

Setup Guide for TaxSlayer Pro Online (TSO) - TY2017

AARP Foundation National Technology Committee

Summary

The NTC Setup Guide is a step-by-step outline for configuring TSO. This is a “living” document in the Tax Software section of the One Support Help Center, which will be updated as needed – be sure you use the latest edition as indicated by the date in the bottom left corner. The TSO User Guide provides instructions for VITA sites; this NTC Guide provides instructions for Tax-Aide sites. Regularly refer to the VITE/TCE Blog for recent TSO updates and changes, <https://vitableblog.taxslayerpro.com/>.

Activating Sites for TY2017

TaxSlayer will send their activating email(s) in December, or January using the information provided in the software order sent to IRS. The current taxyear program (TY2017) will not become active until mid-January, when the state income tax forms are also installed.

TSO prior year programs (TY2014, TY2015 and TY2016) are active as soon as the initial emails are executed – remember, all TSO returns are ‘real returns’ (use the Practice Lab for training).

Activating a Returning Site

Returning sites/users will be able to use the same login active username(s) from the prior year.

All sites from filing season 2017 (TY2016) will receive an email letting them know their filing season 2018 (TY2017) software is available. It will not have a link to activate the site because the site is already active.

TaxSlayer will deactivate a returning site if a software order for tax year 2017 is not received by 12/31/2017. Once the order is received, TaxSlayer will re-activate the site.

If a returning site has a different contact name on the software order, the new contact person will need to contact TaxSlayer Customer support. TaxSlayer will generate an email with a link to provide administrative rights to the new site contact.

Activating a New Site

New sites will receive two emails with activation links. It is imperative that the activation be completed once the email link has been accessed. Failure to do so will lock the process and TaxSlayer support will need to be contacted.

1) The **User Activation Code** email confirms the contact information for the primary contact and permits an ‘alternate contact’ to be named. In addition, it confirms the site’s physical address (labelled as the “mailing address”) and the “shipping” address which will be used to send materials from TaxSlayer to the site’s contact. The ERO verification code, which will be needed during configuration, is located in the “Account History” section of the screen which appears after the User Activation is completed.

2) The **Site Activation Notification** email contains a link to the “Preparer Personal Information” page that registers the Admin name, password and activates the Site identified in the email. The site’s SIDN (beginning with an “S”) and the Tax-Aide PIN of ‘98765’ must be entered before the page is saved. The person who completes the Site Activation instructions is automatically the Administrator for the site, which will include the ability to

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prepare tax returns (note that this person is the only user who will not have a Security Template assigned to them).

These same instructions appear in “Activating your Pro Online Site” file on the left side of the Practice Lab’s Welcome page and in the VITA/TCE Blog’s “Pro Online: Office Identifier”.

Configuring TSO for a Site

The NTC Setup Guide is a step-by-step outline for configuring your TSO program. TSO contains 4 tax years (current and 3 prior); all are configured at the same time and all Settings apply equally to each year’s program. TY 2017 tax returns cannot be created in TSO production sites until sometime in January - this will be announced on the TSO Blog. All training returns must be prepared using the Practice Lab. Configurations will carry forward from year to year.

The **Administrator (Admin)**, or a user with whom the Administrator has shared their abilities via a Security Template, must configure the site’s TSO program by completing 9 of the available 13 Settings (4 Settings are for commercial users) after it has been activated. TSO pre-enters some information based on the IRS order or a Multi-Site Administrator may send pre-defined settings, but some settings must be entered by the site’s Admin - this will become clearer as the following outline is worked through. Log in to TSO, then complete steps 1 through 9 as described below. Note that certain Configuration Menu items are not required for Tax-Aide, so they are skipped below. These items are: Fees Setup, Custom Fees and Discounts, and Consent Form.

