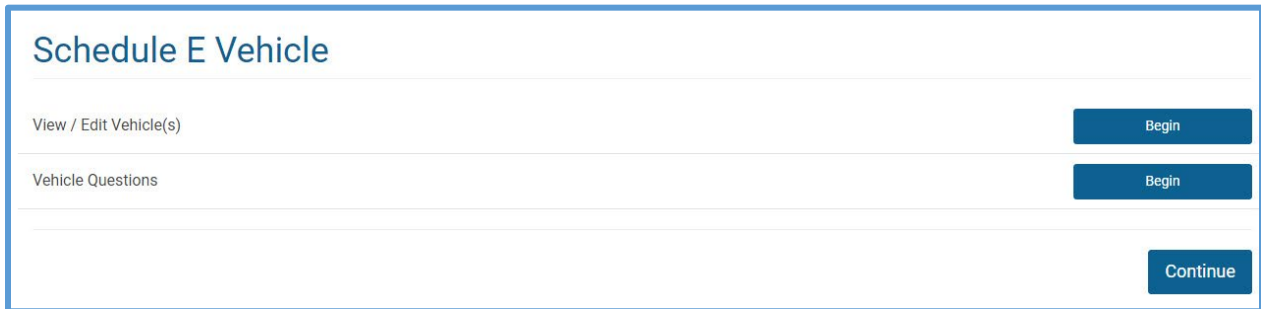
TaxSlayer Pro Online displays the **Schedule E Car & Truck Expenses** page:

The screenshot shows the 'Schedule E Car & Truck Expenses' page. It has a header 'Schedule E Car & Truck Expenses' and a sub-header 'Currently Editing: Rental Home'. Below this, there are two rows: 'Actual Expenses' with an 'Edit' button, and 'Standard Mileage Rate' with an 'Edit' button. At the bottom right, there is a 'Continue' button.

Schedule E Car & Truck Expenses	
Currently Editing: Rental Home	
Actual Expenses	Edit
Standard Mileage Rate	Edit
Continue	

10. Click the **Standard Mileage Rate** line.

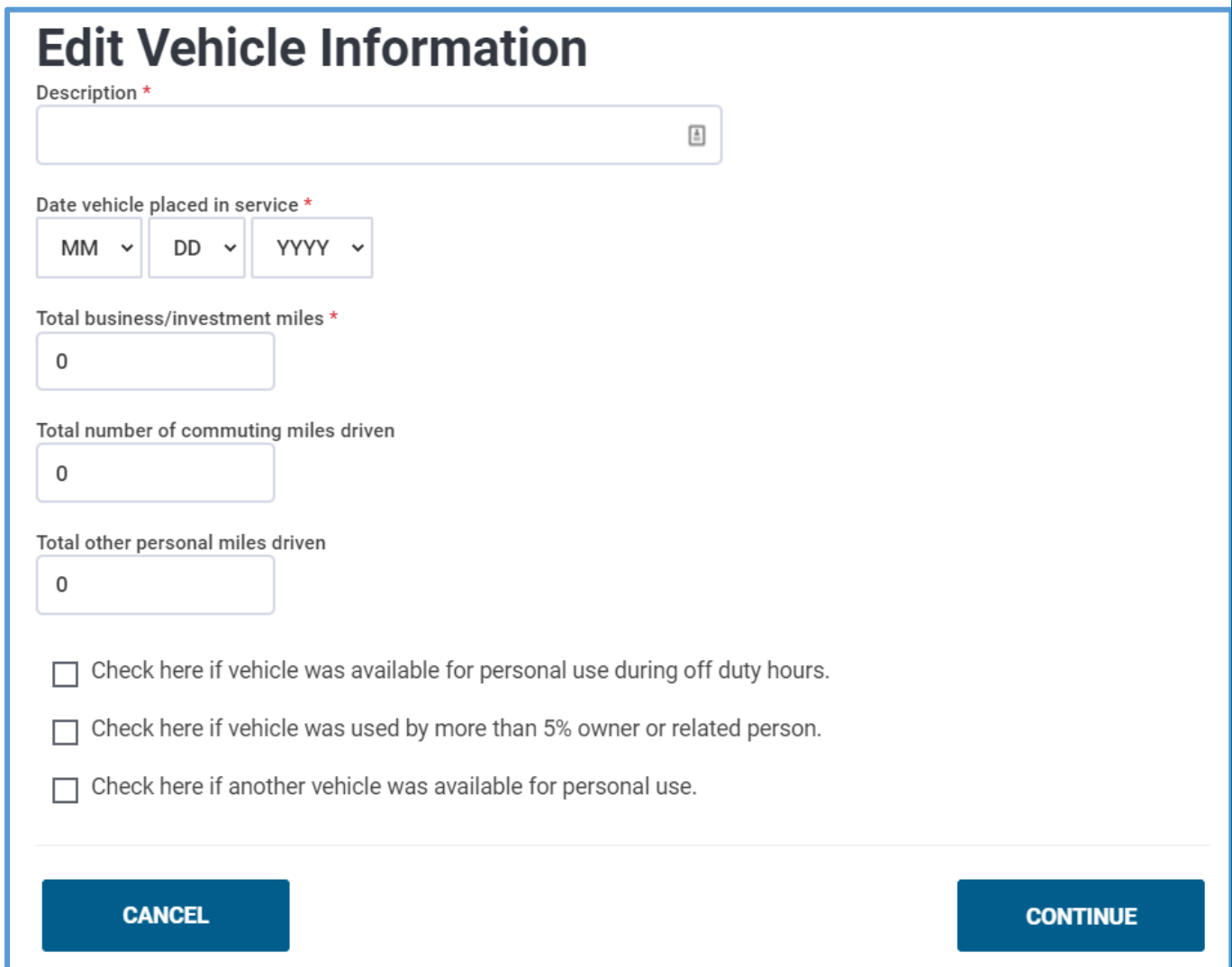
TaxSlayer Pro Online displays the **Schedule E Vehicle** page:



Schedule E Vehicle	
View / Edit Vehicle(s)	Begin
Vehicle Questions	Begin
	Continue

11. Click the **View/Edit Vehicle(s)** line.

TaxSlayer Pro Online displays the **Edit Vehicle Information** page:



Edit Vehicle Information

Description *

Date vehicle placed in service *

MM DD YYYY

Total business/investment miles *

0

Total number of commuting miles driven

0

Total other personal miles driven

0

☐ Check here if vehicle was available for personal use during off duty hours.

☐ Check here if vehicle was used by more than 5% owner or related person.

☐ Check here if another vehicle was available for personal use.

CANCEL CONTINUE



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:

Schedule E Vehicle

+ Add Another Vehicle

Description	Address	
Truck	5/5/2021	 

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:

Schedule E Vehicle

View / Edit Vehicle(s)	Begin
Vehicle Questions	Begin
Continue	

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:

Schedule E Car & Truck Expenses

Currently Editing: Rental Home

Actual Expenses	Edit
Standard Mileage Rate	Edit

Continue

17. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rentals and Royalties** landing page:

Schedule E Rentals and Royalties

Currently Editing: Vacation House



Rent and Royalty Basic Information	EDIT
Depreciation	BEGIN
Expenses	BEGIN
Car and Truck Expenses	BEGIN
Qualified Business Income Deduction	BEGIN

18. Click **Continue**.

TaxSlayer Pro Online displays the **Schedule E Rental/Royalty** page with the property you entered listed:

Schedule E Rental/Royalty

+ Add Another Rental/Royalty

Description	Address (street number & name)	Amount	
Home	150 Forest Park	\$100.00	 

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:

Schedule K-1

Schedule K-1 [Form 1065](#)

Begin

Schedule K-1 [Form 1120S](#)

Begin

Schedule K-1 [Form 1041](#)

Begin

Schedule E (Page 2) Question

Begin

Continue

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:

Form 1041 K-1

CANCEL

CONTINUE

Part I - Information About the Estate/Trust

Estate/Trust Belongs To
Taxpayer

Estate/Trust Name *

Estate/Trust EIN Number *

 -


Address (street number & name) *

ZIP code *

 -

City, town, or post office *

State *

- Please Select - 

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:

Schedule K-1 Form 1041

+ Add A Schedule K-1 Form 1041

EIN	Estate/Trust Name	Estate/Trust Belongs To
123456789	Family Trust	Taxpayer



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:

Schedule K-1

Schedule K-1 Form 1065	Begin
Schedule K-1 Form 1120S	Begin
Schedule K-1 Form 1041	Begin
Schedule E (Page 2) Question	Begin

Continue

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:

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 **Foreign Earned Income Exclusion** line.

TaxSlayer Pro Online displays the **Form 2555 General Information** page:

The screenshot shows the 'Form 2555 General Information' page. At the top, there are two buttons: 'CANCEL' on the left and 'CONTINUE' on the right. Below these buttons, the text 'Form belongs to *' is followed by two radio button options: 'SAMPLE RETURN' and 'SPOUSE RETURN'. Underneath, the section 'Your Foreign Address' is displayed. This section contains two text input fields. The first field is labeled 'Address (Number and Street) *' and the second field is labeled 'City, Town, or Post Office *'.

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:

General Information

Employer is *

☐ A Foreign Entity

☐ A U.S. Company

☐ Self

☐ Foreign Affiliate of U.S. Company

☐ Other

☐ Check here if you have filed Form 2555 since 1982

Of what country are you a citizen? *

- Please Select -

☐ Check here if you maintained a separate foreign residence because of adverse living conditions at your tax home.

Secondary Home

Days at secondary home

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:

Tax home #1

Description

Date Established

MM DD YYYY

Tax home #2

Description

Date Established

MM DD YYYY

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:

Form 2555 Time Waiver

☒ Waiver of time Requirements due to war, civil unrest or adverse conditions

☐ No waiver

☐ Other

CANCEL **CONTINUE**

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:

The screenshot shows the 'Form 2555 Qualifying Test' page. At the top, the title 'Form 2555 Qualifying Test' is displayed in a large, bold, dark blue font. Below the title, the text 'Taxpayer qualifies under *' is shown in a smaller, dark blue font. Underneath, there are two radio button options: 'Physical Presence Test' and 'Bona Fide Residence Test'. At the bottom of the page, there are two blue buttons: 'CANCEL' on the left and 'CONTINUE' on the right.

11. Select the test under which the taxpayer qualifies.
12. Click **CONTINUE**.

TaxSlayer Pro Online displays the appropriate information for the test you select:

The screenshot shows the 'Form 2555 Physical Presence Test' page. At the top, the title 'Form 2555 Physical Presence Test' is displayed in a large, bold, dark blue font. Below the title, there are two blue buttons: 'CANCEL' on the left and 'CONTINUE' on the right. The main section of the page is titled 'Physical Presence Test Based on 12-Month Period'. Below this title, there are two date selection fields: 'From *' and 'Ending *'. Each field consists of three dropdown menus for 'MM', 'DD', and 'YYYY'. Below the date fields, there is a label 'Your Principal Country of Employment During 2017 *' followed by a dropdown menu with the text '- Please Select -'. At the bottom of the page, there is a checkbox labeled 'Check here if there is no travel to report during the period'.

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:

Form 2555 Foreign Earned Income

CANCEL**CONTINUE**

Income Information

Total Wages, Salaries, Bonuses, Commissions, etc

This income does not carry to your tax return as this is only excluding income. You must still enter the income on either a W-2 (if U.S. employer) or within the Foreign Earned Compensation (if Foreign employer or Self-Employed overseas) section of your return.

\$

Allowable Share of Income for Personal Services Performed

In a Business (Including Farming) or Profession

\$

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:

Form 2555 Housing/Foreign Income Exclusion

Number of days in your qualifying period that fall within your 20 tax year *

0

☐ Check here if you are claiming the Housing Exclusion or Deduction

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:

☒ Check here if you are claiming the Housing Exclusion or Deduction

Qualified Housing Expenses for the Tax Year

\$


Location Where Housing Expenses Incurred

Limit on Housing Expenses

\$

Enter the Employer-Provided Amounts

\$

 We calculate the Employer-Provided amounts should be \$5,000.00. You may adjust that amount by changing the amount below. Currently, the amount carrying to your tax return is \$5,000.00.



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:

Foreign Earned Income Exclusion (Form 2555)

Belongs To

Taxpayer



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.

TaxSlayr Pro Online displays the **Adjustments** 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 unreimbursed 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

13. Click the **Traditional IRA Deduction** line.

TaxSlayer Pro Online displays the **IRA Deduction** page:

IRA Deduction

Enter amount of IRA Contribution made by Taxpayer
(Generally this is from a Traditional IRA):
(This deduction may be limited. To see the deductible amount, go to the "Summary/Print" tab located on the left menu after continuing through this page.)
If you entered over \$6,000 (\$7,000 if age 50 or older), visit Form 5329, Part III to report any excess contribution amount for the current year.

\$

Taxpayer Retirement Plan



☐ Taxpayer has a retirement plan.

☐ Taxpayer DOES NOT have a retirement plan

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:

IRA Deduction

Taxpayer Contribution	Spouse's Contribution	
\$5,500	\$5,500	 
		<div>Continue</div>

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:

Credits

Foreign Tax Credits Used to offset income taxes paid to foreign countries by U.S. citizens and residents who earn income abroad	BEGIN
Child and Dependent Care Credit For expenses paid to care for a qualifying individual to enable you to work or actively look for work	BEGIN
Education Credits Credits for higher education expenses; usually reported to you on Form 1098-T	ADD/EDIT
Credit for Qualified Retirement Savings Contributions Also known as the Saver's Credit	BEGIN
Residential Energy Credits Complete Form 5695 to claim the nonbusiness energy property credit and residential energy efficient property credit	BEGIN
Adoption Credit Figure your adoption credit and any employer-provided adoption benefits you can exclude from your income	BEGIN
Mortgage Interest Credit For those who were issued a qualified Mortgagee Credit Certificate (MCC) by a state or local governmental unit or agency	BEGIN
Claiming Certain Credits after Disallowance Only for those who received a federal rejection related to the Earned Income Tax Credit, Child Tax Credit, or Advanced Child Tax Credit	BEGIN

3. Click the **Residential Energy Credit** line.

TaxSlayer Pro Online displays the **Form 5695 – Energy Efficient Improvements** page:

Form 5695 - Residential Energy Credit

☐ Check here if the energy efficiency improvements or residential energy property costs were made to your main home located in the United States.

CANCEL

CONTINUE

4. Select the appropriate check boxes on this page.
5. Click Continue.

TaxSlayer Pro Online displays the **Form 5695** page:

Form 5695

Nonbusiness Energy Property	BEGIN
Energy Efficient Improvement	BEGIN
	CONTINUE

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:

Form 5695 - Energy Efficient Improvements

Qualified Fuel Cell Property

☐ Check here if you installed a Qualified Fuel Cell Property on or in connection with your main home located in the United States

Other Qualified Costs

Qualified solar electric property costs

\$

Qualified solar water heating property costs

\$

Qualified small wind energy property costs

\$

Qualified Geothermal heat pump property costs

\$

Credit carryforward from 20
(Amount from your 20 Form 5695, Line)

\$

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:

Residential Energy Credit

Residential Improvements

3500.00  

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:

Schedule R Retired/Disability Question

Choose one

- ☒ Both spouses were 65 or older.
- ☐ Both spouses were under 65, but only one spouse retired on permanent and total disability.
- ☐ Both spouses were under 65 and both retired on permanent and total disability.
- ☐ One spouse was 65 or older and the other spouse was under 65 and retired on permanent and total disability.
- ☐ One spouse was 65 or older, and the other spouse was under 65 and NOT retired on permanent and total disability.

CANCEL**CONTINUE**

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:

Income

Taxable disability income

\$|

Other pension, annuity, or disability benefit that is excluded from income under any other provision of law (DO NOT re-enter non-taxable income already reported such as Social Security Benefits)

\$

CANCEL

CONTINUE

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:

Credit for the Elderly / Disabled (Schedule R)

Taxable disability income	Other Income
\$0.00	\$0.00


Continue


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:

Statement of Disability

IF  You filed a physician's statement for this disability for 1983 or an earlier year

OR  You filed or got a statement for tax years after 1983 and your physician signed line B on the statement,

AND  Due to your continued disabled condition, you were unable to engage in any substantial gainful activity in 2017.

☐ Check this box only if this entire statement is true.

BACK

CANCEL

CONTINUE

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:

Credit for the Elderly / Disabled (Schedule R)

Schedule R Status Question	Edit
Statement of Disability	Edit
Other Income	Begin

Continue

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:

Enter Social Security Number

Social Security Number

- -

Confirm Social Security Number

- -

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Start Return

2. Type the taxpayer's Social Security number or ITIN twice for verification.

TaxSlayer Pro Online displays the **Available Taxpayer Profiles** section:

The screenshot shows a web form with two main sections. The first section, titled 'Enter Social Security Number', contains two rows of input fields. The first row is for the 'Social Security Number' and the second row is for the 'Confirm Social Security Number'. Each row has three input boxes separated by hyphens. The first box in the first row is highlighted with a red border. The second section, titled 'Available Taxpayer Profiles', contains two options. The first option is 'Basic (No Profile)' with the description 'Create a return without a Taxpayer Profile.' The second option is 'Master Profile' with a checkmark icon and the description 'IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.' At the bottom right of the form is a blue button labeled 'Start Return'.

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:

The screenshot shows a web form titled "What's your filing status?". On the left, there are six radio button options: "Single", "Married Filing Jointly", "Married Filing Separately", "Head of Household", "Qualifying Widow(er) with Dependent Children", and "Nonresident Alien". On the right, there is a link that says "Need help determining your filing status?" above a button labeled "FILING STATUS WIZARD". At the bottom left is a "BACK" button, and at the bottom right is a blue "CONTINUE" button.

6. Select **Nonresident Alien**.

TaxSlayer Pro Online displays the **What's your filing status?** page for nonresident aliens:

The screenshot shows a web form titled "What's your filing status?". On the left, there are three radio button options: "Single nonresident alien", "Married nonresident alien", and "Qualifying widow(er) with dependent child". On the right, there is a link that says "WAIT! This isn't what I wanted!" above a blue button labeled "SHOW RESIDENT OPTIONS". At the bottom left is a "BACK" button, and at the bottom right is a blue "CONTINUE" button.

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:

Personal Information

FILING STATUS**CANCEL****CONTINUE**

Taxpayer Information

Primary First Name * MI

Last Name * Suffix (Jr, Sr, etc.)

Social Security Number *

Date of Birth *

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:

Dependents or Qualifying Person(s)

Do you have any dependents or qualifying person(s) to claim on your return?

Individuals who rely on you for support and reside in your house generally qualify for dependent tax exemptions. However, there are situations when a child's exemption status is more complicated. The IRS has special rules for these situations.

YES**NO**

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:

Dependent/Qualifying Child Information

First name *

MI

Last name *

Date of birth *

MM

DD

YYYY

Social Security number (ITIN & ATIN also accepted) *

-

-

☐ Check here if the individual does not have an SSN, ITIN, or ATIN.

Was this individual a U.S. citizen, U.S. national, or U.S. resident alien? If they were not, you can't claim the child tax credit or the credit for other dependents for this person. *

☐ Yes

☐ No

Relationship *

Please select

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:

Schedule OI

General Information

BEGIN

Dates Entered and Departed the U.S. in Current Year

BEGIN

Income Exempt from Tax

BEGIN

1. Click **Begin** on the **General Information** line.

TaxSlayer Pro Online displays the **Schedule OI – General Information** page:

Schedule OI - General Information

CANCEL **CONTINUE**

General Information

Type of 1040NR Entity *

- Please Select - ▼

Country of Citizenship *

- Please Select - ▼

Country of Residence *

- Please Select - ▼


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:

Days Present in the U.S.

Number of days in the U.S. for 

Number of days in the U.S. for 

Number of days in the U.S. for 

Tax Return Filing Information

☐ Check if you have filed a U.S. Income tax return for a prior year.

☐ Check if you are filing a return for a trust.

☐ Check if you received total compensation over \$250,000.

☐ Check if you used an alternate method to determine the source of the income.

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:

☒ Check if you have filed a U.S. Income tax return for a prior year.

Last Year Filed

Form Title

- Please Select - ▼

8. Scroll to the **Refund Mailing Information** section.

TaxSlayer Pro Online displays the **Refund Mailing Information** and **Income Exempt from U.S. Tax** sections:

Refund Mailing Information

Enter address below if you would like your refund check mailed to an address outside the U.S.

Refund Address Line 1

Refund Address Line 2

Income Exempt from U.S. Tax

☐ Check if you were subject to tax in a foreign country on U.S. exempt income.

☐ Check if you used an alternate method to determine the source of the income.

