



VITA/TCE

TaxSlayer Pro Online User Guide

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Getting Started with TaxSlayer Pro Online

Login and Passwords

This chapter covers the following actions:

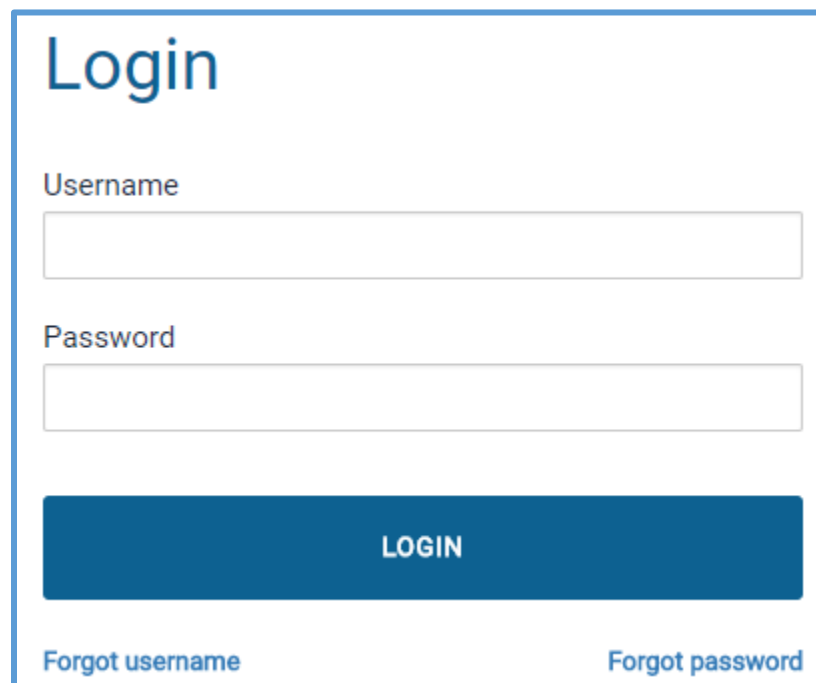
1. Navigate to TaxSlayer Pro Online.
2. List the password requirements.
3. Change your password the first time you log in.
4. Reset your password.
5. Describe and use Multi-Factor Authentication.
6. Describe and use reCAPTCHA.

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:



Login

Username

Password

LOGIN

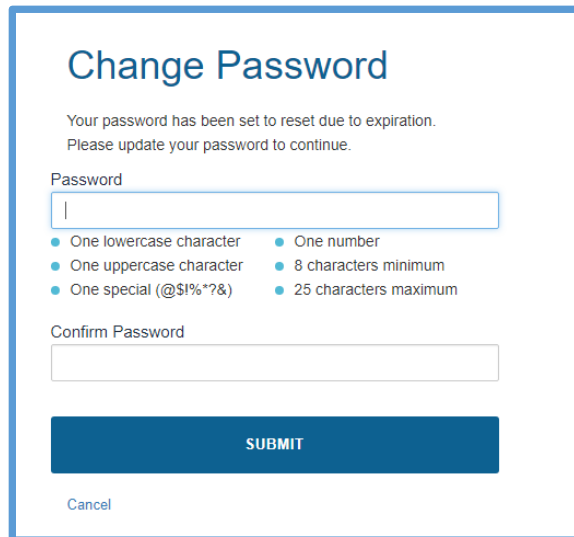
[Forgot username](#) [Forgot password](#)

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.

4. Click **LOGIN**.

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



5. Type a new password.

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

- Create a password that contains at least eight (8) characters.
- Use at least one of each of the following in your password:
 - 1 upper case letter
 - 1 lower case letter
 - 1 number
 - 1 special character

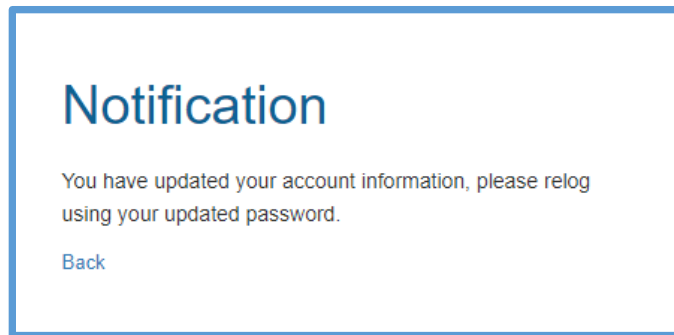
NOTE: You can only use the following special characters: @ \$! % * ? &

- 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**.

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

A screenshot of a notification box with a blue border. The title "Notification" is in blue. The text inside says "You have updated your account information, please relog using your updated password." and there is a "Back" link in blue at the bottom left.

Notification

You have updated your account information, please relog using your updated password.

[Back](#)

8. Click **Back**.

TaxSlayer Pro Online displays the login page.

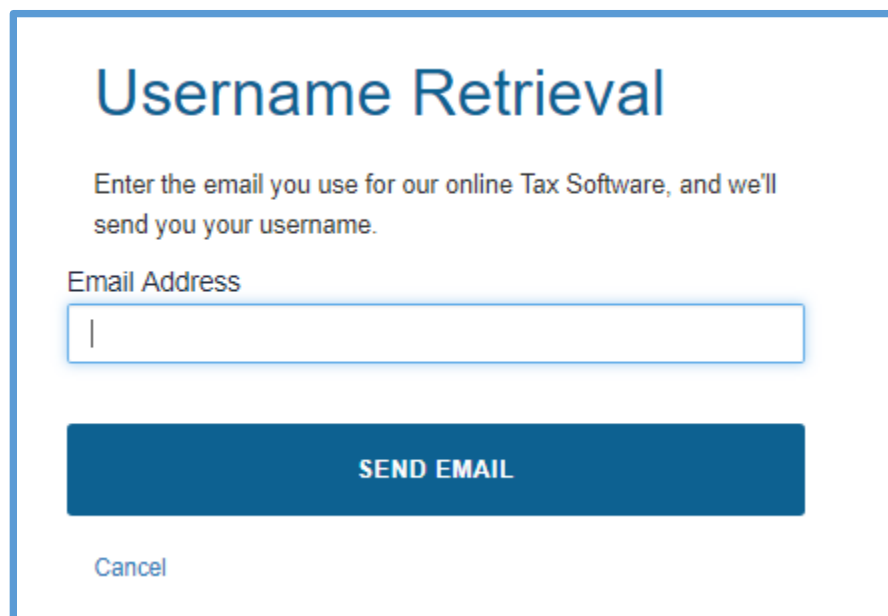
9. Type your user name and **new** password.
10. Click **LOGIN**.

Retrieving Your User Name

To retrieve your user name, use the following steps from the **Login Page**:

1. Click **Forgot username**.

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

A screenshot of the "Username Retrieval" page. The title "Username Retrieval" is in blue. Below it, text says "Enter the email you use for our online Tax Software, and we'll send you your username." There is a text input field labeled "Email Address" with a vertical cursor. Below the field is a large blue button labeled "SEND EMAIL". At the bottom left is a "Cancel" link in blue.

Username Retrieval

Enter the email you use for our online Tax Software, and we'll send you your username.

Email Address

SEND EMAIL

[Cancel](#)

2. Type the email address used during setup for your Preparer account.

3. Click **SEND EMAIL**.

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

TaxSlayer sends an email, similar to the following:

4. On the **Username Retrieval** page, click **Cancel** to log in.

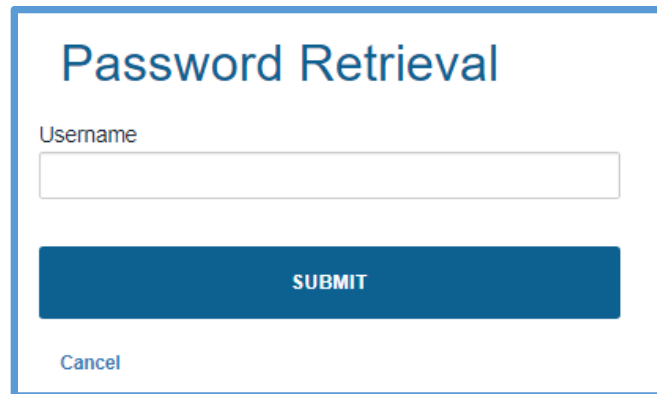
Resetting Your Password

If you type the wrong password, TaxSlayer Pro Online displays the following message:

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

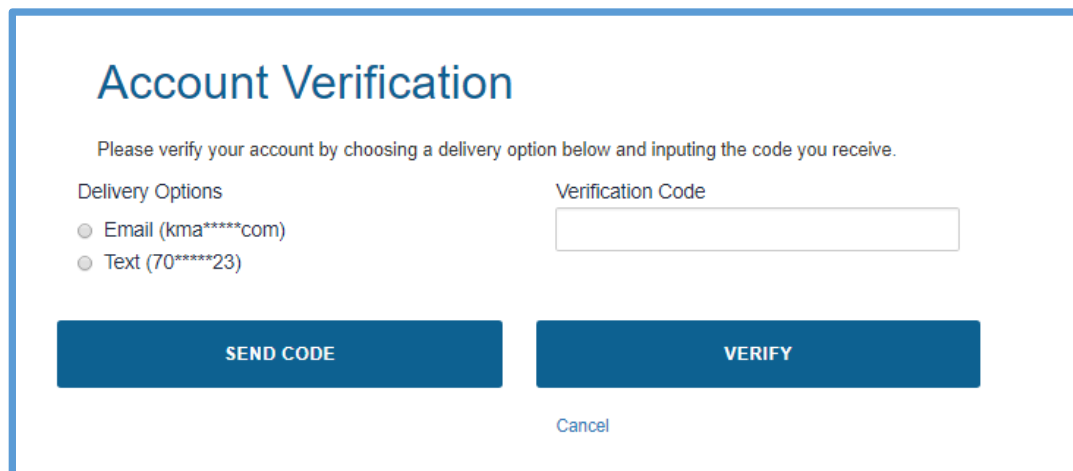
1. Click **Forgot Password**.

TaxSlayer Pro Online displays the **Password Retrieval** page:



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

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



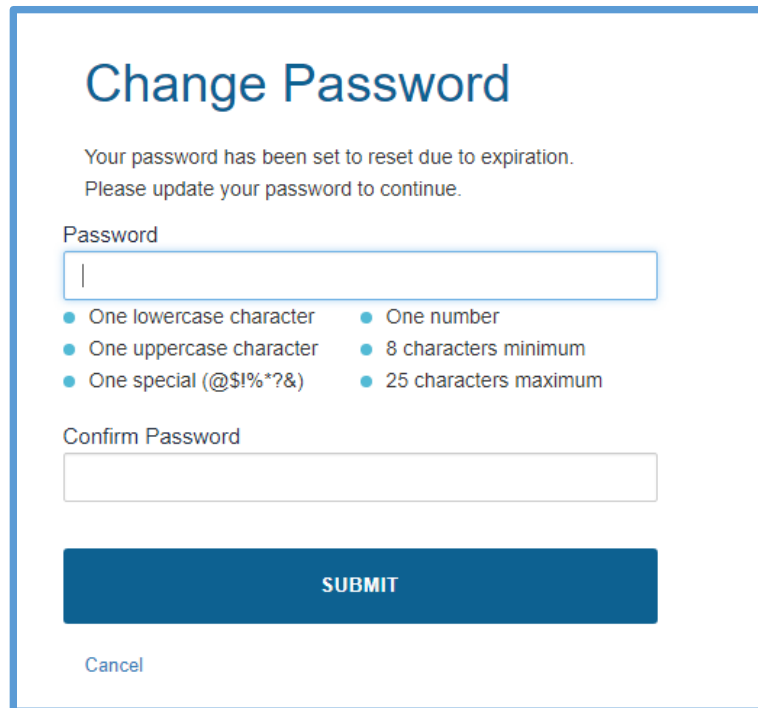
4. Select a delivery option to receive your verification code.

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

5. Click **SEND CODE**.
6. Retrieve your verification code.
7. Type or paste the verification code in the **Verification Code** box.

8. Click **VERIFY**.

TaxSlayer Pro Online displays the **Change Password** page:

The screenshot shows the 'Change Password' page. At the top, the title 'Change Password' is in blue. Below it, a message states: 'Your password has been set to reset due to expiration. Please update your password to continue.' There are two input fields: 'Password' and 'Confirm Password'. Between these fields, a list of password requirements is shown with blue bullet points: 'One lowercase character', 'One uppercase character', 'One special (@!%*?&)', 'One number', '8 characters minimum', and '25 characters maximum'. At the bottom, there is a large blue 'SUBMIT' button and a smaller blue 'Cancel' link.

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, log in with your user name and new password.

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 **Account Verification** page:

Account Verification

Please verify your account by choosing a delivery option below and inputting the code you receive.

Delivery Options

☐ Email (kma*****com)

☐ Text (70*****23)

Verification Code

SEND CODE **VERIFY**

[Cancel](#)

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 **SEND CODE**.
3. Retrieve your verification code from your email or text messages.
4. Type or paste the verification code in the **Verification Code** box.
5. Click **VERIFY**.

TIP: You should only click **SEND CODE** one time. TaxSlayer Pro Online generates a new authentication code each time you click **SEND CODE**.

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

reCAPTCHA

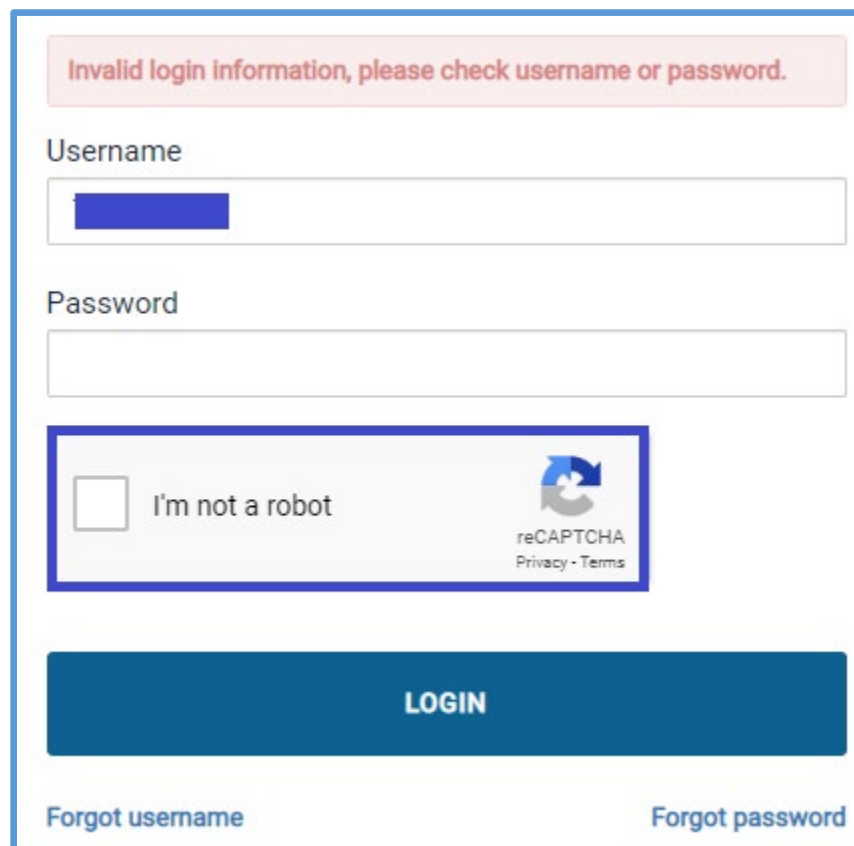
TaxSlayer Pro Online utilizes reCAPTCHA during the login process. reCAPTCHA verifies whether the user is a human or computer in order to fight spam and abuse. TaxSlayer Pro Online utilizes reCAPTCHA as an additional security measure to protect taxpayer data.

When is reCAPTCHA Required?

TaxSlayer Pro Online requires reCAPTCHA when the user types the user name and password combination incorrectly twice.

How to Use reCAPTCHA

If you type the user name and password incorrectly twice, TaxSlayer Pro Online displays the reCAPTCHA section:



The screenshot shows a login form with a red error message at the top: "Invalid login information, please check username or password." Below the error message are two input fields: "Username" and "Password". The "Username" field contains a blue bar. Below the "Password" field is a reCAPTCHA section with a checkbox labeled "I'm not a robot" and a reCAPTCHA logo. To the right of the logo are links for "Privacy" and "Terms". Below the reCAPTCHA section is a large blue "LOGIN" button. At the bottom of the form are two links: "Forgot username" and "Forgot password".

1. Type the correct information in the **Username** and **Password** boxes.
2. Select the **I'm not a robot** check box.
3. Click **LOGIN**.

Setting up Site Information

This chapter covers the following actions:

1. Set up your site.
2. Set up your EROs.
3. Determine the data that carries to the return.
4. Set up EROs for ad hoc/virtual sites.

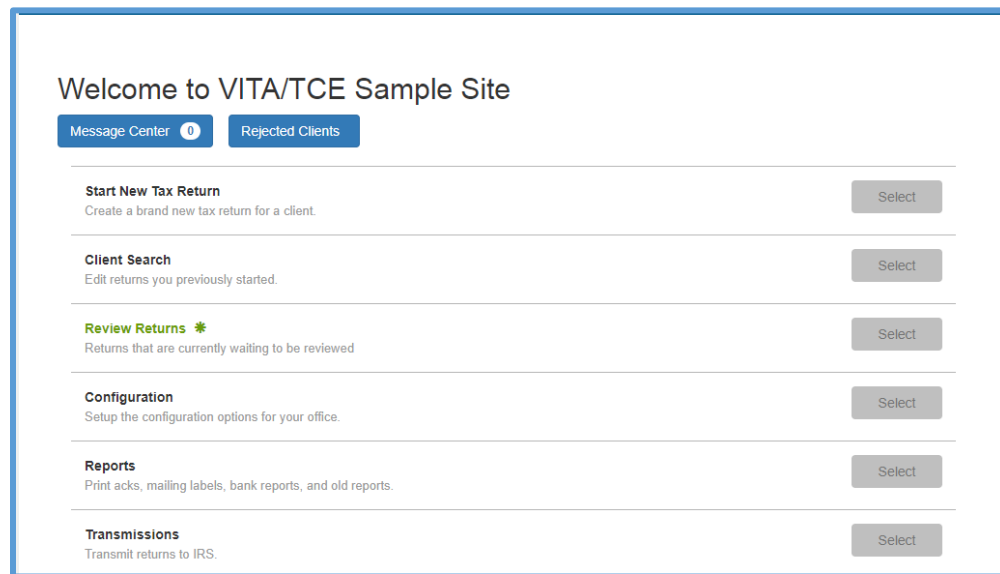
Before you begin using TaxSlayer Pro Online, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carry to tax returns so that you only have to type this information once. This includes items such as the firm/site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

Setting up Your Site

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

1. Log in to TaxSlayer Pro Online.

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



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

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

The screenshot shows a configuration menu with four items:

- 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]

The 'Office Setup' item is highlighted with a blue border.

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

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

The screenshot shows the 'Office Setup' page with the following fields:

- 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 each year 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.

- Select **Disable Third Party Designee Prefill**.
- Select **Offer 8888** if your site will be offering split refunds.
- Select **Display Summary using 1040 View** to default to the 1040 view when opening returns.
- Select **Hide Preparer Name on 1040 Print**.

You can select the following many other office configuration items. Select any appropriate items.

5. Type the appropriate number in the **Maximum number of clients to display on client list** box to determine when TaxSlayer Pro Online displays the *100 Most Recent Returns* in the Client List.
6. Scroll to the **Office Addresses** and **Office Phones** sections.

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

The screenshot displays two sections of the TaxSlayer Pro Online interface. The top section, titled "Office Addresses", contains a table with columns: TYPE, STREET ADDRESS, CITY, STATE, and ZIP. A single row is shown with the following data: TYPE: Physical, STREET ADDRESS: 1234 VITA TCE BLVD, CITY: Rome, STATE: GA, and ZIP: 30165. To the right of this row are two buttons: "Edit" (blue) and "Delete" (red). Below the table is a green "+ Add" button followed by the text "Add Address". The bottom section, titled "Office Phones", contains a table with columns: TYPE, TELEPHONE, and EXT. A single row is shown with the following data: TYPE: Business, TELEPHONE: (706) 555-5555, and EXT: (empty). To the right of this row are two buttons: "Edit" (blue) and "Delete" (red). Below the table is a green "+ Add" button followed by the text "Add Phone".

TYPE	STREET ADDRESS	CITY	STATE	ZIP	
Physical	1234 VITA TCE BLVD	Rome	GA	30165	Edit Delete

[+ Add](#) Add Address

TYPE	TELEPHONE	EXT	
Business	(706) 555-5555		Edit Delete

[+ Add](#) Add Phone

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

7. Click **Add** or **Edit** to make any necessary changes to the information.

TaxSlayer Pro Online displays a blank address line.

8. Type the street address and Zip Code in the appropriate boxes.
9. When you finish adding the address, click **Continue**.
10. Click **Edit** in the **Office Phones** section if you need to make any changes.
11. Add a phone number the same way you added the address.

TIP: If you need to change an existing address or phone number, click **Edit** and type over the existing information.