Step 1. Office Setup

1. On the “Welcome” page, click “Select” at the end of the “Configuration” line.
2. On the “Configuration Menu” page, click “Select” at the end of the “**Office Setup**” line.
 - a. The Office Setup will have several fields pre-filled with information from the order submitted to the IRS. Review each prefilled item for accuracy and change if necessary. Advise the Tax-Aide volunteer who placed the IRS order of any changes made.
 - b. Leave “Selected Bank” empty (that is, do not use the drop-down).
 - c. Leave “Sales Tax Percentage” blank. This is used for paid preparers to calculate their fees and has no effect on the prepared tax return.
 - d. Set the “Date to show on printed returns” as the “Current Date”.
 - e. Set “Signatures on Form 8879” to “ERO Name Only” by selecting that answer from the drop-down box.
 - f. Leave blank (do not check) either “Print Digital Signatures on 1040” or “Print Firm Information on Cover Page”.
 - g. Check (to enable) “Disable Third Party Designee Prefill”.
 - h. Leave blank (do not check) “Require taxpayer signatures prior to efile”.
 - i. Check (to enable) “Offer 8888”.
 - j. Check (to enable) “Display Summary using 1040 View”.

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- k. Check (to enable) “Hide Preparer Name on 1040 Print”.
- l. Leave blank (do not check) “Always Print Schedule A”.
- m. Scroll down to “Office Address” review and edit if necessary. If no address is shown, click on “ADD” then complete the type of address (drop down box), the address and click “Continue”. **This entry is required.**
- n. Scroll down to “Office Phones” review and edit if necessary. If no entry appears, click on “ADD”, choose the type of phone (drop down box) and complete the form. Click “Continue”. **This entry is required.**
- o. Click “Continue”, which returns you to the Configuration Menu.

Step 2. ERO Setup

1. On the “Configuration Menu” page click “Select” at the end of the “**ERO Setup**” line.
2. Please note, *the ERO acronym when used by TSO refers to the site itself, not to the AARP volunteer who transmits returns.*
3. The ERO Name and EFIN should be pre-filled from the order submitted to the IRS. The ERO Name is the name of the site as shown on the software order and should agree with the site name shown on the Portal (check to be sure). Review for accuracy and change, if necessary.
4. Verify the EFIN again – the EFIN must be correct for TSO to properly operate. Verify that the “Office Identifier” is the same as the ERO verification code previously seen in the “Account History” section on the “My Account” page. Advise the Tax-Aide volunteer who placed the IRS order of any changes.
5. If no information is pre-filled, contact the Tax-Aide volunteer who submitted the order to the IRS for the correct entries.
6. Insure the “Default” and the “Active” boxes are checked. Do not check (that is, leave blank) the “EIN” box and the “Self Employed” box.
7. To correct the pre-filled information click “ADD” following the “ERO Addresses” caption.
8. Enter the information requested, including the “Address Type” (drop down box), then click “Continue”.
9. Click “ADD” following the “ERO Phones” caption.
10. Enter the “Type” of phone (drop down box), the phone number, and then click “Continue”.
11. The “Ero(s) Menu” page appears. Review. If correct, click on “Return”.

Note: While “Preparer Setup” is the next item listed on the Configuration Menu, the Security Templates must be completed first so they can be used in the Preparer Setup.

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Step 3. Security Templates

1. On the “Configuration Menu” page skip down to “**Security Templates**” clicking on “Select” at the end of the line.
2. The Security Template defines a volunteer’s ability to use TSO. Only one template can be assigned to a volunteer (it can be changed at any time) and the same template applies to all four tax years. Eight pre-defined “Security Templates” are provided by TSO which cannot be edited, copied or deleted. The Administrator (“Admin”) template applies to a single volunteer. The other pre-defined Security Templates are: Super User, Preparer Current Year, Preparer All Years, Interviewer, Reviewer, Setup Manager and Efile Manager. TSO created each pre-defined Security Template by selecting user privileges from the set provided in the TSO User Guide. *At the time of this document’s publication, the 2018 User Guide is not yet available. When available, you can refer to it for definitions of the various user privileges if needed.*
3. **Tax-Aide recommends that TSO’s pre-defined Security Templates NOT be assigned to Tax-Aide volunteers.** In their place, Admin-created custom Security Templates should be assigned to counselors. The creation of these custom Security Templates is described below. Multi-Site Administrators can create these suggested templates and have them sent to their subscriber sites so the subscriber sites will not have to create the templates themselves.
4. Admin-created custom-defined Security Templates are added to the existing list of TSO pre-defined and Multi-Site Administrator (MSA) pre-defined Security Templates. It is recommended that the following 3 custom templates be created for the site: Novice, Experienced and Assistant Admin.
5. To add a Security Template, click the “Add” button.
6. On the “Add a Security Template” page, enter the name of the template you are creating (e.g., “Novice”), then check the box next to each privilege that you want users to have when assigned this template. All available privileges may be checked by default; if this is the case, you should check the box next to “Check/Uncheck All” so everything is unchecked, then check the specific privileges you want to grant via this template.
7. The following table shows the NTC’s recommended privileges. OK means you should check the box for that privilege.