Wages Exempt by a Treaty (reduces 1040-NR line 8)

\$

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:

Schedule OI

General Information	BEGIN
Dates Entered and Departed the U.S. in Current Year	BEGIN
Income Exempt from Tax	BEGIN

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:

Schedule OI - Travel Dates

Date Entered U.S. *

MM ▾	DD ▾	YYYY ▾
------	------	--------

Date Departed U.S.

MM ▾	DD ▾	YYYY ▾
------	------	--------

CANCEL**CONTINUE**



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:

Schedule OI - Current Year Travel Dates

+ Schedule OI Travel Dates

Date Entered U.S.	Date Departed U.S.	
1/1/2021	N/A	 

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:

Schedule OI - Income Exempt from Tax

Name of the Country *

- Please Select - ▼

Number of months claimed on prior tax returns

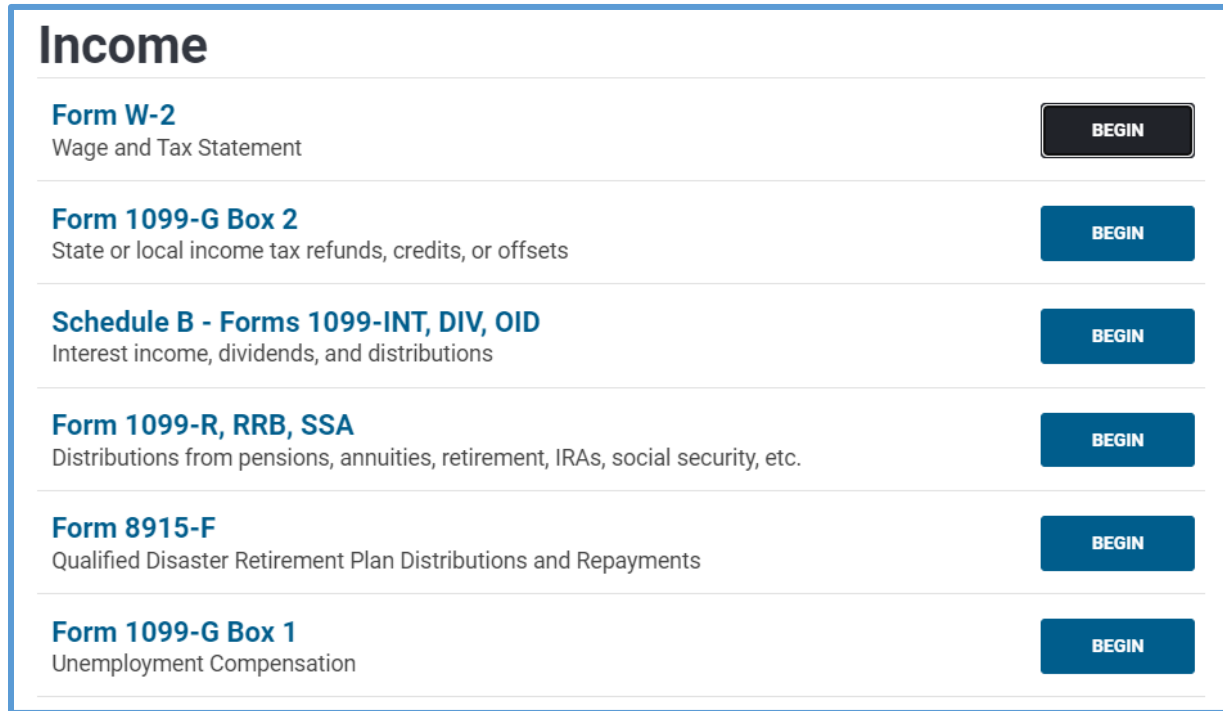
Amount of exempt income

\$

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:



Income	
Form W-2 Wage and Tax Statement	BEGIN
Form 1099-G Box 2 State or local income tax refunds, credits, or offsets	BEGIN
Schedule B - Forms 1099-INT, DIV, OID Interest income, dividends, and distributions	BEGIN
Form 1099-R, RRB, SSA Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
Form 8915-F Qualified Disaster Retirement Plan Distributions and Repayments	BEGIN
Form 1099-G Box 1 Unemployment Compensation	BEGIN

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:

Deductions

Adjustments
Educator expenses, medical savings accounts, student loan interest, etc. **BEGIN**

Itemized Deductions
Charitable contributions, mortgage interest, property taxes, etc. **BEGIN**

Credits Menu
Child and dependent care credit, education credits, mortgage interest credit, etc. **BEGIN**

BACK **CONTINUE**

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:

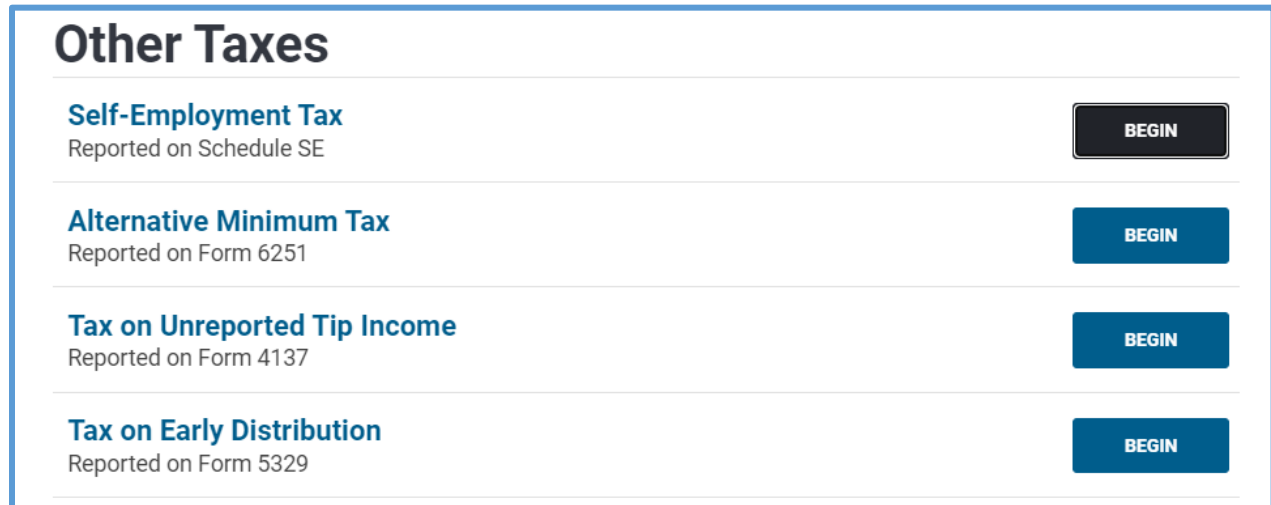
1. Click **BEGIN** on the line for which you need to enter a deduction. You should add adjustments, itemized deductions, and credits from this page.
2. Type the information on the page just as you would for any other taxpayer.

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:



Other Taxes	
Self-Employment Tax Reported on Schedule SE	BEGIN
Alternative Minimum Tax Reported on Form 6251	BEGIN
Tax on Unreported Tip Income Reported on Form 4137	BEGIN
Tax on Early Distribution Reported on Form 5329	BEGIN

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:

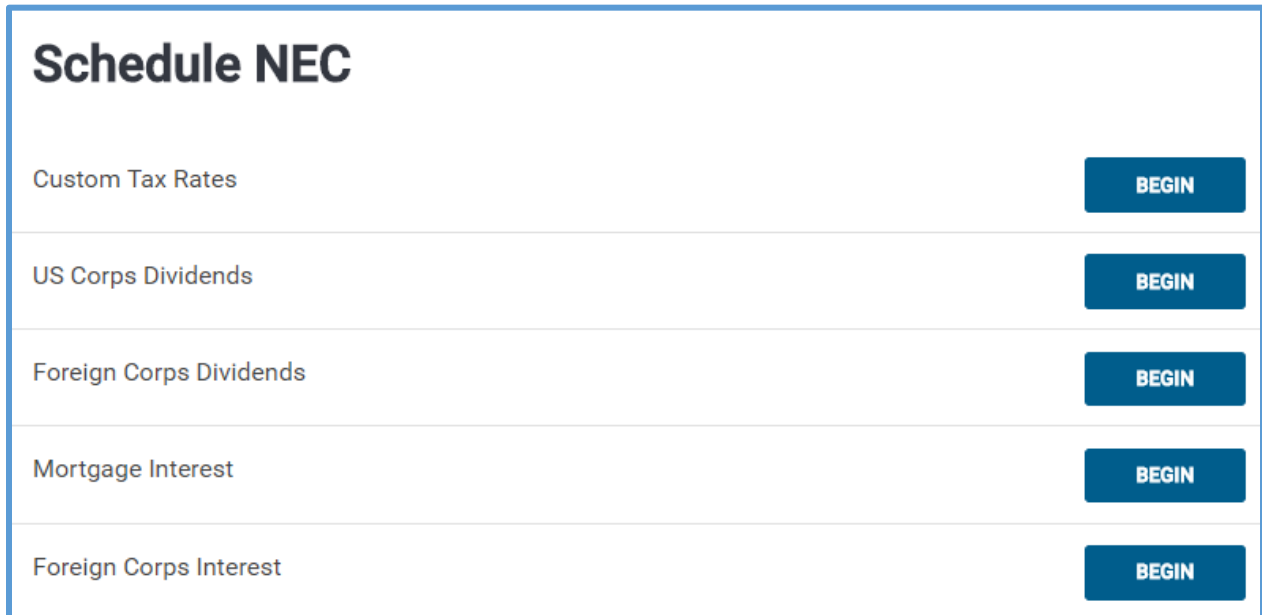
1. Click **BEGIN** on the line for which you need to enter a tax.
2. Type the information on the page just as you would for any other taxpayer.
3. Remember that some nonresident aliens must pay tax on income not effectively connected with a United States trade or business (Schedule NEC) and some must 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.

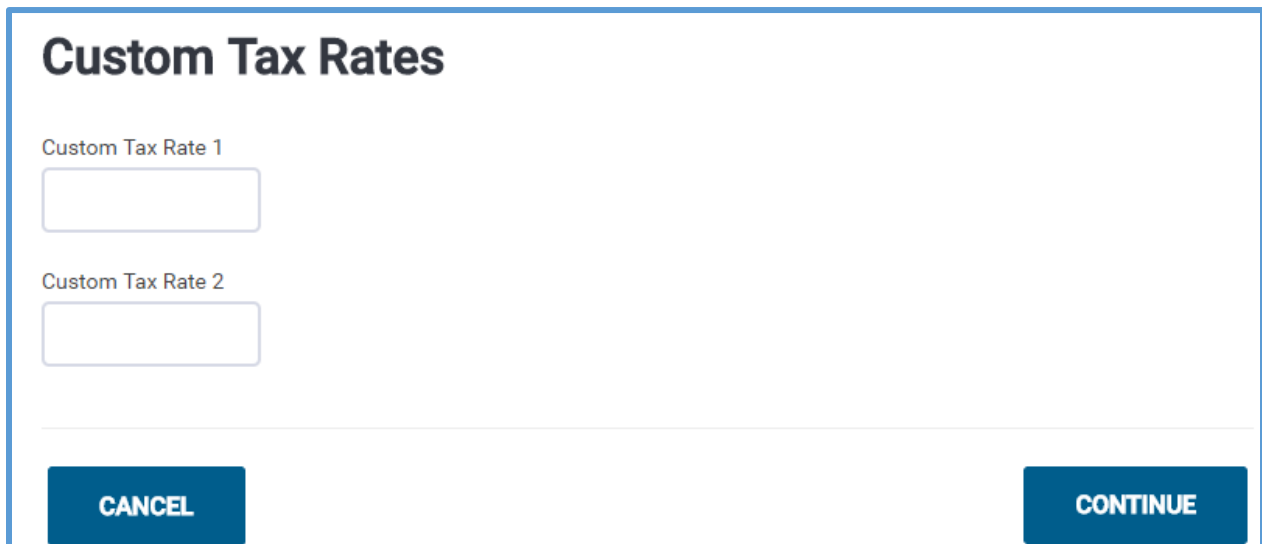
TaxSlayer Pro Online displays the **Schedule NEC** page:



Schedule NEC	
Custom Tax Rates	BEGIN
US Corps Dividends	BEGIN
Foreign Corps Dividends	BEGIN
Mortgage Interest	BEGIN
Foreign Corps Interest	BEGIN

2. If the taxpayer is required to use custom tax rates for some types of income, click **BEGIN** on the **Custom Tax Rates** line.

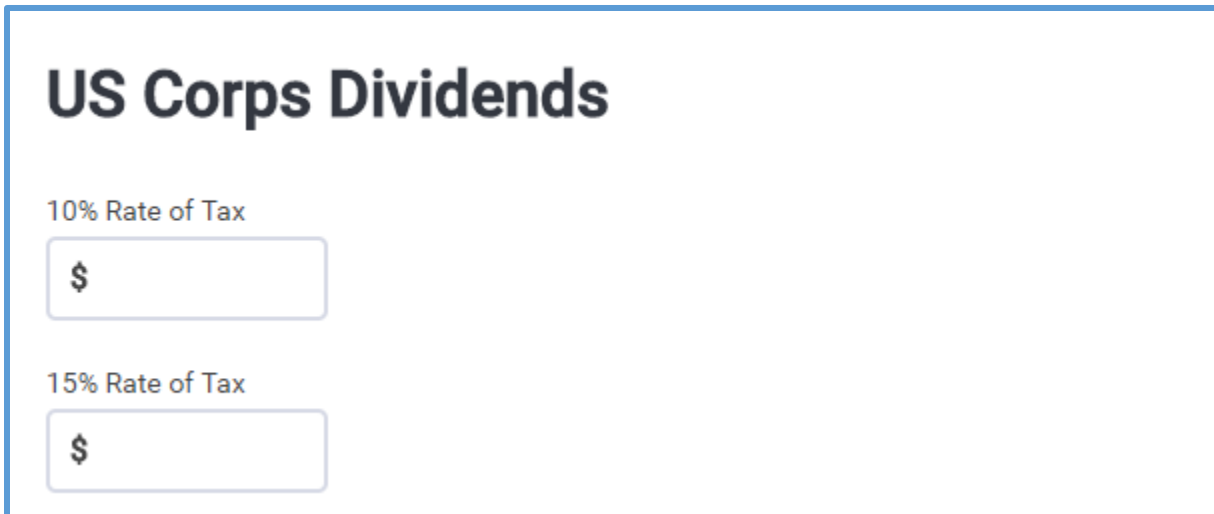
TaxSlayer Pro Online displays the **Custom Tax Rates** page:



Custom Tax Rates	
Custom Tax Rate 1	<input type="text"/>
Custom Tax Rate 2	<input type="text"/>
CANCEL	CONTINUE

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:



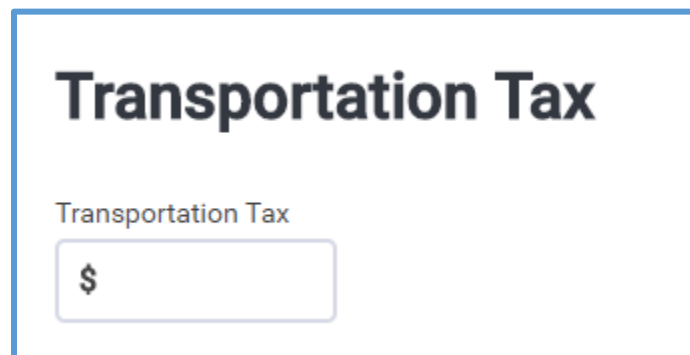
6. Type the amount(s) of income in the appropriate line for the tax rate.
7. Click **CONTINUE**.
8. When you finish typing all income to be entered on Schedule NEC, click **CONTINUE**.

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:

Payments and Estimates

Federal Estimated Tax Payments
Federal tax payments already made for 20 **BEGIN**

State Estimated Payments
State tax payments already made for 20 **BEGIN**

Other Federal Withholdings
Federal withholdings you haven't already entered **BEGIN**

Other State Withholdings
State withholdings you haven't already entered **BEGIN**

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:

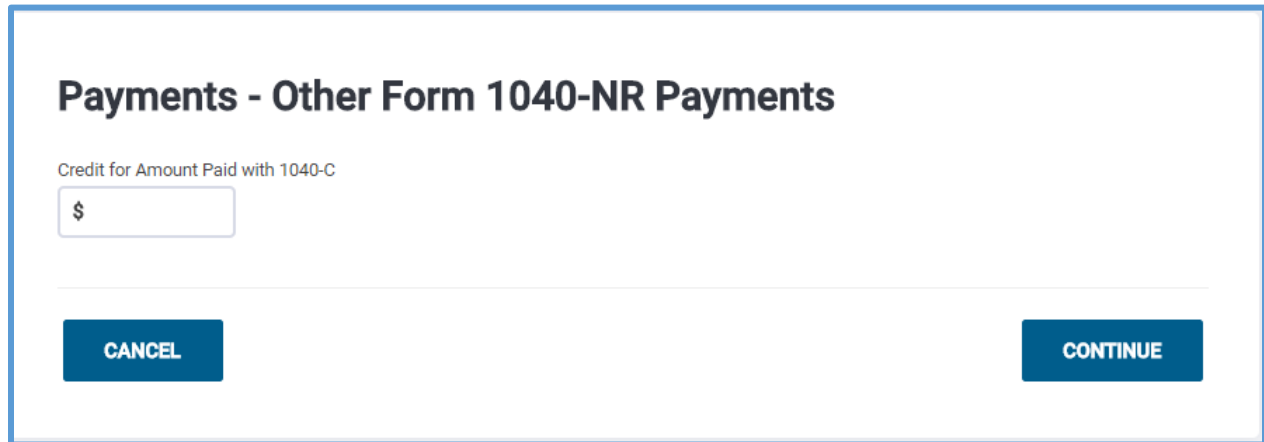
1. Click **BEGIN** on the line for which you need to enter a payment or estimate.
2. Type the information on the page just as you would for any other taxpayer.
3. When you finish entering all payments and estimates, click **CONTINUE**.

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:



Payments - Other Form 1040-NR Payments

Credit for Amount Paid with 1040-C

\$

CANCEL **CONTINUE**

2. Type the amount of the credit for the amount paid with Form 1040-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:

Form 1042-S Foreign Person's U.S. Income Subject to Withholding

Select chapter *

Please Select ▾

Tax Rate

CANCEL

CONTINUE

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:

The screenshot shows the 'Form 1042-S Foreign Person's U.S. Income Subject to Withholding' page. At the top, there are two buttons: 'CANCEL' on the left and 'CONTINUE' on the right. Below these buttons, the form contains the following fields and options:

- Unique Form Identifier ***: A text input field.
- Chapter 3 Code**: A dropdown menu currently showing '- Please Select -'.
- Is this an amended form?**: Two radio button options, 'Yes' and 'No', with 'No' selected.
- Pro-rata basis reporting?**: Two radio button options, 'Yes' and 'No', with 'No' selected.

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:

Miscellaneous Forms	
Form 8379 Injured Spouse	BEGIN
Form 1310 Claim a Refund Due to a Deceased Taxpayer	BEGIN
Form 4868 Application for Extension	BEGIN
Form 8958 Married Filing Separately Allocations	BEGIN
IRS Identification Pin PIN needed if you were issued a CP01A notice from the IRS	BEGIN

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:

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2022? *
If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

☐ Yes

☐ No

BACK **CONTINUE**

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:

Your Federal Return is Complete!

Congratulations! You have completed your Federal Return.

We're ready to add your state return. We'll automatically transfer all the necessary information into your state return for you.

Please choose from the following options:

- Add a State Return to your account.

The following states do not have state income tax returns that can be filed through TaxSlayer Pro: **Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming**

- Skip the State Return process and Continue to the Summary.
- Return to the Federal Section to review or make changes to your Federal Return.

