

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

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.¹

Activating a Site

During late November ‘vita.taxslayerpro.com’ will send two emails to the primary contact’s email address which was identified in Tax-Aide’s software order sent to the IRS. The current tax year program (TY2016) will not become active until mid-January, when the state income tax forms are also installed. TSO prior year programs (TY2013, TY2014 and TY2015) are active as soon as the following emails are executed – remember, all TSO returns are ‘real returns’ (use the Practice Lab for training).

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.

The **Site Activation Notification** email contains a link to the “Preparer Personal Information” page that registers the Admin name, password, **security code** 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 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. Tax returns cannot be created until early January; before then volunteers will use the Practice Lab. Configurations will carry forward from year to year.

¹ Updates are shown in **red** on pages 1, 2, 4, 6, 7, 8 and 9. Changes from the original version include preventing the preparer’s name from printing on the return and emphasizing user email addresses must be unique within the site. View the “2016 Pro Online Enhancements Video” in the **Practice Lab** for a fuller explanation of the updates.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

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 activated². TSO pre-enters some information based on the IRS order or a Multi-Site Administrator may send pre-defined settings, but most 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:

1. On the "Welcome" page, click "Select" at the end of the "Configuration" line³.
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. The "Sales Tax Percentage" is used for paid preparers to calculate their fees using the state sales tax that pertains to the office's location. This has no effect on the prepared tax return - only on the preparation fees. No entry is necessary.
 - d. **Change the "Login Security Code"** to an easily remembered word/phrase associated with the site (one which the counselor need not write down to remember). This new code will be used each time a volunteer logs into the site, assuring they are accessing the correct site.
 - e. Set the "Date to show on printed returns" as the "Current Date".
 - f. Set "Signatures on Form 8879" to "**ERO Name Only**" by selecting that answer from the drop-down box.
 - g. Leave blank (do not check) either "Print **Digital Signatures** on 1040" or "Print Firm Information on Cover Page".
 - h. Check (to enable) "Disable Third Party Designee Prefill".
 - i. Leave blank (do not check) "Require taxpayer signatures prior to efile".
 - j. Check (to enable) "Offer 8888".
 - k. Check (to enable) "Display Summary using 1040 View".
 - l. Check (to enable) "Hide Preparer Name on 1040 Print".
 - m. **Leave blank (do not check)** "Always Print Schedule A".

² The TSO User Guide provides instructions for VITA sites; the NTC Guide provides instructions for Tax-Aide sites. The Brainshark videos available on the Practice Lab Home page in Section 2 (Configuring TaxSlayer Pro Online) offer a video guide to most of the Setup Guide's instructions. Regularly refer to the VITE/TCE Blog for recent TSO updates and changes, <https://vitablog.taxslayerpro.com/>.

³ See page 14 of the TSO User Guide for a screen-shot of the Welcome page. Additional helpful screen-shots appear throughout the TSO User Guide.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

- n. 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.**
 - o. 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.**
 - p. Click “Continue”, which returns you to the Configuration Menu.
3. On the “Configuration Menu” page click “Select” at the end of the “**ERO Setup**” line.
- a. 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.
 - b. 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 (see, page 1 of this Guide, fourth paragraph). Advise the Tax-Aide volunteer who placed the IRS order of any changes.
 - c. If no information is pre-filled, contact the Tax-Aide volunteer who submitted the order to the IRS for the correct entries.
 - d. Insure the “Default” and the “Active” boxes are checked. Do not check (that is, leave blank) the “EIN” box and the “Self Employed” box.
 - e. **To correct the pre-filled information** click “ADD” following the “ERO Addresses” caption.
 - f. Enter the information requested, including the “Address Type” (drop down box), then click “Continue”.
 - g. Click “ADD” following the “ERO Phones” caption.
 - h. Enter the “Type” of phone (drop down box), the phone number, and then click “Continue”.
 - i. The “Ero(s) Menu” page appears. Review. If correct, click on “Return”.
4. On the “Configuration Menu” page skip down to “**Security Templates**” clicking on “Select” at the end of the line.
- a. 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. Seven 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, Return Preparer Current Year, Return Preparer All Years, Interviewer, Reviewer and e-file Manager. TSO

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

created each pre-defined Security Template by selecting user abilities from the set of available abilities seen in the illustration below.