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

Setting up EROs

To set up EROs, 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:

ERO(s) Menu

☐ View Inactive

EFIN	ERO Name	Default	Status	
	MAIN SITE	✓	Active	Edit
			Active	Edit

[+ Add](#) [Add ERO](#)

Note: TaxSlayer automatically displays the ERO name and EFIN sent from the IRS and populates the office identifier automatically. The EFIN and office identifier are the same for “ad hoc” and virtual sites.

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

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

ERO Setup

ERO Personal Information

ERO Name

Office Identifier

EIN

EFIN

☐ Self Employed

☐ Default

☒ Active

☐ Use Office Address and Phone Information

ERO Addresses

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

4. Select the **Default** check box.

NOTE: You must notify your SPEC Relationship Manager if the EFIN needs to be changed. TaxSlayer validates return creation based on the EFIN in our system, and TaxSlayer will make necessary changes based on approved change requests.

5. Click **Add** or **Edit** in the **ERO Addresses** section.

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


6. Make any necessary changes to the street address, Zip Code, and City in the appropriate boxes.
7. Select the state from the **State** drop-down list.
8. When you finish changing the address, click **Continue**.
9. Click **Edit** in the **ERO Phones** section if you need to make any changes.


TaxSlayer Pro Online displays the **ERO Phone** page.

10. Change the phone number in the appropriate boxes.
11. Click **Continue**.
12. When you finish reviewing and adding office 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

13. 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 EFIN and Office Identifier should be the same as the main site's identifier. Make sure you type these correctly to prevent validation errors or IRS rejections.

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

Setting up Security Templates

This chapter covers the following actions:

1. List the pre-defined security templates.
2. Determine which security template to use based on the allowed actions.
3. Create a new security template.
4. Edit an existing security template.
5. Assign security templates.
6. List and describe each security template permission.

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

Predefined Security Templates

In most cases, you need to use the security templates that TaxSlayer Pro Online delivers with your software. You can choose from several predefined security templates for each user.

NOTE: Refer to the TaxSlayer Pro Online Knowledge Base for updated Security Templates and template definitions.

When you set up users/preparers, you can select the security template. See [Adding Preparers](#) for information on selecting security templates for users.

NOTE: You cannot edit the predefined or assigned security templates and will not see them listed in your site's Security Template menu. You will be able to select a template from them when setting up users.

Creating Security Templates

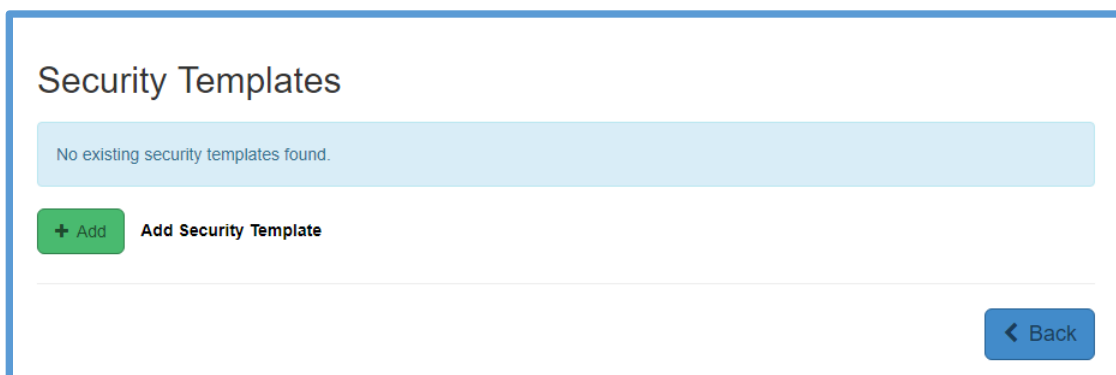
You can create an unlimited number of security templates for your site. To do this, use the following steps from the **Welcome** page:

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



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

TaxSlayer Pro Online displays the **Security Templates** page:



Note: TaxSlayer Pro Online stores previous year's templates as existing Security Templates.

3. Click **Add**.

TaxSlayer Pro Online displays the **Add Security Template** page:

4. Type a name for your template in the **Template Name** box.
5. Review each item for which you can allow access for this security template. If you do **not** want preparers assigned this security template to have access to this item, clear the check box.
6. Click **Continue**.

NOTE: Refer to the TaxSlayer Pro Online knowledgebase for Security Template item definitions.

TaxSlayer Pro Online displays the **Security Templates** page with the new security template listed.

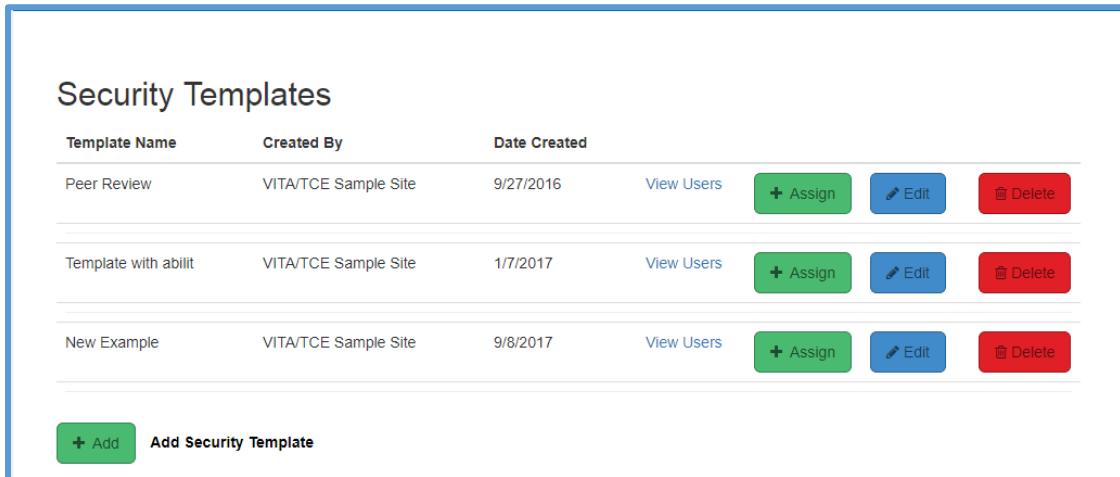
7. If you need to add more security templates, click **Add** and follow the same steps for each security template.
8. When you finish adding security templates, click **Back** to return to the **Welcome** page.

Editing Security Templates

After you add security templates, you can edit those templates. To edit security templates, use the following steps from the **Configuration Menu** page:

1. Click **Select** on the **Security Templates** line.

TaxSlayer Pro Online displays the **Security Templates** page:



Template Name	Created By	Date Created	
Peer Review	VITA/TCE Sample Site	9/27/2016	View Users + Assign Edit Delete
Template with abilit	VITA/TCE Sample Site	1/7/2017	View Users + Assign Edit Delete
New Example	VITA/TCE Sample Site	9/8/2017	View Users + Assign Edit Delete

+ Add [Add Security Template](#)

2. Click **Edit** for the security template you want to change.

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

The screenshot shows the 'Edit Security Template' page. At the top, it says 'Edit Security Template' and 'Last Modified: 9/8/2017 5:07:40 AM'. Below this is a 'Template Name' field with the text 'New Example'. Underneath is a section titled 'Check item to allow access' with a 'Check/Uncheck All' button. The main area contains a grid of 18 checkboxes, each with a label. All checkboxes are checked. The labels are: Access Current Year Client List, Access Office, Access Previous Years Client Lists, Add and Configure Security Templates, Add or Edit Custom Credits, Add or Edit Office Ip Whitelist, Add or Edit Print Sets, Add or Edit Tags, Add/Edit Fees in the Office Configuration, Add/Edit Preparers, Allow Ability to Clear Signatures, Assign Preparer's Security Template, Cannot Change Return Status back to In Progress, Change Consent Forms, Change Questions and Available Answers, Change Return Preparer, Change Tax Profiles, and Configuration.

9. Make any necessary changes to the template. Clear or select any actions.

10. When you finish, click **Continue**.

Assigning Security Templates

To assign a security template to an existing preparer or change the preparer's existing security template, use the following steps from the **Security Templates** page:

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

TaxSlayer Pro Online displays the **Assign Security Template** page:

The screenshot shows the 'Assign Security Template' page. At the top, it says 'Assign Security Template' and 'New Example'. Below this is a section titled 'Assign template to:' with a search bar. Underneath is a section titled 'Preparers' with a search bar and a list of preparers. The list has a checkbox next to 'PREPARER NAME'.

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

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

3. Click **Continue**.

Tip: Select the **Check/Uncheck All** check box to assign the template to all users. To display both active and inactive users, select the **Show Inactive** check box.

Adding Preparers

This chapter covers the following actions:

1. Create a user/preparer.
2. Assign a security template.
3. Control return access.
4. List password requirements.
5. View a preparer's email address.
6. Change the status of one or all preparers.
7. Select a user name to allow for multiple accounts.
8. Mark a user as archived.
9. Set up users for ad hoc/virtual sites.

Creating Users

To add preparers for your site, use the following steps from the **Configuration** page:

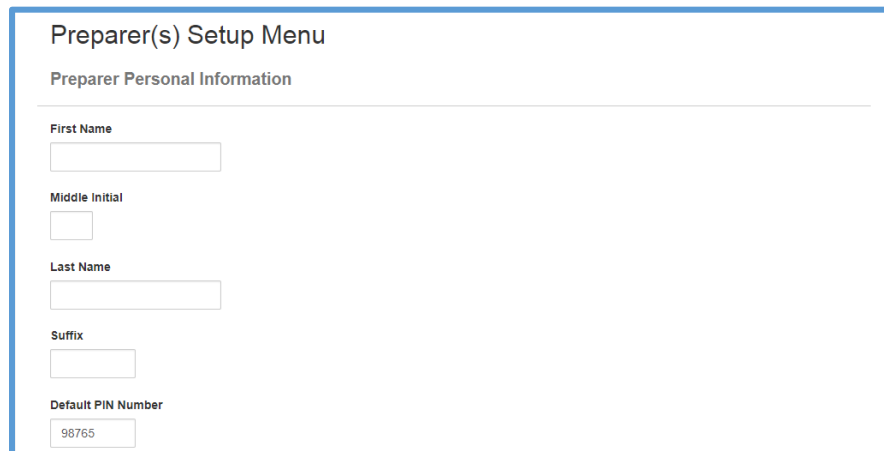
1. Click **Select** on the **Preparer Setup** line.

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

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

2. Click **Add**.

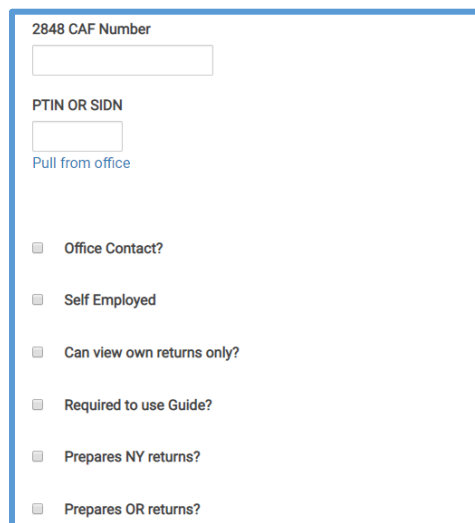
TaxSlayer Pro Online displays the **Preparer(s) Setup Menu** page:



The screenshot shows the 'Preparer(s) Setup Menu' page. Under the heading 'Preparer Personal Information', there are five input fields: 'First Name', 'Middle Initial', 'Last Name', 'Suffix', and 'Default PIN Number'. The 'Default PIN Number' field is pre-filled with the value '98765'.

3. Type the preparer's name in the appropriate boxes.
4. TaxSlayer Pro Online defaults the PIN to 98765 and carries this PIN to all returns created by this preparer.
5. Scroll to view the remainder of the personal information.

TaxSlayer Pro Online displays the next section of the page:



The screenshot shows the next section of the setup menu. It includes a '2848 CAF Number' input field, a 'PTIN OR SIDN' input field with a 'Pull from office' link below it, and a list of six checkboxes: 'Office Contact?', 'Self Employed', 'Can view own returns only?', 'Required to use Guide?', 'Prepares NY returns?', and 'Prepares OR returns?'.

NOTE: VITA/TCE sites do not need a 2848 CAF Number.

SIDN

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

TIP: If you are setting up the preparer for an Ad Hoc site, type the SIDN assigned to the Ad Hoc site. Search the Pro Online Knowledge Base for detailed information on setting up your Ad Hoc site(s).

Return Access

8. Select the check box to allow the preparer to view only his or her own returns.
9. Check **Required to use Guide?** if you want to restrict the preparer to using the Guide Me feature for data entry.
10. Select **Prepares NY returns?** and select volunteer tax preparer if you are preparing returns in New York.
11. If you prepare returns in Oregon, select the **Prepares OR returns?** check box and type the preparer's OR License number.

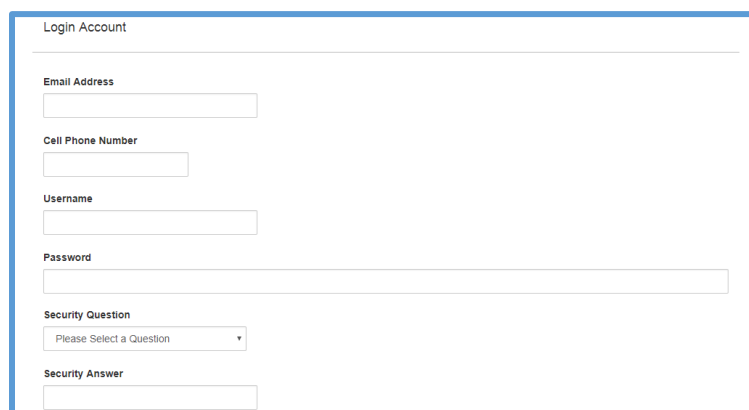
Preparer Agent Information (Optional)

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. TaxSlayer Pro Online prints this information on the Form W-7.

Login Setup

12. Scroll to the **Edit Login Account** section.

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



The screenshot shows a web form titled "Login Account". It contains the following fields and controls:

- Email Address:** A text input field.
- Cell Phone Number:** A text input field.
- Username:** A text input field.
- Password:** A text input field.
- Security Question:** A dropdown menu with the text "Please Select a Question" and a downward arrow.
- Security Answer:** A text input field.

13. Type the preparer's email address, cell phone number, and a unique user name with at least six (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 Multi-Factor Authentication standards, all email addresses and cell phone numbers must also be unique unless they are marked to allow for multiple accounts.

Password Requirements

14. 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.

15. Select the security template you want this preparer to use from the list.

TIP: Click **Show Definitions** to review the actions for which the security template has permission checked.

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

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

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

Tip: Press Ctrl + End to navigate directly to the bottom of the page.

Managing Preparers

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

- Easily mark a preparer as active or inactive.
- 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 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 new **Email** column. Use this to ensure that your preparers use unique email addresses and find the preparer's email address when needed.

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

Marking a User Name to Allow Multiple Accounts (Optional)

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

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

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

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

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

Note: You must edit an existing preparer to select these check boxes.

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

In addition to **Active** and **Inactive**, users with appropriate permissions can mark preparers who no longer volunteer at your site as **Archived**. When you use 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.

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

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

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

2. At the bottom of the page, clear the **Active** check box, and then select the **Is Archived** check box.
3. Click **Continue**.

TIP: To view preparers you have archived, click **View Archived** on the **Preparer(s) Menu**.

If you later need to reactivate a preparer, select the **Active** check box on the **Preparer(s) Setup Menu** for that preparer.

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. In this circumstance, the preparer can use the same email address and/or cell phone number.

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.

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).

Working with Custom Questions

This chapter covers the following actions:

1. Configure custom questions and answers.
2. List reports 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

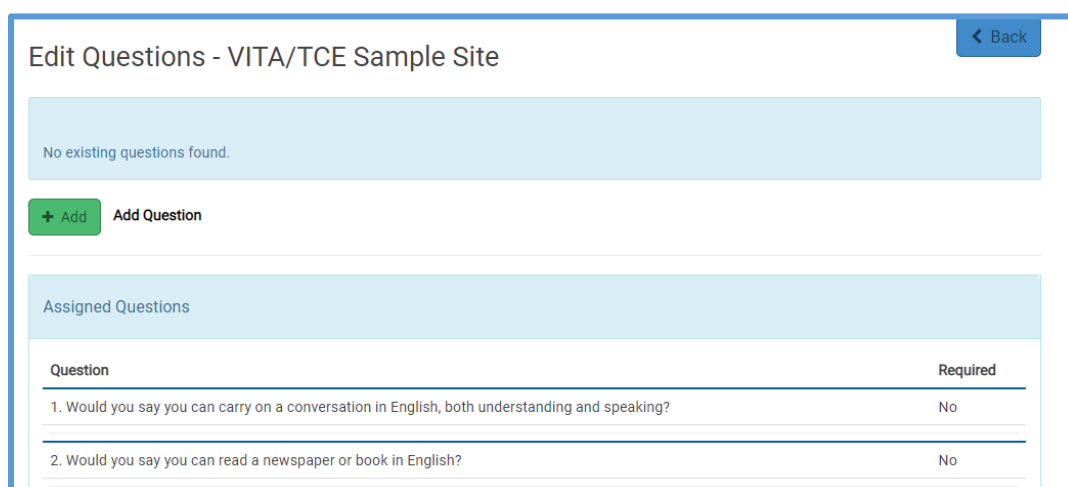
To access custom questions from the **Welcome** page, use the following steps:

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



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:



The screenshot shows the 'Edit Questions - VITA/TCE Sample Site' page. It includes a 'Back' button, a message 'No existing questions found.', an 'Add Question' button, and a table of '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. To add more questions, click **Add**.

Note: Questions assigned to your site cannot be modified, deleted or assigned to another site.

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

4. Type the question in the **Question** box.
5. If you want to require preparers to answer this question, select the **Is Required** check box.

TIP: If you require the answer to a question, the preparer **cannot** save the **E-file** page and mark the return for e-file unless he or she answers the question.

6. Click **Add** in the **Available Answers** section.
7. Type the first answer choice.
8. Click **Add** and type the answer choice.
9. To change the display order of the answers, drag each answer to the position you want it to appear during return preparation.
10. When you finish adding the question and answer choices, click **Save**.

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

11. To add more questions, click **Add** 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. 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 the **E-file** page and marking the return for e-file.

Question Reports

TaxSlayer Pro Online contains three reports to analyze question data:

- Question Statistics: generates a summary level report for each question
- Return Questions with Consent Indicator Report: generates a detailed listing of question data, along with corresponding taxpayer demographic information and assigned/custom consents
- Return Questions: generates a detailed listing of question data, along with limited demographic information

TIP: You must run all question reports at the site level, even if the site is in your relational group.

Refer to the [Working with Reports](#) section for detailed instructions for running reports.

TIP: You cannot export to CSV if you use punctuation in the custom question or answer.

Working with Taxpayer Profiles

This chapter covers the following actions:

1. Create taxpayer profiles.
2. Add forms to a taxpayer profile.
3. Edit taxpayer profiles.
4. Delete taxpayer profiles.
5. Assign a taxpayer profile to another site as the multi-site administrator.
6. Select a taxpayer profile when starting a new return.
7. Locate a list of 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 **Configuration Menu** page, use the following steps:

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



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

The screenshot shows the 'Taxpayer Profiles' page. At the top, there is a table with columns: Profile Name, Description, and Tax Year. The first row shows 'Schedule R' with 'testing' in the Description column. To the right of this row are 'Edit' and 'Delete' buttons. Below the table is a green '+ Add' button and a link 'Add Taxpayer Profile'. Underneath is a section titled 'Assigned Taxpayer Profiles' which contains another table. This table has columns 'Profile Name', 'Description', and 'Tax Year'. The first row shows 'Master Profile' with a detailed 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.'

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, delete, or assign these to another site.

2. To add a taxpayer profile, click **Add**.

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

The screenshot shows the 'Edit Taxpayer Profile' page. It has four main input fields: 'Profile Name' (a text box), 'Description' (a larger text box), 'Tax Year' (a dropdown menu currently showing '2016'), and 'Tax Form (Lookup)' (a text box). Below these fields is a section titled 'Selected Tax Forms' which contains a list box.

Adding General Taxpayer Profile Information

3. Type a name for your new taxpayer profile in the **Profile Name** box.

4. 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.

5. 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 to the Taxpayer Profile, see the VITA/TCE Blog.

6. Begin typing a form name you want included in the **Tax Form (Lookup)** box.
7. 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		⊗

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

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

11. 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 Taxpayer Profile

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

1. 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

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

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

3. In the **Assign profile to** section, select the site to which you want to assign the profile.
4. Click **Continue**.

TIP: If you need to delete a profile, unassign it from applicable offices before deleting.

Selecting a Taxpayer Profile

The preparer can select the taxpayer profile when starting a new return. For information on starting a new return, see the [Starting a Tax Return](#) section.

Working with Consents

This chapter covers the following actions:

1. Add a new consent form.
2. Edit an existing consent form.
3. Delete a consent form.
4. Complete a consent in a tax return.
5. Use the Global Carryforward Consent.
6. Work in the Consent Report.