RETURN TO FEDERAL SECTION

ADD STATE RETURN(S)

CONTINUE TO SUMMARY

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**:

Tax Return Summary

VIEW/PRINT RETURN

1040 page 1 [show details](#)

1040 page 2 [show details](#)

Schedule 1 – Part I Additional Income [show details](#) \$0.00

Schedule 1 – Part II Adjustments to Income [show details](#) \$0.00

Schedule 2 – Part I Tax [show details](#) \$0.00

Schedule 2 – Part II Other Taxes [show details](#) \$0.00

Schedule 3 – Part I Nonrefundable Credits [show details](#) \$0.00

Schedule 3 – Part II Other Payments And Refundable Credits [show details](#) \$0.00

BACK

CONTINUE

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:

Office Client List

Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: Any Tag

☐ Do Not Show Deactivated Returns ☐ Do Not Show Accepted Returns ☐ Do Not Show Paper Returns

Date From: yyyy/mm/dd Date To: yyyy/mm/dd Date Type: Create Date

Search Client List

Show 100 entries

Showing 1 to 50 of 50 entries

Previous 1 Next

SSN FIRST LAST PHONE PREPARER STATUS STATE STATUS

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:

Tax Return Summary

[View/Print Return](#) | [Prior Year Comparison](#)

BACK

Last Checkpoint

CONTINUE

Form 1040 page: [1](#) [2](#) [3](#) [4](#)

Summary View

1040 View

Form **1040** Department of the Treasury—Internal Revenue Service (99)

U.S. Individual Income Tax Return

OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)
Check only one box. 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	
Taxpayer		Sample		Age: 60	
700		00		9996	
If joint return, spouse's first name and middle initial		Last name		Spouse's social security number	
Spouse		Sample		Age: 60	
700		00		6666	
Home address (number and street). If you have a P.O. box, see instructions.				Apt. no.	
1530Papaya Street					
City, town, or post office. If you have a foreign address, also complete spaces below.			State	ZIP code	Presidential Election Campaign 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. <input type="checkbox"/> You <input type="checkbox"/> Spouse
Augusta			GA	30904	
Foreign country name			Foreign province/state/county	Foreign postal code	

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ☐ Yes ☒ No

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:

Do you want to complete an amended return?

Please see our Knowledgebase for more information about this process and for mailing instructions.

BACK **GET STARTED**

Copyright © 2023 TaxSlayer Pro

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:

Amended Tax Return - Form 1040X

How To Amend Your Return	Begin
Original Federal Return Information	Begin
Make Corrections for Amended Return	Begin
Amend State Return(s)	Begin
Explain Changes	Begin
Print Amended Return	Begin
Delete Amended Return	Begin

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:

Do not make changes to this page unless you have already mailed in an amended return. In most cases, the information on this page should match the return that prints when you click Print Accepted Return on your Manage My Account page.

Original Amount

Adjusted gross income

[Where is this located?](#)

Itemized or standard deduction

[Where is this located?](#)

Tax

[Where is this located?](#)

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:

Amended 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.

State	Return Type		
Georgia	Resident	Amend State	 

2. Click **Amend State** for the state you need to amend.

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

Amended Return	BEGIN
----------------	--------------

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:

The screenshot shows the 'Georgia Return' page for an 'Amended Return'. At the top, there are 'BACK' and 'CONTINUE' buttons. A blue informational box states: 'If you need to make changes to your Georgia return after it has been accepted by the state, you will be required to file an Amended State Return (Form 500X). Information entered in the menus below will aid in completing the amended state return. Please print a copy of your originally accepted return and review and complete the menus below.' Below this, a question asks 'To create Form 500X, Georgia amended return, select YES and complete the additional section below.' with radio buttons for 'Yes' and 'No'. The 'No' option is selected. Another blue box explains: 'The corrected information will be pulled from your changes made in the Federal and State return and we will populate Form 500X with this corrected information. Complete the additional section below to finalize the amended return questions. Once the amended return is complete, you will print, sign and mail the return to Georgia for filing.' At the bottom, there are four sections with 'BEGIN' buttons: 'General Questions', 'Payments and Credits', 'Refund or Balance Due', and 'Explanation of Changes'.

Georgia Return

Amended Return

[BACK](#) [CONTINUE](#)

If you need to make changes to your Georgia return after it has been accepted by the state, you will be required to file an Amended State Return (Form 500X). Information entered in the menus below will aid in completing the amended state return. Please print a copy of your originally accepted return and review and complete the menus below.

To create Form 500X, Georgia amended return, select YES and complete the additional section below.

☐ Yes

☒ No

The corrected information will be pulled from your changes made in the Federal and State return and we will populate Form 500X with this corrected information. Complete the additional section below to finalize the amended return questions. Once the amended return is complete, you will print, sign and mail the return to Georgia for filing.

General Questions [BEGIN](#)

Payments and Credits [BEGIN](#)

Refund or Balance Due [BEGIN](#)

Explanation of Changes [BEGIN](#)

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:

The screenshot shows a web form titled "Georgia Return" with a subtitle "General Questions". At the top, there are two buttons: "BACK" on the left and "CONTINUE" on the right. Below these buttons is a question: "Are you amending due to IRS changes?". There are two radio button options: "Yes" and "No". The "No" option is selected, indicated by a blue dot inside the radio button.

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:

The screenshot shows the 'Georgia Return' page with the 'Explanation Of Changes' section. At the top, there are two buttons: 'BACK' and 'CONTINUE'. Below these buttons is a question: 'Would you like to pull the explanation from the federal amended return?' with two radio button options: 'Yes' and 'No'. Underneath the radio buttons is a light blue text box with the placeholder text 'Enter explanation of changes below'. At the bottom, there is a label 'Line (1)' followed by a text input field.

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:

Amended Questions

Clicking 'Print' will generate a PDF document of your Form 1040X, along with the supporting forms that must be attached to the amended return. Be sure to review the Form 1040X to ensure that the necessary corrections are reflected appropriately. Once you have verified that the corrections are entered as needed, print the entire document that opens. You will need to mail your 1040X, all of the federal forms that print, and any additional tax statements (such as W-2s, 1099s, or 1098s) to the appropriate address.

To locate the correct address for mailing, [click here](#).

 PRINT

CONTINUE


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:

Print Results

Your return is ready to be printed. Please click the button below in order to view/print your 2020 Tax Return.

Direct Deposit information will be printed on your return once it has been accepted by the taxing authority, if applicable.

 Print your Tax Return

[Alternate Method for viewing/printing your 2020 Tax Return](#)

Adobe Acrobat Reader is required to view/print your 2020 Tax Return.

- [Download the latest version of the free Adobe Reader.](#)

CONTINUE

4. Click **Print your 20XX Tax Return**.

TaxSlayer Pro Online displays a pdf of the tax return in a new window:

3 / 32 | - 110% + | [Icon] [Icon]

Form **1040-X**
(Rev. January 2020)

Department of the Treasury—Internal Revenue Service
Amended U.S. Individual Income Tax Return
▶ Go to www.irs.gov/Form1040X for instructions and the latest information.

OMB No. 1545-0074

This return is for calendar year ☐ 2019 ☐ 2018 ☐ 2017 ☐ 2016
Other year. Enter one: calendar year **2020** or fiscal year (month and year ended):

Your first name and middle initial TAXPAYER	Last name SAMPLE	Your social security number [Redacted]
If joint return, spouse's first name and middle initial SPOUSE	Last name SAMPLE	Spouse's social security number [Redacted]
Current home address (number and street). If you have a P.O. box, see instructions.		Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below. See instructions. AUGUSTA, GA 30904		Your phone number
Foreign country name		Foreign province/state/county
		Foreign postal code

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:

The screenshot shows the 'Office Client List' interface. At the top, it says 'Client Tax Return List'. Below this are two dropdown menus: 'Filter by Status' (set to 'Any Status') and 'Filter by Return Tag' (set to 'Any Tag'). There are three checkboxes: 'Do Not Show Deactivated Returns', 'Do Not Show Accepted Returns', and 'Do Not Show Paper Returns', all of which are unchecked. Below these are three date-related fields: 'Date From:' (with a calendar icon and 'yyyy/mm/dd' format), 'Date To:' (with a calendar icon and 'yyyy/mm/dd' format), and 'Date Type' (a dropdown menu set to 'Create Date'). A 'Search Client List' text box is present. Below the search box is a 'Show' dropdown menu set to '100' entries. At the bottom, it says 'Showing 1 to 50 of 50 entries'. There are navigation buttons: 'Previous', '1' (highlighted), and 'Next'. At the very bottom, there are column headers for a table: SSN, FIRST, LAST, PHONE, PREPARER, STATUS, and STATE STATUS, each with an up/down arrow icon.

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:

Tax Return Summary [View/Print Return](#) [Prior Year Comparison](#)

BACK **Last Checkpoint** **CONTINUE**

Form 1040 page: [1](#) [2](#) [3](#) [4](#) **Summary View** **1040 View**

Form 1040 Department of the Treasury—Internal Revenue Service (99) **U.S. Individual Income Tax Return** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)
Check only one box. 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 Taxpayer Sample		Last name Sample	Age: 60	Your social security number [REDACTED]	
If joint return, spouse's first name and middle initial Spouse Sample		Last name Sample	Age: 60	Spouse's social security number [REDACTED]	
Home address (number and street). If you have a P.O. box, see instructions. 1530 Papaya Street			Apt. no.	Presidential Election Campaign 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. <input type="checkbox"/> You <input type="checkbox"/> Spouse	
City, town, or post office. If you have a foreign address, also complete spaces below. Augusta		State GA	ZIP code 30904		
Foreign country name		Foreign province/state/county	Foreign postal code		

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ☐ Yes ☒ No

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:

The screenshot shows a web page with the title "Do you want to complete an amended return?". Below the title is a link to the Knowledgebase. At the bottom, there are two buttons: "BACK" on the left and "GET STARTED" on the right. A copyright notice "Copyright © 2023 TaxSlayer Pro" is at the very bottom.

Do you want to complete an amended return?	
Please see our Knowledgebase for more information about this process and for mailing instructions.	
BACK	GET STARTED
Copyright © 2023 TaxSlayer Pro	

2. Click **GET STARTED**.

TaxSlayer Pro Online displays the **Amended Tax Return – Form 1040X** page:

The screenshot shows a web page titled "Amended Tax Return - Form 1040X". It contains a list of options, each with a "Begin" button to its right. The options are: "How To Amend Your Return", "Original Federal Return Information", "Make Corrections for Amended Return", "Amend State Return(s)", "Explain Changes", "Print Amended Return", and "Delete Amended Return". The "Amend State Return(s)" row is highlighted.

Amended Tax Return - Form 1040X	
How To Amend Your Return	Begin
Original Federal Return Information	Begin
Make Corrections for Amended Return	Begin
Amend State Return(s)	Begin
Explain Changes	Begin
Print Amended Return	Begin
Delete Amended Return	Begin

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:

Do not make changes to this page unless you have already mailed in an amended return. In most cases, the information on this page should match the return that prints when you click Print Accepted Return on your Manage My Account page.

Original Amount

Adjusted gross income

[Where is this located?](#)

Itemized or standard deduction

[Where is this located?](#)

Tax

[Where is this located?](#)

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:

Amended 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.

State	Return Type		
Georgia	Resident	Amend State	 

2. Click **Amend State** for the state you need to amend.

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

Amended Return	BEGIN
----------------	--------------

3. Click **BEGIN** on the **Amended Return** line.

TaxSlayer Pro Online displays the **State Return: Amended Return** page:

Georgia Return

Amended Return

BACKCONTINUE

If you need to make changes to your Georgia return after it has been accepted by the state, you will be required to file an Amended State Return (Form 500X). Information entered in the menus below will aid in completing the amended state return. Please print a copy of your originally accepted return and review and complete the menus below.

To create Form 500X, Georgia amended return, select YES and complete the additional section below.

☐ Yes

☒ No

The corrected information will be pulled from your changes made in the Federal and State return and we will populate Form 500X with this corrected information. Complete the additional section below to finalize the amended return questions. Once the amended return is complete, you will print, sign and mail the return to Georgia for filing.

General Questions

BEGIN

Payments and Credits

BEGIN

Refund or Balance Due

BEGIN

Explanation of Changes

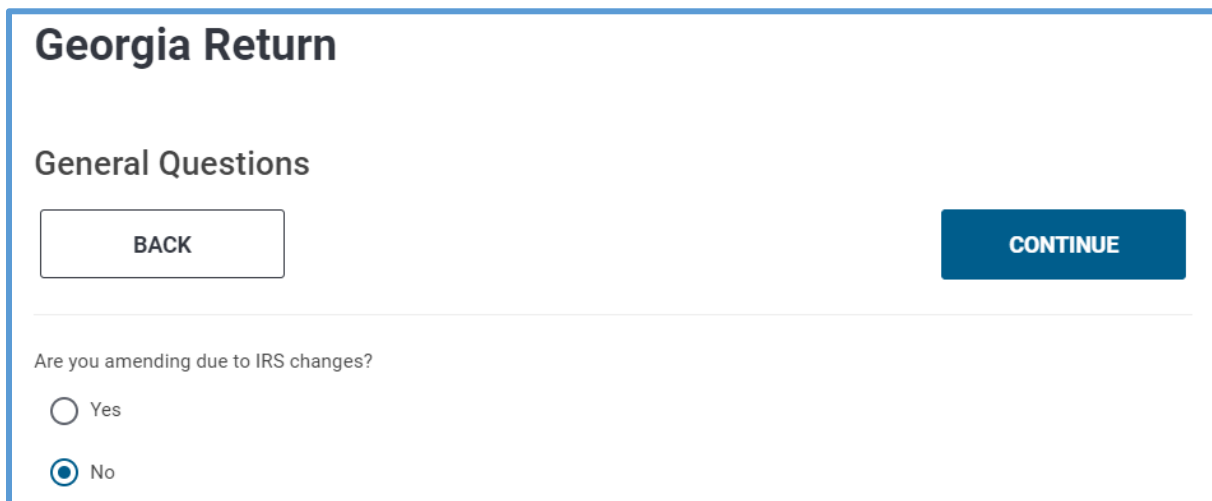
BEGIN

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:



The screenshot shows the 'Georgia Return' page with a 'General Questions' section. At the top left is a 'BACK' button, and at the top right is a blue 'CONTINUE' button. Below these buttons is a question: 'Are you amending due to IRS changes?'. There are two radio button options: 'Yes' (which is unselected) and 'No' (which is selected with a blue dot).

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:

Georgia Return

Amended Return

BACKCONTINUE

If you need to make changes to your Georgia return after it has been accepted by the state, you will be required to file an Amended State Return (Form 500X). Information entered in the menus below will aid in completing the amended state return. Please print a copy of your originally accepted return and review and complete the menus below.

To create Form 500X, Georgia amended return, select YES and complete the additional section below.

☐ Yes

☒ No

The corrected information will be pulled from your changes made in the Federal and State return and we will populate Form 500X with this corrected information. Complete the additional section below to finalize the amended return questions. Once the amended return is complete, you will print, sign and mail the return to Georgia for filing.

General Questions	<button>BEGIN</button>
Payments and Credits	<button>BEGIN</button>
Refund or Balance Due	<button>BEGIN</button>
Explanation of Changes	<button>BEGIN</button>

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:

The screenshot shows the 'Georgia Return' page with the 'Explanation Of Changes' section. At the top, there are 'BACK' and 'CONTINUE' buttons. Below them is a question: 'Would you like to pull the explanation from the federal amended return?' with radio button options for 'Yes' and 'No'. A light blue box contains the text 'Enter explanation of changes below'. Below this box is a label 'Line (1)' and an empty text input field.

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:

The screenshot shows the 'Amended Questions' page. It contains a paragraph of text explaining that clicking 'Print' will generate a PDF of Form 1040X and supporting forms, and that the user must review and mail the documents. Below the text is a link: 'To locate the correct address for mailing, [click here](#).' At the bottom, there are two buttons: 'PRINT' (with a printer icon) and 'CONTINUE'.


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:

Print Results

Your return is ready to be printed. Please click the button below in order to view/print your 2020 Tax Return.

Direct Deposit information will be printed on your return once it has been accepted by the taxing authority, if applicable.


Print your Tax Return

[Alternate Method for viewing/printing your 2020 Tax Return](#)

Adobe Acrobat Reader is required to view/print your 2020 Tax Return.

- [Download the latest version of the free Adobe Reader.](#)

CONTINUE

4. Click **Print your 20XX Tax Return**.

TaxSlayer Pro Online displays a pdf of the tax return in a new window:

3 / 32 | 110% | + | − | 🔍 | 🔄

Form 1040-X
(Rev. January 2020)

Department of the Treasury—Internal Revenue Service
Amended U.S. Individual Income Tax Return
▶ Go to www.irs.gov/Form1040X for instructions and the latest information.

OMB No. 1545-0074

This return is for calendar year ☐ 2019 ☐ 2018 ☐ 2017 ☐ 2016
Other year. Enter one: calendar year 2020 or fiscal year (month and year ended):

Your first name and middle initial <u>TAXPAYER</u>	Last name <u>SAMPLE</u>	Your social security number <div style="background-color: #ccc; height: 1.2em; width: 100%;"></div>
If joint return, spouse's first name and middle initial <u>SPOUSE</u>	Last name <u>SAMPLE</u>	Spouse's social security number <div style="background-color: #ccc; height: 1.2em; width: 100%;"></div>
Current home address (number and street). If you have a P.O. box, see instructions.		Apt. no. Your phone number
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below. See instructions. <u>AUGUSTA, GA 30904</u>		
Foreign country name	Foreign province/state/county	Foreign postal code

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.

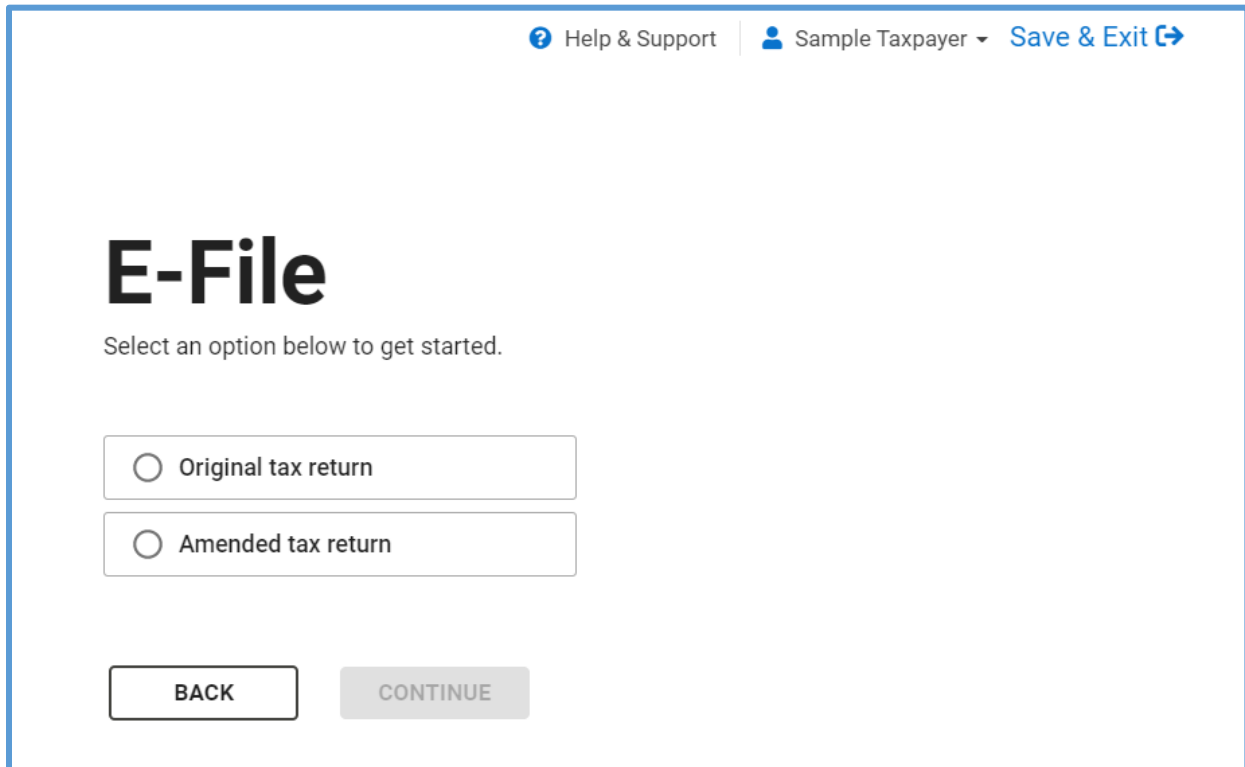
TIP: If the taxpayer is due a refund on the amended return, he or she will have a choice of receiving a mailed check or direct deposit for the refund. If taxpayer owes a balance due, the taxpayer can use direct debit, mail the payment, or use online payment on www.irs.gov.

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:

The screenshot shows the 'E-File' page in the TaxSlayer Pro Online interface. At the top right, there are links for 'Help & Support', 'Sample Taxpayer' with a dropdown arrow, and 'Save & Exit' with an external link icon. The main heading is 'E-File' in a large, bold font. Below it, the text 'Select an option below to get started.' is displayed. There are two radio button options: 'Original tax return' and 'Amended tax return'. At the bottom, there are two buttons: 'BACK' and 'CONTINUE'.

Help & Support | Sample Taxpayer ▾ Save & Exit ↗

E-File

Select an option below to get started.

☐ Original tax return

☐ Amended tax return

BACK CONTINUE

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:

2021 [Help & Support](#) [Sample Taxpayer](#) [Save & Exit](#)

Amended Return

[Regular E-file](#) [Amended E-file](#)

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Amended Return Fee Summary State ID License Taxpayer Consent Custom Questions Custom Credits Sub Pag

ERO * EFIN *

Test Sample ERO 001111

Federal return

How would the client like to send their tax return?

