

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.](#)

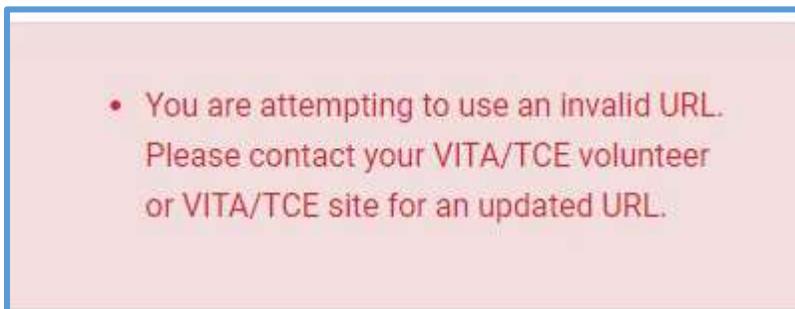
Username

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.

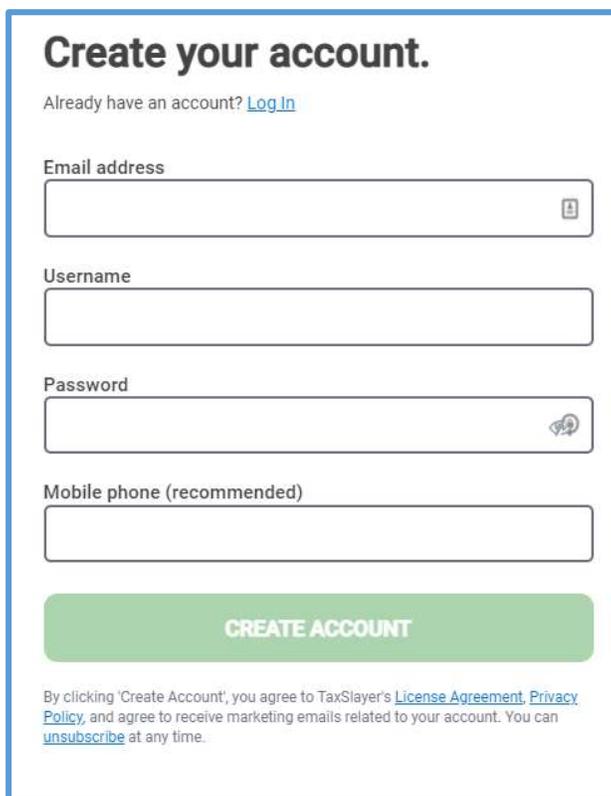
Note: If the taxpayer uses an invalid URL, TaxSlayer FSA displays the error message shown below. Do not allow the taxpayer to continue. Restart the taxpayer using the correct URL.



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:

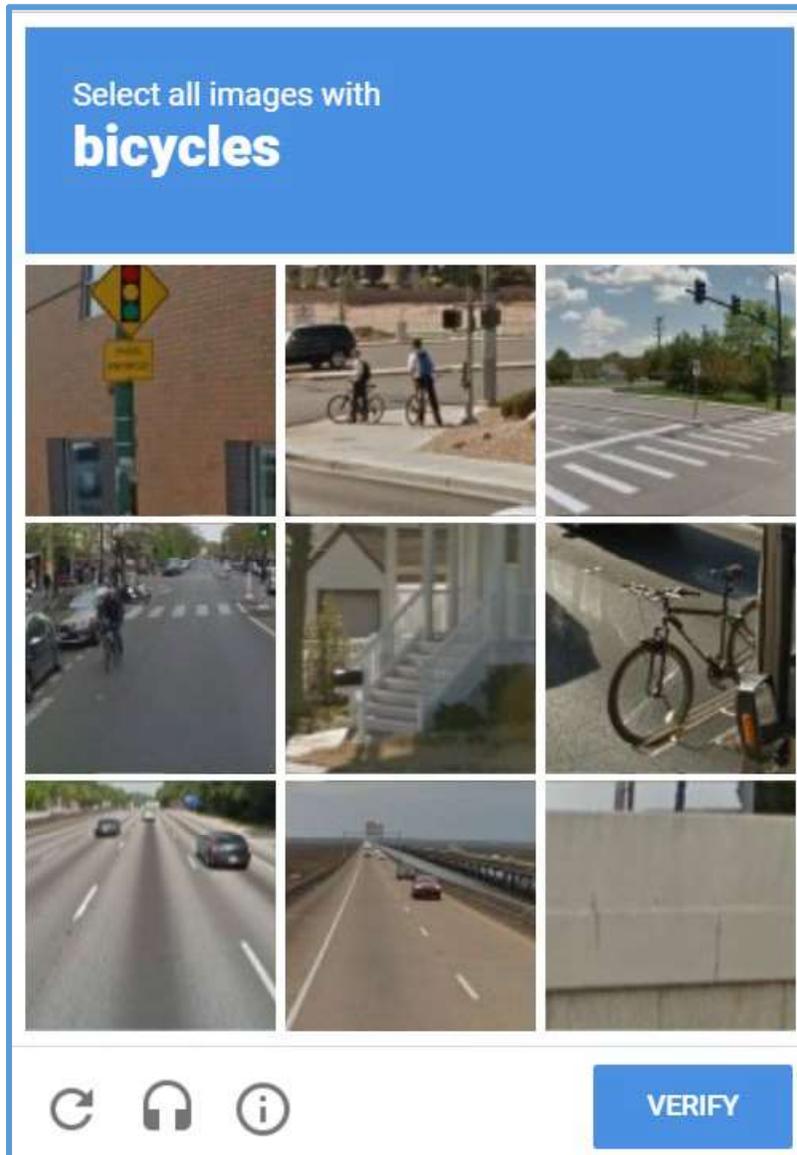
A screenshot of the 'Create your account' page. The page has a white background and a blue border. At the top, it says 'Create your account.' in bold. Below that, it says 'Already have an account? [Log In](#)'. There are four input fields: 'Email address', 'Username', 'Password', and 'Mobile phone (recommended)'. The 'Email address' field has a small icon on the right. The 'Password' field has a small icon on the right. Below the input fields is a green button with the text 'CREATE ACCOUNT'. At the bottom, there is a small disclaimer: '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:

Check your phone

Enter the verification code we sent you to verify

We sent a code to:
[blurred phone number]

Enter the 6-digit code

[Resend Verification Code](#)

[Skip](#) **VERIFY**

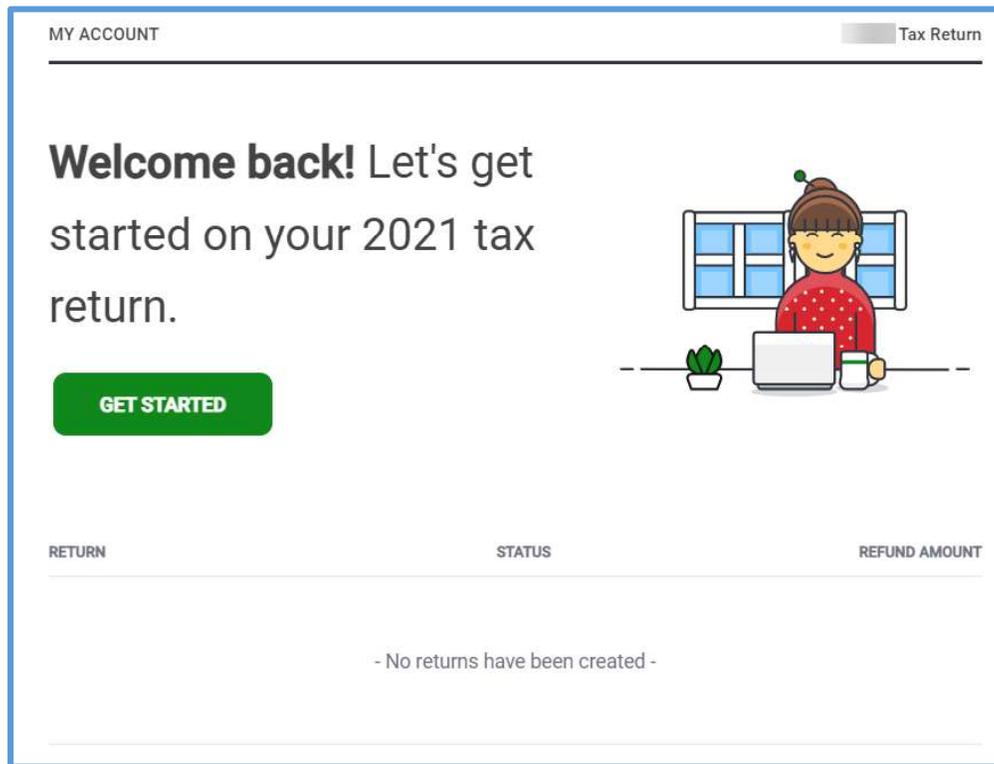
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8. Type the 6-digit code from the text into the appropriate box.

