



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:

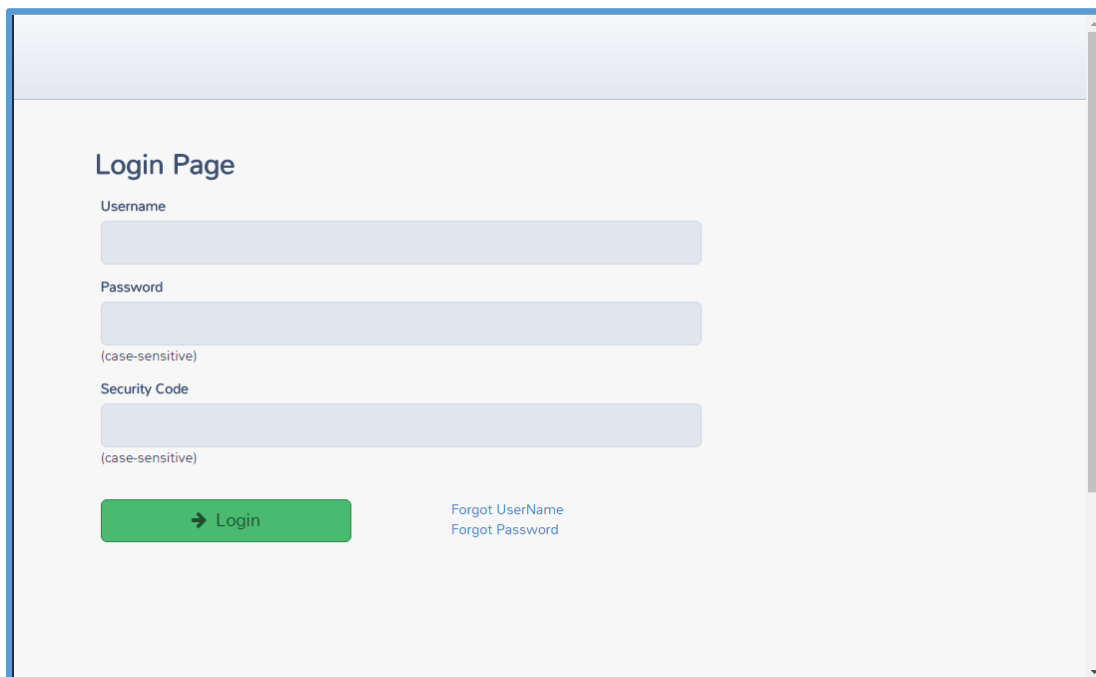
1. Navigate to TaxSlayer Pro Online.
2. List the password requirements.
3. Change your password the first time you log in.
4. Reset your password.

### Login

When you are ready to begin working in TaxSlayer Pro Online, use the following steps:

1. Navigate in your web browser to TaxSlayer Pro Online.

Your web browser displays the TaxSlayer Pro **Login** page:

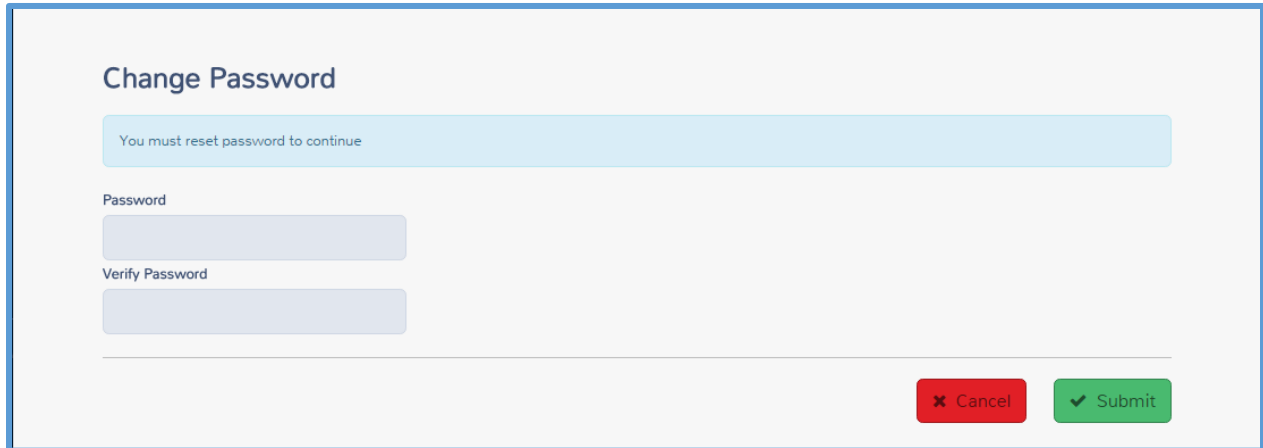
A screenshot of the TaxSlayer Pro Login page. The page has a light gray background. At the top, there is a header bar. Below the header, the title "Login Page" is displayed. Underneath the title, there are three input fields: "Username", "Password", and "Security Code". Each field is a light blue rectangle. Below the "Password" field, the text "(case-sensitive)" is displayed. Below the "Security Code" field, the text "(case-sensitive)" is displayed. At the bottom left, there is a green button with a right-pointing arrow and the text "Login". At the bottom right, there are two links: "Forgot UserName" and "Forgot Password".