Federal refund - \$4,502 *

E-file: Paper Check

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**.

BACK

TRANSMIT RETURN

 SAVE & RETURN

 SAVE & EXIT

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:

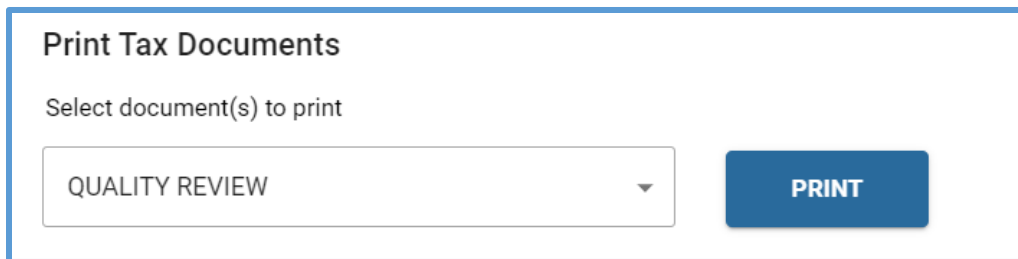
Return Details

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Return Details	Fee Summary	State ID License	Taxpayer Consent	Custom Questions	Custom Credits	Submission Page
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

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:



Print Tax Documents

Select document(s) to print

QUALITY REVIEW

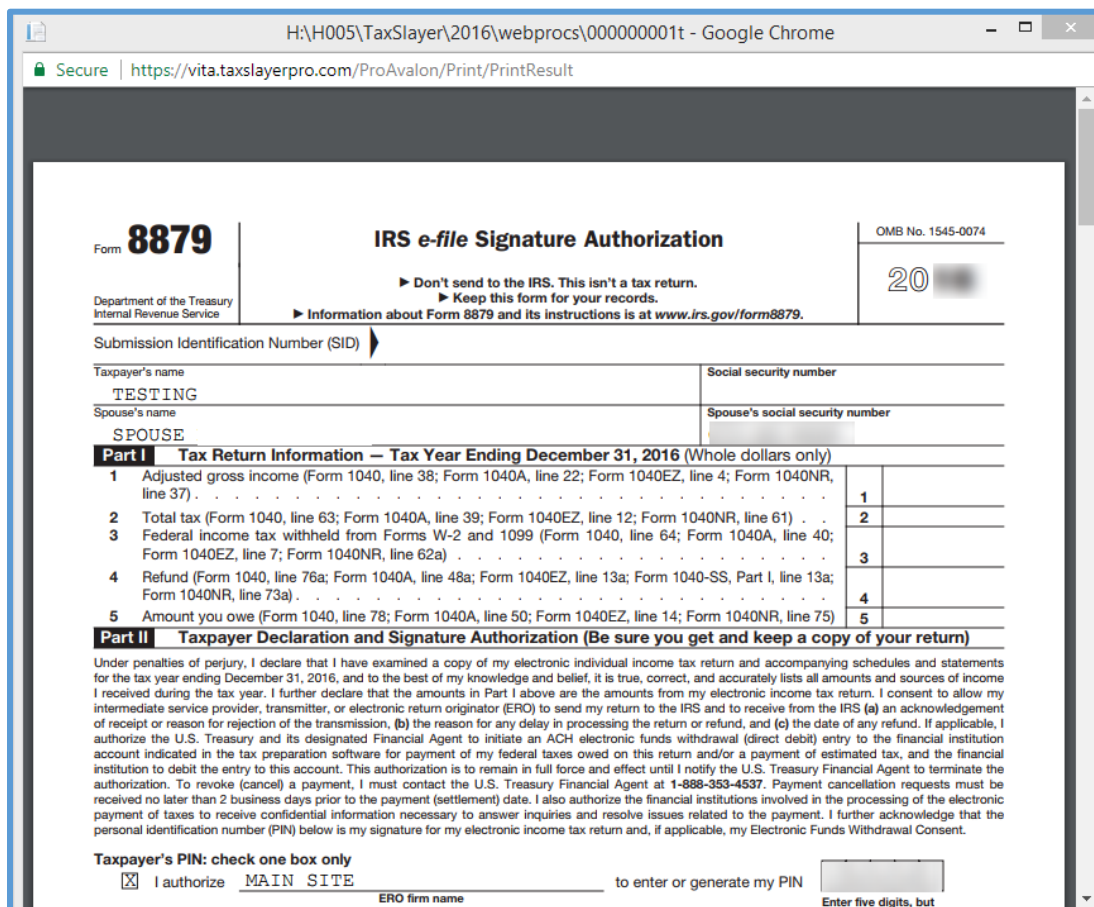
PRINT

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** IRS e-file Signature Authorization OMB No. 1545-0074

20

Department of the Treasury Internal Revenue Service

► 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.

Submission Identification Number (SID) ►

Taxpayer's name: TESTING Social security number: [REDACTED]

Spouse's name: SPOUSE Spouse's social security number: [REDACTED]

Part I Tax Return Information — Tax Year Ending December 31, 2016 (Whole dollars only)

Line	Description	Amount
1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4; Form 1040NR, line 37)	
2	Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12; Form 1040NR, line 61)	
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)	
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)	
5	Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14; Form 1040NR, line 75)	

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: [REDACTED] Enter five digits, but [REDACTED]

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:

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS
-00-9996	Taxpayer	Sample	.7567	Smith	In Progress	

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:

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS
-00-9996	Taxpayer	Sample	.7567	Smith	In Progress	

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		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		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			

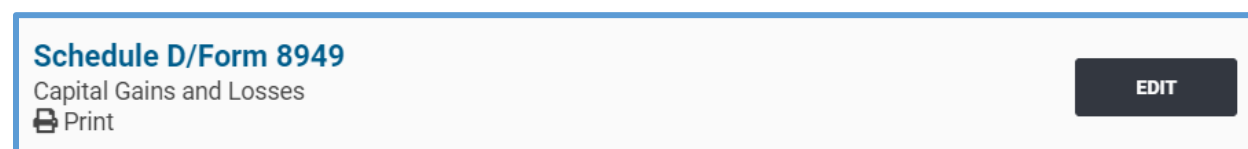
Printing a Single Form

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

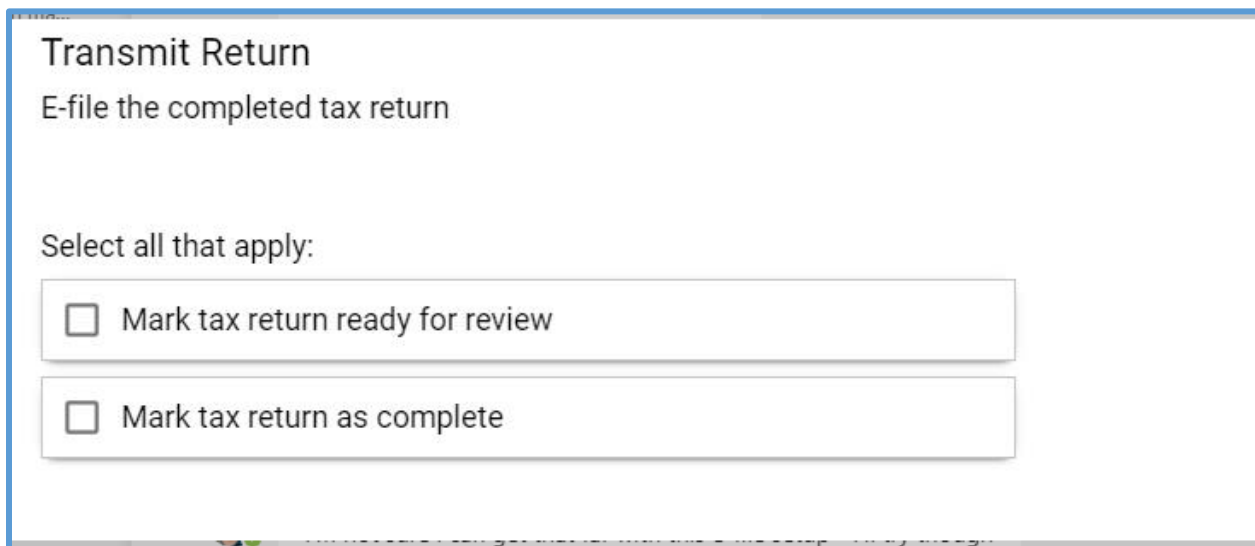
When you complete the return, you are required to have another person review the return before e-filing. Use the following steps to mark the return for review in order to use the built-in Review Returns feature:

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:



Transmit Return

E-file the completed tax return

Select all that apply:

☒ Mark tax return ready for review

☐ Mark tax return as complete

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:

Welcome to VITA/TCE Sample Site

Message Center 0 Rejected Clients

Start New Tax Return
Create a brand new tax return for a client. Select

Client Search
Edit returns you previously started. Select

Review Returns *
Returns that are currently waiting to be reviewed Select

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:

Review Returns < Back

1 return waiting for review

SSN	NAME	PREPARER	REVIEW REQUESTED	
3828	WORKSHEET, EIC	Kim Site Admin	5/10/2021 8:38:22 AM	Tools Select

Showing 1 to 1 of 1 entries

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)		20		OMB No. 1545-0074		IRS Use Only—Do not write or staple in this space.																															
Filing Status <input checked="" type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately (MFS) <input type="checkbox"/> Head of household (HOH) <input type="checkbox"/> Qualifying widow(er) (QW) Check only one box. 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 Test			Last name TaxReturn			Age: 41		Your social security number 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. 150 Forest Park							Apt. no.		Presidential Election Campaign 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. <input type="checkbox"/> You <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No																																							
Standard Deduction Someone can claim: <input type="checkbox"/> You as a dependent <input type="checkbox"/> Your spouse as a dependent <input type="checkbox"/> Spouse itemizes on a separate return or you were a dual-status alien																																							
Age/Blindness You: <input type="checkbox"/> Were born before January 2, 1957 <input type="checkbox"/> Are blind Spouse: <input type="checkbox"/> Was born before January 2, 1957 <input type="checkbox"/> Is blind																																							
Dependents (see instructions): <table border="1"> <thead> <tr> <th>(1) First name</th> <th>Last name</th> <th>(2) Social security number</th> <th>(3) Relationship to you</th> <th>(4) <input checked="" type="checkbox"/> if qualifies for (see instructions): Child tax credit</th> <th>Credit for other dependents</th> </tr> </thead> <tbody> <tr> <td>Child</td> <td>TaxReturn</td> <td>700 00 5858</td> <td>Son</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/> Age: 6</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>										(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions): Child tax credit	Credit for other dependents	Child	TaxReturn	700 00 5858	Son	<input checked="" type="checkbox"/>	<input type="checkbox"/> Age: 6					<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions): Child tax credit	Credit for other dependents																																		
Child	TaxReturn	700 00 5858	Son	<input checked="" type="checkbox"/>	<input type="checkbox"/> Age: 6																																		
				<input type="checkbox"/>	<input type="checkbox"/>																																		
				<input type="checkbox"/>	<input type="checkbox"/>																																		
				<input type="checkbox"/>	<input type="checkbox"/>																																		

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.

Form Finder

Enter the form number...

Basic Information

Federal Section

Income

- W-2 Wage Statement
- Interest and Dividends
- Form 1099-MISC
- Schedule C
- Capital Gains

Deductions

- Itemized Deductions

Other Taxes

Payments & Estimates

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:

FEDERAL RETURN	GA STATE RETURN						
<p>Federal refund</p> <p>\$5,602</p> <p>Return method: E-file: Paper Check</p> <p>Edit Refund Method</p>	<p>GA state taxes due</p> <p>-\$1,998</p> <p>Payment method: Paper Return</p> <p>Edit Payment Method</p>						
<p>FORM 8879 INFORMATION</p> <p>Taxpayer's Pin:</p> <p>11234 Edit Pin</p> <p>ERO's Pin:</p> <p>98765 Edit Pin</p>							
<p>DIRECT DEBT INFO</p> <table><tr><td>Amount of tax payment:</td><td>Debit phone number:</td><td>Requested payment date:</td></tr><tr><td>\$0</td><td></td><td></td></tr></table>		Amount of tax payment:	Debit phone number:	Requested payment date:	\$0		
Amount of tax payment:	Debit phone number:	Requested payment date:					
\$0							

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:

Return review status
Select the status of the return below

☐ Approved

☒ Failed

Why did the return fail?
Please briefly explain why the return was not approved.

Explanation can be typed here for the preparer to review

6. If you have approved the return and are ready to mark it complete, select the **Mark Complete** check box.

Transmit Return

E-file the completed tax return

Select all that apply:

☐ Mark tax return ready for review

☒ Mark tax return as complete

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:

Return Status Tag(s)

Select the tags below to sort returns from within the client list based on the predefined criteria below.

☐ referral

☐ returning

☐ new #1

☐ SomeTag

☐ scriptalert(123);/script

☐ Tifs Testing Tag

[View all return tags](#)

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:

Errors Concerning Your Federal Return

 The following errors concerning your Federal return were found.

Our records indicate the Health Insurance section is incomplete. Select Visit to correct this information.

[VISIT](#)

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:

Warnings Concerning Your Federal Return

 The following warnings concerning your Federal return were found.

- You indicated that you paid taxes to GA on your W-2, but you are not filing a GA state return. To add a state return, select the button below and follow the instructions to add your state return.

ADD STATE RETURN(S)

You have the following sticky notes in your account.

- *Sample Note*
 - Notes display in the warning section of the return and can be reviewed by the Quality Review team

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:

Bank Information

Enter any necessary bank account information for the taxpayer.

Return Details

Fee Summary

Bank Account

State ID License

Taxpayer Consent

Custom Questions

Custom Credits

Submission Page

✓

✓

●

○

○

○

○

○

Taxpayer bank account information - 8888

The taxpayer may allocate their refund into:

- Up to 3 bank accounts
- A Paper check
- Up to 3 savings bonds

The total amount of the deposits and purchased savings bonds must equal the total refund (**\$2,915.00**).

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:

Return Details

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Return Details	Fee Summary	State ID License	Taxpayer Consent	Custom Questions	Custom Credits	Submission Page
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ERO *

Main Default ERO

EFIN *

582355

Federal return

How would the client like to send their tax return?

Federal refund - \$5,502 *

E-file: Paper Check

☐ Only transmit the state return(s)

Completing Return Details

Confirming ERO Information

In the **Return Details** section, TaxSlayer Pro Online displays the **ERO Information** section:

Return Details

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Return Details	Fee Summary	Bank Account	Taxpayer Consent	Custom Questions	Custom Credits	Submission Page
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

ERO *

Main Default ERO

EFIN *

582355

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:

Form 8879
Confirm the information below for the IRS e-file signature authorization.
Taxpayer Email

Taxpayer's PIN *

ERO's PIN *

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.

Optional questions ^

Third party designee information

The taxpayer can choose to allow another person to discuss their tax return with the IRS.

Designee first name *

Designee last name *

Designee phone number *

Designee PIN *

CLEAR

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:

Bank Information

Enter any necessary bank account information for the taxpayer.

Return
Details

Fee
Summary

**Bank
Account**

State ID
License

Taxpayer
Consent

Custom
Questions

Custom
Credits

☒

☐

☒

☐

☐

☐

☐

Bank Account Type *

☒ Checking

☐ Savings

Bank Name *

Deposit Amount *

Routing Number *

Bank Account Number *

Confirm Routing Number *

Confirm Bank Account Number *

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:

Bank Accounts

Enter the taxpayer's bank account information for the account(s) they want the refund deposited into.

Bank Name ^

Account type

☒ Checking

☐ Savings

Bank name

Wells Fargo

Deposit amount

[Pull refund](#)

Routing number

Bank account number

Confirm routing number

Confirm bank account number

Bank Name v

Bank Name v

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.

Paper check allocation

Select a portion of the refund to be issued as a paper check.

\$0.00

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.

Savings Bonds
The taxpayer can purchase up to 3 savings bonds with their refund.
** Bonds must be purchased in \$50 increments*

Savings Bond 1

Bond amount

☒ The taxpayer does not wish to purchase this bond

Bond owner

First name

Last name

Beneficiary or co-owner (optional)

First name

Last name

☒ Is beneficiary

Savings Bond 2

Savings Bond 3

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

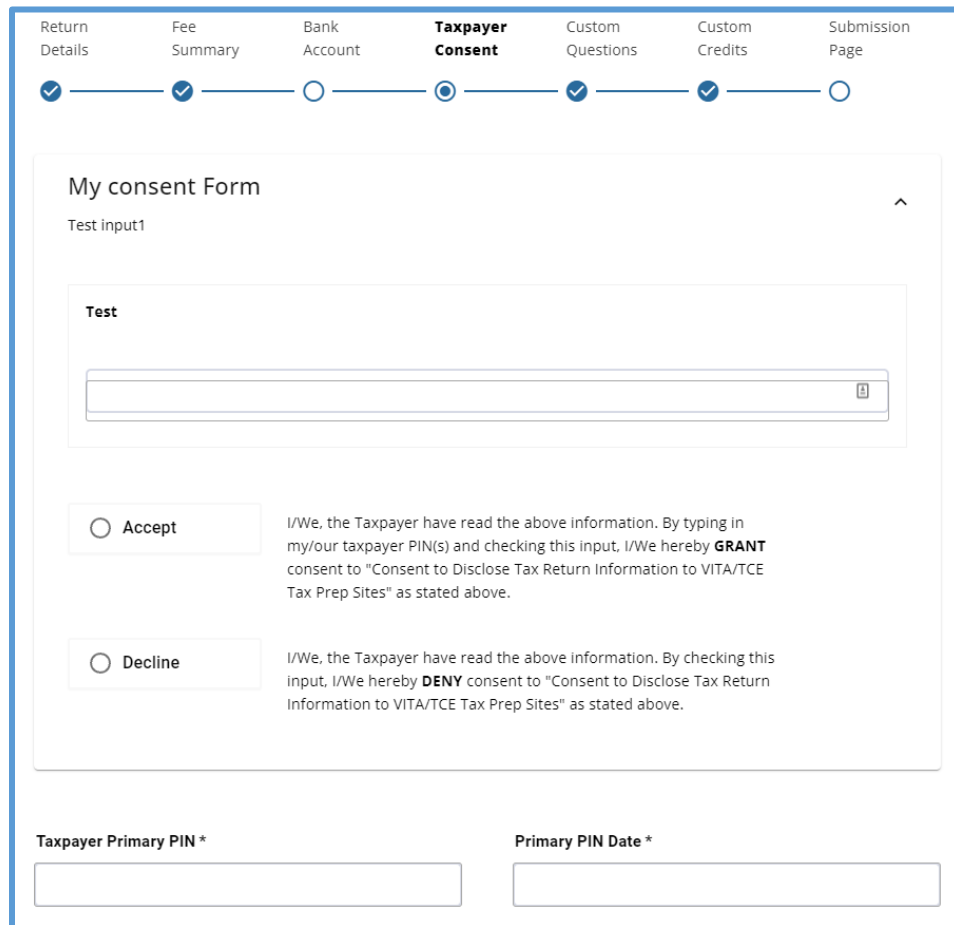
☐ Not provided

☐ 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:



The screenshot shows a multi-step process bar at the top with seven steps: Return Details, Fee Summary, Bank Account, Taxpayer Consent (highlighted), Custom Questions, Custom Credits, and Submission Page. Below the bar, the 'My consent Form' section contains a 'Test input1' label and a 'Test' input field. Two radio button options are presented: 'Accept' and 'Decline'. The 'Accept' option is accompanied by text stating that the taxpayer grants consent to disclose tax return information to VITA/TCE Tax Prep Sites. The 'Decline' option is accompanied by text stating that the taxpayer denies consent to disclose tax return information to VITA/TCE Tax Prep Sites. At the bottom, there are two input fields labeled 'Taxpayer Primary PIN *' and 'Primary PIN Date *'.

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:

Custom Questions

Answer any custom questions set up by your office.

Return Details	Fee Summary	Bank Account	Taxpayer Consent	Custom Questions	Custom Credits	Submission Page
✓	✓	○	✓	○	✓	○

1. Company Question 1

Answer1

2. Company Question 2

Select

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

Apply any custom credits set up by your office.

Return Details

Fee Summary

State ID License

Taxpayer Consent

Custom Questions

Custom Credits

✓

✓

○

✓

✓

●

State Education Credit

\$ 0

State Heating Credit *

\$ 0

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:

Submission Page

Review the final details and transmit the return.

Fee Summary

Bank Account

State ID License

Taxpayer Consent

Custom Questions

Custom Credits

Submission Page

✓

○

○

✓

✓

✓

○

TAXPAYER ELECTRONIC SIGNATURE

[Edit Signature](#)

FEDERAL RETURN

Federal refund

\$1,900

Return method: E-file: Direct Deposit

[Edit Refund Method](#)

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.