Privilege	Novice	Experienced	Asst Admin
Access Current Year Client List	OK	OK	OK
Access Office			
Access Previous Years Client List		OK	OK
Add and Configure Security Templates			OK
Add or Edit Custom Credits			OK
Add or Edit Office IP Whitelist			
Add or Edit Print Sets			OK
Add or Edit Tags			OK
Add/Edit Fees in Office Configuration			
Add/Edit Preparers			OK
Allow Ability to Clear Signatures			OK

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Privilege	Novice	Experienced	Asst Admin
Assign Preparer's Security Template			OK
Cannot Change Return Status back to In Progress	OK	OK	
Change Consent Forms			
Change Questions and Available Answers			OK
Change Return Preparer			OK
Change Tax Profiles			OK
Configuration			OK
Create Tax Return	OK	OK	OK
Deactivate Return			OK
Delete Return Notes			OK
Delete Scanned Documents			
Do Not Force Return Review			OK
Edit Calculated Preparer Fee			
Edit ERO Setup			OK
Edit Minimum Preparer Fee			
Edit Office Setup			OK
Email Return			
Hide Accepted Returns from Limited Users			OK
Import Desktop Returns			
Mark Return Complete		OK	OK
Mark Return for Review	OK	OK	OK
Override Return Minimum Preparer Fee			
Password Protect Return			
Print Checks			
Print Returns		OK	OK
Review Returns and Mark Review Decision		OK	OK
Scanned Documents			
Send Return to IRS			OK
View Client Status	OK	OK	OK
View Full SSN	OK	OK	OK
View Refund Status			
View Reports			OK
View/Edit Existing Returns	OK	OK	OK

Step 4. Preparer Setup

1. On the "Configuration Menu" page, click "Select" at the end of the "**Preparer Setup**" line.
NOTE: If the preparer will be working at another site, the Multi Factor Authentication (MFA) routine will be different. See MFA instructions in a separate document (Multifactor Authentication for TSO)
2. The "Preparer(s) Menu" appears; click on "Add" beside "Add Preparers".
3. The "Preparer(s) Setup Menu" appears.
4. Scroll down. If the "SIDN" and "Default PIN Number" (which is 98765) are not pre-filled, click on "Pull from office" that appears in pale blue under the SIDN line. TSO will take these numbers from the Office Setup information.
5. DO NOT check either the "Office Contact?" box or the "Self Employed" box.