2. In the appropriate boxes, type the user name and password you received from your site administrator.
3. Type the security code you received from your site administrator.

**TIP:** Passwords and security codes are case-sensitive.

4. Click **Login**.

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

The screenshot shows the 'Change Password' page. At the top, there is a light blue banner with the text 'You must reset password to continue'. Below this, there are two input fields: 'Password' and 'Verify Password'. At the bottom right, there are two buttons: a red 'Cancel' button with a white 'x' icon and a green 'Submit' button with a white checkmark icon.

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 special character (!@\*) in your password.
- Remember that passwords are case-sensitive. If you use a combination of upper-case and lower-case letters, 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 **Login Page**.

8. Type your user name, **new** password, and your security code.

9. Click **Login**.

## Authenticating on a New Computer

When you log in from a new computer (one from which you have not logged in to TaxSlayer Pro Online previously), TaxSlayer Pro Online displays the **Verify Account** page:

TaxSlayer verifies your identity this way to ensure that all users are authorized and to ensure taxpayer and preparer security against identity theft.

To verify your account, use the following steps:

1. Select the delivery option. You can receive your code through email or text, if your site administrator entered both of these during preparer setup.
2. Click **Send Code**.
3. Check your email or text messages to find the code.
4. Type the code in the **Enter Your Security Code** box.
5. Click **Submit**.

TaxSlayer Pro Online verifies the code and displays the **Welcome** page.