Print Tax Documents

Select document(s) to print

QUALITY REVIEW

▼

PRINT

2. Click **Print**.

TaxSlayer Pro Online displays the return in a separate tab as a PDF:

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:

Return Status Tag(s)

Select the tags below to sort returns from within the client list based on the predefined criteria below.

☐ Ready to File

☐ Waiting on Signature

☐ Need W-2


☐ Reviewed by Steve

☐ 1040-NR

[View all return tags](#)

Return review status

Select the status of the return below

 **PENDING REVIEW**

☐ Approved

☐ Failed

Transmit Return


E-file the completed tax return


Select one:

☒ Mark tax return ready for review

☐ Mark tax return as complete

BACK

 **SAVE & RETURN**

 **SAVE & EXIT**

2. Do one of the following:

- 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**.

Return Details

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Return Details	Fee Summary	State ID License	Taxpayer Consent	Custom Questions	Custom Credits	Submission Page
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ERO *

Main Default ERO

EFIN *

582355

Federal return
How would the client like to send their tax return?
Federal refund - \$5,502 *

E-file: Paper Check

☐ Only transmit the state return(s)

3. Scroll to the **State Return(s)** area.

TaxSlayer Pro Online displays the **State Return(s)** area:

State return
How would the client like to send their tax return?
GA state amount due - \$268 *

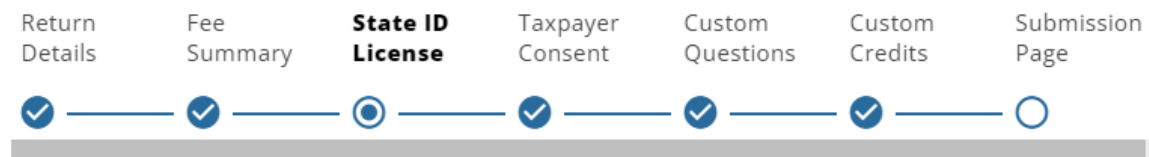
Not Selected ▼

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.

State ID License

Complete the optional or required taxpayer state ID info.



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 *

☐ Driver's License

☐ DMV/BMV State Id

☐ No Driver's License Or State ID

☒ Not Provided

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:

Return Details

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Return Details Fee Summary State ID License Taxpayer Consent Custom Questions Custom Credits Submission Page

ERO * EFIN *

Main Default ERO 582355

Federal return

How would the client like to send their tax return?

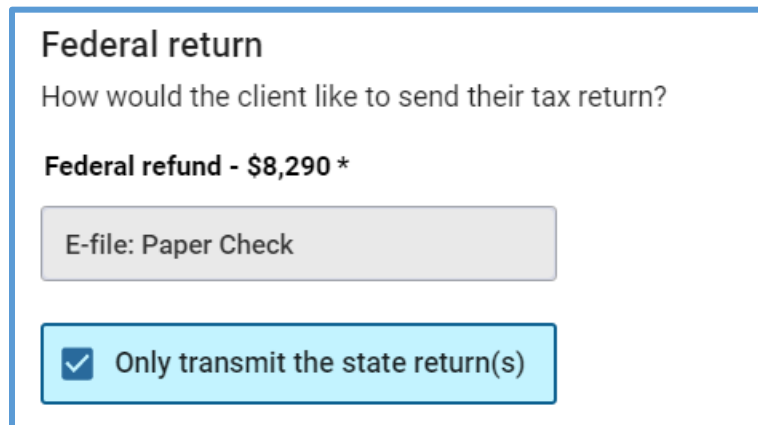
Federal refund - \$5,502 *

E-file: Paper Check

☐ Only transmit the state return(s)

3. Select the **Only Transmit the State Return(s)** check box.

TaxSlayer Pro Online changes the display when you select the check box:



Federal return
How would the client like to send their tax return?

Federal refund - \$8,290 *

E-file: Paper Check

☒ Only transmit the state return(s)

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:

Welcome to VITA/TCE Sample Site

Message Center 0 Rejected Clients

Start New Tax Return Create a brand new tax return for a client.	Select
Client Search Edit returns you previously started.	Select
Review Returns * Returns that are currently waiting to be reviewed	Select
Configuration Setup the configuration options for your office.	Select
Reports Print acks, mailing labels, bank reports, and old reports.	Select
Transmissions Transmit returns to IRS.	Select

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

Search:

Show 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
<input type="checkbox"/>	300-00- [REDACTED]	TAXPAYER	TESTING TAGS	(706) 223-2555	Kim Site Admin	JAN 12	Complete	E-file: Direct Deposit	\$ 5220.00	No Electronic State		
<input type="checkbox"/>	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:

<input type="checkbox"/>	400- [REDACTED]	W Two	Problems	(706) 456-4654	Will Smith		Complete	E-file: Mail Payment	\$ (12574.00)	E-file: Direct Debit
<input type="checkbox"/>	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

1 return transmitted.

[< Back](#)

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:

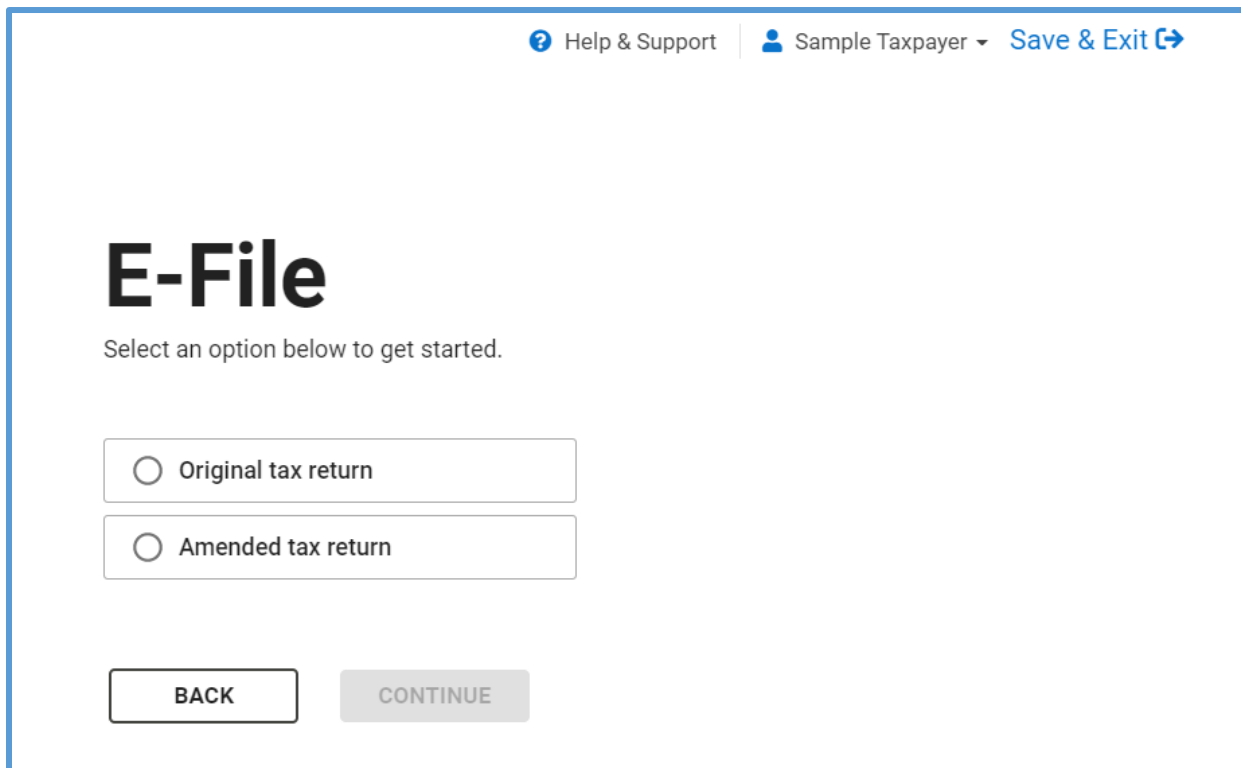
- Make the selection to electronically file a Federal 1040X.
- File a Federal 1040X return.

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:

A screenshot of the TaxSlayer Pro Online 'E-File' page. The page has a blue header bar with 'Help & Support' (with a question mark icon), 'Sample Taxpayer' (with a user icon and a dropdown arrow), and 'Save & Exit' (with an exit icon). The main content area has a large 'E-File' heading, followed by the instruction 'Select an option below to get started.' There are two radio button options: 'Original tax return' and 'Amended tax return'. At the bottom, there are two buttons: 'BACK' and 'CONTINUE'.

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:

2021 [Help & Support](#) [Sample Taxpayer](#) [Save & Exit](#)

Amended Return

Regular E-file Amended E-file

Determine how the taxpayer wants to pay their taxes due or receive their refund.

Amended Return Fee Summary State ID License Taxpayer Consent Custom Questions Custom Credits Sub Pag

ERO * EFIN *

Test Sample ERO 001111

Federal return

How would the client like to send their tax return?

Federal refund - \$4,502 *

E-file: Paper Check

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**.

BACK

TRANSMIT RETURN

 SAVE & RETURN

 SAVE & EXIT

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:

Welcome to VITA/TCE Sample Site

Message Center 0 Rejected Clients

Start New Tax Return Create a brand new tax return for a client.	Select
Client Search Edit returns you previously started.	Select
Review Returns * Returns that are currently waiting to be reviewed	Select
Configuration Setup the configuration options for your office.	Select
Reports Print acks, mailing labels, bank reports, and old reports.	Select
Transmissions Transmit returns to IRS.	Select

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

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

Office Reporting

Note: The reports below are set up and can be edited from Report Customization in the Configuration Menu.

Search for a report or a keyword...

Federal

State

Financial Reports

Custom Configuration Items

Other Data Reports

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:

20 IRS Acknowledgements

Showing 1 to 110 of 110 entries

Efin	L4SSN	Last Name	Status	Reject Code
0478			Accepted - 09/14/	N/A
9539			Rejected - 09/14/	'PrimarySSN' and 'PrimaryNameControlTxt' in the Return Header must match the e-File database. Data Value: 9539
3112			Accepted - 09/14/	N/A
5252			Accepted - 09/08/	N/A
4606			Accepted - 09/08/	N/A
2136			Accepted - 09/08/	N/A
6598			Accepted - 09/08/	N/A

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:

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.

2. Click **Select** on the **Validation Errors** line.

TaxSlayer Pro Online displays the **Validation Errors** page:

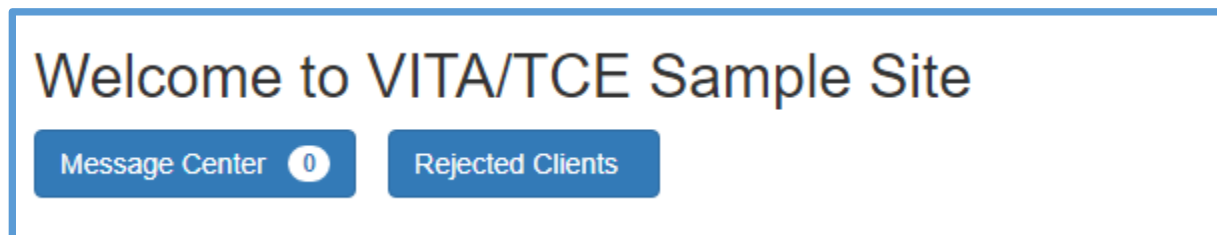
20 Validation Errors							
Showing 1 to 5 of 5 entries				Search: <input type="text"/>			
↓↑ Efin	↓↑ L4SSN	↓↑ Last Name	↓↑ State	↓↑ Error Date	↓↑ Error Message	↓↑ Help	↓↑
3966			FD	03/09/20	The element 'IRS1040NR' in namespace 'http://www.irs.gov/efile' has invalid child element 'AppLawfulPermanentResidentInd' 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**.

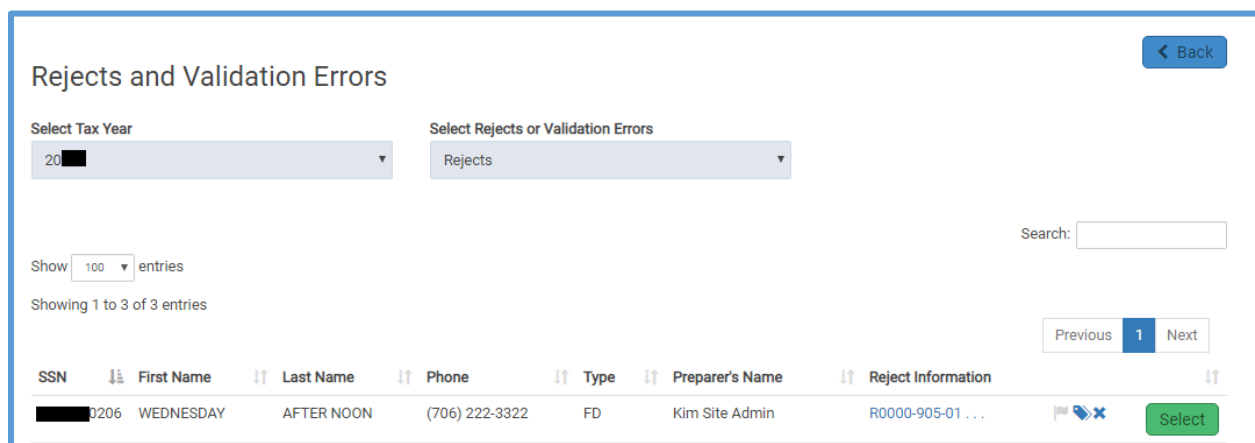
Using Rejected Clients

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:



Rejects and Validation Errors

Back

Select Tax Year: 2020

Select Rejects or Validation Errors: Rejects

Search:

Show 100 entries

Showing 1 to 3 of 3 entries

Previous 1 Next

SSN	First Name	Last Name	Phone	Type	Preparer's Name	Reject Information
0206	WEDNESDAY	AFTER NOON	(706) 222-3322	FD	Kim Site Admin	R0000-905-01 ...

Select

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	
0102	ITEMIZED		(706) 000	FD	Kim Site Admin	R0000-905-01 ...	Select
1818	TAG		(770) 555	FD	Kim Site Admin	R0000-905-01 ...	Select
0418	ACA		(766) 766	FD	Kim Site Admin	R0000-905-01 ...	Select
0116	TESTING		(706) 766	CA	Kim Site Admin	S0000-080 ...	Select
1234	TESTING		(706) 223	FD	Kim Site Admin	R0000-905-01 ...	Select
0207	TESTING		(706) 222	FD	Kim Site Admin	R0000-905-01 ...	Select
1123	TESTING		(706) 222	FD	Kim Site Admin	R0000-905-01 ...	Select
0126	KIMS		(706) 223	FD	Kim Site Admin	R0000-905-01 ...	Select
0203	TEST		(706) 232	FD	Kim Site Admin	R0000-905-01 ...	Select
0203	AFTER		(706) 222	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.

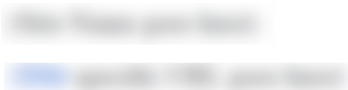
The TaxSlayer Online FSA program works the same way for the taxpayer in all cases.

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:

Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

Click the Continue button to create a new account or login with an existing account.

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:

Log In

Need a TaxSlayer account? [Create account.](#)

Username

Password

[Forgot Username](#) | [Forgot Password](#)

By clicking 'Log In', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and agree to receive marketing emails related to your account. You can [unsubscribe](#) at any time.

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.

- You are attempting to use an invalid URL.
Please contact your VITA/TCE volunteer
or VITA/TCE site for an updated 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:

Create your account.

Already have an account? [Log In](#)

Email address

Username

Password

Mobile phone (recommended)

CREATE ACCOUNT

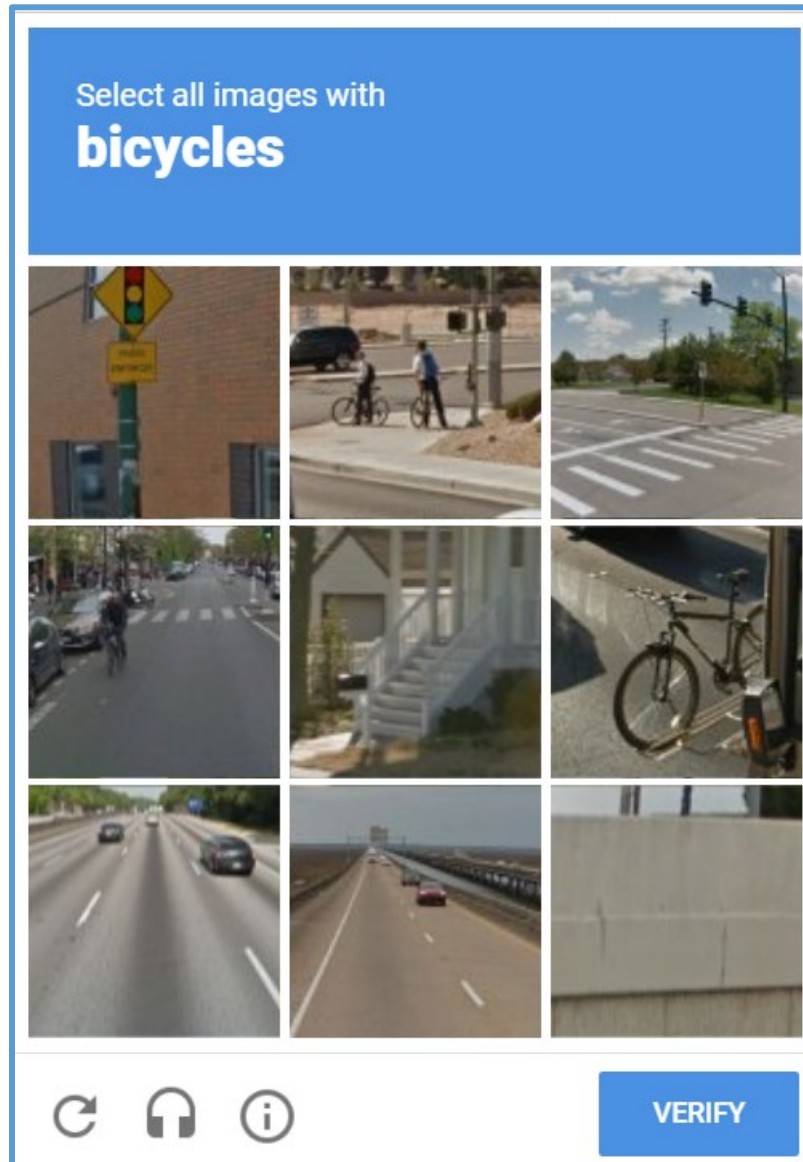
By clicking 'Create Account', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and agree to receive marketing emails related to your account. You can [unsubscribe](#) at any time.

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.

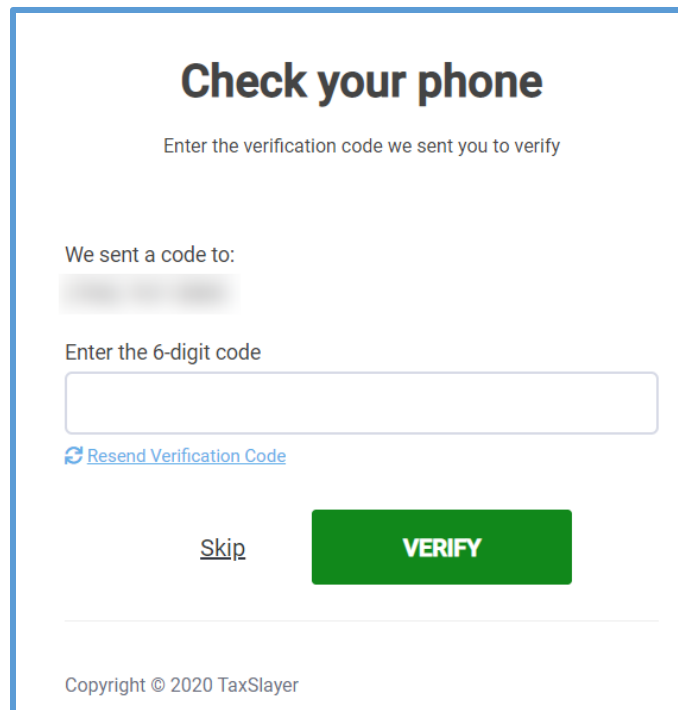
5. Click **CREATE ACCOUNT**.

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:



The screenshot shows a web page titled "Check your phone" with the instruction "Enter the verification code we sent you to verify". Below this, it says "We sent a code to:" followed by a blurred phone number. There is a text input field labeled "Enter the 6-digit code". Below the input field is a link that says "Resend Verification Code" with a circular arrow icon. At the bottom, there are two buttons: a "Skip" link and a green "VERIFY" button. The footer of the page reads "Copyright © 2020 TaxSlayer".