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6. Check the “Can view own returns only?” box if you want this preparer to be restricted to viewing only the returns they have prepared. **Be aware that if checked, this preparer will not be able to see or edit any return they did not create!**
7. DO NOT check the “Required to use Guide?” box. Doing so limits the preparer to using the Guide Me method of tax preparation for every return – a very slow process.
8. If preparing tax returns in New York, check the “Prepares NY Returns?” box, leave the NYTPRIN box blank (do not enter an 8-digit number) and select “Volunteer Preparer” from the drop-down box in the second pop-up box for “NYPRIN exempt”.
9. Scroll down to the “Edit Login Account” section. Enter the preparer’s email address that will be used to advise the user of their forgotten user name, of their forgotten password and of the Multi-Factor Authentication (MFA) code. This email address must be different than all other users at this site.
10. Enter the preparer’s cell phone number if they have one. This is the second option the user will have for receiving the Multi-Factor Authentication code when it is required to complete their TSO login.
11. Scroll down and enter the “Username” for the preparer. **This must be different than the name used for the Practice Lab, and must be different than all other user names nationally.**
 - a. The name may contain letters, numbers and/or special characters. It must be between 5 and 30 characters long. The recommended Tax-Aide format is the last 4 numbers of the SIDN, followed by the preparer’s full last name, the preparer’s first initial and, if necessary, a one digit number to distinguish similar names.
 - b. If a preparer works at more than one site, they must have distinct usernames at each site. This is easily accomplished if the naming convention previously mentioned is used because the site ID will be different.
12. Enter a “Password” for the preparer containing a mixture of upper case letters, lower case letters, special characters and numbers totaling at least 8 characters in length. This will be used by the preparer for their first log in, when the program will request that they immediately change their password; therefore, the Admin may enter the same password for each preparer added to the site.
13. The “Active” box will be automatically checked for new preparers. Should the preparer leave the Tax-Aide program, this box must be un-checked (so that it is empty) to remove the user’s access to the TSO program. The preparer is either active for all four tax years in TSO (current and prior 3 tax years), or is inactive for all of the tax years. A preparer cannot be granted access to only some of the tax years in the TSO program.
14. Select one “Security Template” to assign this preparer from the drop-down menu. The drop-down will list both pre-defined and custom-defined Security Templates. As noted previously it is recommended that TSO pre-defined templates NOT be assigned because their defined privileges do not fit with Tax-Aide practice. Note that only one template can be assigned to a preparer and this applies to all the tax years available in TSO (current and prior 3 tax years), not just the current year. You can change the preparer’s assigned template at any time. Picking a template from the drop-down

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menu, then clicking “Show Definitions” (beside the drop-down box) will show which privileges are included in that template.

15. Skip past (do not click on) “Electronically Sign”. If checked, this feature will place the preparer’s signature on the printed tax return, which is not desired.
16. Review the entries. If correct, click “Continue”.
17. Repeat ‘1’ through ‘16’, above, for each new Tax-Aide volunteer that will access TaxSlayer Pro Online. All active users are listed in the ‘Username Report’, which may be helpful in identifying which users have been created.
18. When the last new preparer has been added, review the Preparer(s) Menu. If correct, click “Return”.

Step 5: Question Templates

1. On the “Configuration Menu” page, click “Select” at the end of the “**Question Templates**” line.
2. On the “Edit Questions” page TSO lists four pre-filled questions and answers, which cannot be edited, copied or deleted. They are part of the program.
3. Answers to pre-filled and custom questions must be chosen from a drop-down list of pre-defined answers.
4. To create custom Questions click on “Add” next to “Add Questions”. Before creating a new question, review the information available in the “Client Return History” accessed from individual returns on the “Client Status” page – note that a record is kept of each user who opens the return to edit, create an e-file or print the return.
5. On the “Add Question” page, type in the custom question, no longer than 100 characters. If the question must be answered, check the “Is Required” box below the new question. A ‘required’ question must be answered before the tax return’s e-file can be created.
6. Click the “Add” beside “Available Answers” to create a drop-down menu of available answers to the custom question. There are no limits on the number of answers, but each answer must be shorter than 100 characters. As each answer is created, click “Add” to continue entering answers.
7. Add the following custom questions and associated answers if not already present (some might have been provided by the MSA). Questions TA1 through TA3 are **required**; TA4 and TA5 are **not required (do not check the “Is Required” box)**. The “TAX” is part of the question and is necessary for TaxSlayer to sort this funding information for Tax-Aide:

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Question	Answer(s)
TA1 - Quality Reviewer	<i>Provide list of site QR initials/names</i>
TA2 - Which best describes your race/ethnicity (Taxpayer #1)	American Indian/Alaskan Native Asian Black/African-American White Native Hawaiian/Pacific Islander Other Prefer not to answer
TA3 - Are you of Hispanic, Spanish, or Latin origin (Taxpayer #1)	Yes No Prefer not to answer
TA4 - Which best describes your race/ethnicity (Taxpayer #2)	American Indian/Alaskan Native Asian Black/African-American White Native Hawaiian/Pacific Islander Other Prefer not to answer
TA5 - Are you of Hispanic, Spanish, or Latin origin (Taxpayer #2)	Yes No Prefer not to answer

8. Review the “Edit Questions” page. If additional custom questions are desired, repeat ‘4’ through ‘6’ above. Click “Save” to close the drop-down answer menu.
9. When finished adding questions and/or answers, click “Back”.