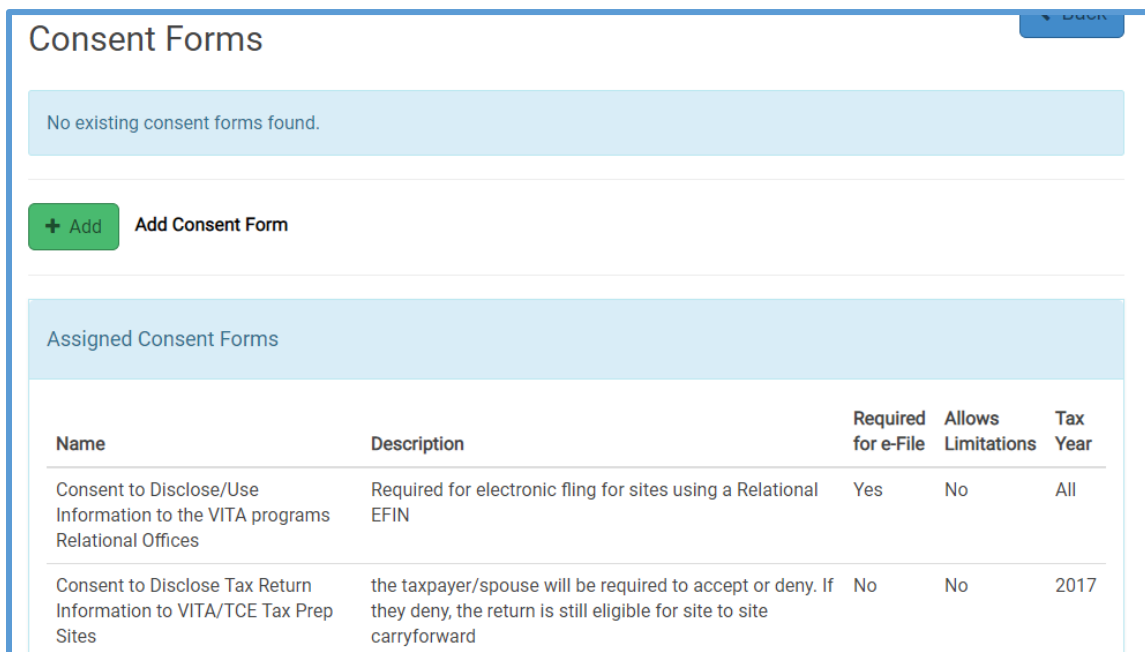
Adding a Consent

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.

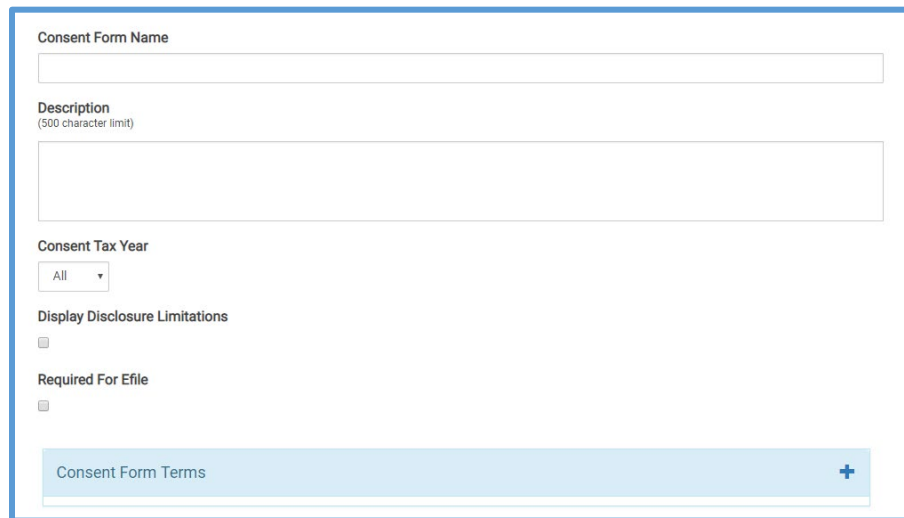
TaxSlayer Pro Online displays the **Consent Forms** page, listing any assigned consent forms:



Name	Description	Required for e-File	Allows Limitations	Tax Year
Consent to Disclose/Use Information to the VITA programs Relational Offices	Required for electronic filing for sites using a Relational EFIN	Yes	No	All
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

2. Click **Add**.

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

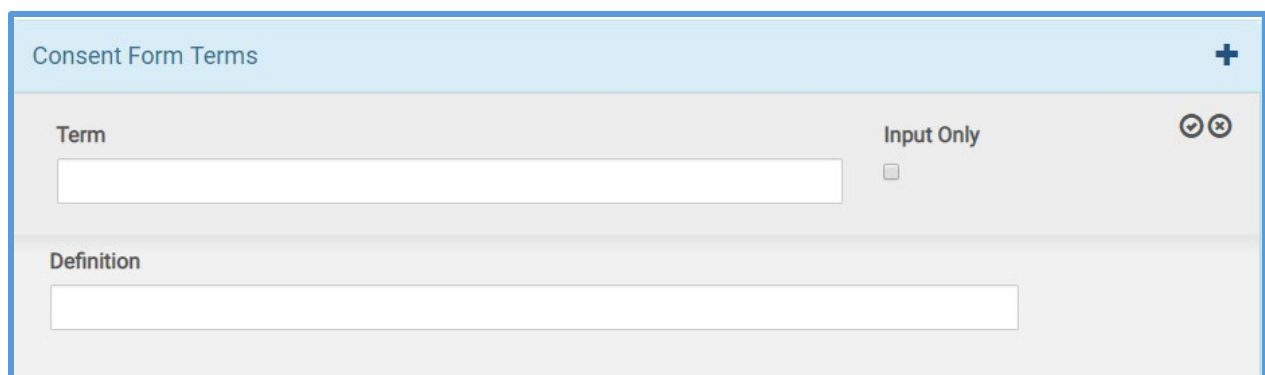


The screenshot shows the 'Edit Consent Form' page. It includes a 'Consent Form Name' text field, a 'Description' text field with a '(500 character limit)' note, a 'Consent Tax Year' dropdown menu currently set to 'All', a 'Display Disclosure Limitations' checkbox, and a 'Required For Efile' checkbox. At the bottom, there is a 'Consent Form Terms' section with a blue header and a '+' icon to add terms.

3. Type a name and description for your consent form.
4. Select the **Consent Tax Year**, either **All**, the current year, or one of the three prior tax years.
5. Select the **Display Disclosure Limitations** check box if you need to display the disclosure limitations (optional).
6. Click the **Add** icon in the **Consent Form Terms** section.

NOTE: Select the **Required For Efile** check box to prevent the preparer from creating an e-file 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:



The screenshot shows the expanded 'Consent Form Terms' section. It has a blue header with the title 'Consent Form Terms' and a '+' icon. Below the header, there is a 'Term' text field, an 'Input Only' checkbox, and a 'Definition' text field. To the right of the 'Input Only' checkbox are two circular icons: one with a checkmark and one with an 'X'.

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

Note: Type a description definition so the preparer and taxpayer can see the exact terms of the consent and knowingly accept those terms. Do **not** select **Input Only**, as this option requires the preparer to manually type consent form terms on each consent for each taxpayer and must be tracked manually by the site.

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

Editing a Consent Form

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

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

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

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

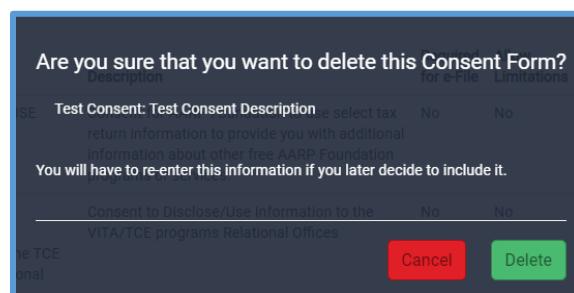
TIP: TaxSlayer Pro Online makes changes to consents immediately available in returns. We do not recommend making changes to consents after you start preparing returns.

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:



A confirmation dialog box with a dark background and white text. The title is "Are you sure that you want to delete this Consent Form?". Below the title, it shows "Test Consent: Test Consent Description" with a "select tax" dropdown and "No" buttons. A note says "You will have to re-enter this information if you later decide to include it." At the bottom, there are "Cancel" and "Delete" buttons.

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 assign a consent to a group, unassign the consent from the group before you delete it. You cannot unassign a deleted consent from a site.

Global Carryforward Consent

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. Locate the **Custom Consents** report in the **Custom Configuration Items** on the **Office Reporting** 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		001111		FRESH TEST	ARIZONA	Tester@tseter.com				70622
2		001111		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

Refer to the [Working with Reports](#) topic for information on running reports.

Configuring Printing

This chapter covers the following actions:

1. List the predefined assigned print sets.
2. Determine which print sets to use for the taxpayer.
3. Create custom print sets.

Predefined Print Sets

TaxSlayer Pro Online contains several print sets you can use when printing. 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 the one of the print sets assigned by TaxSlayer. TaxSlayer Pro designed these print sets based on collaboration with the IRS.








TIP: All print sets are available from the **Submission**, but those available from the **Client List** are limited.

View Assigned Print Sets

To view the contents of the assigned print sets, use the following steps from the **Configuration Menu**:

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

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

PY TAXPAYER COPY PRINT	VITA/TCE Main	9/30/2016	 Set As Default	 View
2018 PAPER FILE COPY	VITA/TCE Main	1/4/2019	 Set As Default	 View
2018 TAXPAYER COPY PRINT	VITA/TCE Main	4/20/2016	 Set As Default	 View
QUALITY REVIEW	VITA/TCE Main	5/13/2016	 Set As Default	 View

2. To view the assigned print set, click **View**. You cannot edit these print sets.

Create a Custom Print Set

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

1. Click **Add**.

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

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	0
2	FD	Audit Guard	0
3	FD	Federal Electronic Filing	0

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.

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

4. 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

5. 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.
6. Type the correct number in the **Print Count** box.
7. Click **Submit**.

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

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

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

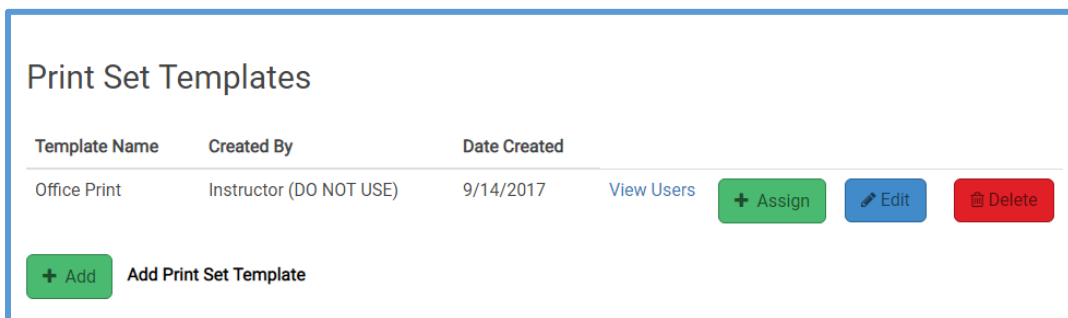
9. Click **Add** and follow the same steps for any additional print sets you want to use.
10. To set a print set as the default set for all returns printed from the Client List and/or Submission page, click **Set As Default** on the line for that print set.
11. If you need to edit or delete a print set you created, click **Edit** or **Delete** to do so.
12. 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 from the **Configuration Menu** after logging in with your Group Level login:

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

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



Template Name	Created By	Date Created	
Office Print	Instructor (DO NOT USE)	9/14/2017	View Users + Assign Edit Delete

[+ Add](#) Add Print Set Template

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

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

Assign Print Set Template

Office Print

☐ Set Assigned as Default Print Set

Assign template to:

search...

☐ Check/Uncheck all

☐ Show Inactive

Offices

3. Select the **Set Assigned as Default Print Set** check box.
4. Select the offices in the **Offices** section.

Managing Returns

This chapter covers the following actions:

1. Set up return tags.
2. Filter returns by return tags.
3. Deactivate returns.
4. Restore returns.
5. Add taxpayer notes.
6. Send messages.
7. Change the language in a return.

Working with Return Tags

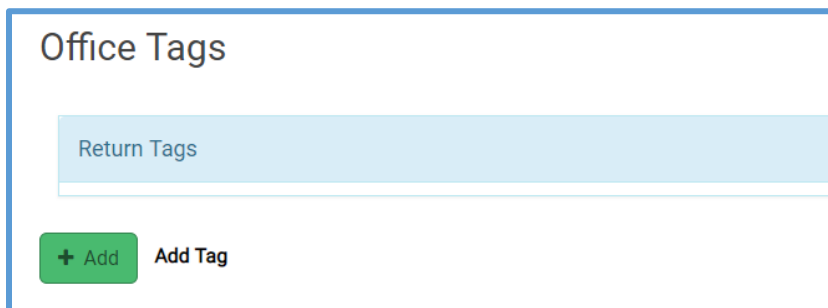
You can create a customized list of return tags to manage the status of the returns at your site or track the returns by Quality Reviewer.

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 **Configuration Menu** page:

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

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



1. Click **Add**.
2. Type a tag name in the **Add new tag** box.

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

3. Repeat the steps until you add all the return tags you want.
4. To change the tag display order, drag each tag to the correct position.
5. When you finish adding return tags, click **Back** to return to the **Configuration Menu** landing page.

TIP: For information on using return tags as a preparer, see [Marking a Return for e-file](#).

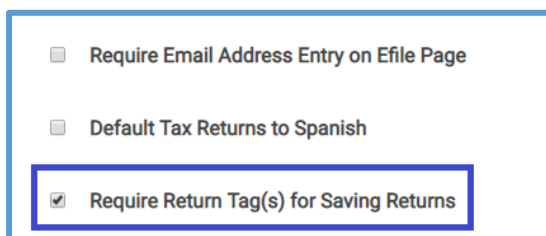
Making Return Tags Required

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

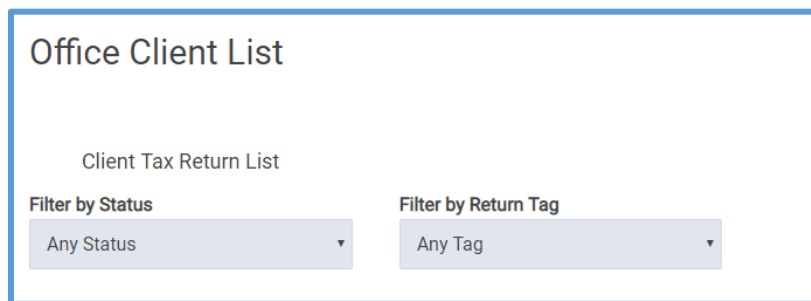
☒ Require Return Tag(s) for Saving Returns

3. Click **Continue**.

NOTE: For quality review reports on return tags, creates *Pending Review* and *Not Reviewed* return tags.

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 **Office Client List** page:



Office Client List

Client Tax Return List

Filter by Status: Any Status ▼

Filter by Return Tag: Any Tag ▼

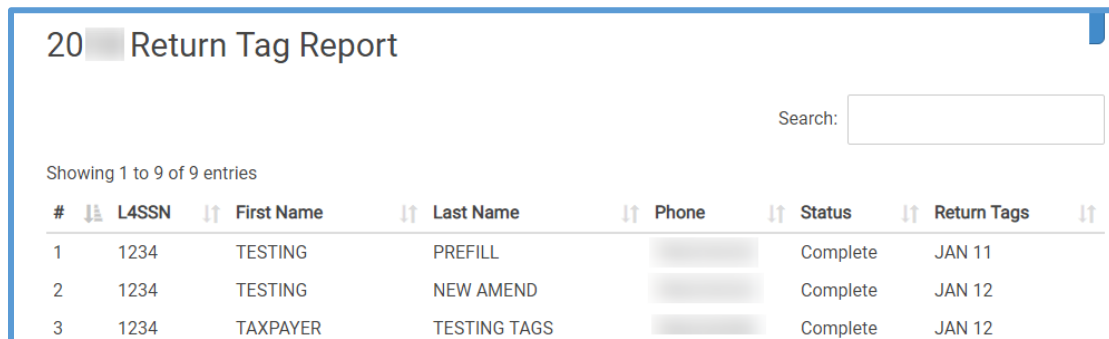
1. Select the return tag for which you want to search from the **Filter by Return Tag** drop-down list.

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

Tip: You can also select **No Tag** to filter those returns or sort by quality reviewer.

Using the Return Tag Report

The site administrator can use the Return Tag report to easily manage returns. Locate the Return Tag report in the **Custom Configuration Items** category on the **Office Reporting** page.



20 Return Tag Report

Search:

Showing 1 to 9 of 9 entries

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

TaxSlayer Pro Online includes the following information in this report:

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

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

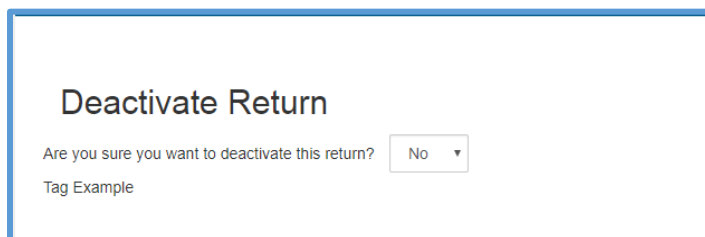
Deactivating Returns

In rare events, you may need to deactivate a return. You can do this in the **Office Client List** if 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 **Office Client List** page:

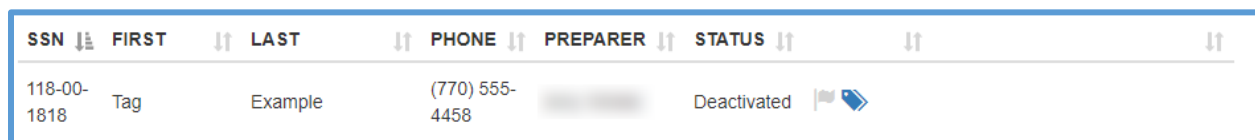
1. Find the return you want to deactivate.
2. From the **Tools** drop-down list, click **Deactivate**.

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



3. Select **Yes** from the drop-down list.
4. 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	

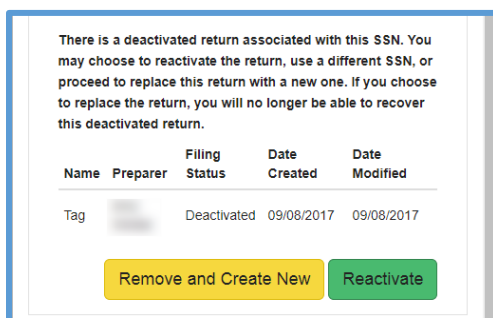
Tip: Select **Do Not Show Deactivated Returns** on the **Office Client List** to hide deactivated returns from view.

Reactivating a Return

If you later need to reactivate a return your site deactivated, use the following steps:

1. Start a new return.

TaxSlayer Pro Online displays the **Create New Return** page with information on 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
Tag		Deactivated	09/08/2017	09/08/2017

[Remove and Create New](#) [Reactivate](#)

2. Determine whether you want to reactivate or replace the deactivated return.
 - a. To reactivate the return with existing information, click **Reactivate**.

- b. To replace the deactivated return, click **Remove and Create New**.
- c. If the Social Security number you typed for the current return is incorrect, type the Social Security number again to change it.

NOTE: If you replace a deactivated return, you cannot retrieve information from that return. TaxSlayer Pro Online discards all that information and creates a new, blank return.

Adding Notes

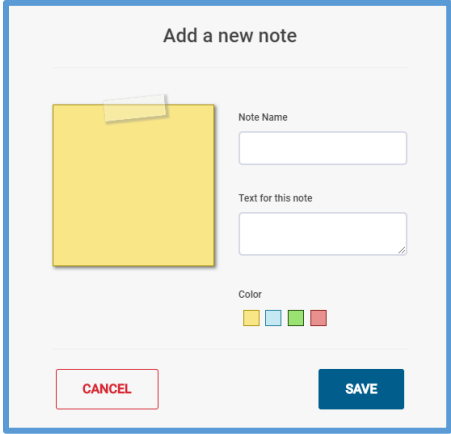
You can add notes to a tax return so you can review information later. For example, you may want to add a note to remind you of what information you still need from the taxpayer.

Note: TaxSlayer Pro Online does not transmit notes to the IRS, but prints 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.
2. Click **Notes**.

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



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

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

Found notes

1. Example




REMOVE ADD

6. If you need to add another note, click **Add** and use the same steps to add the new note.

7. If you need to remove a note, click **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	   Tools
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.

4. To add a new note, type the title and description in the appropriate boxes.
5. Click **Save**.
6. Click **Add New** and use the same steps to add a new note.
7. If you need to print or export a note, click **Print PDF** or **Export CSV**.
8. When you finish adding notes, click the **X** to close the window.

Tip: From the client list, you can see who created the note and the date/time it was created. You can also view notes in **Warnings Concerning Your Federal Return**.