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:

MY ACCOUNT

Tax Return

Welcome back! Let's get started on your 2021 tax return.

GET STARTED



RETURN	STATUS	REFUND AMOUNT
- No returns have been created -		

10. Click **GET STARTED**.

TaxSlayer FSA displays the **Let's get this out of the way** page:

Let's get this out of the way.

Review the legal info below, give us your autograph, and you'll be on your way to a faster, easier tax filing experience – created with you in mind.

Sign by typing your name and the date in the boxes below

Use of Information

Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of Tax Return Information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your Tax Return Information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

We use the information you provide (discussed above) to complete services and products you request. That is, we may use your information to show you additional products (if applicable) such as options to pay for tax preparation services (e.g. Refund Transfer), various ways to receive a refund disbursement, personalized tax tips, and other relevant products and services based upon your Tax Return Information. These offers may come from us or a third-party service provider. As permitted by law,

PRINT

Full Name *

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.

Personal Information

Taxpayer's Information

Primary taxpayer first name	MI
<input type="text"/>	<input type="text"/>
Last name	Suffix (Jr, Sr, etc.)
<input type="text"/>	<input type="text" value="---"/>
SSN <i>The IRS requires your Social Security Number for e-filing. *</i>	
<input type="text"/> - <input type="text"/> - <input type="text"/>	
Date of Birth	
<input type="text" value="MM"/>	<input type="text" value="DD"/>
<input type="text" value="YYYY"/>	
Occupation	
<input type="text"/>	

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:

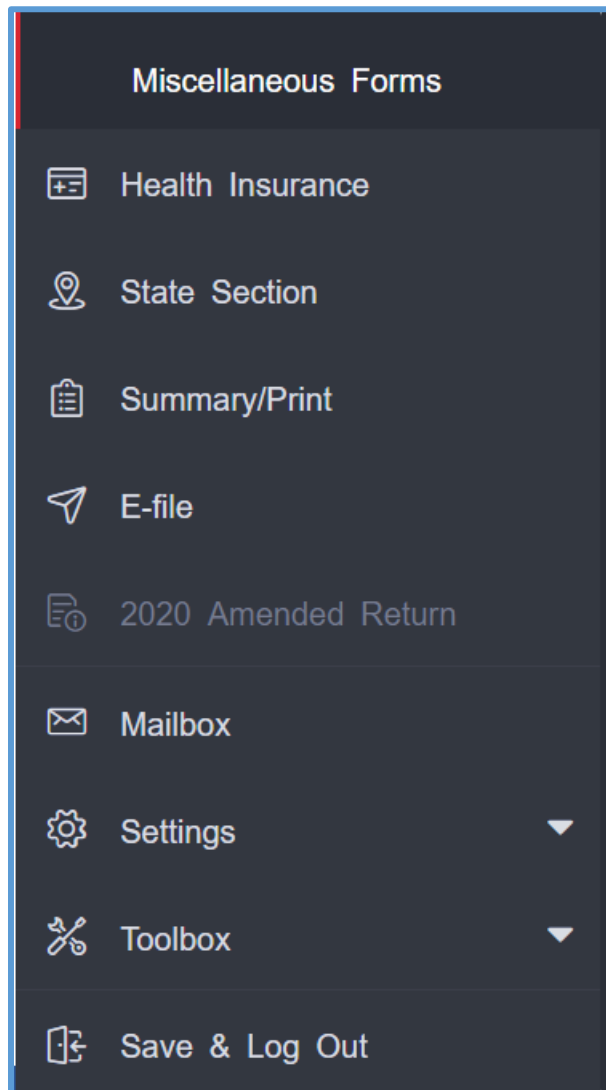
The screenshot shows a web interface titled "Add your forms quickly with Quick File" with the subtitle "If you know which forms you need, easily search and add them to your tax return." The main visual is a laptop displaying a "Form Search" interface. The search bar contains "W-2 Form" and a magnifying glass icon. Below the search bar, a green button labeled "Form W-2" is visible. At the bottom of the laptop screen, there are three options: a grey "BACK" button, a link that says "I don't know which forms I need", and a green "CONTINUE" button.

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.

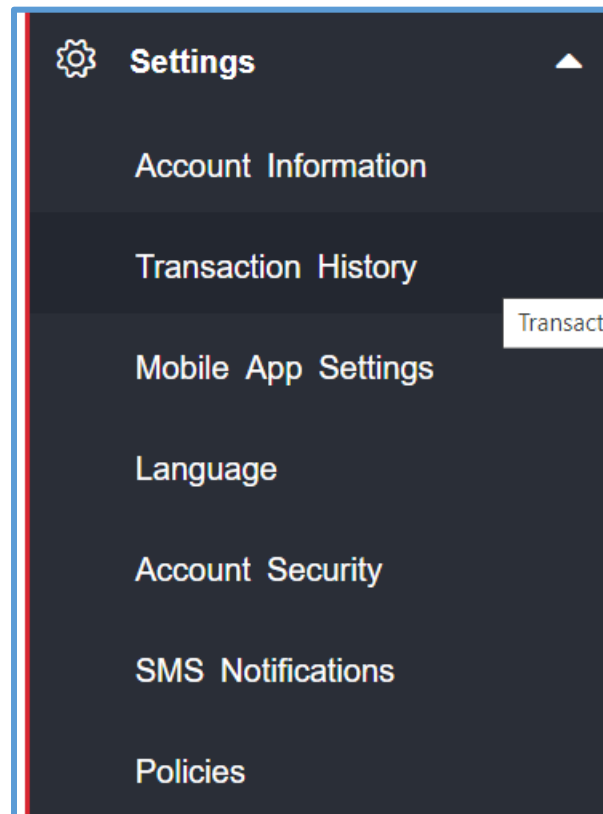
Preparing the Return in Spanish

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:



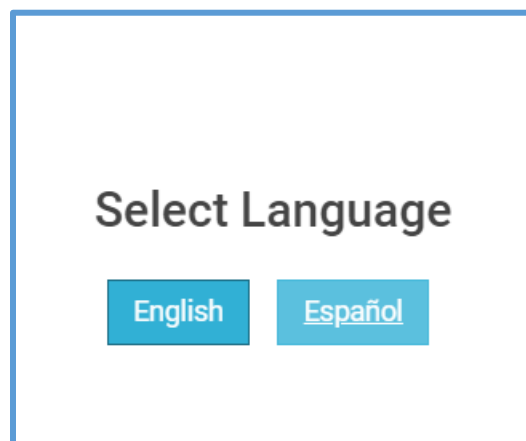
1. Click **Settings** to expand the section.

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:

Ingresos

W-2 *(Formulario mas comun)* ?

Sueldos y Salarios

1099-DIV, INT, OID ?

Interés y Dividendos

1099-MISC ?

Ingresos Misceláneos


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.

Tax Return Summary



Total Income	\$25,000.00	▼
Adjusted Gross Income	\$25,000.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$1,120.00	▼

The taxpayer can click a heading to expand the section:

Total Income	\$25,000.00 ▾
Wages, salaries, tips, etc.	\$25,000.00
Taxable interest	\$0.00
Tax-exempt interest	\$0.00
Ordinary dividends	\$0.00
Qualified dividends	\$0.00

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:

Sample, we need the adjusted gross income (AGI) from your [redacted] tax return so the IRS can confirm your identity.

Do you have access to your [redacted] tax return?

☐ Yes, I have my [redacted] tax return with me.

☐ No, I can't locate my [redacted] tax return.

☐ No, I didn't file a [redacted] tax return.

BACK **CONTINUE**

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:

Sample, which type of tax return did you file last year?

Look for the form name in the top-left corner of your federal return.

- ☒ 1040
- ☐ 1040NR
- ☐ 1040X
- ☐ 1040SR



Enter your Adjusted Gross Income (AGI)



Located on last year's tax return (Line 11 Form 1040)

This amount is used by the IRS to confirm your identity. It must be correct for your return to be accepted.

Primary taxpayer - Sample FSA

 Adjusted Gross Income (AGI) *

Located on line 11 of your form 1040. Round to the closest dollar if your AGI includes cents.

\$0

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).

Now, create a Self-Select PIN for this year

Create a 5-digit PIN for this year's tax return. We'll import it for you when you file next year.

*You may be asked for this PIN in the future so the IRS can confirm your identity. We recommend making note of your PIN and keeping track of it.

Taxpayer's 5-digit PIN *

State Information

Some states request the taxpayer's ID information. If so, TaxSlayer FSA walks the taxpayer through entering the information.

Identifying Information

[Does not have Identification](#)

[I do not wish to provide](#)

ID Type *

- Please Select - ▾

Issuer *

- Please Select - ▾

ID Number *

Issue Date *

MM ▾

DD ▾

YYYY ▾

☐ No Expiration Date

Expiration Date *

MM ▾

DD ▾

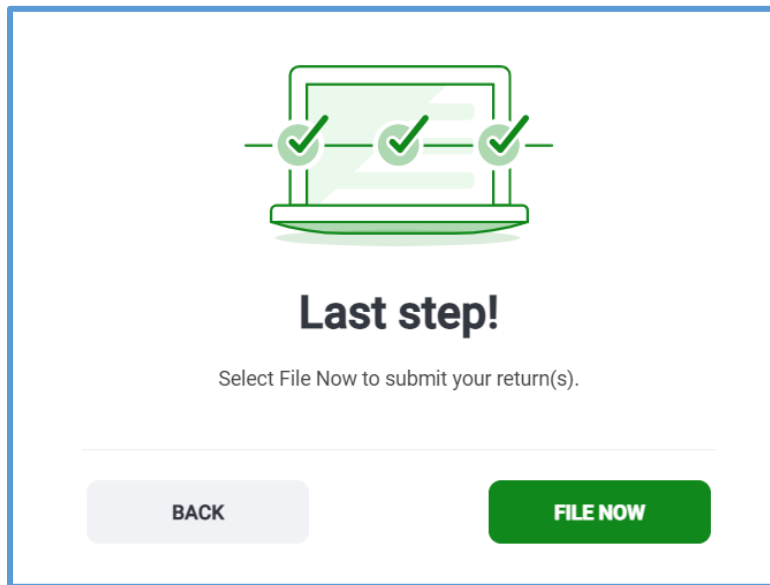
YYYY ▾

BACK

CONTINUE

Submit Return

Click **File Now**, as shown below:



Payment

Taxpayers do not need to pay when preparing a return through 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:

TaxSlayer <≡

MY ACCOUNT 2021 Tax Return

Welcome back! Let's finish your 2021 tax return.

CONTINUE

RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	\$1,082.00

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[Privacy Policy](#)

Mailbox Settings Save & Log Out

2. Click **Settings** on the left navigation panel. to expand the section.
3. Click **Transaction History**.

TaxSlayer FSA displays the **Transaction History** page:

The screenshot shows a web interface for the TaxSlayer FSA Transaction History page. At the top left, there is a link "Deactivate Tax Return" followed by a blue "hide" link. Below this, the text "Tax Year 2020 (122-00-1212)" is displayed. To the right of this text is a dropdown menu with the text "- Please Select -" and a downward arrow. Below the dropdown menu is a button labeled "CLEAR YOUR RETURN AND RESTART". At the bottom of the interface, a note states: "* You will be logged out of your account after deactivating your return."

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:

Security Templates - Sample VITA/TCE Site

+ Add Security Template

Template Name	Created By	Date Created			
Peer Review	Sample VITA/TCE Site	7/27/2020	View Users	<div>+ Assign</div>	<div><div>Edit</div><div>Delete</div></div>
New Example	Sample VITA/TCE Site	7/27/2020	View Users	<div>+ Assign</div>	<div><div>Edit</div><div>Delete</div></div>
Preparer with Restrictor	Sample VITA/TCE Site	7/27/2020	View Users	<div>+ Assign</div>	<div><div>Edit</div><div>Delete</div></div>
ADMINISTRATOR		2/7/2017			

+ Add Security Template

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:

Add Security Template

Cancel

Continue

Template Name

Check item to allow access

☒

 Check/Uncheck All

☒

 Access Current Year Client List

☒

 Add and Configure Security Templates

☒

 Add or Edit Print Sets

☒

 Add/Edit Preparers

☒

 Access Office

☒

 Add or Edit Custom Credits

☒

 Add or Edit Tags

☒

 Allow Ability to Clear Signatures

☒

 Access Previous Years Client Lists

☒

 Add or Edit Office Ip Whitelist☒☒

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:

Assign Security Template

New Example ◆

Assign template to:

search...

☐ Check/Uncheck all

☐ Show Inactive

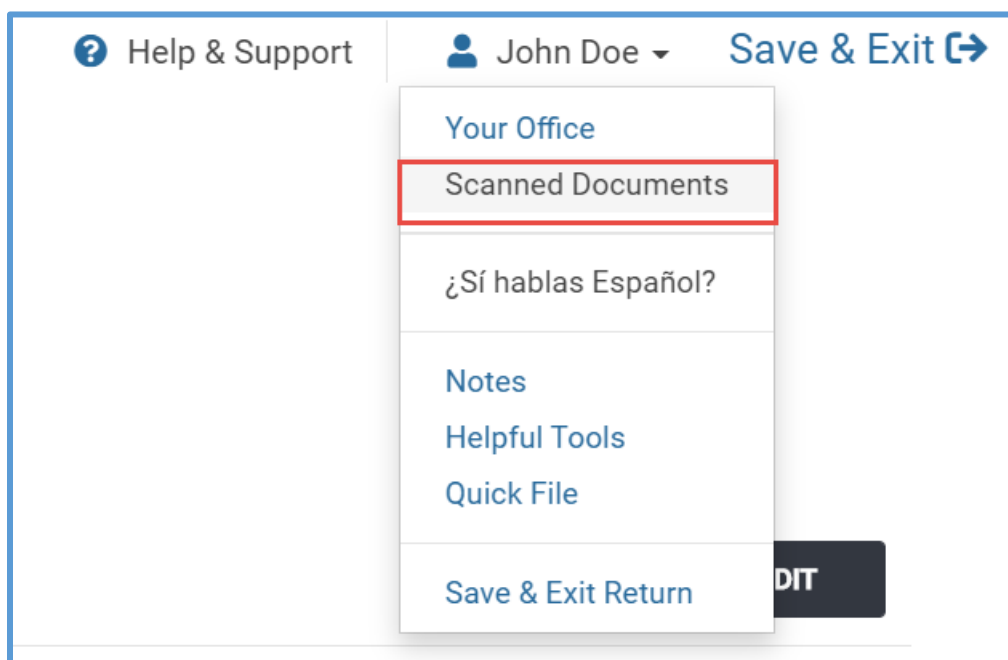
⬇ Preparers

2. Select the check box for the user(s) you want to allow access to scanned documents.
3. Click **Continue**.

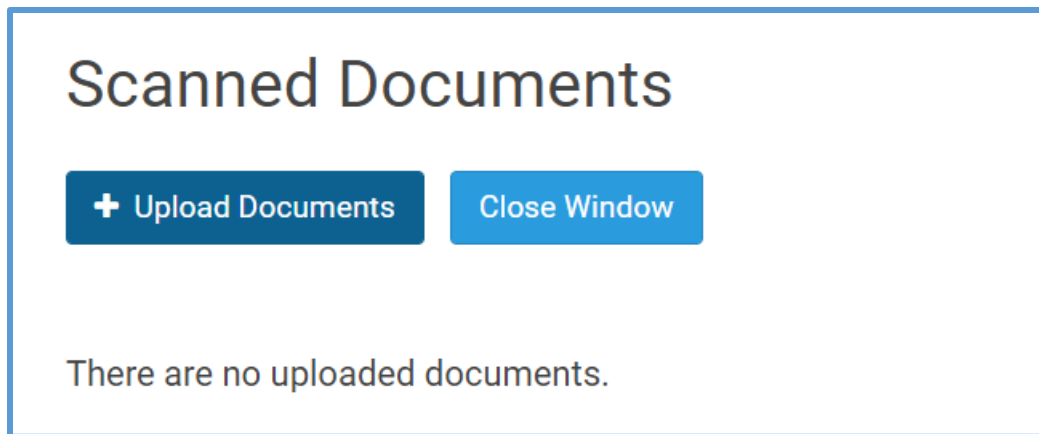
Adding Scanned Documents to a Return

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:

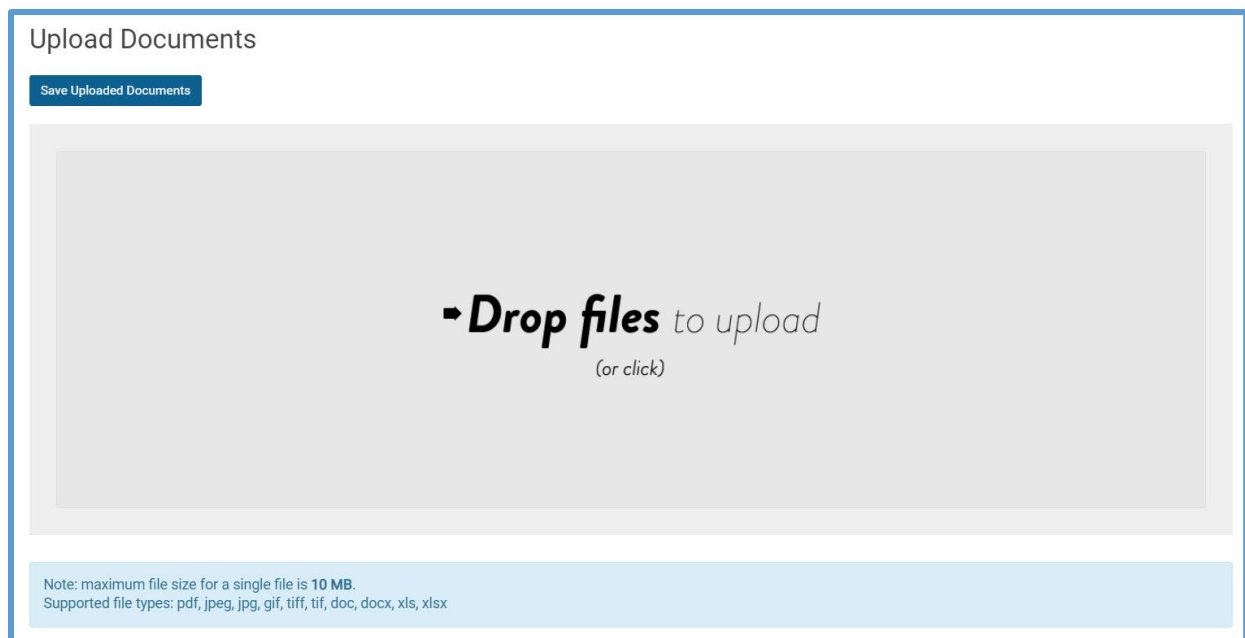


TaxSlayer Pro Online displays the **Upload Documents** page in a new browser window:



4. Click **Upload Documents**.

TaxSlayer Pro Online displays the **Upload Documents** page:

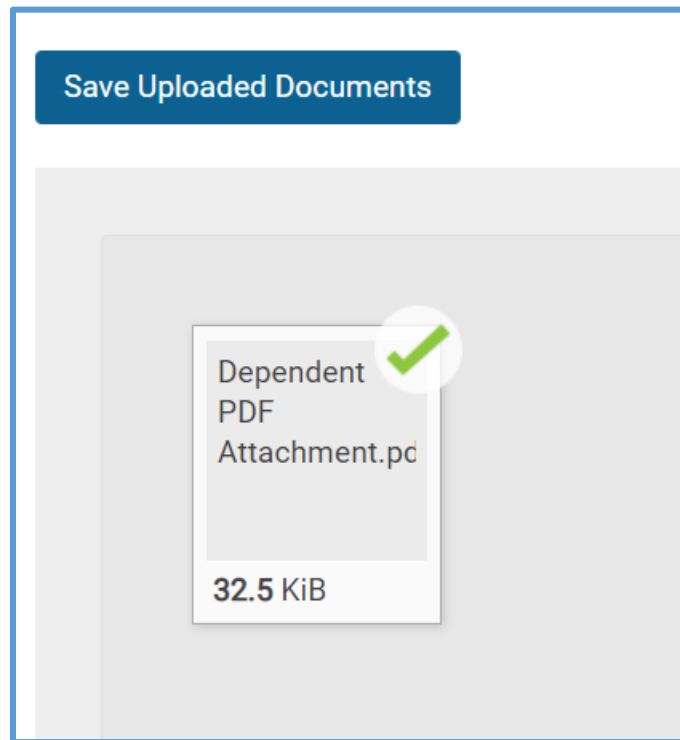


5. Do one of the following:

- 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.