Step 6. Taxpayer Profile

1. On the “Configurations Menu”, click “Select” at the end of the “**Taxpayer Profile**” line.
2. The Taxpayer Profile is a return preparation shortcut for Federal returns only; there are no Taxpayer Profiles for State returns. A selected profile presents the identified forms to the preparer after completing the taxpayer’s personal information. Profiles may be created for specific tax years; the Taxpayer Profiles will remain associated with those tax years in future years.
3. The Taxpayer Profile must be selected before the return is begun and cannot be changed after the return is begun.

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4. The “Taxpayer Profiles” page displays TSO pre-defined profiles, MSA-defined profiles and any Admin-defined profiles. Two TSO pre-defined Taxpayer Profiles come with TSO, a “Basic” profile which is empty and the “Master Profile” which is defined by the IRS. The pre-defined profiles cannot be edited, copied or deleted.
5. Create new Admin-defined custom profiles by clicking on “Add” (beside Add Taxpayer Profile).
6. Enter the profile’s name in the “Profile Name” box, enter a description in the “Description” box and select the tax year from the drop-down box beside “Tax Year”. The Description will be shown for each new return; therefore, it is suggested that the forms chosen for the profile be included in the Description.
7. In the “Tax Form (Lookup)” box enter the first form to be included. When found, highlight the form and click on it – it will appear in the “Selected Tax Forms” list just below.
8. Enter the next form in the “Tax Form (Lookup)”, highlight it and click it. Continue until all of the desired forms appear in the “Selected Tax Forms” list. There is no limit to the number of forms that may be included.
9. To arrange the order of presentation to the preparer, drag each form to the appropriate location. Click “Save”.
10. Review the “Taxpayer Profile” page, including the description and tax year. Admin-defined profiles can be edited or deleted by clicking the “Edit” box or “Delete” box which appear at the end of the line. Beware: If an MSA edits or deletes a profile, it will change the subscriber’s profile as well.
11. When finished click “Back”.

Step 7. Print Sets

1. On the “Configuration Menu” page, click “Select” at the end of the “**Print Sets**” line.
2. Two pre-defined print sets are listed on the Print Sets page. The contents of each print set can be reviewed by clicking “View” following the name of the print set. The Master Print is designed by the IRS to be the preferred print set for both e-file and paper filed returns. The Quality Review print set creates a PDF that provides an easy way to review inputs. It is meant to be used during quality review. Do not use this print set to create hard copy. The pre-defined print sets cannot be edited, copied or deleted.
3. Site-defined print sets may be created by the Admin, adding to the list of predefined print sets. However, the order in which forms are printed cannot be altered from the IRS-defined order.
4. To create a site-defined print set click “Add” (beside Add Print Set).
5. Type the name of the new print set in the “Print Set Name” box, then search for and add the federal and/or state forms that will be in the print set. As forms are added identify the number of copies to be printed in the “Number of Copies” box following the form description. Each form added will be numbered from one to the end.

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6. *[Note – this step was valid for 2016, but may not be valid for 2017]* If the number of copies of each form to be printed are the same, “Set Range” box should be clicked. The “Set Print Count by Range” box will open asking for the “Beginning Range No.,” the “End Range No.” and “Print Count”. The ‘range numbers’ refer to the added form’s number (from one to the end) and the ‘print count’ is the number of copies that will print for all of the forms. Click “Submit” to close. After Set Range identifies the same number of copies for each form, the number of copies may be changed for individual forms by selecting the form and changing the ‘number of copies’.
7. Click “Save” to finish creating a new site-defined print set. Click “Add” to continue adding print sets, or click “Back” to return to the Configuration Menu.
8. New this year is the ability to designate a print set as your site’s default print set by clicking the “Set as Default” button for that print set.