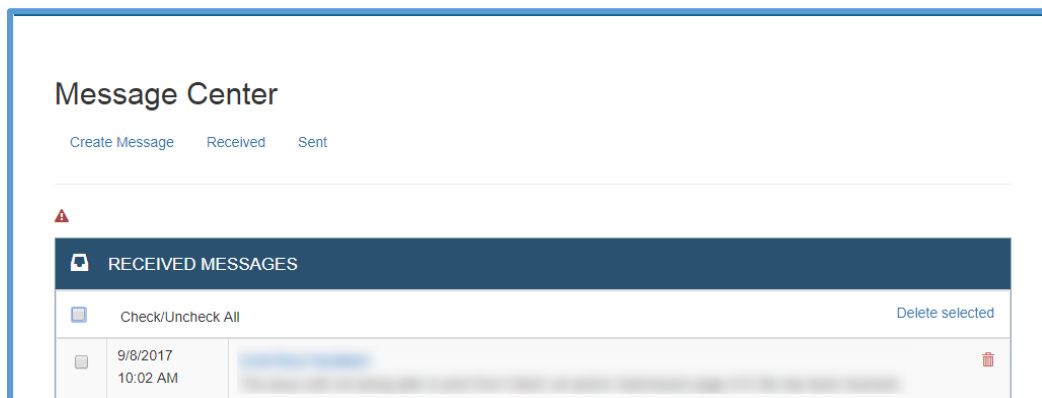
Tip: When carrying forward returns, clear check boxes to remove year-specific notes you do not need in the current return.

Sending Messages

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

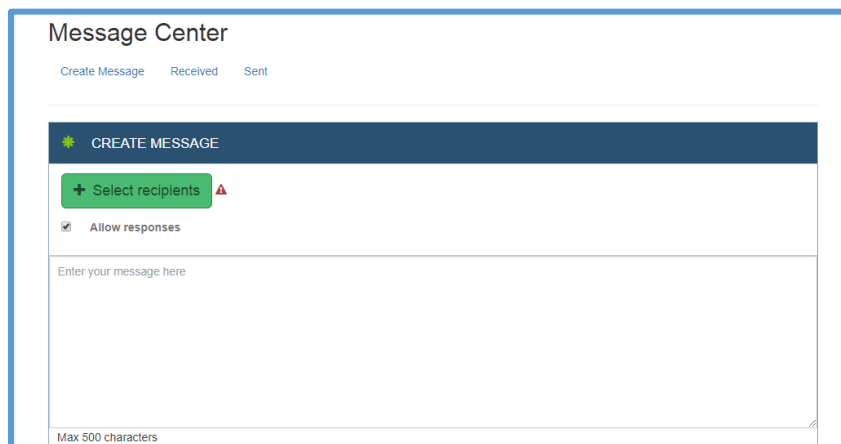
1. Click **Message Center**.

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



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

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

The screenshot shows the 'Message Center' interface. At the top, there are three tabs: 'Create Message', 'Received', and 'Sent'. The 'Create Message' tab is active. Below the tabs is a dark blue header with a green star icon and the text 'CREATE MESSAGE'. Under this header is a green button with a plus icon and the text 'Select recipients', followed by a small red warning triangle. Below the button is a checkbox labeled 'Allow responses' which is checked. Below the checkbox is a large text area with the placeholder text 'Enter your message here'. At the bottom of the text area, it says 'Max 500 characters'.

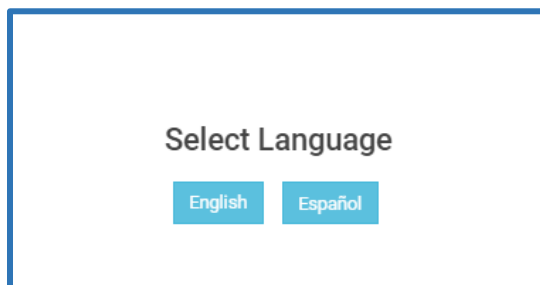
4. Click **Select recipients** and select any other preparers at your site to which you want to send the message.
5. Type the message you want to send in the message box. You can type up to 500 characters.
6. When you finish typing your message, click **Send**.

Changing the Language in a Return

TaxSlayer Pro Online defaults to displaying and printing returns in English unless you select **Default Tax Returns to Spanish** during office configuration. To change the language to Spanish while in a tax return, use the following steps:

1. From the **Tools** drop-down list, click **¿Sí hablas Español?**

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

The screenshot shows a window titled 'Select Language'. Inside the window, there are two buttons: 'English' and 'Español'. The 'Español' button is highlighted with a blue border.

2. Click **Español**.

TaxSlayer Pro Online now displays certain items in Spanish and prints IRS approved forms in Spanish until you exit the return.

Working with Reports

This chapter covers the following actions:

1. Run reports.
2. Filter reports.
3. Export reports.
4. Run Management reports (web reports)
5. 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

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

<input checked="" type="checkbox"/>	Transmission Reports
<input checked="" type="checkbox"/>	Financial Reports
<input checked="" type="checkbox"/>	Custom Configuration Items
<input checked="" type="checkbox"/>	Other Data Reports

2. Click the appropriate report category to expand it. For purposes of this topic, expand the **Custom Configuration Items** category.
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 WAY	ROME	GA	30

4. Review the information on the report.

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

Searching and Sorting

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

Printing

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

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

Exporting

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

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

TIP: Follow all security, privacy, and confidentiality rules for taxpayer data.

TIP: Search the Pro Online Knowledge Base for detailed information on all TaxSlayer Pro Online reports. Type the key words *Report Descriptions*, and then click **Find Matches**.

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 Reports** page:

1. Click the **Other Data Reports** section to expand it.
2. Click **Select** on the **Management Reports** line.

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



NOTE: Because TaxSlayer Pro Online launches a separate window for management reports, you must enable pop-up blockers.

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 should 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**.

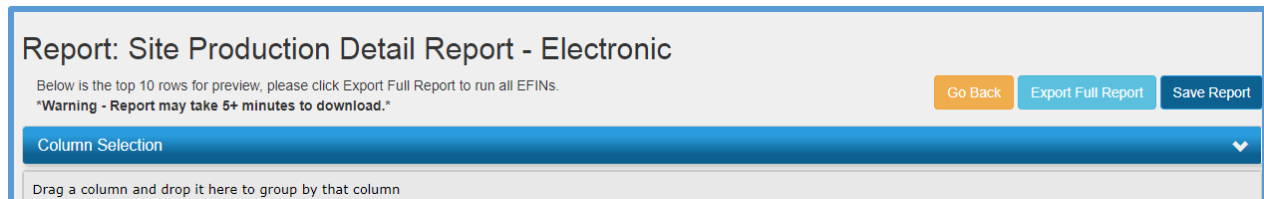
TaxSlayer Pro Online displays the **EFIN Selection** section:

6. Select the check box for the EFIN(s) for which you want to run the report (even if running the report at the site level for a single EFIN).

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

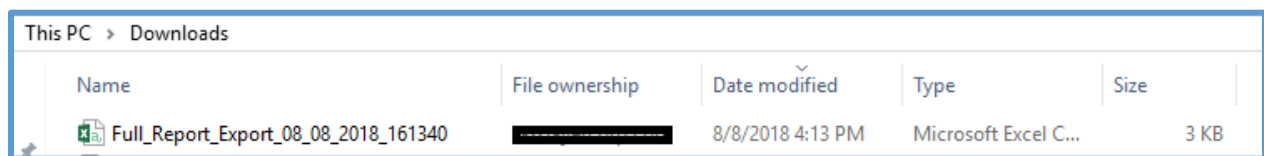
7. Do one of the following. For this exercise, select **Run Report to Export**.
 - a. Click **Run Report** to display the report on the screen.
 - b. Click **Run Report to Export** to enable an export and display the first ten (10) rows of the report on the screen.

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.

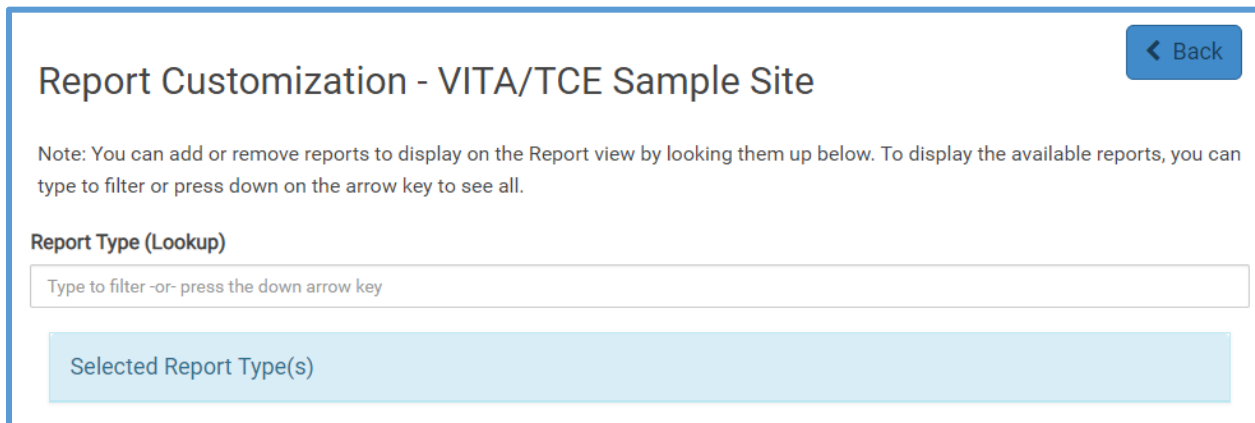
Report Customization

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 **Configuration Menu** page:

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

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

The screenshot shows the 'Report Customization - VITA/TCE Sample Site' page. At the top right is a blue 'Back' button. Below the title is a note: '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.' Under the heading 'Report Type (Lookup)', there is a text input field with the placeholder text 'Type to filter -or- press the down arrow key'. Below this field is a light blue box labeled 'Selected Report Type(s)'.

2. 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.
3. Select the report(s) you want to display.

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

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

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

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

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

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

Managing Multiple Sites

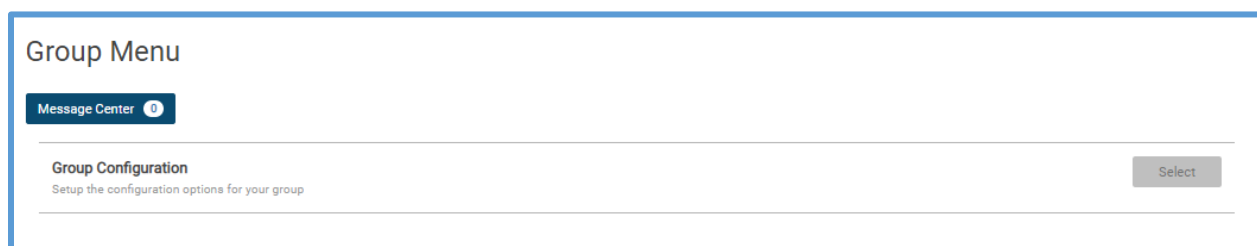
This chapter covers the following actions:

1. Log in as the multi-site/group administrator.
2. 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.

Note: During the ordering process, TaxSlayer sends Group Administrator login credentials via email to the site designated as the multi-site administrator.

When you log in, TaxSlayer Pro Online displays the **Welcome** page:

The screenshot shows a web interface titled "Group Menu". Below the title is a "Message Center" button with a notification icon. A horizontal line separates this from the "Group Configuration" section. Under "Group Configuration", there is a description: "Setup the configuration options for your group". To the right of this section is a "Select" button.

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.

Note: Sites using a Relational EFIN must use the Reporting Consent to Use. TaxSlayer assigns this form to all locations with a Relational EFIN, and the form is required to electronically file the return.

Assigning Settings to Offices

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


- a) Security Templates
- 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: ALL multi-site (MSA) group administrators can access this feature.

Assign Questions

New Template 

Questions

What is the primary source of income in your household?

Assign template to:

search...

Offices

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

- TaxSlayer makes any modifications to an item immediately available to the assigned site.
- You must unassign items from any applicable site before you delete it at the group level. Once you delete an item, you cannot unassign it.

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 an appropriate security template. 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 a list of search criteria: SSN, SSN, Name - First or Last, Phone, Preparer - First or Last, EFIN, and Office. The 'Office' option is highlighted in blue. Other form elements include 'Date From:' and 'Date To:' date pickers, 'Show By Return Tag' and 'Show By Status:' dropdowns, and a green 'Search >' button.

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

The screenshot shows the search results page. The 'Search By:' dropdown is set to 'Office'. The results table displays two entries:

Return ID	Client	Case Name	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 an appropriate security template. 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	
[REDACTED]	Avon, CT	[REDACTED]	Active	Access Edit
[REDACTED]	Berlin, CT	[REDACTED]	Active	Access Edit
[REDACTED]	Berlin, CT	[REDACTED]	Active	Access Edit
[REDACTED] Cente	Bristol, CT	[REDACTED]	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.

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.

Working with Custom Credits

This chapter covers the following actions:

1. Set up custom credits.
2. 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 items that your site needs for grant purposes. You can add an unlimited number of custom credits, and the Custom Credit Report displays the following information:

- 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 **Configuration Menu**:

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

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

Custom Credit

Credit Name	Date Created	Required	
Example credit	12/6/2016	Yes	Edit Delete

[+ Add](#) **Add Custom Credit**

Assigned Custom Credit(s)

Name	Required
DEC 22 BLOG CUSTOM CREDIT TO CAPTURE	No

2. Click **Add**.

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

☐

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

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

Custom Credit			
Credit Name	Date Created	Required	
Example credit	12/6/2016	Yes	Edit Delete
New Custom	9/21/2017	No	Edit Delete

6. 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

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** page:

1. Work through the sections of the **E-File** page until you reach the **Custom Credit(s)** section.

TaxSlayer Pro Online displays the **Custom Credit(s)** section:

The screenshot shows a vertical list of menu items, each with a right-pointing arrow. The items are: Return Type, Tax Preparation and E-File Information, State Return(s), Taxpayer Bank Account Information, Third Party Designee Info, Consent to Disclose Personal Tax Return Information, Consent to Disclose/Use Information to the VITA programs Relational Offices, Questions, and Custom Credit(s). The 'Custom Credit(s)' item is highlighted with a light blue background and a downward-pointing arrow. Below this list, the text 'Example credit' is followed by a text input field containing a dollar sign (\$) and the value '0.00'.

2. 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.

Adding an Office IP Whitelist

This chapter covers the following actions:

1. Discuss the purpose of an Office IP Whitelist.
2. Add IP Addresses to the Office IP Whitelist.
3. Configure TaxSlayer Pro Online to verify IP addresses.
4. 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.


NOTE: 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 **Configuration Menu**:

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

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



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

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

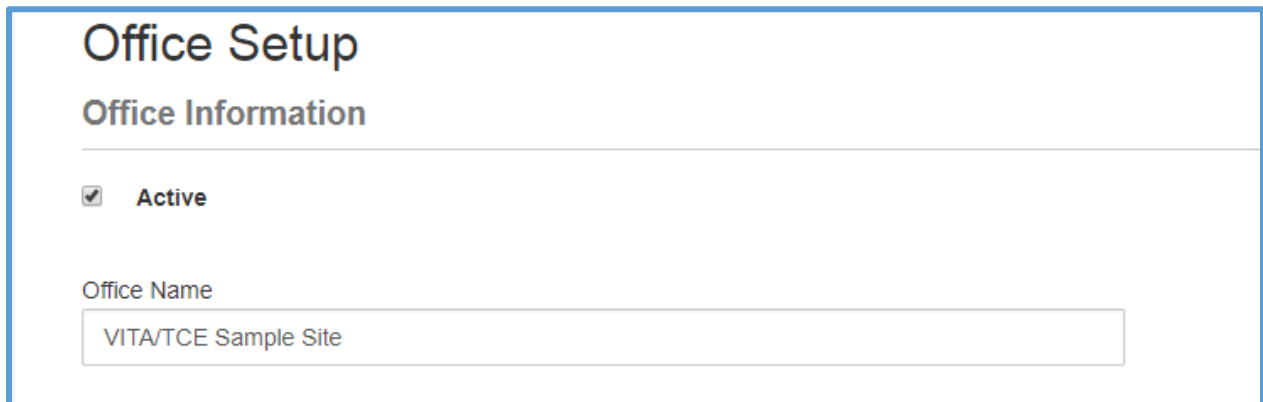
4. Repeat the last two steps for all allowed IP addresses.

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.

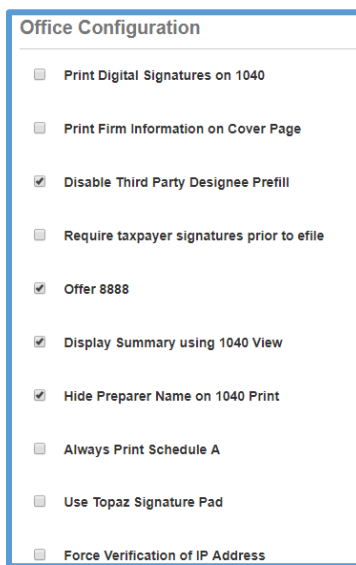
TaxSlayer Pro Online displays the **Office Setup** page:



The screenshot shows the 'Office Setup' page. At the top, the title 'Office Setup' is displayed in a large, dark font. Below it, the section 'Office Information' is highlighted. Under this section, there is a checkbox labeled 'Active' which is checked. Below the checkbox, there is a label 'Office Name' and a text input field containing the text 'VITA/TCE Sample Site'.

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

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



The screenshot shows the 'Office Configuration' section. It contains a list of checkboxes with the following labels: 'Print Digital Signatures on 1040', 'Print Firm Information on Cover Page', 'Disable Third Party Designee Prefill', 'Require taxpayer signatures prior to efile', 'Offer 8888', 'Display Summary using 1040 View', 'Hide Preparer Name on 1040 Print', 'Always Print Schedule A', 'Use Topaz Signature Pad', and 'Force Verification of IP Address'. The checkboxes for 'Disable Third Party Designee Prefill', 'Offer 8888', 'Display Summary using 1040 View', and 'Hide Preparer Name on 1040 Print' are checked.

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 **Edit Office IP Whitelist** page:

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

TaxSlayer Pro Online deletes the IP address.

Working with TaxSlayer Pro Desktop

Contingency Procedures

This chapter covers the following actions:

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

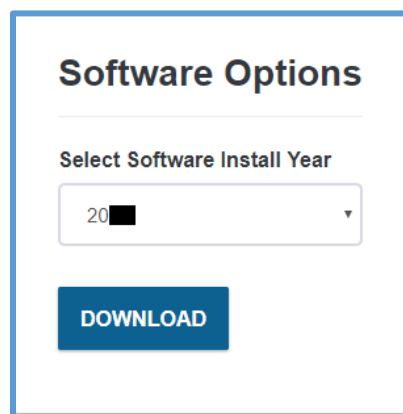
TaxSlayer Pro

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.

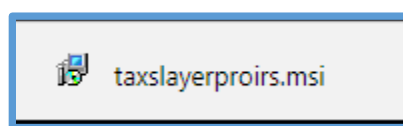
Download the desktop application in advance so that your site does not have any downtime. We recommend that you do not install TaxSlayer Pro on a network as a contingency plan. Instead, install on a standalone computer with an internet connection.

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:

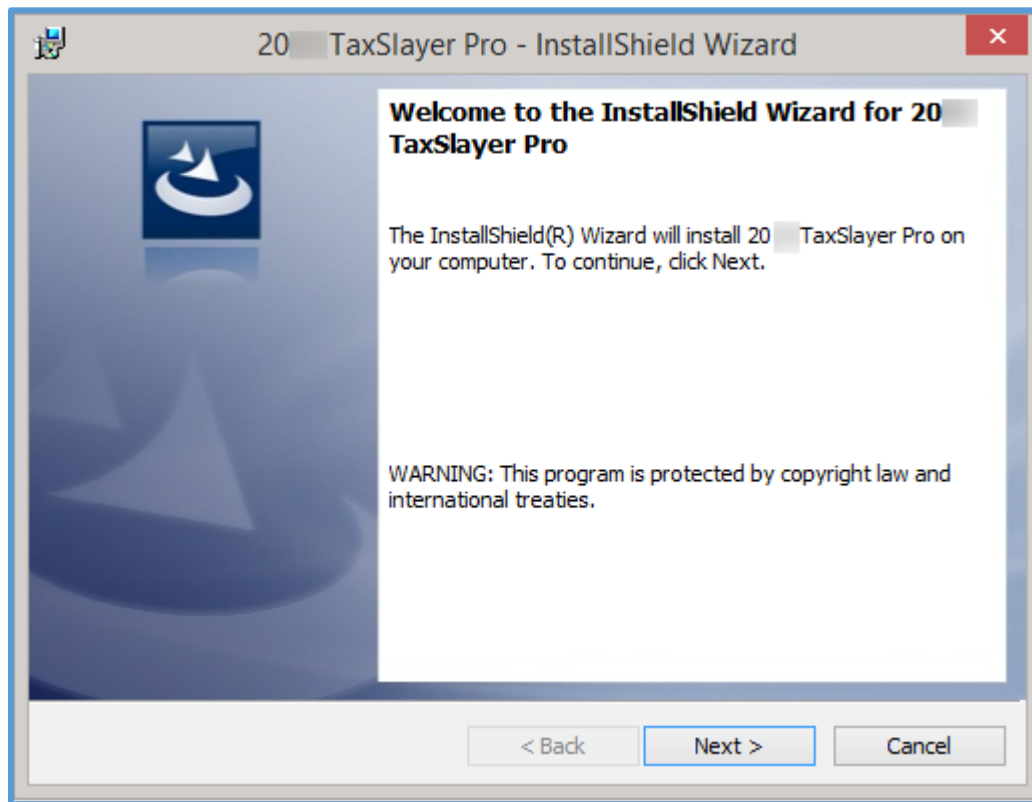
A screenshot of a web interface titled "Software Options". Below the title is a section labeled "Select Software Install Year" which contains a dropdown menu currently showing "20". Below the dropdown is a blue button with the text "DOWNLOAD" in white capital letters.