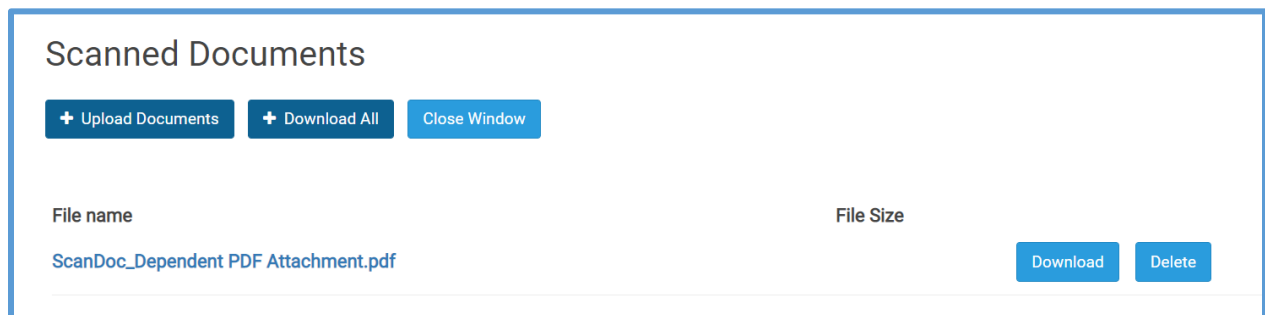
Note: You cannot upload single documents larger than 10 MB or a total of more than 25 MB.

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:



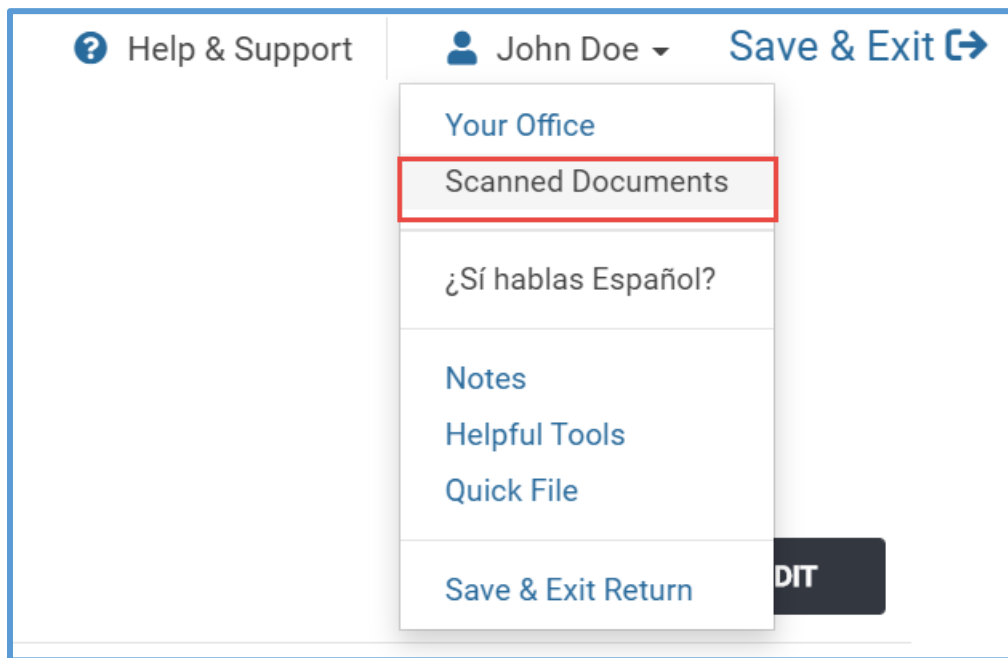
8. Click **Close Window**.

TaxSlayer Pro Online closes the window and displays the return.

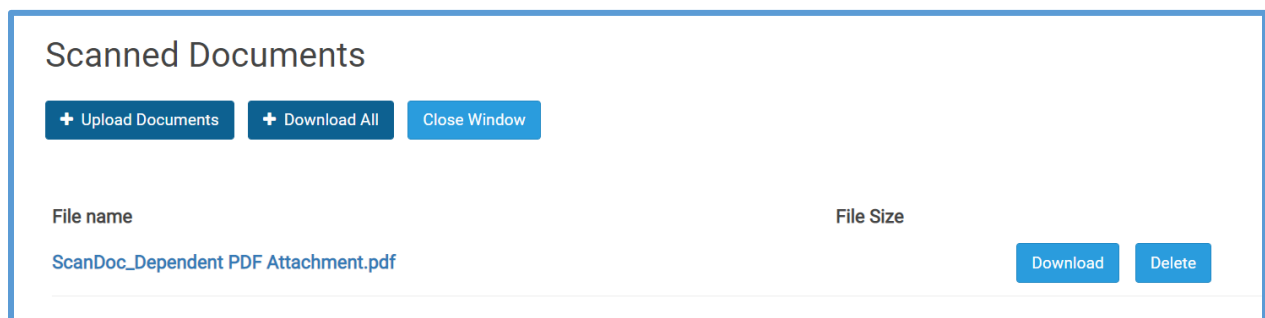
Accessing Scanned Documents

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:



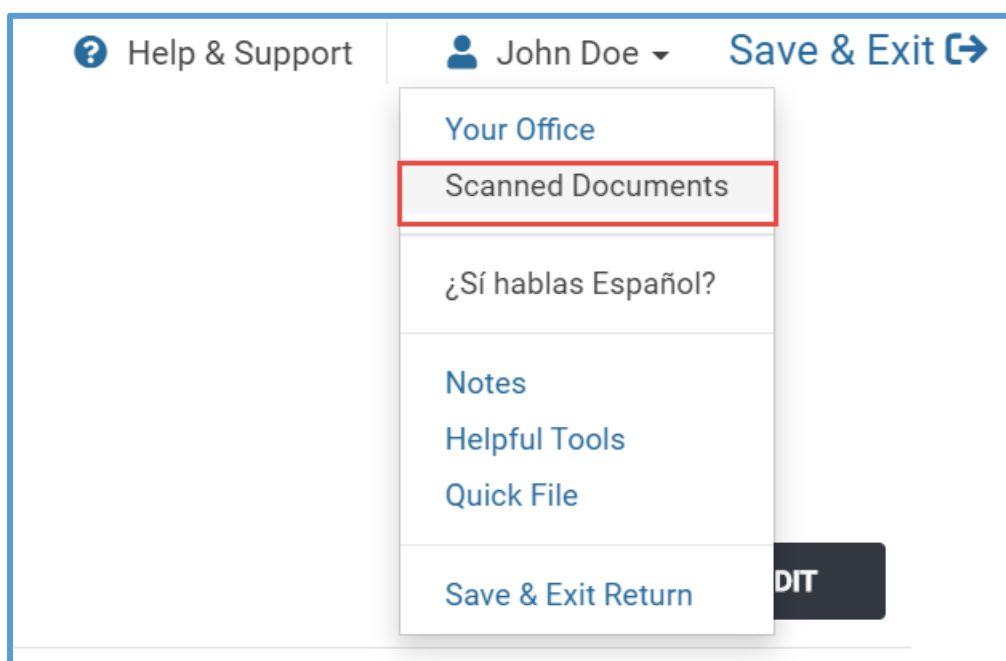
3. Use the document to prepare the taxpayer's return.
4. Click **Go Back**.
5. Click each document as needed and use it to prepare the taxpayer's return.

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:

File name	File Size
ScanDoc_Dependent PDF Attachment.pdf	Download

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:

Security Templates - Professional Tax Office

[+ ADD SECURITY TEMPLATE](#) [< BACK](#)

Template Name	Created By	Date Created			
Full Access - Office	Professional Tax Office	8/6/2015	View Users	+ ASSIGN	EDIT DELETE
full SSN	Professional Tax Office	5/17/2016	View Users	+ ASSIGN	EDIT DELETE

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:

Edit Security Template

[CANCEL](#) [CONTINUE](#)

Last Modified: 2/10/2021 4:10:47 AM

Template Name
New Preparers

Check item to allow access
☐ Check/Uncheck All

<input checked="" type="checkbox"/> Access Current Year Client List	<input type="checkbox"/> Access Office	<input type="checkbox"/> Access Previous Years Client Lists
<input type="checkbox"/> Add and Configure Security Templates	<input checked="" type="checkbox"/> Add or Edit Custom Credits	<input type="checkbox"/> Add or Edit Office Ip Whitelist
<input checked="" type="checkbox"/> Add or Edit Print Sets	<input checked="" type="checkbox"/> Add or Edit Tags	<input type="checkbox"/> Add/Edit Fees in the Office Configuration

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.

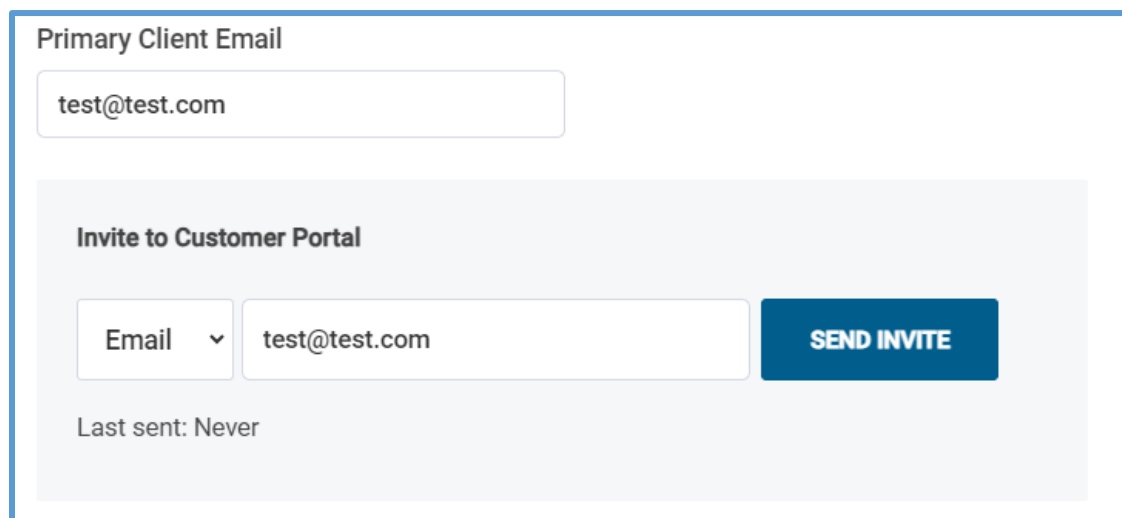
NOTE: Security roles assigned by TaxSlayer will have both Customer Portal and Scanned Documents enabled.

Inviting Taxpayers to the Customer Portal

Initial Invitation

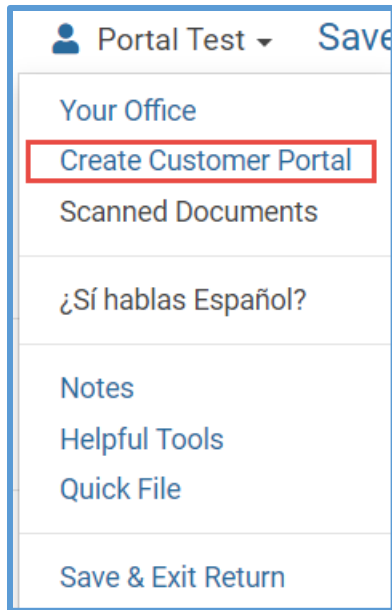
You can invite the taxpayer to the Customer Portal beginning with the Personal Information page or at any point after you complete the taxpayer's Basic Information pages. To begin the invitation to the Customer Portal, use the following steps:

1. Do one of the following:
 - a. Type the taxpayer's e-mail address and click **SEND INVITE**.

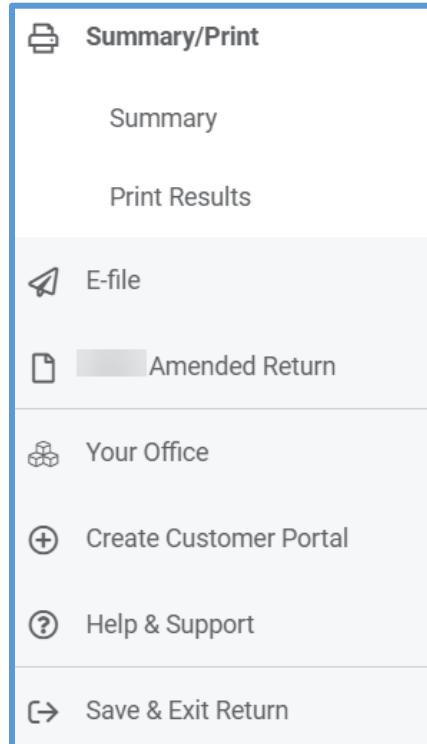


The screenshot shows a web form titled "Primary Client Email". At the top, there is a text input field containing "test@test.com". Below this, there is a section titled "Invite to Customer Portal" with a light gray background. Inside this section, there is a label "Email" next to a dropdown arrow, followed by a text input field containing "test@test.com". To the right of the input field is a blue button with the text "SEND INVITE". Below the input field and button, it says "Last sent: Never".

- b. Click **Create Customer Portal** from the taxpayer drop-down menu, as shown below:

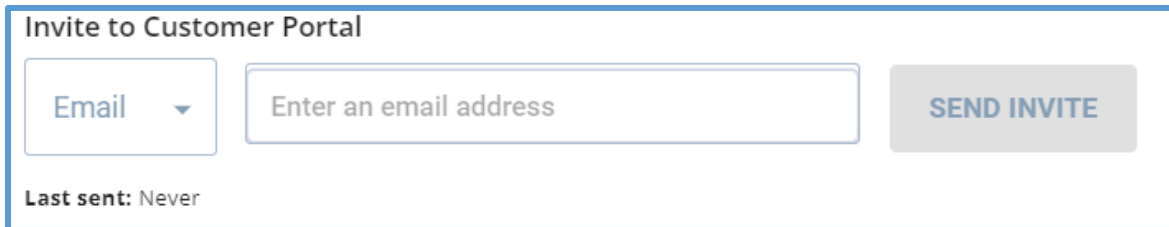


- c. Click **Create Customer Portal** from the left navigation panel, as shown below:



- 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.



Invite to Customer Portal

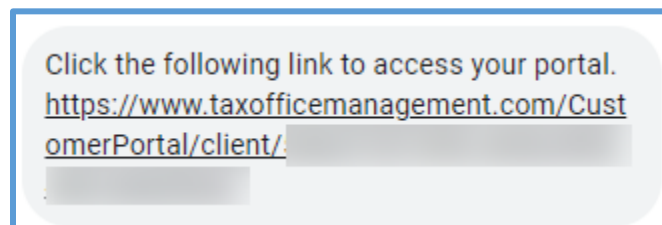
Email ▼ Enter an email address SEND INVITE

Last sent: Never

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:



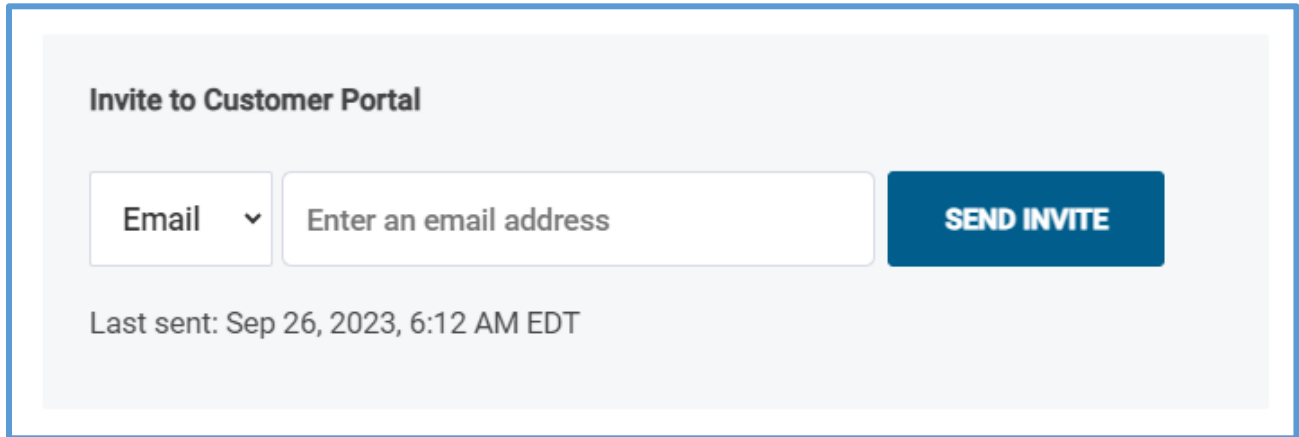
Note: Each link is unique to the taxpayer. It cannot be used to create a Customer Portal account for another taxpayer.

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:



Invite to Customer Portal

Email ▼ Enter an email address

SEND INVITE

Last sent: Sep 26, 2023, 6:12 AM EDT

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:

Invite to Customer Portal


Email ▾

Enter an email address

SEND INVITE

Last sent: Jul 13, 2022 2:09pm EST

Send tax return via Customer Portal

 SEND DOCUMENT

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:


Invite to Customer Portal

Email ▾

Enter an email address

SEND INVITE

Last sent: Jul 13, 2022 2:09pm EST

 Tax return sent

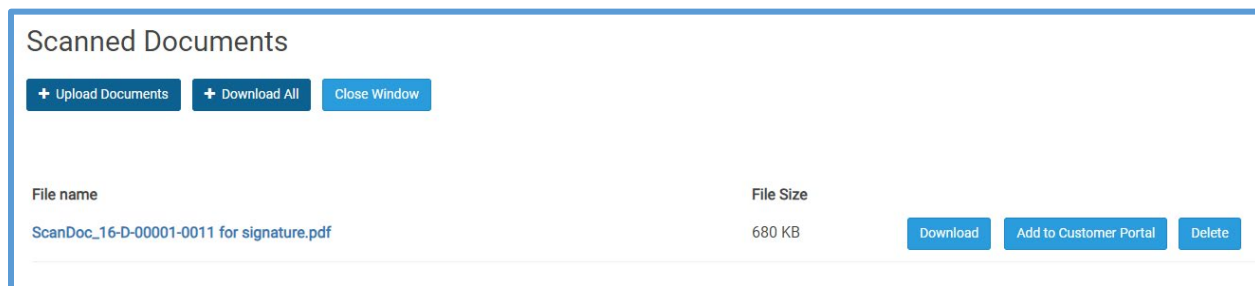
Once the taxpayer signs the document, TaxSlayer Pro Online displays the signature in the **Electronic Signature** section of the **Submission** page and uses it for necessary signatures on Form 1040, Form 8879, applicable consents, and state documents:



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:

File name	File Size	Uploaded		
54ed7187-0f9c-405a-8f50-44614d6d39dc_637669895138396451_Proweb.pdf	1 MB	9/11/2021 8:37 PM	DOWNLOAD	DELETE
PortalTest.xlsx	8 KB	9/11/2021 8:27 PM	DOWNLOAD	DELETE

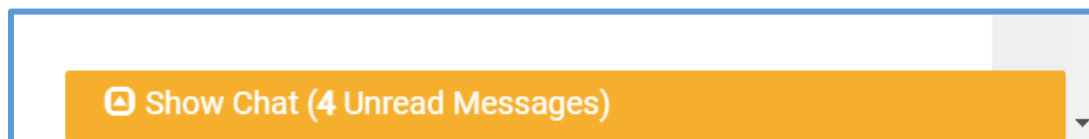
2. Download the documents as needed.