Security Template Option Definitions	
Security Template Option	Gives user ability to...
Create Tax Returns	Create a new Return
View/Edit Existing Returns	View or edit previously created tax returns (must be used in conjunction with Access current Year Client List)
Access Current Year Client List	Access to current year client list (must be used in conjunction with View/Edit Existing Returns)
Access Previous Years Client Lists	Access three prior years
Override Return Minimum Preparer Fee	Not Applicable
Mark Return Complete	Signify the return complete and ready for transmission
Mark Return for Review	Mark a return Ready for Review which will add it to the Review Returns queue
Review Returns and Mark Review Decision	Review returns marked "Ready for Review" and either approve or Fail the return
Send Return to IRS	Transmit returns to the TaxSlayer Processing Center
Change Return Preparer	Change from current preparer to another preparer
View Client Status	Ability to view taxpayer's return status and return history
Deactivate Return	Delete return(s) with status of In Progress or Review Failed
Print Returns	Print returns
Password Protect Return	Add a password to a return. Required for opening return, printing return, and viewing client status
Do not Force Return Review	Does not require return review option if preparer has Mark Return for Review enabled
View Full SSN	View client's entire social security number
Configuration	Ability to see and access Configuration menu from main office menu
Edit Office Setup	Edit basic office information, including office name, address, and phone number.
Access Office	Not Applicable
Add/Edit Fees	Ability to set fees to determine cost savings to taxpayers (primarily used by Military sites)
Edit Minimum Preparer Fee	Not Applicable
Add/Edit Preparers	Add new preparers or edit existing preparers
Edit ERO Setup	Add/Edit an ERO, including name, EIN, EFIN, address, and phone number.
Change User's Security Template	Add Security Templates and/or Edit created Security Templates
View Reports	View Reports, including Acknowledgements
Add or Edit Tags	Create and edit return tags, which are used to label returns (ex: Missing Info). No default tags provided currently
Add or Edit Print Sets	Add Print Sets and/or Edit Created Print Sets
Change Questions and Available Answers	Add Custom Questions and Answers and/or edit created Custom Questions and Answers
Change Tax Profiles	Add Taxpayer Profiles and/or edit created Taxpayer Profiles
Change Consent Forms	Add Consent to Use/Consent to Disclose and/or edit Created Consent to Use/Consent to Disclose Forms
View Refund Status	Not Applicable (will be disabled)
Add or Edit Office IP Whitelist	Limit login access if the user is not logging in from a designated IP Address
Add or Edit Custom Credits	Add Custom Credits and/or edit created Custom Credits
Change Consent Forms	Change consent forms

- b. **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 counselors¹. 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. In that case, the subscriber sites will not have to create the templates themselves.
- c. 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.
 "Novice" will not permit the user to quality review a return, approve a return for e-filing, print returns nor submit e-files. "Experienced" permits the user to perform all the functions of a quality reviewer and those required of the site

⁴ TSO's pre-defined Security Templates do not appear during Setup until assigning a template to a new preparer. The abilities of each of TSO's Security Templates is **also shown on the VITA/TCE Blog**.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

coordinator. “Assistant Admin” adds the administrative abilities of the Admin, as well as permitting the AA to create returns.

- d. On the “Security Templates” page click the “Add” box (beside “Add Security Template”).
 - e. To create “Novice” enter **Novice** as the Template Name, then check the boxes beside: Create Tax Returns, View/Edit Existing Returns, Access Current Year Client List, Mark Return for Review, View Client Status and View Full SSN. The Novice user will have 6 boxes checked; the remainder of the boxes must be empty (not checked). Click “Continue”.
 - f. On the “Security Templates” page click the “Add” box (beside “Add Security Template”).
 - g. To create “Experienced” enter **Experienced** as the Template Name, then check the boxes beside: Create Tax Returns, View/Edit Existing Returns, Access Current Year Client List, Access Previous Years Client List, Mark Return Complete, Mark Return for Review, Review Returns and Mark Review Decision, Send Return to IRS, View Client Status, Print Returns, View full SSN and View Reports. The Experienced user will have 12 boxes checked; the rest of the boxes must be empty (not checked). Click “Continue”.
 - h. To create “Assistant Admin” enter **Assistant Admin** as the Template Name, then check all of the boxes **except**: Override Return Minimum Preparer Fee, Password Protect Return, Access Office, Add/Edit Fees, Edit Minimum Preparer Fee, Change Consent Forms, View Refund Status and Add or Edit Office IP Whitelist. The Assistant Admin will have only 8 specific abilities not checked (the boxes will be empty). Click “Continue”.
 - i. The “Security Templates” page shows the names of custom-defined templates, as well as the date each was created. If a Security Template needs to be edited, click the “Edit” box following that template. Note that the predefined templates from both TSO and the MSA are not listed even though they are available to be assigned to preparers, since they cannot be edited.
 - j. Security Templates are assigned to users as they are created, or to existing users from the “Assign Security Template” page by clicking on “Assign” following the template’s name.
 - k. When finished with the custom-defined templates click “Back”, returning to the “Welcome” page.
5. On the “Welcome” page, click “Select” at the end of the “Configuration” line.
 6. On the “Configuration Menu” page, click “Select” at the end of the “**Preparer Setup**” line.
 - a. The “Preparer(s) Menu” appears; click on “Add” beside “Add Preparers”.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