9. Click **VERIFY**.

Tip: The taxpayer can verify the code by email if he or she did not add a cell phone number when creating the account.

TaxSlayer FSA displays the **My Account** page:



10. Click **GET STARTED**.

TaxSlayer FSA displays the **Let's get this out of the way** page:

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:

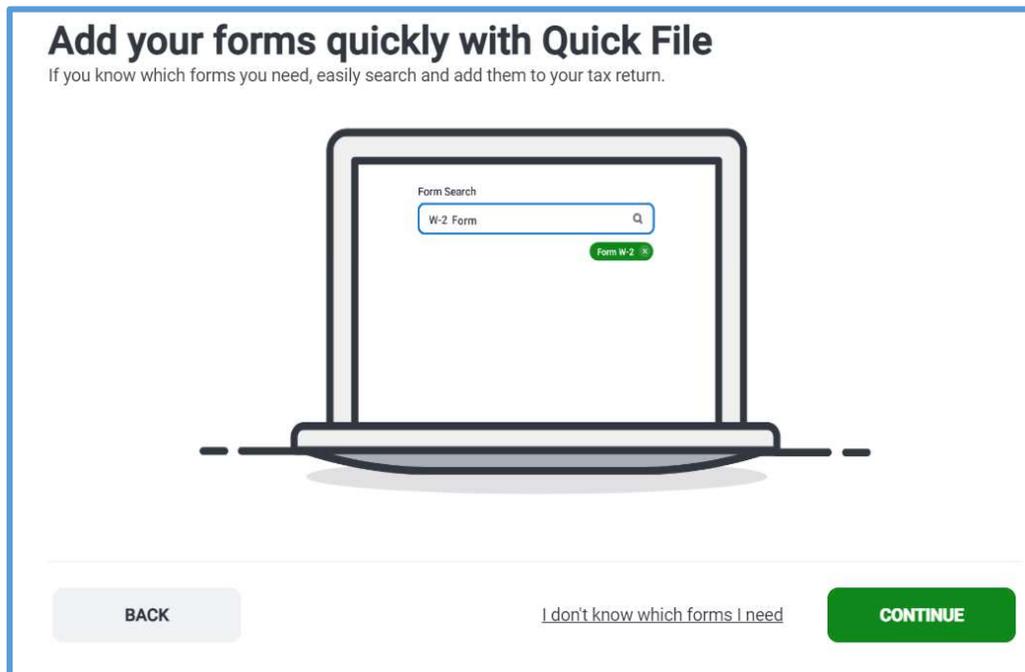
1. Do one of the following:
 - a. If you have a PDF of the previous year's return, upload it to import personal information.
 - b. Click **Skip**.
2. Type or verify your personal information.

Personal Information

Taxpayer's Information

| | | |
|--|--|---|
| Primary taxpayer first name | MI | |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | |
| Last name | Suffix (Jr, Sr, etc.) | |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text" value="---"/> ▼ | |
| SSN <i>The IRS requires your Social Security Number for e-filing.*</i> | | |
| <input style="width: 30%;" type="text"/> - <input style="width: 30%;" type="text"/> - <input style="width: 30%;" type="text"/> | | |
| Date of Birth | | |
| <input style="width: 30%;" type="text" value="MM"/> ▼ | <input style="width: 30%;" type="text" value="DD"/> ▼ | <input style="width: 30%;" type="text" value="YYYY"/> ▼ |
| Occupation | | |
| <input style="width: 95%;" 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:

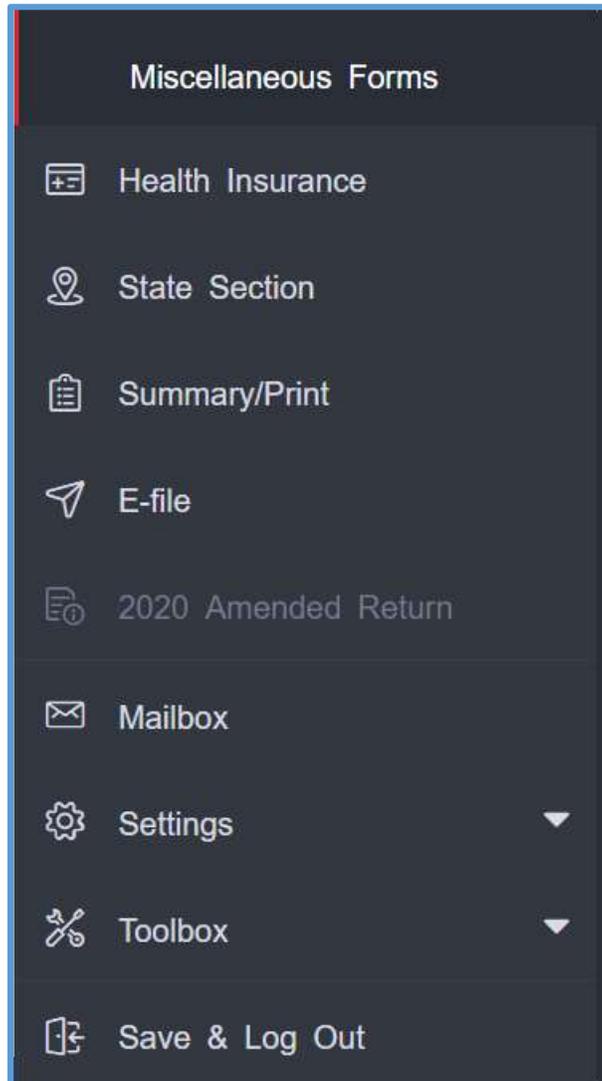


3. Select **CONTINUE** to use Quick File or **I don't know which forms I need** to skip loading forms.
4. If you selected that you want to use Quick File, select the forms you need in the return.

TaxSlayer FSA allows the taxpayer to choose either **Guide Me** or **Enter Myself** just as in TaxSlayer Pro Online. The taxpayer can prepare the return using either method.

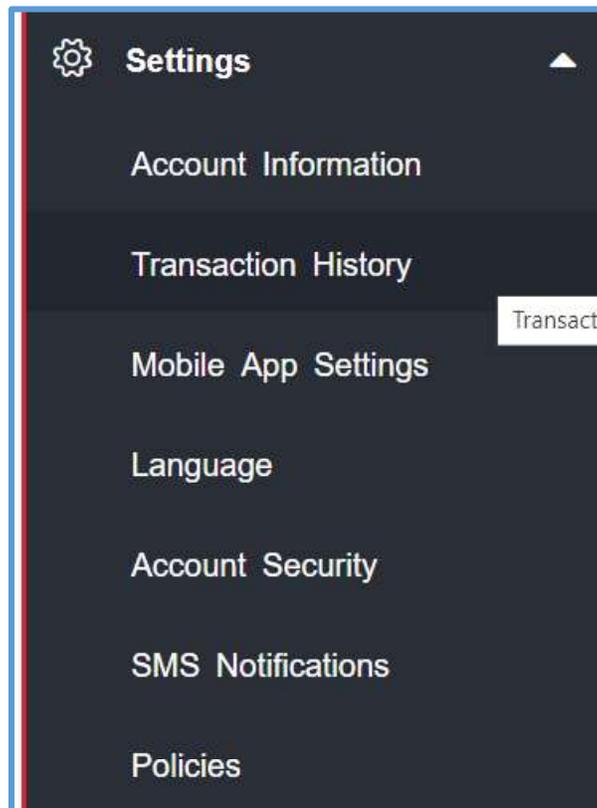
Preparing the Return in Spanish

If the taxpayer needs to prepare the return using Spanish and the user did not select Spanish from the Welcome page, you can change the language using the following steps from the left navigation panel:



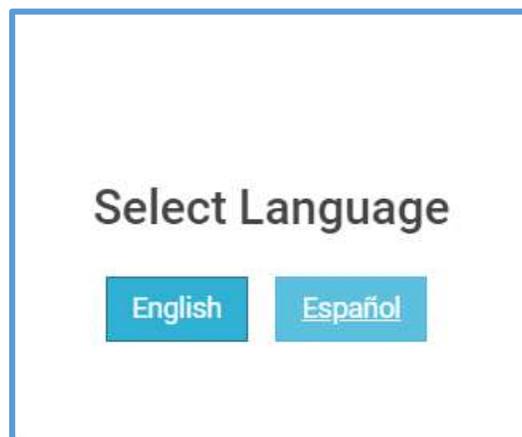
1. Click **Settings** to expand the section.

TaxSlayer FSA displays the **Settings** options:



2. Click **Language**.

TaxSlayer Pro Online displays the **Select Language** pop-up window:



3. Click **Español** to change the language to Spanish.

TaxSlayer FSA displays Spanish on-screen and in IRS-available forms:



Differences in TaxSlayer Pro Online and TaxSlayer FSA

When the taxpayer works through FSA, you will see some differences in the two programs.

[Summary/Print Page](#)

TaxSlayer FSA displays only the Summary View display on the **Summary/Print** page. Taxpayers cannot view the 1040 View.

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.

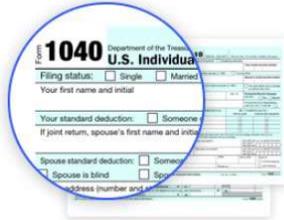
If the taxpayer does not have access to the previous year's return, or did not file a previous year's return, make the appropriate selection. TaxSlayer FSA provides additional assistance..

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.

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 ▾

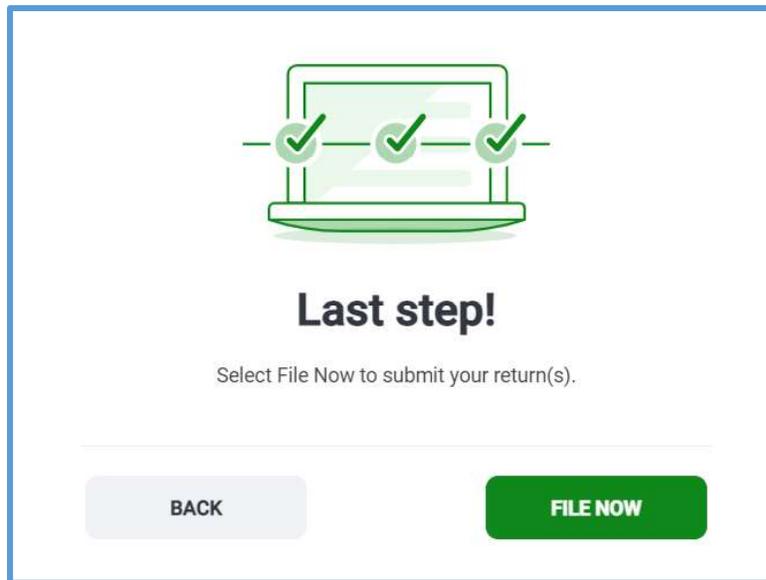
YYYY ▾

BACK

CONTINUE

Submit Return

Click **File Now**, as shown below:



Payment

Taxpayers do not need to pay when preparing a return though TaxSlayer FSA. If TaxSlayer asks the client to pay, the taxpayer did not start from the appropriate TaxSlayer FSA URL. He or she will need to deactivate the return and start from the correct TaxSlayer FSA URL provided by your site. If the taxpayer needs to deactivate the return, direct the client to use the following steps:

1. Click **My Account** in the left navigation panel.

TaxSlayer FSA displays the **My Account** page:

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](#)

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 user interface for deactivating a tax return. 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 with the text "CLEAR YOUR RETURN AND RESTART". At the bottom of the interface, there is a note: "* 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.