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.

Preparing a Return

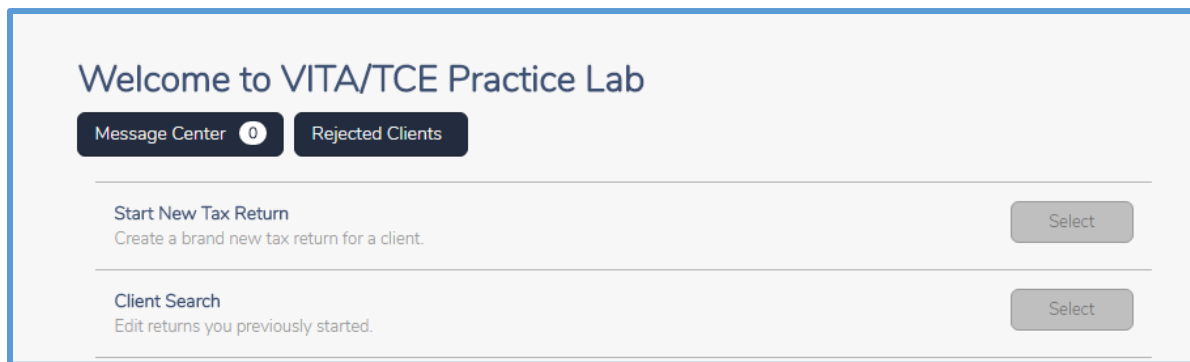
Starting a Tax Return

This chapter covers the following actions:

1. Start a tax return in TaxSlayer Pro Online.
2. Select a filing status.
3. Enter personal information for the taxpayer and spouse.
4. Enter dependent information.
5. Add IRS Identity Protection PIN(s).

Starting a New Return

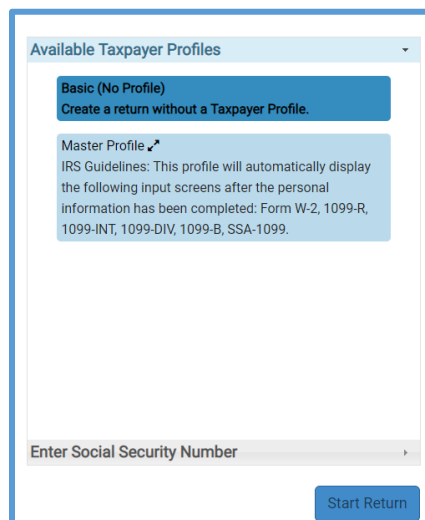
After you log in, TaxSlayer Pro Online displays the **Welcome to...** page:



To start a new return, use the following steps:

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

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



1. Select a taxpayer profile, or select **Basic (No Profile)** to prepare the return without a taxpayer profile.
2. Click **Enter Social Security Number**.

Taxslayer Pro Online displays the **Enter Social Security Number** section:

The screenshot shows a web interface for entering a Social Security Number. At the top, there is a dropdown menu labeled 'Available Taxpayer Profiles' with 'Enter Social Security Number' selected. Below this, the section is titled 'Social Security Number'. It 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, with placeholder text '***', '**', and '****' respectively. At the bottom right of the section is a blue button labeled 'Start Return'.

3. Type the taxpayer's Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN).
4. 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.
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.

TaxSlayer Pro 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 **Nonresident Alien** as the filing status, you cannot change back to a resident filing status (i.e. Single, etc.) on the tax return. You will need to deactivate the return and then reactivate using new return data.

Working in the Return

Layout and Links

Use the left navigation panel to determine your current section of the tax return. The submenu links in the left navigation panel show you more detail on the section.

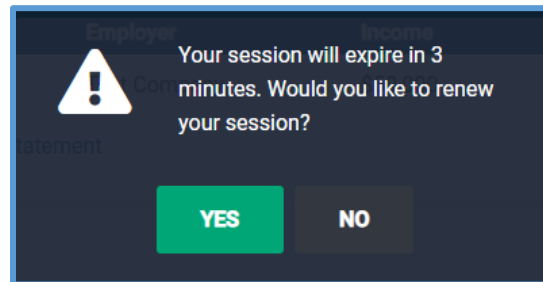
If you need to close the return, click **Save & Exit Return** at the left:

Q Enter the Form Number...

i Basic Information
Federal Section
Income
Deductions
Other Taxes
Payments & Estimates
Miscellaneous Forms
Health Insurance
State Section
Summary/Print
e-File
2016 Amended Return
Save & Exit Return
Help & Support

Session Expiration

If you are inactive for an extended period, TaxSlayer Pro Online displays a warning:

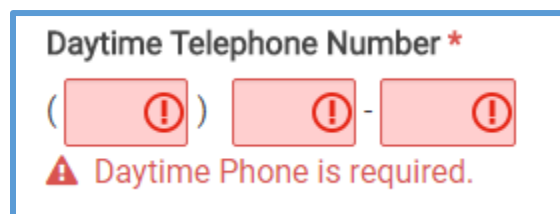


Click **Yes** to remain logged in. If TaxSlayer Pro Online logs you out, TaxSlayer Pro Online logs you out and displays the Office Client List. You will need to log in again.

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 for that page.

Required Information

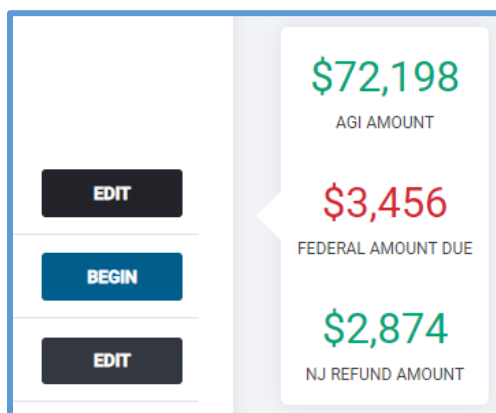
If you do not complete a required box on the page and attempt to continue to the next page, TaxSlayer Pro Online displays a warning in red either at the top of the page or on the box:



Click the warning to go to the error and correct it.

Federal AGI and Refund Amount

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



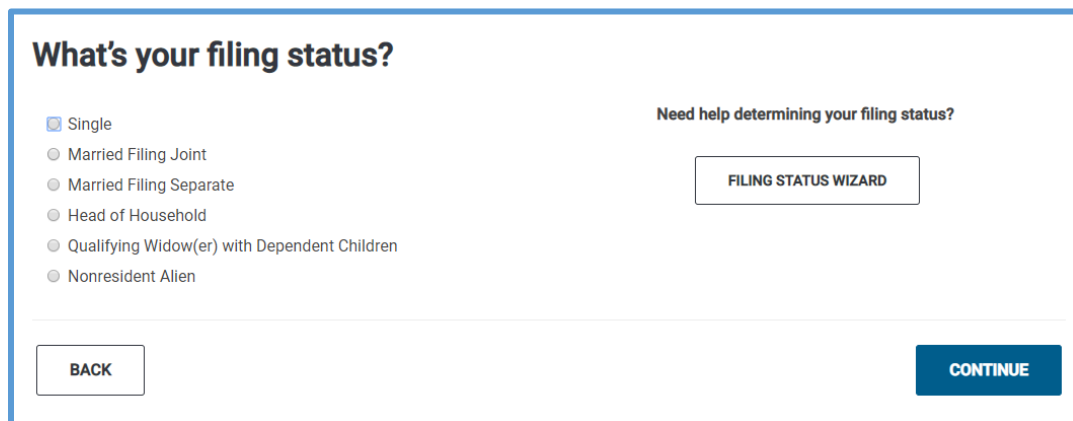
The screenshot shows a summary of tax amounts. On the left, there are three buttons: 'EDIT' (black), 'BEGIN' (blue), and 'EDIT' (black). On the right, the amounts are displayed in a light blue box:

Amount	Description
\$72,198	AGI AMOUNT
\$3,456	FEDERAL AMOUNT DUE
\$2,874	NJ REFUND AMOUNT

NOTE: If you have not added a state, TaxSlayer Pro Online displays **N/A** for the state refund amount. If you have multiple states in the return, TaxSlayer Pro Online rotates the state section between the applicable states, displaying the appropriate refund/balance due information.

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 the 'What's your filing status?' page. It includes a list of filing status options with radio buttons:

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

On the right, there is a link: 'Need help determining your filing status?' with a button labeled 'FILING STATUS WIZARD'.

At the bottom, there are two buttons: 'BACK' and 'CONTINUE'.

If you know the taxpayer's filing status based on the information he or she gives you, use the following steps:

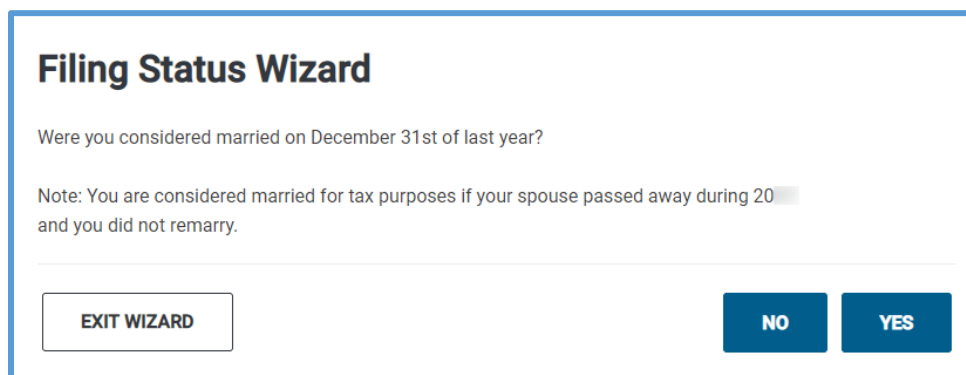
1. Select the appropriate filing status.
2. Click **Continue**.

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**:



Filing Status Wizard

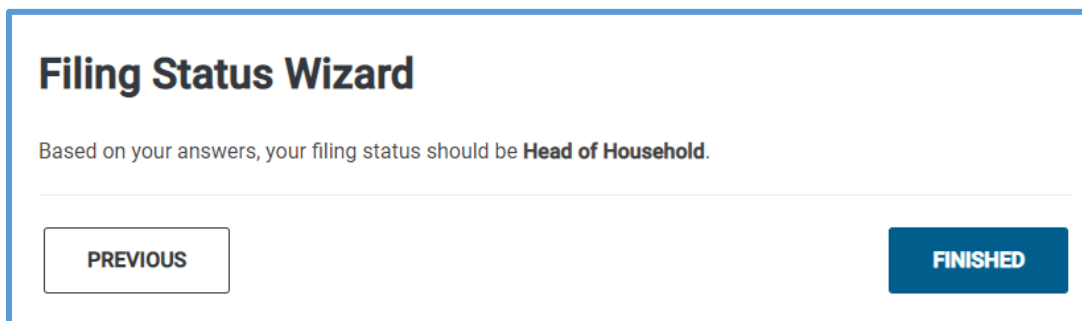
Were you considered married on December 31st of last year?

Note: You are considered married for tax purposes if your spouse passed away during 20 and you did not remarry.

EXIT WIZARD NO YES

2. Read each question in the wizard to the taxpayer and click the appropriate answer.

When you finish answering questions, TaxSlayer Pro Online determines and displays the appropriate filing status based on your answers:



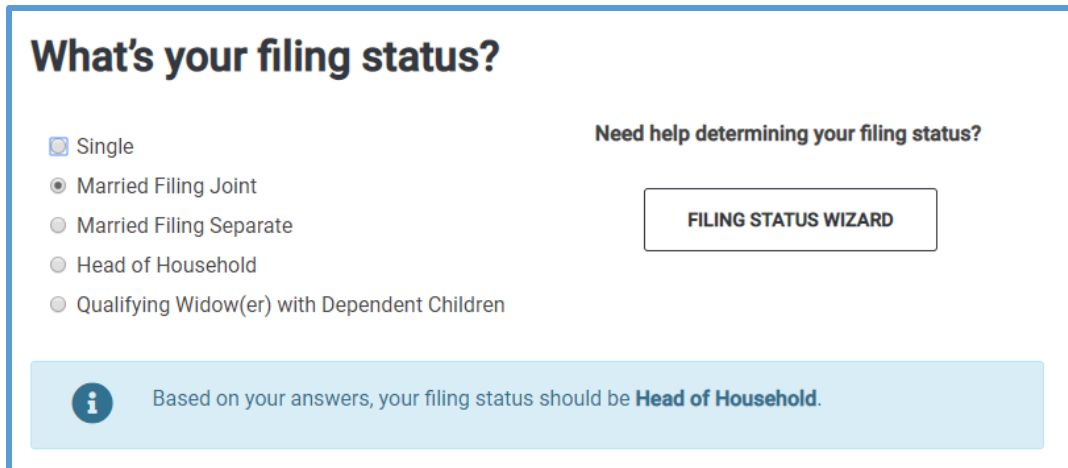
Filing Status Wizard

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

i 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 and Spouse Information

Complete the following pages, including taxpayer and spouse information. Read each question on the pages and select or type the appropriate answer.

Dates

When entering dates in TaxSlayer Pro Online, type 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.

Zip Codes

TaxSlayer Pro Online automatically completes the city, state, and resident state when you type a Zip code.

Spouse and Dependent Information

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.

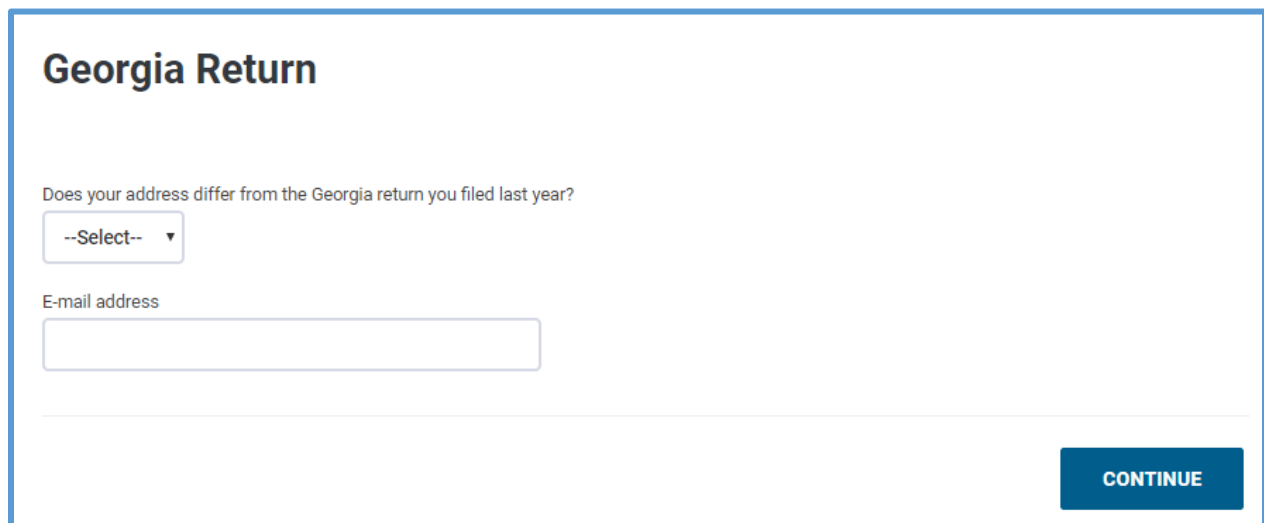
TaxSlayer Pro Online automatically completes the spouse and dependent's last name based on the information you typed for the taxpayer's last name. You can change this box if necessary.

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 needs to paper file the return.

Entering State Information

When you enter the address, TaxSlayer Pro Online automatically selects the taxpayer's state from the **Resident State Return** drop-down list and completes the basic state return as you add information to the return.

TaxSlayer Pro Online displays the **Just a few more questions** page with additional questions required by the resident state that are not necessarily captured when completing the Federal return:



Georgia Return

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

--Select-- ▼

E-mail address

CONTINUE

1. Read each question carefully and answer the question.
2. Click **Continue**.

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.

YES **NO**

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

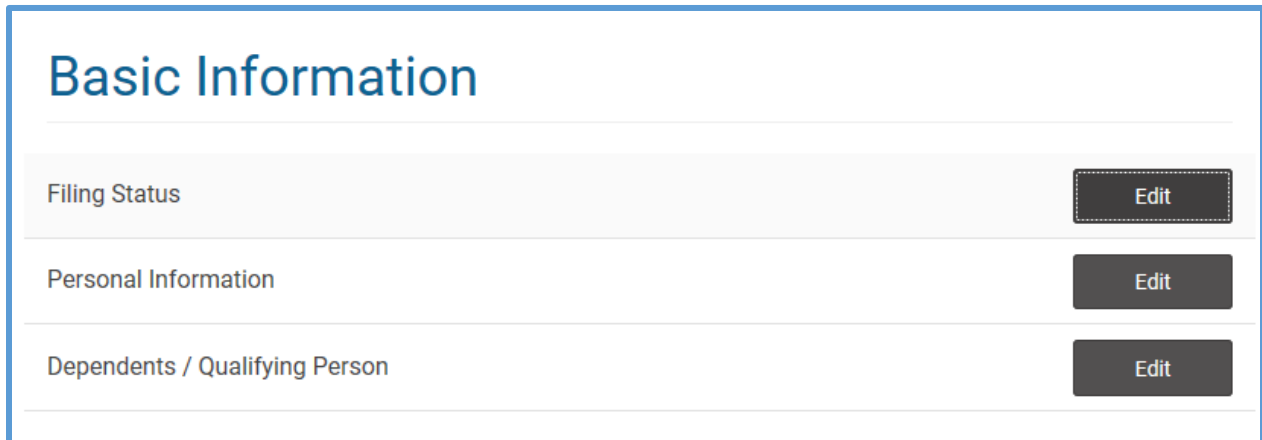
2. Read each question for the dependent and answer it appropriately.

3. 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.

4. When you finish entering dependents, click **Continue**.

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



Basic Information	
Filing Status	Edit
Personal Information	Edit
Dependents / Qualifying Person	Edit

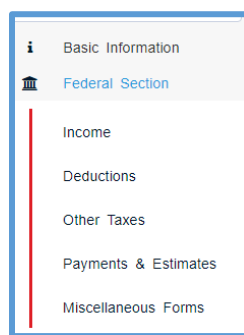
Ending a Section

As you work through a return, TaxSlayer Pro Online displays a menu at the end of each section. Review and edit any information for that section using this menu, and then click **Continue**.

Entering IRS Identification PINs

If the IRS issued identity protection PINs to the taxpayer, spouse and/or dependents, use the following steps to add the identity protection PINs to the return:

1. Click **Miscellaneous Forms** in the left navigation bar, as shown below:



2. Click **BEGIN** on the **IRS Identification PIN** line.

TaxSlayer Pro Online displays the **IRS Identity Protection Pin** page:

The screenshot shows a web form titled "IRS Identity Protection Pin". Below the title is a paragraph: "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." There are two input fields: "SAMPLE RETURN (XXX-XX-0815)" and "CHILD RETURN (XXX-XX-0815)". At the bottom are two buttons: "CANCEL" and "CONTINUE".

3. Type the appropriate PINs.

Methods of Entering Income

TaxSlayer Pro Online provides several methods of entering income, adjustments, deductions, and credits in the taxpayer's return. You can use any of the following:

- Taxpayer Profile
- 1040 View
- Guide Me
- Enter Myself
- Quick File
- Forms Search

Taxpayer Profile

In TaxSlayer Pro Online, you can choose a taxpayer profile to automatically display income and adjustment entry pages based on a pre-created list. You can still add additional information to the return after you complete any of the necessary forms displayed by the taxpayer profile.

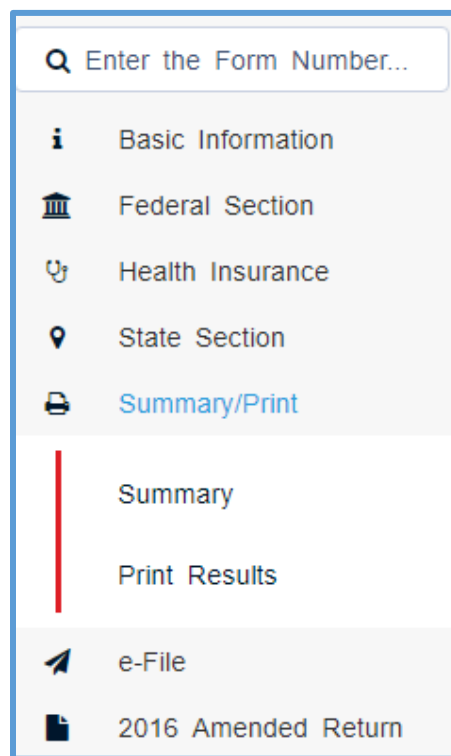
If you applied a taxpayer profile when creating the return, TaxSlayer Pro Online displays the entry forms in the designated order.

For information on creating a taxpayer profile, see [Working with Taxpayer Profiles](#).