Template Name	Created By	Date Created	
Grover Beach Master	Rabobank, Grover Beach	1/8/2017	Set As Default Edit Delete
Special Print Set	Rabobank, Grover Beach	1/23/2017	Set As Default Edit Delete
QUALITY REVIEW	Vita/TCE Main	5/13/2016	Set As Default View
MASTER PRINT	Vita/TCE Main	4/20/2016	Set As Default View
MASTER PRINT (2 8879s)	Vita/TCE Main	9/30/2016	Set As Default View

Step 8. Tags

1. On the “Configuration Menu”, click “Select” at the end of the “**Tags**” line.
2. Tags are a site-defined help in assuring returns are correctly processed and timely filed. There are no Tags in the program until created by the MSA or the Admin. Sites differ in the wording and in usage of tags, but they are commonly used to identify an unfinished return due to missing documents or an un-signed 8879, a return to be deleted, paper filed returns, amended returns and returns of questioned validity.
3. Tags are set, removed and managed by site personnel. Multiple tags may be added to a return. To create a new Tag enter the Tag’s name into the “Add New Tag” box (for example, “Amended Return”, “Delete this Return”, or “8879 Not Signed”), then click “Add” at the end of the line. The new tag will appear on the page.
4. Repeat ‘3’, above, to add more tags.
5. When finished, click “Back” to return to the Configuration Menu page.

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Step 9. Custom Credit

1. If “Custom Credit” will be used, click “Select” at the end of the “**Custom Credit**” line.
2. Credits, like questions can be required, but the answers are not pre-defined and must be numerical (maximum of 9 digits). A total of 10 credits (maximum of 45 characters to describe each credit) are permitted. Credits will be compiled into reports available compatible with Excel.
3. An example of a Custom Credit is “How many people are included in this return?”.
4. To add a credit click on “Add” (beside Add Custom Credit).
5. When finished, click “Continue” and then “Back” to return to the Configuration Menu. Click “Return” on the Configuration Menu to return to the Welcome Page.

Multi-Site Administrator (MSA)

The **Multi-Site Administrator** relationship with subscriber sites is defined in the IRS order. The MSA may distribute any of their site-defined settings (Security Templates, Custom Questions-Answers, Taxpayer Profiles, Print Sets and Tags) to subscriber sites. The Admin of the MSA site will receive the usual activation email(s) for the site, but will also receive an additional email to establish a “Group Admin login”. This email notification will be sent once the multi-site Admin accounts are activated for Tax Year 2017. The “Group Admin login” is a distinct login that differs from the regular Admin login.

The MSA is also the Admin of the MSA site and will configure their site as outlined above. The MSA can then assign any of their site’s settings to subscriber sites. Settings sent by the MSA cannot be edited, copied or deleted by the Admin of the subscriber sites.

1. The Admin of the site selected to create and send settings gains the title of MSA, or group administrator. The MSA’s only ability is to send settings to their subscriber sites.
2. Settings sent to the subscriber site are added to the pre-defined settings from TSO and any site-defined setting created by the local Admin. The tax preparer is free to select either a pre-defined setting or a site-defined setting without regard to who defined it.
3. Relational EFINs are not permitted for Tax-Aide; therefore, the completion of Section 7216 taxpayer privacy forms is not required of the subscribers.
4. MSA selects the setting to send to a subscriber by opening the “Configuration Menu”, opening the desired settings page and locating the setting to send. At the end of the line following each setting on the MSA’s screen will be boxes for “Assign”, “Edit” and “Delete”.
5. MSA sends the selected settings by checking the box, or boxes, in front of the receiving subscribing “Offices”; then clicking on “Continue”.

MSA settings Sent to subscriber sites may only be edited or deleted by the MSA; not by the subscribing office’s Admin. **A note of caution for the MSA:** changing a setting on the MSA’s site causes the same change to appear in each of the subscriber sites.