- b. The “Preparer(s) Setup Menu” appears. DO NOT ENTER the preparer’s SSN, but complete the name.
- c. 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.
- d. DO NOT check either the “Office Contact?” box or the “Self Employed” box.
- e. The “Can view own returns only?” box may be checked if this preparer will be restricted to viewing only the returns they’ve prepared. Be aware that if checked, this preparer will not be able to see or edit any return they did not create!
- f. 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.
- g. 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”.
- h. 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. The user will have two options for receiving the MFA code: email address or cell phone text message. An MFA code is required periodically and when logging into TSO from computer not previously used. This email address must be different than all other users at this site (though the preparer may use the same email address at each site where they work).
- i. Enter the preparer’s cellular telephone number in the space asking for their “Cell Phone Number”. This cell phone number is the second option the user will have for receiving the Multi-Factor Authentication code when it is required to complete their TSO login. TSO permits multiple users at a site to share a phone number; however, the MFA code will not identify which user’s log in the code is for. Scroll down.
- j. 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. 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.
- k. 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

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

will request that they immediately change their password; therefore, the Admin may enter the same password for each preparer added to the site.

- l. Select a “Security Question” from the drop-down box, then enter a “Security Answer” to the question. The question and the answer may be changed later (by the Admin), if the user requests it be changed.
 - m. 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); thus removing 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. Note that the Novice Security Template does not permit a Novice user to access prior year returns.
 - n. 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; it is recommended that TSO pre-defined templates NOT be assigned because their defined abilities do not fit with Tax-Aide practice. Note that the single assigned template applies to all the tax years available in TSO (current and prior 3 tax years), not just the current year and that it can be changed. Picking a template from the drop-down menu, then clicking “Show Definitions” (beside the drop-down box) will show which abilities are included in that template.
 - o. Skip past (do not click on) “Electronically Sign”. This feature will place the preparer’s signature on the printed tax return.
 - p. Review the entries. If correct, click “Continue”.
 - q. Repeat ‘a’ through ‘n’, 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.
 - r. When the last new preparer has been added, review the Preparer(s) Menu. If correct, click “Return”.
7. On the “Configuration Menu” page, click “Select” at the end of the “**Question Templates**” line.
- a. 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.**
 - b. Answers to pre-filled and custom questions must be chosen from a drop-down list of pre-defined answers.
 - c. 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.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

- d. 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.
- e. 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.
- f. 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:

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 Did not answer
TA3 - Are you of Hispanic, Spanish, or Latin origin (Taxpayer #1)	Yes No Did not answer
TA4 - Which best describes your race/ethnicity (Taxpayer #2)	American Indian/Alaskan Native Asian Black/African-American White Native Hawaiian/Pacific Islander Other Did not answer
TA5 - Are you of Hispanic, Spanish, or Latin origin (Taxpayer #2)	Yes No Did not answer

- g. Review the “Edit Questions” page. If additional custom questions are desired, repeat ‘b’ through ‘d’ above. Click “Save” to close the drop-down answer menu.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

- h. When finished adding questions and/or answers, click “Back”.
8. If “Custom Credit” will be used, click “Select” at the end of the “**Custom Credit**” line.
 - a. 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.
 - b. An example of a Custom Credit is “How many people are included in this return?”.
 - c. To add a credit click on “Add” (beside Add Custom Credit).
 - d. When finished, click “Continue”.
9. On the “Configuration Menu” page, click “Select” at the end of the “**Print Sets**” line.
 - a. **Two** pre-defined print sets are listed on the Print Sets page; the user will choose one of these, or one of the site-defined print set, each time a return is printed. 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 prints the return’s notes as well as the forms printed in the Master Print set. The pre-defined print sets cannot be edited, copied or deleted.
 - b. 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.
 - c. To create a site-defined print set click “Add” (beside Add Print Set).
 - d. 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.
 - e. If the number of copies 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.
 - f. 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’.
 - g. 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.
10. On the “Configuration Menu”, click “Select” at the end of the “**Tags**” line.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

- a. 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.
 - b. 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.
 - c. Repeat 'c', above, to add more tags.
 - d. When finished, click "Back".
11. On the "Configuration Menu" page go past "Edit Office IP Whitelist".
12. On the "Configurations Menu", click "Select" at the end of the "**Taxpayer Profile**" line.
- a. 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.
 - b. The Taxpayer Profile must be selected before the return is begun and cannot be changed after the return is begun.
 - c. 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.
 - d. Create new Admin-defined custom profiles by clicking on "Add" (beside Add Taxpayer Profile).
 - e. 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 identified.
 - f. 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.
 - g. 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.

Setup Guide for TaxSlayer Pro Online (TSO) - TY2016

AARP Foundation National Technology Committee

- h. To arrange the order of presentation to the preparer, drag each form to the appropriate location. Click “Save”.
- i. 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.
- j. When finished click “Back”.

Multi-Site Administrator (MSA)

The **Multi-Site Administrator** relationship with subscriber sites is defined in the IRS order which permits the MSA to distribute their site-defined settings (Security Templates, Custom Questions-Answers, Taxpayer Profiles, Print Sets and Tags) to subscriber sites. The MSA will receive the same 2 emails as the Admin, but will receive a third email to establish a “Group 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”.
6. 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.