1040 View

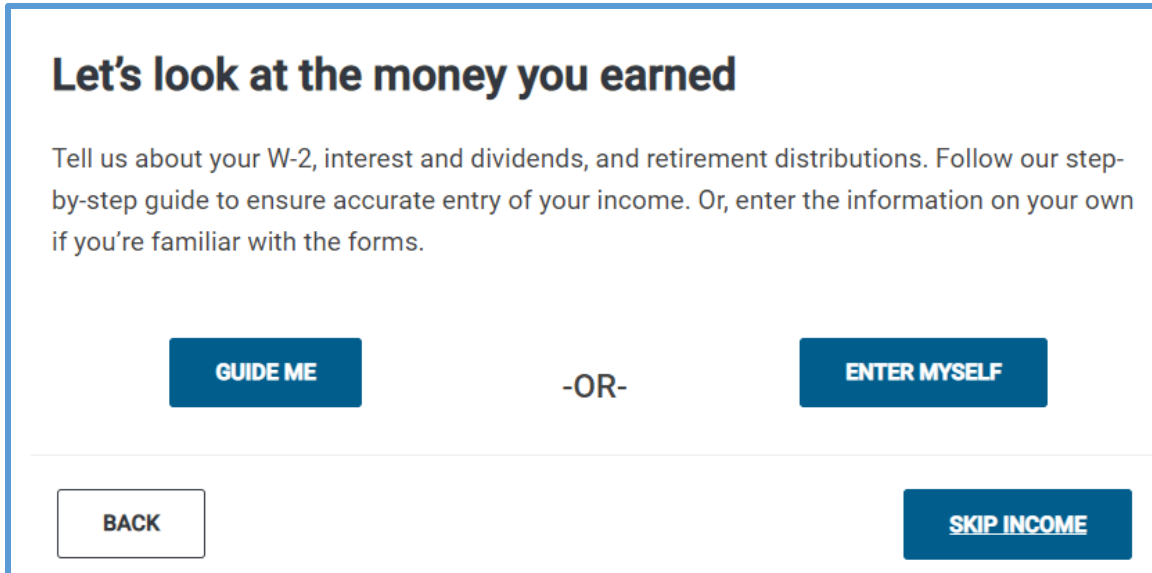
You can add information to the return using the Form 1040 as a guide. To do this, use the following steps:

1. In an open return, click the **Summary/Print** link on the left navigation bar.



90

TaxSlayer Pro Online displays the **Let's look at the money you earned** page:



Let's look at the money you earned

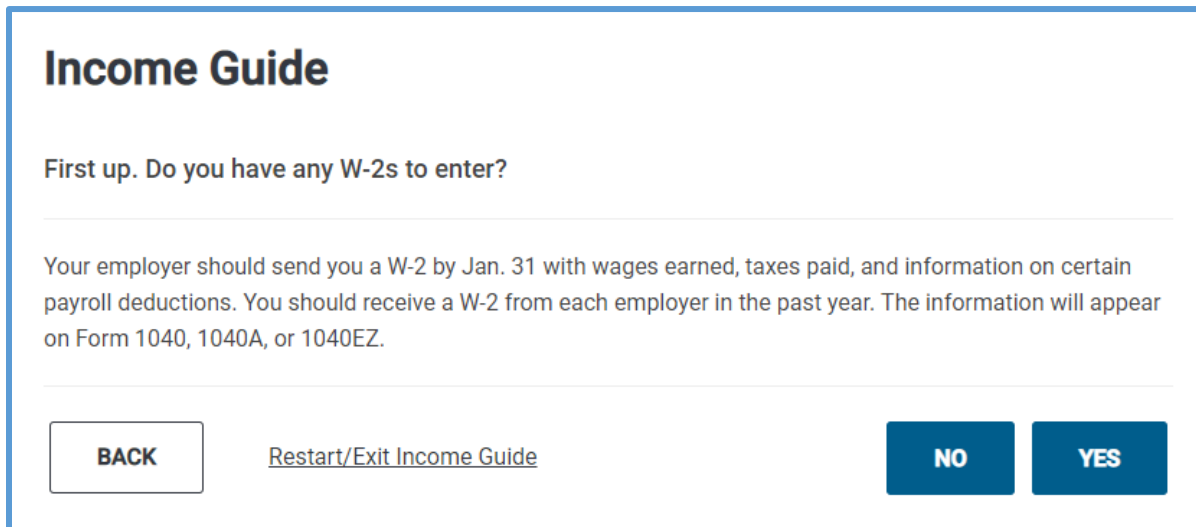
Tell us about your W-2, interest and dividends, and retirement distributions. Follow our step-by-step guide to ensure accurate entry of your income. Or, enter the information on your own if you're familiar with the forms.

GUIDE ME -OR- **ENTER MYSELF**

BACK **SKIP INCOME**

6. Click **Guide Me**.

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



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

Another way you can add information to the return is to enter the information yourself, without having TaxSlayer Pro Online guide you

through entering the information. To use this method, use the following steps:

1. On the **Let's look at the money you earned** page, click **Enter Myself** or select **Income** from the left navigation panel.

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

Income	
Wages and Salaries Form W-2	Begin
State and Local Refunds Form 1099-G Box 2	Begin
Interest and Dividends Form 1099-INT / 1099-DIV	Begin
IRA/Pension Distributions Form 1099-R / RRB, SSA	Begin
Unemployment Compensation Form 1099-G Box 1	Begin
Form 1099-Misc	Begin
Profit or Loss From A Business Schedule C	Begin

2. Click **BEGIN** for the type of income you need to add to the return.

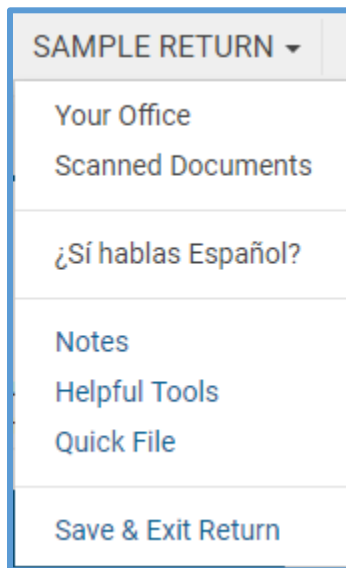
Note: See the TaxSlayer Pro Online knowledge base for the latest Enter Myself menu maps.

Quick File

In TaxSlayer Pro Online, you can create a list of forms based on the information presented by the taxpayer. TaxSlayer Pro Online then automatically displays income and adjustment entry pages based on this pre-created list. You can still enter additional information to the return after you complete the necessary forms displayed by the Quick File.

To use Quick File from an open return, use the following steps:

1. From the **Taxpayer** menu, click **Quick File**.



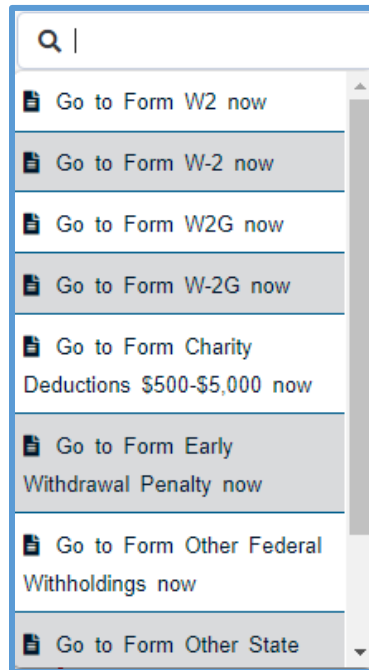
2. Type the name of the form(s) in the **Search** box to build a list of forms.

A screenshot of the 'Quick File' search interface. At the top, the title 'Quick File' is displayed. Below it, a paragraph of text explains the search process: 'Begin typing the form name or description in the box below then select the form or forms you need to visit. Don't worry if you don't see a form you need. You will have the opportunity to enter additional items at the end of this process. When you have completed your list, select CONTINUE and we will guide you to those specific forms to enter.' Below this text is a search box with the label 'Search for tax forms by keyword or title:'. To the right of the search box is a list of tax forms, each with a checkbox and a trash icon. The forms listed are 'W-2, Wages and ...' and '1099-INT, Intere...'. At the bottom left is a 'Back' button with a left arrow, and at the bottom right is a 'Continue' button.

3. Click **Continue** to proceed through the listed forms.

Forms Search

To locate and load an entry form, type the form number in the **Forms Search** box located on the left navigation bar.

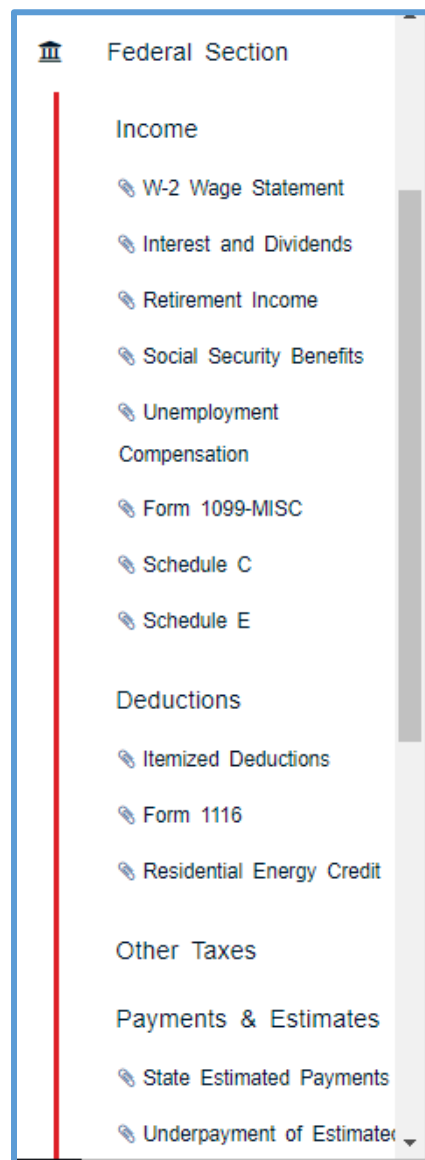


A screenshot of a search dropdown menu. At the top is a search input field with a magnifying glass icon and a vertical line. Below the input field is a list of search results, each preceded by a document icon. The results are: 'Go to Form W2 now', 'Go to Form W-2 now', 'Go to Form W2G now', 'Go to Form W-2G now', 'Go to Form Charity Deductions \$500-\$5,000 now', 'Go to Form Early Withdrawal Penalty now', 'Go to Form Other Federal Withholdings now', and 'Go to Form Other State'. A vertical scrollbar is on the right side of the list.

Search Result
Go to Form W2 now
Go to Form W-2 now
Go to Form W2G now
Go to Form W-2G now
Go to Form Charity Deductions \$500-\$5,000 now
Go to Form Early Withdrawal Penalty now
Go to Form Other Federal Withholdings now
Go to Form Other State

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:



Working with Health Insurance Credits

This chapter covers the following actions:

1. Complete the health insurance questionnaire.

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.

Completing the Health Insurance Questionnaire

TaxSlayer Pro Online created a questionnaire that requests information concerning the taxpayer's coverage, household members, and other applicable information. To add the taxpayer's health insurance information, read each question carefully and select or type the correct answer to that question.

TaxSlayer Pro Online automatically determines questions you need to answer based on the answers to other questions. Complete the dynamic questionnaire using the taxpayer's information.

Completing a State Return

This chapter covers the following actions:

1. Add states to a return.
2. Add information to a state return.
3. Delete a state from the return.
4. 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.

When you select a state on the **Personal Information** page, TaxSlayer Pro Online adds the state return. If the taxpayer does not need to add another state, click **Continue to Summary**. Otherwise, use the information in this lesson to add another 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:

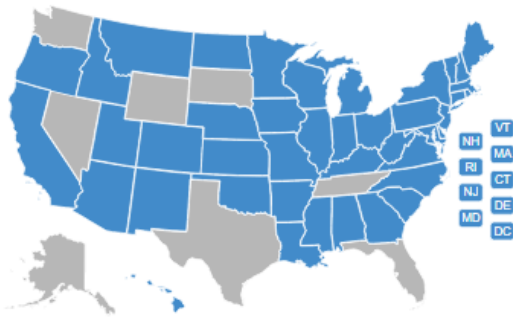
1. Click **Add State Return(s)**.

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 - ▼

-
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

Please choose a return type

☒ **Resident:** You are a Resident of Georgia if you have a permanent place to live in Georgia for the entire tax year regardless of brief, infrequent absences.

☐ **Part Year:** You are a Part Year Resident of Georgia if you have a permanent place to live in Georgia for a minimum of 30 days regardless of brief, infrequent absences.

☐ **Non-Resident:** You are a Nonresident of Georgia if you do not maintain a permanent place to live in Georgia during the tax year for a minimum of 30 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	BEGIN
Additions to Income	BEGIN
Subtractions from Income	BEGIN
Itemized Deductions	BEGIN
Credits	BEGIN
Contributions	BEGIN
Payments	BEGIN
Miscellaneous Forms	BEGIN

6. Click **BEGIN** on the line for which you need to add information.
7. Follow the instructions for each line on the page.
8. Continue adding information to the state return as needed based on the taxpayer's circumstances.

NOTE: TaxSlayer Pro Online automatically transfers state-sourced income from the Federal Section.

Caution: 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 (in Subtractions) to allocate the nontaxable income based on your state laws.

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** 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

+ Add Another State Return

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:

The screenshot shows the 'State Return' section of the software. At the top, there is a yellow warning box with an exclamation mark icon and the text: '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.' Below this is a blue button labeled '+ Add Another State Return'. Underneath is a table with two columns: 'State' and 'Return Type'. The table contains one row for 'Georgia' with 'Resident' as the return type. To the right of this row are three icons: a printer icon, a pencil icon, and a trash can icon. Below the table is another blue button labeled '+ Add Another State Return'.

State	Return Type
Georgia	Resident

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:

The screenshot shows the first page of the Georgia Form 500 Individual Income Tax Return. At the top left is a barcode with the number 1800403818 below it. To the right of the barcode is a QR code. Below the barcode, the text reads: 'Georgia Form 500 (Rev. 06/22/2020) Page 1', 'Individual Income Tax Return', 'Georgia Department of Revenue', and '20 (Approved software version)'. The form contains several fields for personal information: 'Fiscal Year Beginning', 'Fiscal Year Ending', 'YOUR DRIVER'S LICENSE/STATE ID', 'STATE ISSUED', 'YOUR FIRST NAME' (with '1. SAMPLE' entered), 'MI', 'YOUR SOCIAL SECURITY NUMBER', 'LAST NAME' (with 'RETURN' entered), 'SUFFIX', 'SPOUSE'S FIRST NAME' (with 'SPOUSE' entered), 'MI', 'SPOUSE'S SOCIAL SECURITY NUMBER', and a 'DEPARTMENT USE ONLY' box at the bottom right.

Review Process

This chapter covers the following actions:

1. Mark a return for review.
2. Identify returns to review.
3. View the status of reviewed returns.
4. Mark a return complete.
5. Mark a return as ready to e-file.

Note: TaxSlayer's built-in review process is designed to enhance your existing review process by allowing automated queuing processes. This process is not designed to replace your existing quality review processes.

Marking a Return for Review

When you complete the return, use the following steps to mark the return for review:

1. From the left navigation bar, click **e-File**.

TaxSlayer Pro Online displays the **E-File** page:

The screenshot shows the 'E-File' page in TaxSlayer Pro Online. The page has a light blue header with 'E-File' and a 'Log out' button. Below the header, there are 'Save' and 'Back' buttons. A 'Return Type' dropdown menu is visible. The main content area contains the following text: 'Your return is now ready to be e-Filed to the IRS. Please make sure that all information you enter below is correct. In order for us to transmit your client's return to the IRS you must complete all Steps in the e-File Process.' A blue caution box states: 'CAUTION: Your client's return will not be sent to the IRS unless you complete ALL steps. None of the information is saved until all information is entered and the "Continue" button below is clicked.' Below this, it says: 'To continue the e-File process, please first select a return type and the form will ask for all required information.' There is a 'Refund and Estimated Check Summary' button. At the bottom, there is a 'Send State Only' checkbox and a 'Federal Return Type' dropdown menu with 'Please Select' as the current selection. The page also has an 'ERO Information' section at the bottom.

2. Complete any required information on this page. See the [Electronic Filing](#) section for more information.
3. Click **Save**.

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

The screenshot shows the 'Submission' page in TaxSlayer Pro Online. At the top, the title 'Submission' is displayed. Below it, a red message box states: 'You can't efile. However, you can still mark the return complete and save your work.' Underneath this, a text prompt reads: 'Please review all information on this screen. To finalize your return please click on the submit button located below.' This is followed by a dropdown menu currently set to 'New Print Set' and a blue 'Print Return' button. Below these elements is a section titled 'ERO Information'. This section contains two rows of information: 'EFIN' with the value '001111' and 'Company Name' with the value 'MAIN SITE'.

4. Verify the information on the **Submission** page and scroll to the bottom of the page.

TaxSlayer Pro Online displays the bottom of the **Submission** page:

This screenshot shows the bottom portion of the 'Submission' page. It features a section titled 'Review/Retransmit Status'. Within this section, there are two rows, each with a label and an unchecked checkbox: 'Ready for Retransmit' and 'Ready For Review'. At the bottom of the page, there are three buttons: a blue 'Save And Return' button, a blue '< Back' button, and a green 'Save And Exit Return' button.

5. Select the **Ready For Review** check box in the **Review Status** section.
6. 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 from the **Welcome** page:

1. Click **Select** on the **Review Returns** line.

TaxSlayer Pro displays the **Review Returns** page, listing all returns that tax preparers have marked for review:

SSN	NAME	PREPARER
[REDACTED]	MO, MO	[REDACTED]
[REDACTED]	SMITH, ANTHONY	[REDACTED]

2. To review a return, click **Select** on the line for that return.

TaxSlayer Pro Online displays the return.

Note: Work down the **Summary/Print** page to review the return using your Quality Review procedures. When you click a line and then return, TaxSlayer Pro Online brings you back to the **Summary/Print** page.

Viewing Reviewed Return Status

If you need to view the status of a reviewed return, you can do that from the **Office Client List** page. For more detailed information, see [Searching for Existing Taxpayers](#). To find the status, 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 '20 Client Tax Return List'. Below this, there are two filter sections: 'Filter by Status' and 'Filter by Return Tag'. The 'Filter by Status' dropdown menu is open, showing a list of status options: Any Status, In Progress, Review, Approved, Failed, Complete, Transmitted, Denied, Rejected, Accepted, Paper, and Deactivated. The 'Filter by Return Tag' dropdown menu is also visible, showing 'Any Tag'. There is also a 'Date To:' field with a calendar icon.

2. From the **Filter by Status** drop-down list, select **Review Approved**.

TaxSlayer Pro Online displays a list of all returns marked **Review Approved**:

The screenshot shows the 'Office Client List' page with the 'Filter by Status' dropdown menu set to 'Review'. Below the filters, there is a checkbox labeled 'Do Not Show Deactivated Returns' which is checked. There are also 'Date From:' and 'Date To:' fields with calendar icons. A search bar labeled 'Search Client list' is present. Below the search bar, there is a 'Show' dropdown menu set to '10' entries. At the bottom, there is a table with columns: SSN, FIRST, LAST, PHONE, PREPARER, STATUS, and a 'Tools' dropdown menu. The table shows one entry for John Doe with a phone number (706) 555-1414 and a status of 'Review'. The 'Tools' dropdown menu is open, showing a 'Select' button.

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

Forms Complete to Review Returns

After you identify the returns you need to review, you can use the Forms Complete feature to easily review the completed entry forms in that return. To do this, use the following steps:

1. Click **Select** on the line for that return.

TaxSlayer Pro Online displays the return.

2. Click **Federal Section** in the left navigation panel.



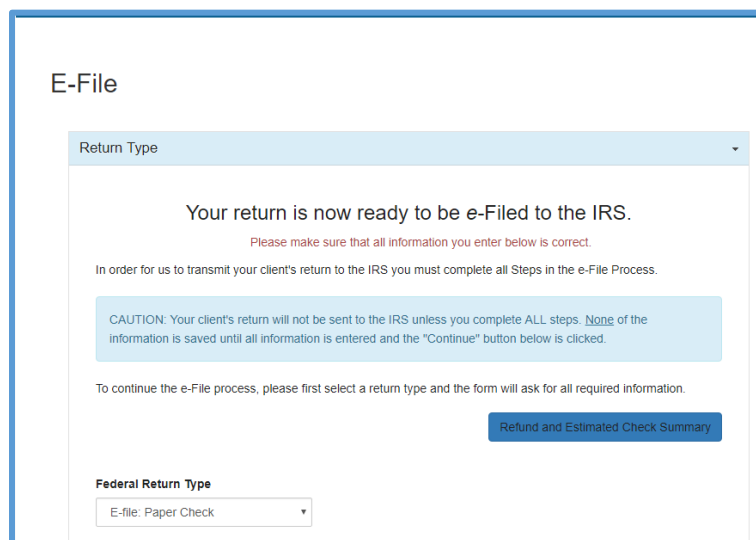
3. Click each entry item to review the information.

Marking a Return Complete

When you finish reviewing a return, use the following steps:

1. From the left navigation bar, click **e-File**.

TaxSlayer Pro Online displays the **E-File** page:



2. Review the information on this page.
3. Click **Save**.

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

The screenshot shows the 'Submission' page in TaxSlayer Pro Online. At the top, there's a heading 'Submission'. Below it, a pink message box states: 'You can't efile. However, you can still mark the return complete and save your work.' Underneath, a text prompt says: 'Please review all information on this screen. To finalize your return please click on the submit button located below.' There is a dropdown menu labeled 'New Print Set' and a blue button labeled 'Print Return'. Below this is a section titled 'ERO Information' which contains a table with two rows: 'EFIN' with value '001111' and 'Company Name' with value 'MAIN SITE'.