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:

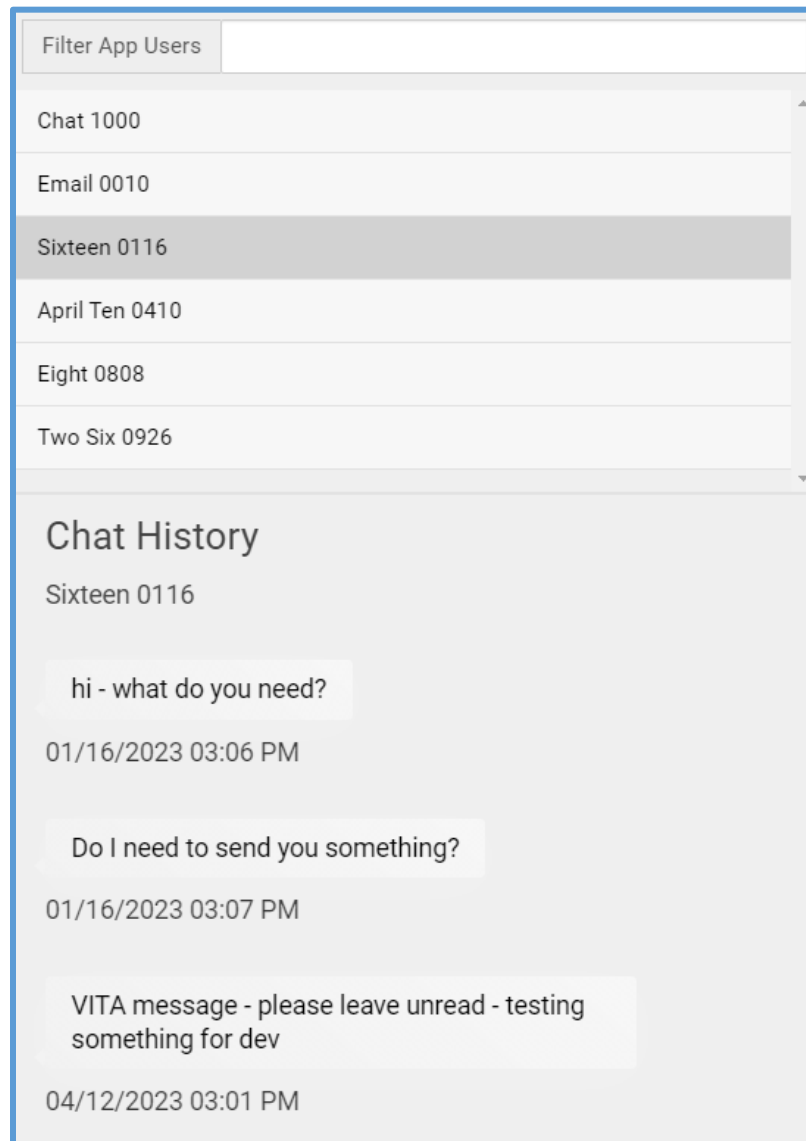
Filter App Users
Chat 1000
Email 0010
Sixteen 0116
April Ten 0410
Eight 0808
Two Six 0926

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:

Register Your Account

User Name

Password

- One lowercase character
- One uppercase character
- One special (@\$!%*?&)
- One number
- 8 characters minimum
- 25 characters maximum

Email

Phone Number

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:


Verify Account

Please verify your account using one of the options below.



Send text verification

70*****83



Send email verification

ame*****com

Cancel Verification

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:

Do not close this browser window until after you have entered your verification code. If you selected to have the code emailed to you, open a new browser tab to access your email account. If the browser is closed, the code will have to be sent again.

Verification code sent

Enter the verification code below.


Code sent to: 70*****83

Please check your phone for your authentication code.

Enter 6-digit code

VERIFY

Don't see your code? **Resend it now.**

 Select another verification method

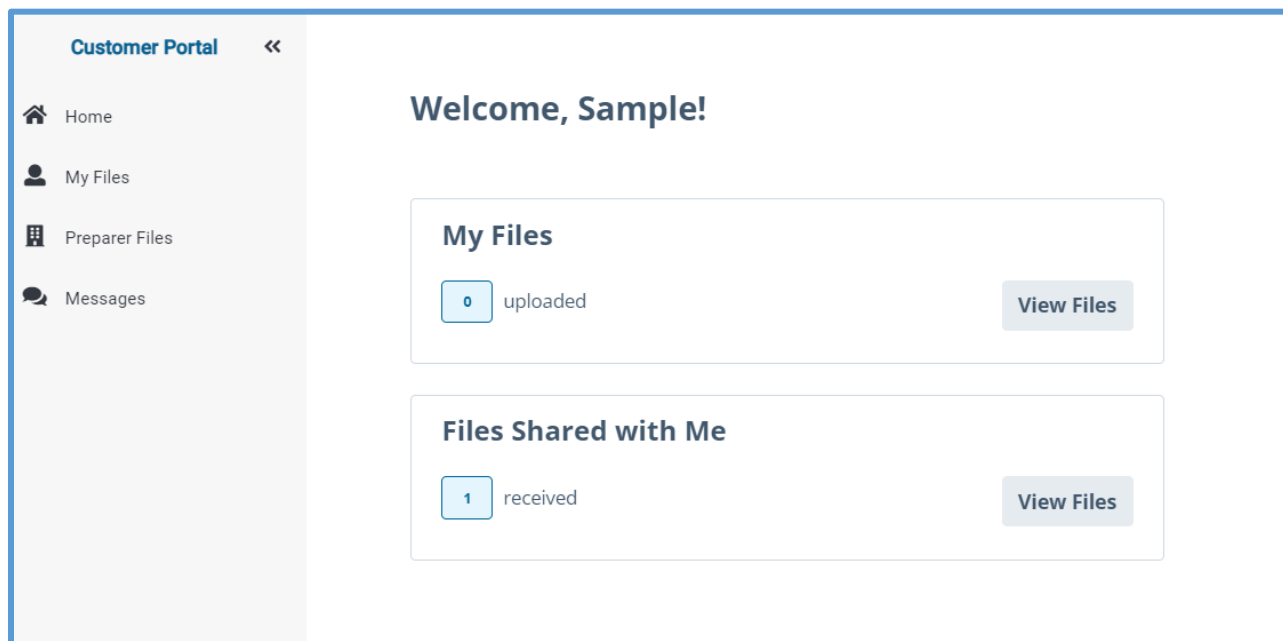
9. Find the code in your text or email and type it in the box.

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

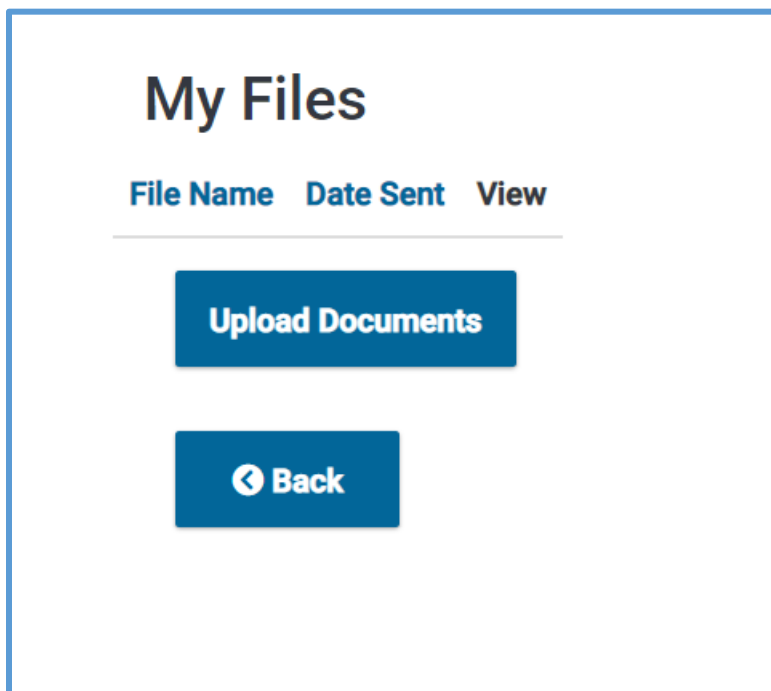
If you need additional forms or documents to complete a taxpayer's return, he or she can upload them through Customer Portal. Customer Portal accepts the following file types up to 5 mb each, with a maximum of 25 mb:

- .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:

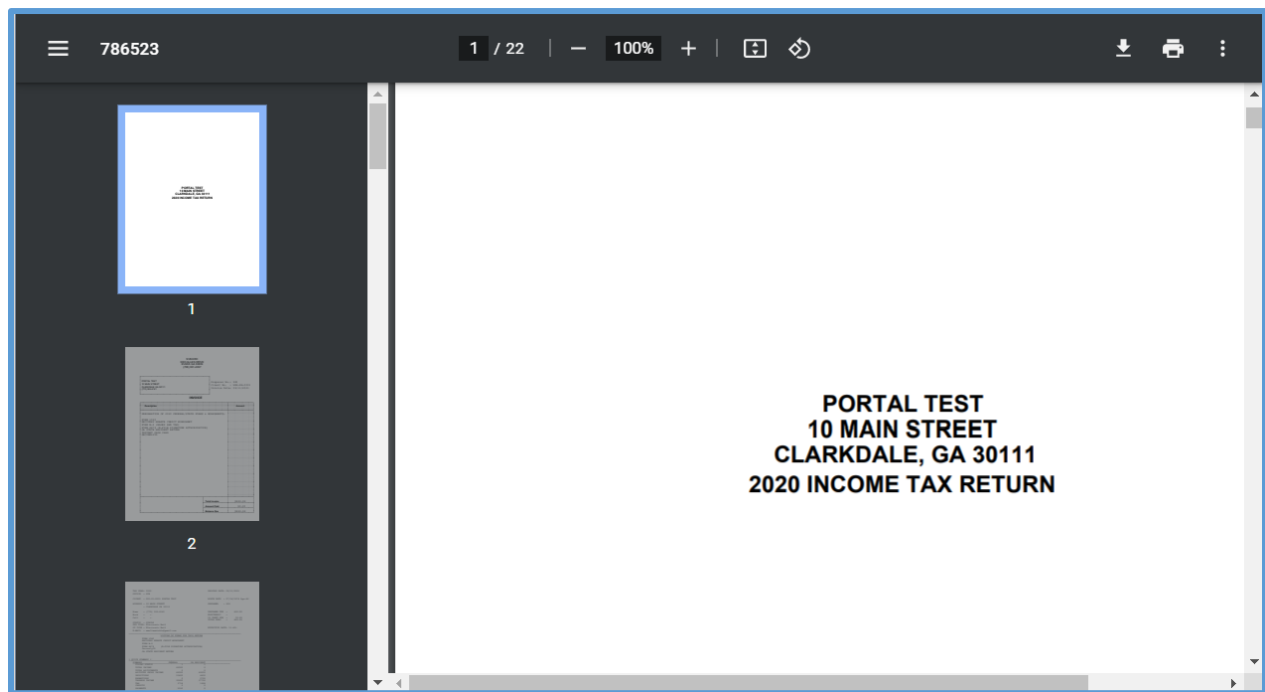
1. Click **Preparer Files**.

Customer Portal displays the **Files From My Preparer** page:

File Name	Date Sent	Taxpayer Sign Document	View
5a7d106e-8deb-4bba-bb36-52beb3e191c9_637933185928796083_Proweb.pdf	7/13/2022 2:16:48 PM	Sign	View

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:



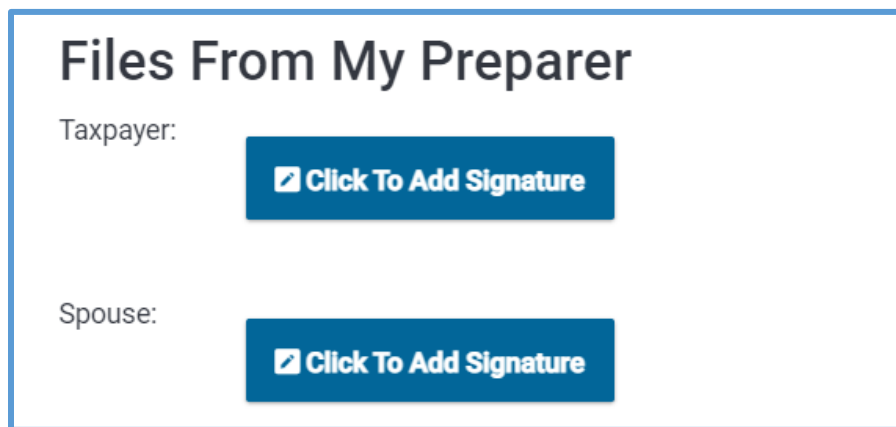
3. Use Adobe Reader's features to navigate in or print the documents to review.

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:



The screenshot shows a web interface titled "Files From My Preparer". It contains two sections: "Taxpayer:" and "Spouse:". Each section has a blue button with a white icon of a document and the text "Click To Add Signature".

2. Review the files as needed.
3. Click **Click To Add Signature**.

Customer Portal displays the **Edit Taxpayer Signature** page:



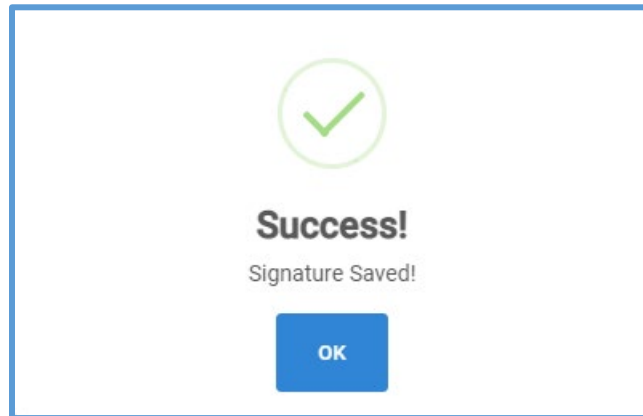
The screenshot shows a web interface titled "Edit Taxpayer Signature". It features a large, empty rectangular box for the signature. Below the box are three blue buttons: "Back" (with a left arrow icon), "Clear", and "Save".

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:

Files From My Preparer			
Taxpayer:			
<input checked="" type="checkbox"/> Signature On File			
File Name	Date Sent	Taxpayer Sign Document	View
54ed7187-0f9c-405a-8f50-44614d6d39dc_637669895138396451_Proweb.pdf	9/11/2021 8:38:34 PM	<input type="button" value="Sign"/>	<input type="button" value="View"/>

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:

Files From My Preparer

Taxpayer: ☒ **Signature On File**

File Name	Date Sent	Taxpayer Sign Document	View
54ed7187-0f9c-405a-8f50-44614d6d39dc_637669895138396451_Proweb.pdf	9/11/2021 8:38:34 PM	<input type="button" value="Sign"/>	<input type="button" value="View"/>

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:

Taxpayer Sign Document

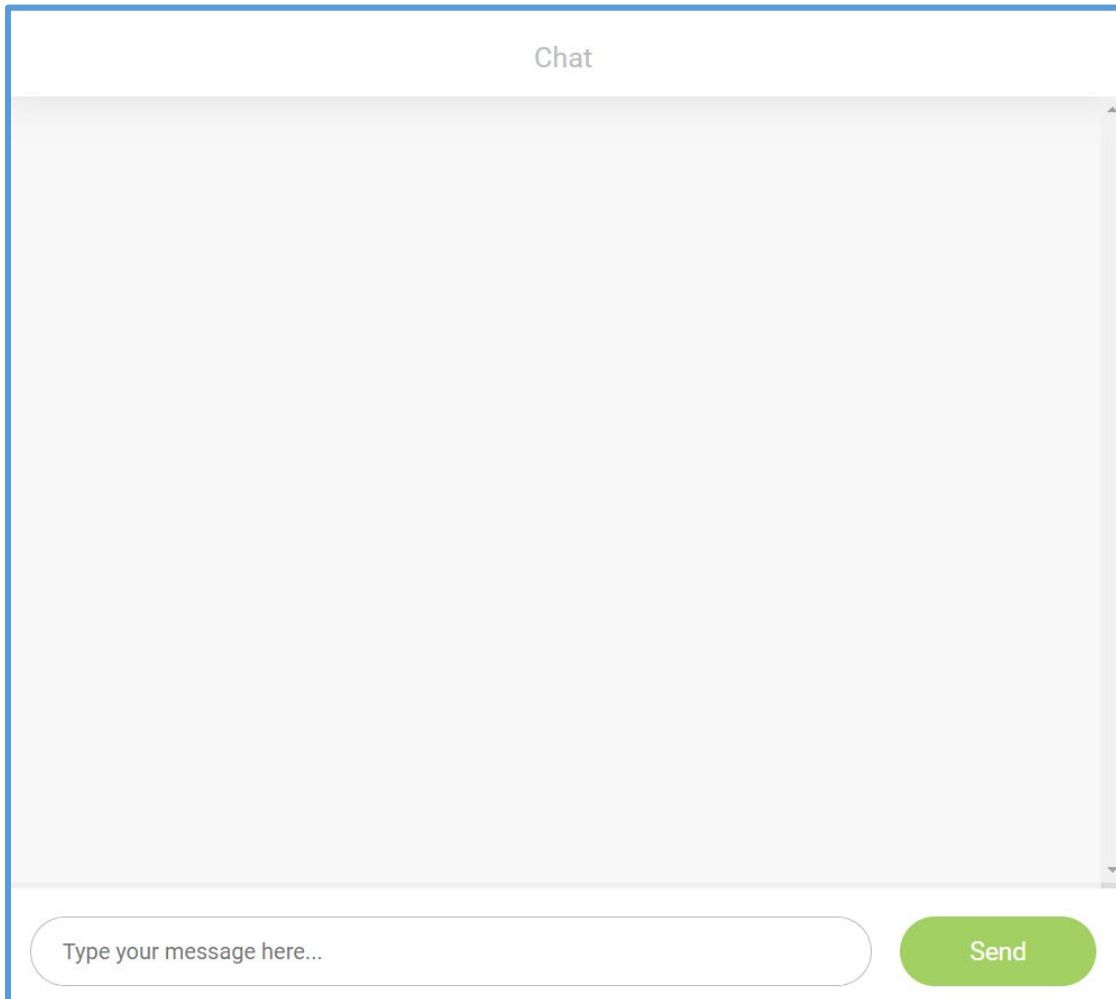
Customer Portal also transfers the signature to the **Submission** page in TaxSlayer Pro Online as a signature for Form 1040, Form 8879, and any necessary consents, along with appropriate state documents.

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:

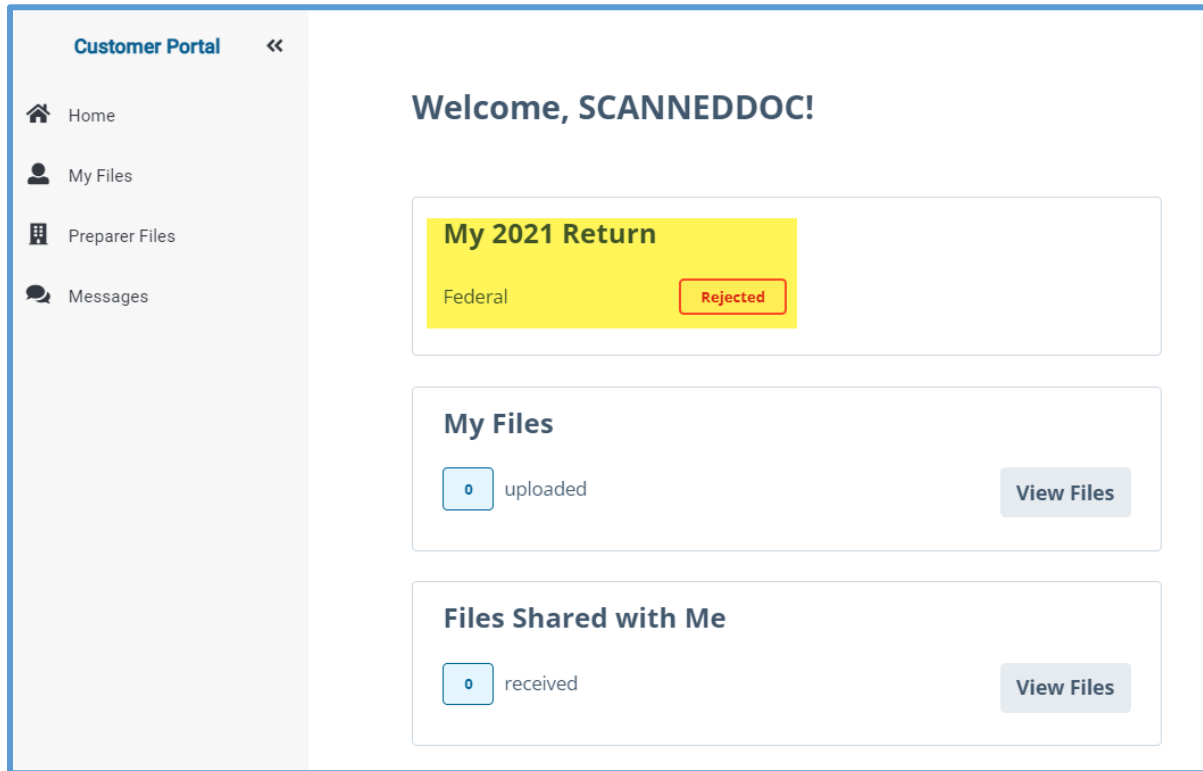
The screenshot shows a web interface for a chat function. At the top, the word "Chat" is centered in a light gray font. Below this is a large, empty rectangular area with a light gray background, intended for displaying chat messages. On the right side of this area is a vertical scrollbar. At the bottom of the interface, there is a white rounded rectangular input field containing the placeholder text "Type your message here...". To the right of the input field is a green rounded rectangular button with the word "Send" in white text.

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.

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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 <i>In Progress</i> or <i>Review Failed</i> 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
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- 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