ERO Information	
EFIN	001111
Company Name	MAIN SITE

4. Verify the information on the **Submission** page and scroll to the bottom of the page.

TaxSlayer Pro Online displays the bottom of the **Submission** page:

The screenshot shows the bottom section of the 'Submission' page, titled 'Review/Retransmit Status'. It contains two rows: 'Ready for Retransmit' with an unchecked checkbox, and 'Ready For Review' with a checked checkbox. At the bottom right, there are three buttons: 'Save And Return' (blue), '< Back' (blue), and 'Save And Exit Return' (green).

Review/Retransmit Status	
Ready for Retransmit	<input type="checkbox"/>
Ready For Review	<input checked="" type="checkbox"/>

5. If you have approved the return and are ready to mark it complete, select the **Mark Complete** check box.
6. 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.

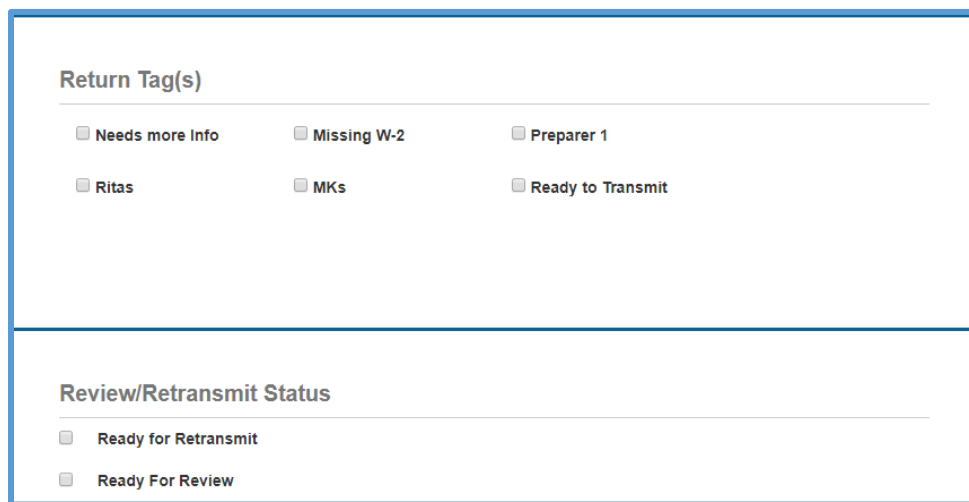
Note: When you mark a return with the status of **Complete**, TaxSlayer Pro Online makes it available for submitting to the TaxSlayer Processing Center.

Marking a Return for e-file

If you do not have permission to e-file returns, or you do not want to e-file a return now, you can tag the return with Return Tags as a reminder to e-file it later. Use the following steps from the **Submission** page:

1. Find the **Return Tag(s)** section located above the **Review/Transmit Status** section.

TaxSlayer Pro Online displays the **Return Tag(s)** section:



The screenshot shows two sections within a form. The top section is titled "Return Tag(s)" and contains six checkboxes arranged in two rows of three: "Needs more Info", "Missing W-2", "Preparer 1", "Ritas", "MKs", and "Ready to Transmit". The bottom section is titled "Review/Retransmit Status" and contains two checkboxes: "Ready for Retransmit" and "Ready For Review".

Return Tag(s)		
<input type="checkbox"/> Needs more Info	<input type="checkbox"/> Missing W-2	<input type="checkbox"/> Preparer 1
<input type="checkbox"/> Ritas	<input type="checkbox"/> MKs	<input type="checkbox"/> Ready to Transmit

Review/Retransmit Status	
<input type="checkbox"/> Ready for Retransmit	
<input type="checkbox"/> Ready For Review	

2. Select the check box for the **Ready to Transmit** return tag (or other applicable return tag your site uses to designate returns as ready to e-file).
3. Click **Save and Exit Return**.

Printing a Return

This chapter covers the following actions:

1. Print a return from the **e-File** page.
2. Print a return from the taxpayer's status page.
3. Print a copy of the return at time of IRS acceptance.
4. Print a copy of the state return.
5. Print a single form.

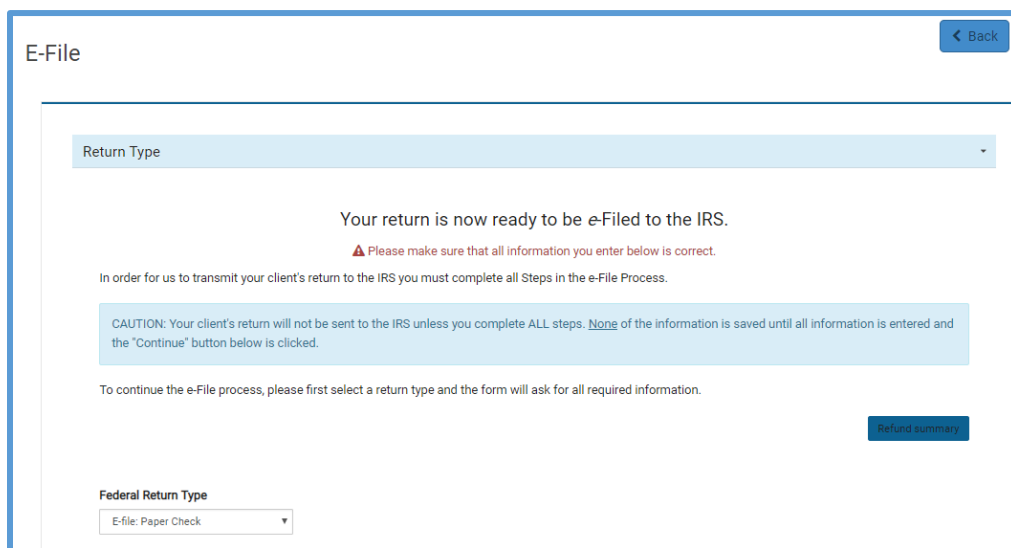
When you complete a return, you need to print a copy for the taxpayer. Depending on how your site handles printing, you can print either from within the return or from the client's status.

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.

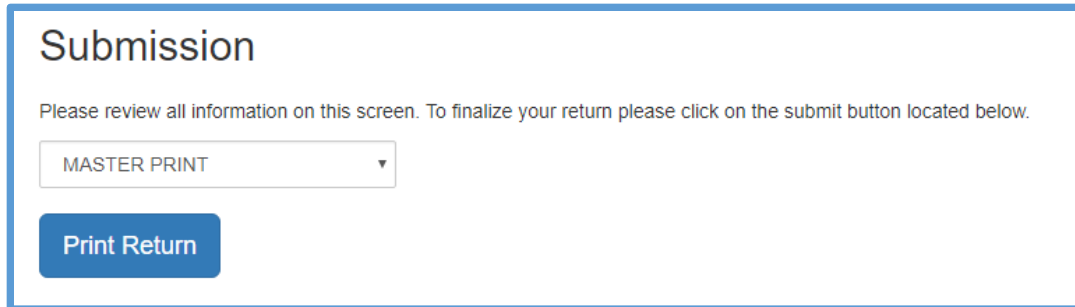
TaxSlayer Pro Online displays the first **e-File** page:



The screenshot shows the 'E-File' page in TaxSlayer Pro Online. At the top left is the 'E-File' header, and at the top right is a '< Back' button. Below the header is a 'Return Type' dropdown menu. The main content area contains the following text: 'Your return is now ready to be e-Filed to the IRS.' followed by a red warning triangle icon and the text 'Please make sure that all information you enter below is correct.' Below this is a paragraph: 'In order for us to transmit your client's return to the IRS you must complete all Steps in the e-File Process.' A blue box contains a 'CAUTION' message: 'Your client's return will not be sent to the IRS unless you complete ALL steps. None of the information is saved until all information is entered and the "Continue" button below is clicked.' Below the caution box is another paragraph: 'To continue the e-File process, please first select a return type and the form will ask for all required information.' At the bottom right of the main content area is a 'Refund summary' button. At the bottom left, there is a 'Federal Return Type' dropdown menu with 'E-file: Paper Check' selected.

2. Continue through the e-File section as described in [Creating the e-File](#).

TaxSlayer Pro Online displays the **Print Return** option on the **Submission** page.



3. Select a **Print Set** from the drop-down list.
4. Click **Print Return**.

TaxSlayer Pro Online display the **Print Results** page with a PDF of the return.

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 **Office Client List** page:

1. Find the client in the list.
2. Click the **Printer** icon.
3. Select a print set from the drop down list.

Note: You can select a default print set in Configuration that always displays at the top of the drop-down list.



4. 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 **Office Client List** page:

1. Find the client in the list.
2. 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	








3. 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	  

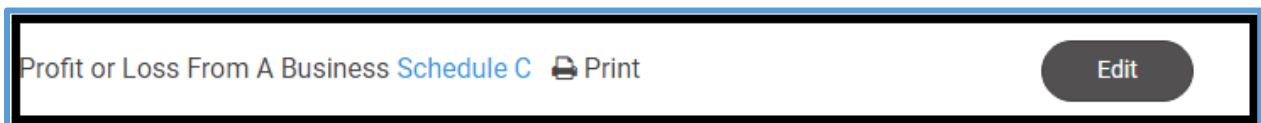
Printing a Single Form

In 2017 and later returns, you can print the following forms as a single form:

- Schedule A
- Schedule B
- Schedule C
- Schedule D
- Schedule R
- Form W-4
- 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**.
3. Follow the on-screen instructions to view the form in PDF and print if needed.

Searching for Existing Taxpayers

This chapter covers the following actions:

1. Open an existing return.
2. View the return history.
3. Find a taxpayer's e-file status.
4. Find explanations for any reject codes.

Opening an Existing Return

If you need to open an existing 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

2016 Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: Any Tag

☒ Do Not Show Deactivated Returns

Date From: mm/dd/yyyy

Date To: mm/dd/yyyy

Search Client list

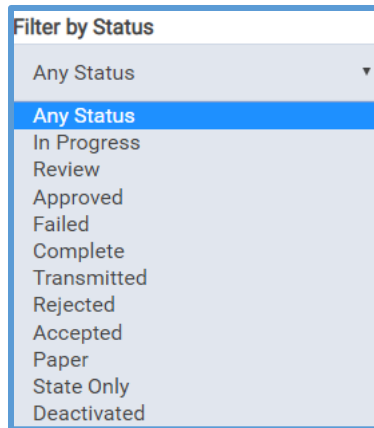
Show 10 entries

Showing 1 to 10 of 328 entries (filtered from 345 total entries)

SSN	FIRST	LAST	PHONE	PREPARER	STATUS
000-00-0001	test	test	(706) 986-7484	[redacted]	In Progress

Tools Select

2. To filter returns by status, select an option from the **Filter by Status** drop-down list, as shown below:



A screenshot of a 'Filter by Status' dropdown menu. The menu is open, showing a list of status options. The 'Any Status' option is highlighted in blue at the top of the list. Below it are the following options: In Progress, Review, Approved, Failed, Complete, Transmitted, Rejected, Accepted, Paper, State Only, and Deactivated.

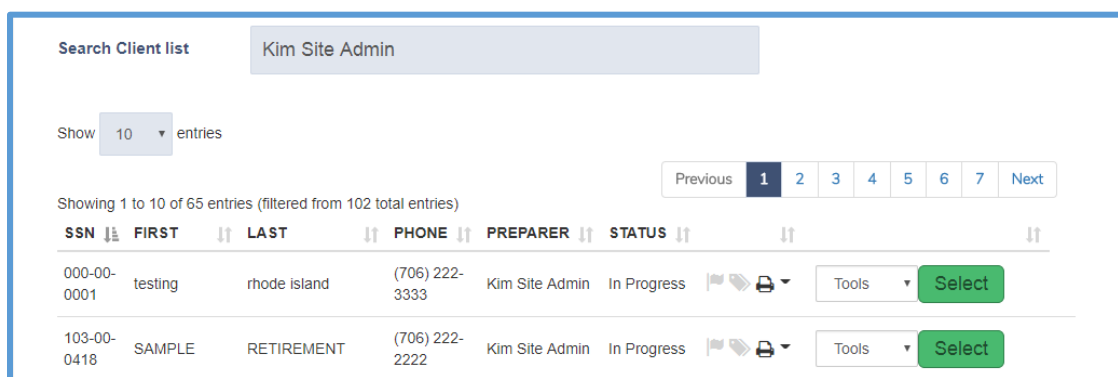
Filter by Status
Any Status
In Progress
Review
Approved
Failed
Complete
Transmitted
Rejected
Accepted
Paper
State Only
Deactivated

3. Type client information in the **Search Client List** box. You can search the client list using one of the following:
- Last 4 digits of Social Security number
 - Full Social Security number
 - First or Last Name
 - Phone number
 - Preparer
 - Status

Note: TaxSlayer Pro Online only enables the auto-find feature when the site has either:

- Fewer than 1,000 returns, or
- Fewer returns than designated in Office Setup.

For this example, search using the preparer name. TaxSlayer Pro Online displays all returns prepared by that preparer:



A screenshot of the 'Search Client list' interface. The search box contains 'Kim Site Admin'. Below the search box, it says 'Show 10 entries'. A pagination bar shows 'Previous', '1', '2', '3', '4', '5', '6', '7', and 'Next'. Below the pagination bar, it says 'Showing 1 to 10 of 65 entries (filtered from 102 total entries)'. The table below has columns: SSN, FIRST, LAST, PHONE, PREPARER, STATUS, and a set of icons. The first two rows of data are shown.

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	Icons
000-00-0001	testing	rhode island	(706) 222-3333	Kim Site Admin	In Progress	Icons: flag, magnifying glass, printer, Tools, Select
103-00-0418	SAMPLE	RETIREMENT	(706) 222-2222	Kim Site Admin	In Progress	Icons: flag, magnifying glass, printer, Tools, Select

TIP: 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.

4. Click **Select** on the line for the return you want to open.

TaxSlayer Pro Online displays the **Summary/Print** page for the return:

Form 1040 page: 1 2 3 Prior Year Comparison Summary View

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.

U.S. Individual Income Tax Return

Filing status: ☐ Single ☒ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)

Your first name and initial: **SAMPLE** Last name: **RETURN** Age: 51 Your social security number: **00 1111**

Your standard deduction: ☐ Someone can claim you as a dependent ☐ You were born before January 2, 1954 ☐ You are blind

If joint return, spouse's first name and initial: **SPOUSE** Last name: **RETURN** Age: 58 Spouse's social security number: **00 1234**

Spouse standard deduction: ☐ Someone can claim your spouse as a dependent ☐ Spouse was born before January 2, 1954 ☒ Full-year health care coverage or exempt (see inst.)

☐ Spouse is blind ☐ Spouse itemizes on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions. **123 VITA TCE WAY** Apt. no. **Presidential Election Campaign** (see inst.) ☐ You ☐ Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6. **Rome GA 30165** If more than four dependents, see inst. and ✓ here ☐

(1) First name Last name		(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see inst.):	
				Child tax credit	Credit for other dependents
CHILD	RETURN	00 1234	Daughter	<input checked="" type="checkbox"/>	<input type="checkbox"/> Age: 7
				<input 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:

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

TaxSlayer Pro Online displays the **Client Status** page:

Client Status

EFIN [REDACTED] Preparer Name [REDACTED]

Client Information

Primary TERISA [REDACTED] (9223)
 Primary DOB 1/31/1995
 Home Phone [REDACTED] 693
 Cell Phone
 Address 637 EAST 82ND STREET [REDACTED]

Enter Return

Federal Information	State Information
IRS Code Accepted	State Agency NY
Return Type 1040A	State Code Accepted
Disbursement Direct Deposit	Form Type IT203
Transmitted To IRS 6/20/2017 7:04:52 AM	Disbursement Direct Deposit
Received Ack from IRS 6/20/2017 7:14:53 AM	Transmitted To State 6/20/2017 7:15:00 AM
Submission ID [REDACTED] 68411	Received Ack 6/20/2017 11:09:04 PM
Times Sent 1	Submission ID [REDACTED] 4750
Federal Refund/Balance \$765.00	Times Sent 1
Federal Deposit \$0.00	State Refund/Balance \$559.00
Direct Debit Received No	State Deposit \$0.00
Fed Ack Outstanding No	Direct Debit Received No
	State Ack Outstanding No

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.

Note: TaxSlayer Pro Online adds a new entry to the Client Return History each time the preparer saves and exits the return through the **E-file** 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 **IRS Transmissions** 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 accepted or rejected the return in the **IRS Acknowledgements** and **State Acknowledgements** 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	2/23/2017 5:31:20 PM	2/23/2017 5:40:39 PM	1036951	[REDACTED] 36951	Rejected	\$2,337.00	1040A	

Transmission Details								Collapse
Reject Code: IND-181-01 Category: Database Validation Error Severity: Reject and Stop								
The Primary Taxpayer did not enter a valid Identity Protection Personal Identification Number (IP PIN). Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number.								
*** Additional Information: xxx-xx7899 ***								

Electronically Filing Returns

Creating the e-file

This chapter covers the following actions:

1. Run e-file validation.
2. Correct e-file and validation errors.
3. Review notes entered by the preparer.
4. Review warning messages.
5. Select a federal return type.
6. Enter direct deposit information or split a refund.
7. Confirm ERO information.
8. Verify Form 8879 information.
9. Mark a state for e-file.
10. File a Credit Only state return.
11. Describe the difference in linked and unlinked state returns.

Running e-file Validation


To prepare the return for e-file, use the following steps from the open return:

1. Click **e-File** in the left navigation bar.

Correcting e-file Errors

TaxSlayer Pro Online displays the e-file page, with any errors concerning the return that were not corrected during return preparation:

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](#)

1. If TaxSlayer Pro Online displays an error on the return, read the error carefully and click **Visit** for that error.
2. Make corrections to the return to eliminate the error.
3. Click **e-File** again.

4. 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:

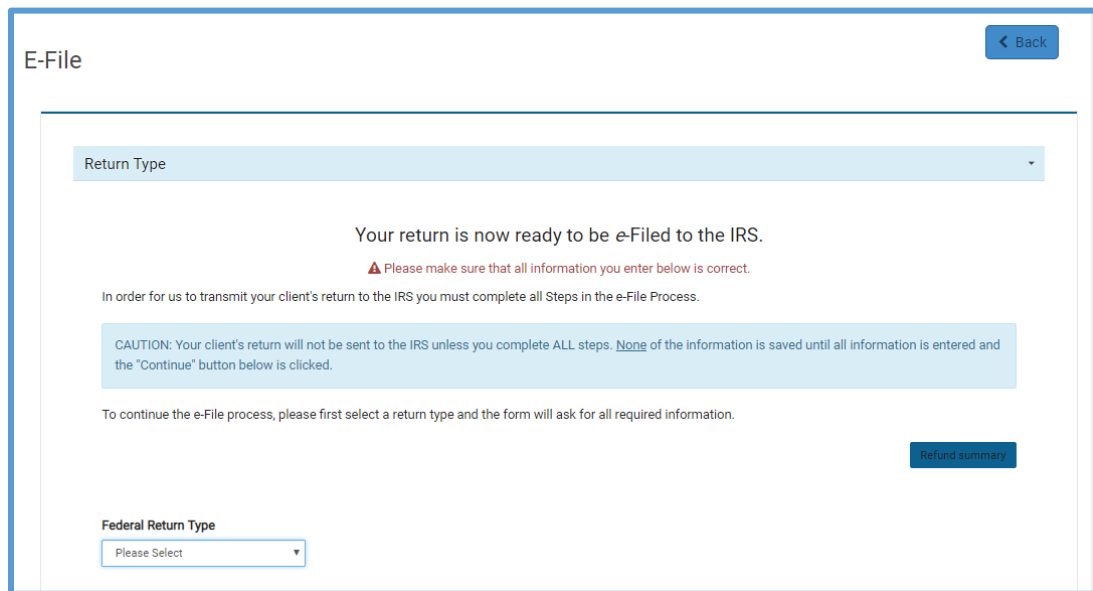
The screenshot shows a section titled "Warnings Concerning Your Federal Return". It features a yellow banner with an exclamation mark icon and the text "The following warnings concerning your Federal return were found." Below this, a list of warnings is displayed, including one about paying taxes to GA on a W-2 without filing a GA state return. A button labeled "ADD STATE RETURN(S)" is provided. At the bottom, it states "You have the following sticky notes in your account." followed by a "Sample Note" which reads: "Notes display in the warning section of the return and can be reviewed by the Quality Review team".

5. Review any warnings.
6. 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.
7. Review your notes. If you need to change something in the return, click the appropriate section in the left navigation bar and make changes.
8. 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.

Selecting the Return Type

TaxSlayer Pro Online displays the **E-File** page:



First, complete the **Return Type** section. To complete this section, use the following steps:

1. From the **Federal Return Type** drop-down list, select how the taxpayer wants to file the return.

TaxSlayer Pro Online displays additional information depending on your selection.

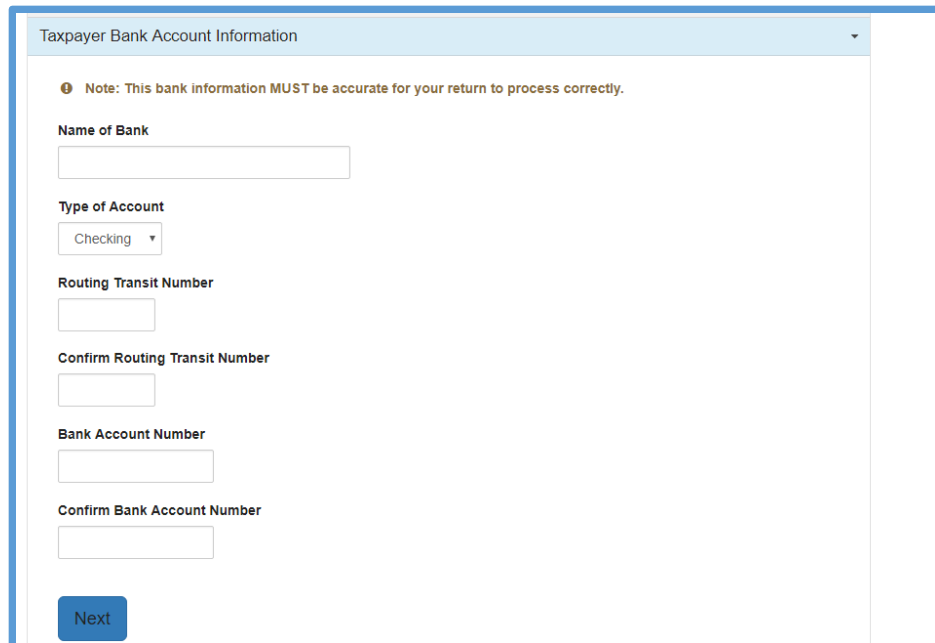
Note: Please refer to the TaxSlayer Pro Online Knowledge Base for an updated list of return types and return type definitions. TaxSlayer Pro Online changes the options depending on the refund or balance due.

Entering Direct Deposit Information

If the taxpayer wants his or her refund directly deposited into a bank account, use the following steps from the **E-File** page:

1. Select **E-file: Direct Deposit** from the **Federal Return Type** drop-down list.
2. Click **Taxpayer Bank Account Information**.

TaxSlayer Pro Online displays the **Taxpayer Bank Account Information** section:



The screenshot shows a web form titled "Taxpayer Bank Account Information". At the top, there is a note: "Note: This bank information MUST be accurate for your return to process correctly." Below the note, the form contains several input fields: "Name of Bank" (a text box), "Type of Account" (a dropdown menu with "Checking" selected), "Routing Transit Number" (a text box), "Confirm Routing Transit Number" (a text box), "Bank Account Number" (a text box), and "Confirm Bank Account Number" (a text box). At the bottom left of the form is a blue "Next" button.

3. Type the name of the bank (Optional).
4. Select whether the account is a checking account or savings account.
5. Type the routing transit and bank account numbers in the appropriate boxes. TaxSlayer Pro Online requires that you type these numbers twice for accuracy.
6. Click **Next**.

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:

1. Make sure you selected **Direct Deposit** from the **Federal Return Type** drop-down list.
2. Click **Taxpayer Bank Account Information**.

TaxSlayer Pro Online displays the **Taxpayer Bank Account Information** section:

You may split your refund in up to 3 accounts, paper check and purchase up to 3 savings bonds. The total deposits and savings bond purchases must equal your total refund of \$2,772.00

Bank Accounts

Enter bank account information where you would like your refund deposited.

Bank Account 1

Account Type <input type="text" value="Checking"/>	Bank Name <input type="text"/>	Deposit Amount <input type="text" value="\$ 0.00"/>	Pull Refund
Routing Number <input type="text"/>	Account Number <input type="text"/>		
Confirm Rtn Number <input type="text"/>	Confirm Account Number <input type="text"/>		

Bank Account 2

Account Type <input type="text" value="Checking"/>	Bank Name <input type="text"/>	Deposit Amount <input type="text" value="\$ 0.00"/>
--	--	---

3. Select whether the account is a checking account or savings account.
4. Type the routing transit and bank account numbers in the appropriate boxes.
5. Type both the routing transit and bank account numbers again.
TaxSlayer Pro Online requires that you verify the numbers for accuracy by retyping them.
6. For each account, type the amount the taxpayer wants deposited to that account. If the taxpayer wants part of the refund issued as a paper check, type the appropriate amount in the **Paper Check Allocation** box.

TIP: If you only want to deposit the refund into one account, click **Pull Refund**.

NOTE: State refunds will be deposited to the account listed on the first line.

7. Scroll down to enter information to purchase savings bonds.

Purchase Savings Bonds

You can purchase up to 3 savings bonds with the remainder of your refund.

Bond amounts must be in \$ 50 increments

Purchase A Bond ☒ I do not want to purchase this bond

Amount to be used for bond purchase for yourself

Purchase another bond for yourself or someone else ☒ I do not want to purchase this bond

Bond Amount

Enter the owner's name (First then Last) for the bond registration

If you would like to add a co-owner or beneficiary, enter the name here (First then Last)

☐ Is Beneficiary?

Purchase another bond for yourself or someone else ☒ I do not want to purchase this bond

Bond Amount

Enter the owner's name (First then Last) for the bond registration

If you would like to add a co-owner or beneficiary, enter the name here (First then Last)

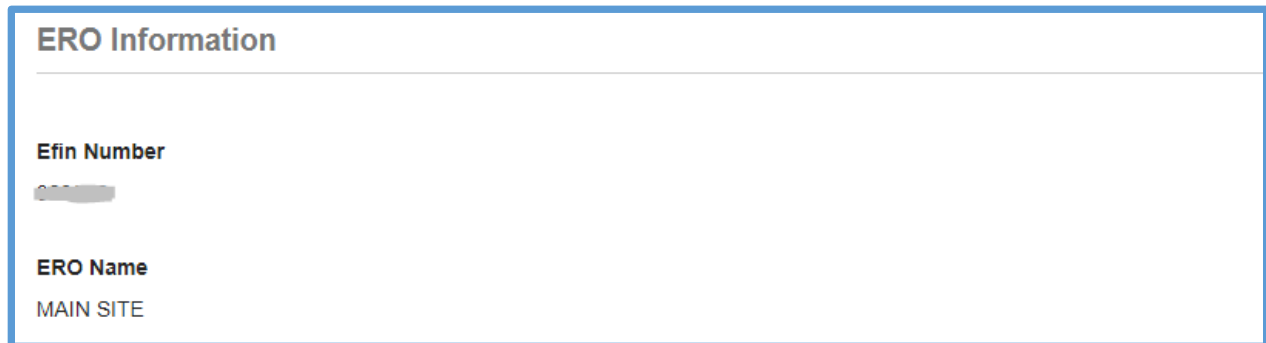
☐ Is Beneficiary?

8. Clear the **I do not want to purchase this bond** check box.
9. Type the amount the taxpayer wants to use to purchase savings bonds. Always use \$50 increments.
10. If the taxpayer is **not** purchasing the bond for himself/herself, type the owner's name.
11. If necessary, type the name of a co-owner or beneficiary. If a beneficiary, select the **Is Beneficiary?** check box.
12. Click **Next**.

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.

Confirming ERO Information

In the **Return Type** section, TaxSlayer Pro Online displays the **ERO Information** section:



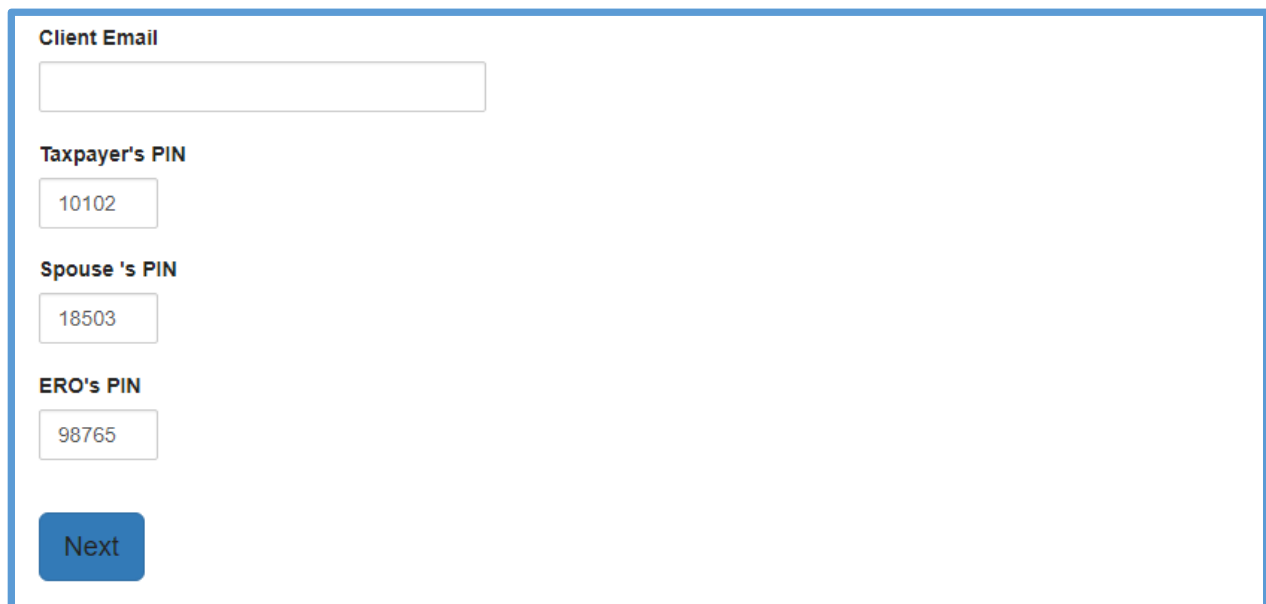
The screenshot shows a form titled "ERO Information". It contains two fields: "Efin Number" with a masked value "000000" and "ERO Name" with the value "MAIN SITE".

1. Review the ERO information for accuracy.
2. Click **Next**.

TIP: If you set up multiple EROs to accommodate ad hoc/virtual sites, TaxSlayer Pro Online displays a **Select ERO to Use** drop-down box and defaults to the main location.

Confirming Form 8879 Information

TaxSlayer Pro Online displays the **Tax Preparation and E-File Information** section:



The screenshot shows a form titled "Tax Preparation and E-File Information". It contains four fields: "Client Email" (empty), "Taxpayer's PIN" (10102), "Spouse's PIN" (18503), and "ERO's PIN" (98765). A blue "Next" button is located at the bottom left.

1. 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 [Setting Up Site Information](#) chapter.
2. Click **Next**.

Marking a State for e-file

Use the following steps to mark the state return for e-filing:

1. Click the **State Return(s)** section.

TaxSlayer Pro Online displays the **State Return(s)** section:

The screenshot shows a web interface titled "State Return(s)". Below the title is a heading "Choose how you would like to file your state returns:". There is a table with three columns: "State", "Refund/Due", and "Return Type". The first row shows "GA" for the state, "Refund: \$ 3545.00" for the refund/due amount, and a dropdown menu for the return type currently set to "Not Selected". Below the table is a consent statement: "By using a computer system and software to prepare and transmit this return electronically, I consent to the disclosure of all information pertaining to my use of the system and software to create this return and to the electronic transmission of this tax return to the Department, as applicable by law." At the bottom left of the form is a blue "Next" button.

State	Refund/Due	Return Type
GA	Refund: \$ 3545.00	Not Selected

By using a computer system and software to prepare and transmit this return electronically, I consent to the disclosure of all information pertaining to my use of the system and software to create this return and to the electronic transmission of this tax return to the Department, as applicable by law.

Next

2. From the **Return Type** check box, select what the taxpayer wants to do for the state return.

Note: Please refer to the TaxSlayer Pro Online Knowledge Base for an updated list of return types and return type definitions. TaxSlayer Pro Online changes the options depending on the refund or balance due.

Complete the information for any state-specific e-file requirements, as shown below:

State ID

You may provide your state issued id or drivers license in the section below. This information is optional but may assist the state in verifying your identity and processing your return.

Taxpayer ID Information

Type

Please Select

The Type field is required.

Number

Id card number is required

IssueDate

mm/dd/yyyy

The IssueDate field is required.

ExpireDate

mm/dd/yyyy

☐ No Expiration date

IssueState

Please Select

Id Card Issue State is required

NY Document ID

Id card number is required
If the issue state is NY, this field is required

Third Party Designee Information

TaxSlayer Pro Online does not populate the third party designee information when you have the **Disable Third Party Designee** check box selected in Office Setup. If you need to enter another taxpayer as the third party designee, click **Third Party Designee Info** and complete the appropriate information.

NOTE: You cannot enter a volunteer preparer as the third party designee.

Third Party Designee Info

This information is optional

First Name

Designee Last Name

Designee Phone

() -

Designee Pin

Next

Consent to Use/Consent to Disclose

TaxSlayer Pro Online displays the Consent to Use and Consent to Disclose pages next. 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:

Examples of Taxpayer Information: - your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address and sources of income, deductions and credits claimed on the tax return.

Dependent Information includes, but not limited to: - The name, SSN, date of birth, and relationship of any dependent claimed on the tax return.

Limitation of the Duration of Consent: - I, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above. If I wish to limit the duration to an earlier date, I will deny consent.

Limitation of the Scope of Disclosure: - I, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I wish to limit the scope of the disclosure of tax return information further, I will deny consent.

Explanation of Denial - Taxpayer does not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA/TCE Site next year.

Consent Status

☐ I / we, the Taxpayer have read the above information. By typing in my / our taxpayer PIN(s) and checking this input, I / we hereby **GRANT** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites" as stated above.

☒ I / we, the Taxpayer have read the above information. By checking this input, I / we hereby **DENY** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites" as stated above.

Primary PIN (enter 5 numbers)

Primary PIN Date

Follow your site procedures when completing the Consent pages. If the taxpayer denies 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 denies the consent, you must paper file the return.

TIP: If the filing status is married filing jointly, you are not required to complete the spouse PIN and date information.

NOTE: TaxSlayer Pro Online prints the consent forms with taxpayer and spouse signature lines.

Answering Custom Questions

TaxSlayer Pro Online displays the **Questions** section:

Questions

1. Would you say you can carry on a conversation in English, both understanding and speaking?

Please Select ▾

2. Would you say you can read a newspaper or book in English?

Please Select ▾

3. Do you or any member of your household have a disability?

Please Select ▾

4. Are you or your spouse a Veteran from the US Armed Force?

Please Select ▾

5. Was the taxpayer physically present during the entire return preparation and quality review process?

Please Select ▾

NOTE: For Tax Year 2019, TaxSlayer will assign nine questions to all sites 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 **Next** or **Save**.

State ID

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 in this section before you click **Save**.

Completing the Submission Page

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

Submission

Please review all information on this screen. To finalize your return please click on the submit button located below.

2018 TAXPAYER COPY PRINT ▾

Print Return

ERO Information

EFIN	██████████
Company Name	MAIN SITE

Client Information

Client Name	SAMPLE RETURN
Primary Email Address	██

Print

If you want to print the return from this page, see [Printing from the e-File page](#).

Reviewing Information

Review the following sections on this page:

1. ERO Information
2. Client Information
3. Return Information
4. Form 8879
5. State Return Information

Next Steps

For the last steps in this section, 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:

The screenshot displays the TaxSlayer Pro Online interface with the following sections and fields:

- Type of Return:** E-file: Paper Check
- Federal Refund:** \$2,772.00
- Is Complete:** ☐
- Invoice Paid:** ☐
- Tax Preparation Charges:**
 - Total Preparer Fee:** \$0.00
 - Electronic Filing Fee:** \$0.00
 - Total Fee:** \$0.00
- Return Tag(s):**
 - ☐ Add Missing Information
 - ☐ Contacted Taxpayer
 - ☐ JAN 11
 - ☐ JAN 12
- Review/Retransmit Status:**
 - Ready for Retransmit:** ☐
 - Ready For Review:** ☐

At the bottom of the form, there are four buttons: **Save And Return**, **< Back**, **Save And Exit Return**, and **Save And Transmit Return >**.

2. Do one of the following:

- If the return is complete and ready to be e-filed, select the **Mark Complete** check box in the **Return Information** section.
- If another person needs to review the return and you are using the built-in review process before it can be marked complete, select the **Ready for Review** check box at the bottom of the page.

TIP: You cannot select both **Is Complete** and **Ready for Review**.

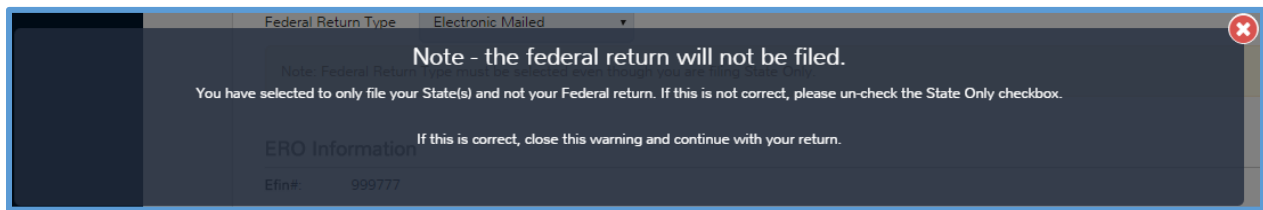
3. Click **Save and Exit Return**.

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. Select the **Send State Only** check box.

TaxSlayer Pro Online displays the **Note** warning:



2. Read the warning and click the **X** to close the box.
3. Select an **E-file option** from the **Federal Return Type**. You must select from this drop-down list even if you are not electronically filing the federal return.

Submitting e-files

This chapter covers the following actions:

1. Select e-files to submit.
2. 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 from the **Welcome** page of a user with e-file submission rights:

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

TaxSlayer Pro Online displays the **Transmissions** page, listing all returns that have been marked complete:

	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

2. Select the check box(es) for the returns you want to transmit.

Note: To sort 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 in the return. If the preparer marked the state for **paper** filing, TaxSlayer Pro Online displays the **No Electronic State** status.

3. If you want to select all returns, click **Check All**.

4. 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:

Add Returns

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"/>	0128	TESTING	GEORGIA	(706) 232-5555	Kim Site Admin	JAN 12	Rejected	E-file: Mail Payment	\$ 0.00	No Electronic State		
<input type="checkbox"/>	0206	WEDNESDAY	AFTER NOON	(706) 222-3322	Kim Site Admin	JAN 11	Rejected	E-file: Paper Check	\$ 5610.00	E-file: Mail Payment	\$ 0.00	NE

Add Returns Check All Uncheck All

5. 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.

6. Click **Add Returns**.
7. When you finish selecting returns to transmit, click **Transmit selected return(s) to IRS**.

TaxSlayer Pro Online displays the **Tax Return Transmissions** page indicating the number of returns submitted:

Transmissions

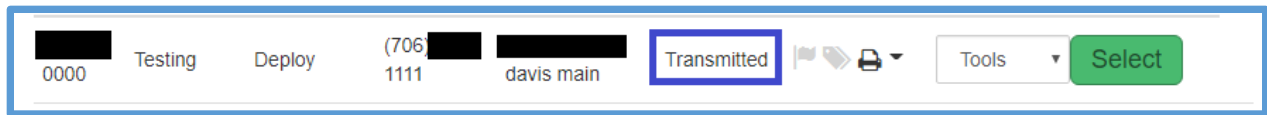
Tax Return Transmissions

Back

1 return transmitted.

8. 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:



Refer to [Managing Returns](#) to review filtering by status.

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.

Working with Acknowledgements

This chapter covers the following actions:

1. Receive acknowledgements.
2. Print an acknowledgement report.
3. Review processing center rejects.
4. 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 from the **Office Reporting** page:

1. Click **Transmission Reports** to expand the list.
2. Click either **Federal** or **State** to expand the category.
3. Click **Select** on either the **IRS Acknowledgements** or **State Acknowledgements** line.

TaxSlayer Pro Online displays the **IRS Acknowledgements** page, listing all acknowledged returns that have not previously been viewed:

20 IRS Acknowledgements

Search:

Showing 1 to 110 of 110 entries

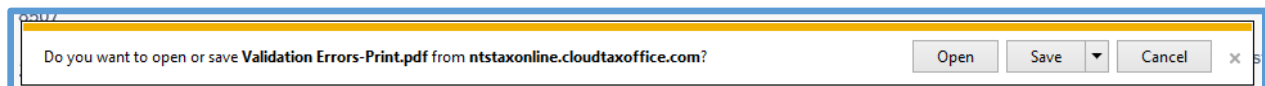
↑↓ Efin	↑↓ L4SSN	↑↓ Last Name	↑↓ Status	↑↓ Reject Code
0478			Accepted - 09/14/	N/A
9539			Rejected - 09/14/	N/A
3112			Accepted - 09/14/	N/A
5252			Accepted - 09/08/	N/A
4606			Accepted - 09/08/	N/A
2136			Accepted - 09/08/	N/A
6598			Accepted - 09/08/	N/A

Document Id: NA, Rule Number: R0000-500-01, Severity: Reject and Stop

'PrimarySSN' and 'PrimaryNameControlTxt' in the Return Header must match the e-File database.

Data Value: 9539

4. 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.
5. Print your acknowledgement report. Click **Print PDF**.
6. 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.

7. 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 **Transmission Reports** to expand the category.
2. Click **Federal** to expand the category.
3. 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						
↓↑ 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

4. Review each return rejected from the TaxSlayer Processing Center.

- a. If the TaxSlayer Processing Center rejected the return, TaxSlayer Pro Online displays the reason for the validation error in the **Help** column.
2. 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

Select Tax Year: 20

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
[redacted] 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.

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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

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

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

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

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

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