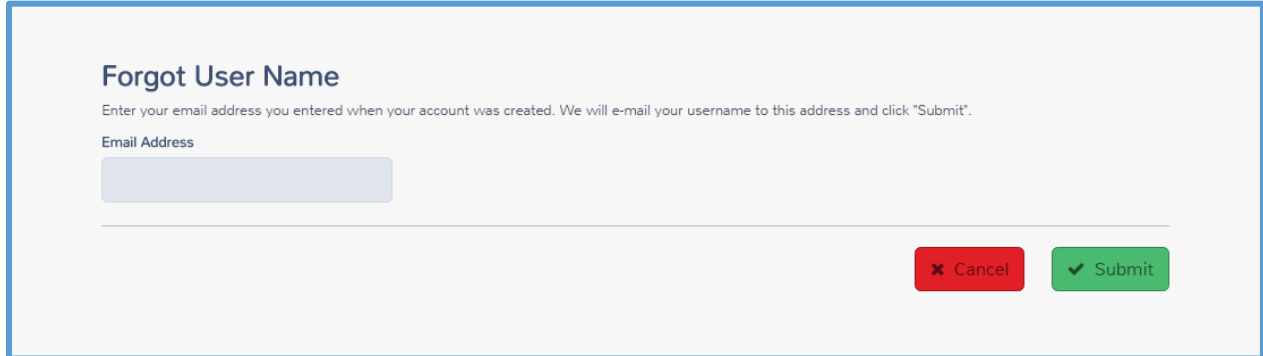
## Retrieving Your User Name

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

1. Click **Forgot UserName**.

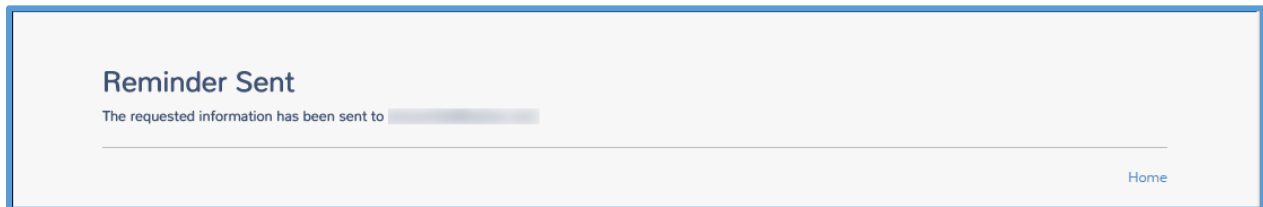


TaxSlayer Pro Online displays the **Forgot User Name** page:

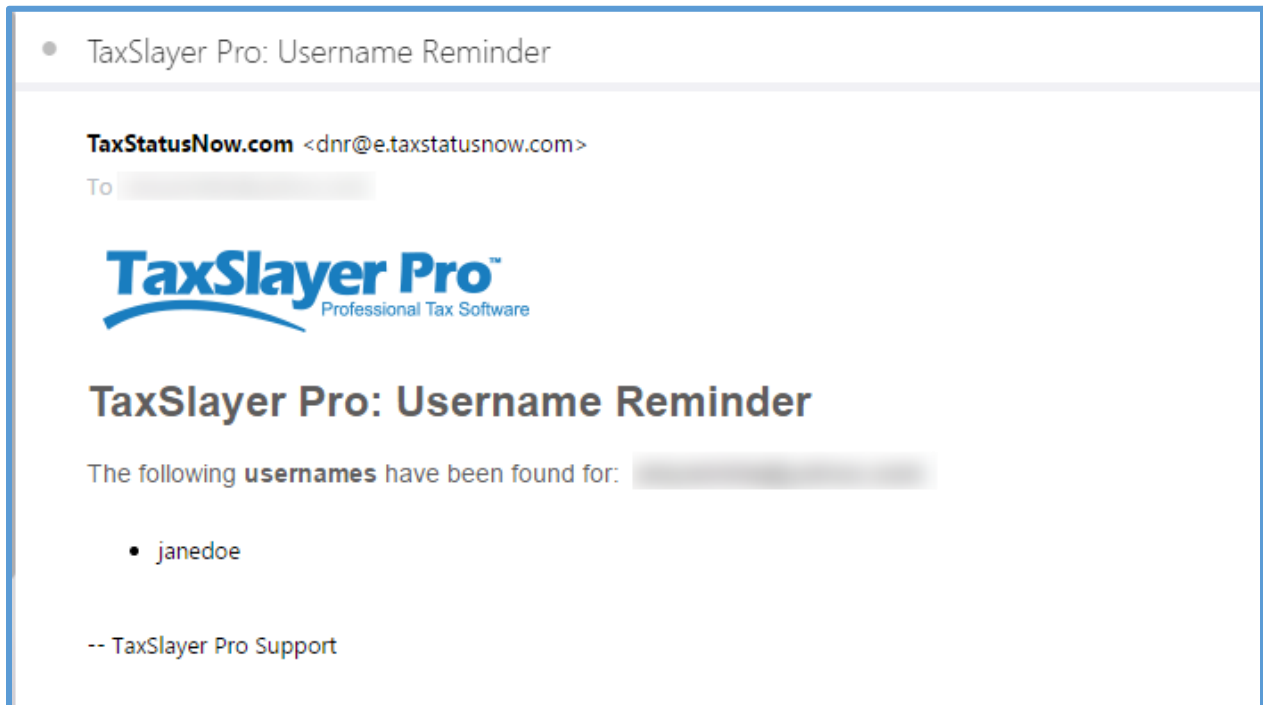


2. Type the email address your site administrator used during setup for your Preparer account.
3. Click **Submit**.

TaxSlayer Pro Online displays the **Reminder Sent** page:



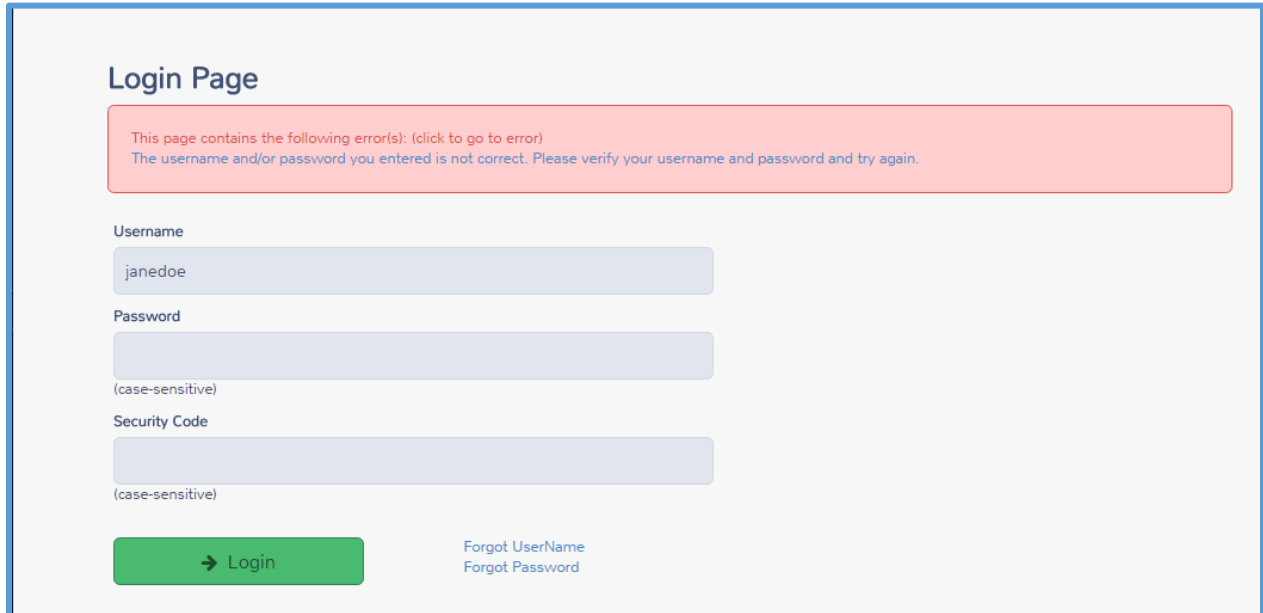
TaxSlayer sends an email, similar to the following:



4. On the **Reminder Sent** page, click **Home** to log in.

## Resetting Your Password

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

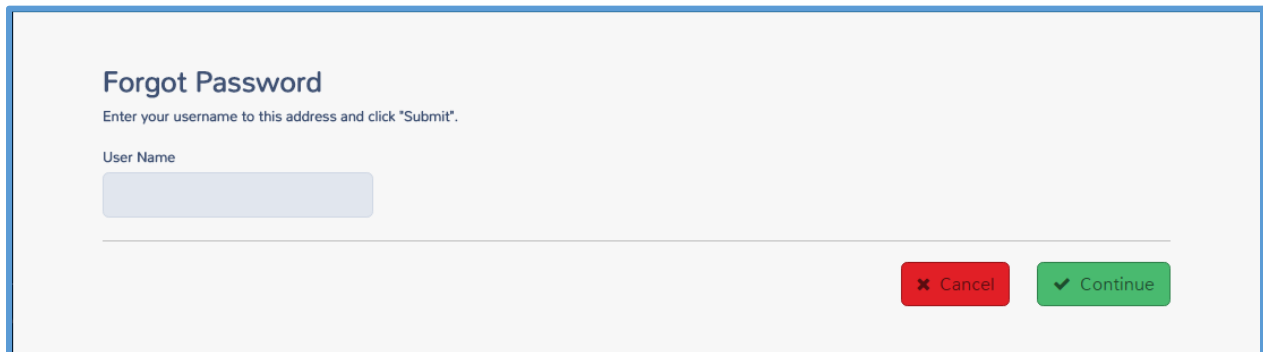


The screenshot shows the 'Login Page' of TaxSlayer Pro Online. At the top, there is a red error message box that reads: 'This page contains the following error(s): (click to go to error) The username and/or password you entered is not correct. Please verify your username and password and try again.' Below the error message, there are three input fields: 'Username' (containing 'janedoe'), 'Password' (with a '(case-sensitive)' note below it), and 'Security Code' (with a '(case-sensitive)' note below it). At the bottom left, there is a green button with a right arrow and the text 'Login'. At the bottom right, there are two links: 'Forgot UserName' and 'Forgot Password'.

To reset your password, you will need your user name, and either the answer to your security question or your password. Use the following steps:

1. Click **Forgot Password**.

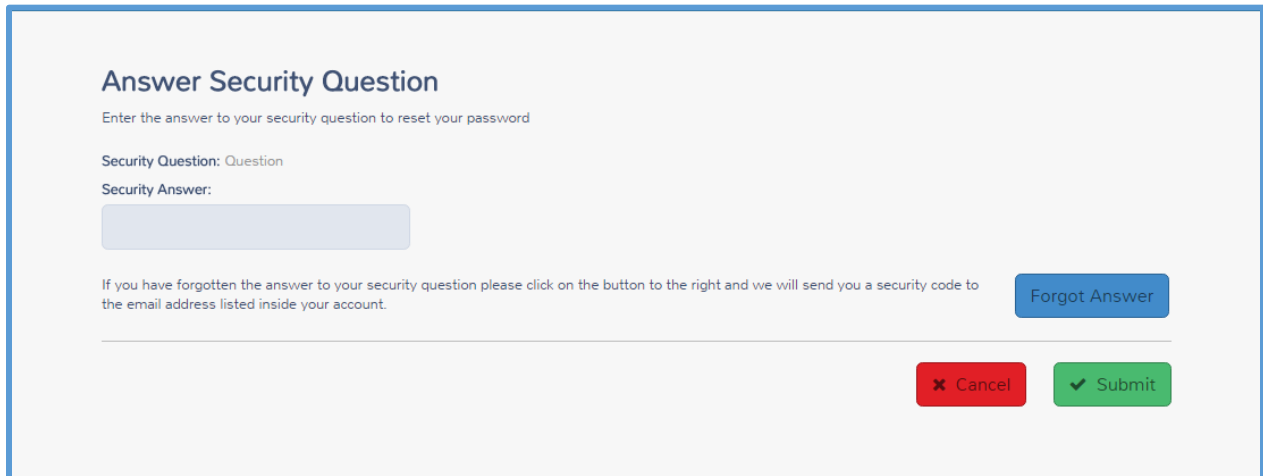
TaxSlayer Pro Online displays the **Forgot Password** page:



The screenshot shows the 'Forgot Password' page of TaxSlayer Pro Online. At the top, there is a heading 'Forgot Password' followed by the instruction 'Enter your username to this address and click "Submit".' Below this, there is a 'User Name' input field. At the bottom right, there are two buttons: a red button with a left arrow and the text 'Cancel', and a green button with a right arrow and the text 'Continue'.

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

TaxSlayer Pro Online displays the **Answer Security Question** page:



The screenshot shows the 'Answer Security Question' page. At the top, the title 'Answer Security Question' is displayed in a dark blue font. Below it, a subtitle reads 'Enter the answer to your security question to reset your password'. The page contains a label 'Security Question: Question' and another label 'Security Answer:' followed by a light blue text input field. Below the input field, a message states: 'If you have forgotten the answer to your security question please click on the button to the right and we will send you a security code to the email address listed inside your account.' To the right of this message is a blue button labeled 'Forgot Answer'. At the bottom right of the page are two buttons: a red button with a white 'x' icon labeled 'Cancel' and a green button with a white checkmark icon labeled 'Submit'.

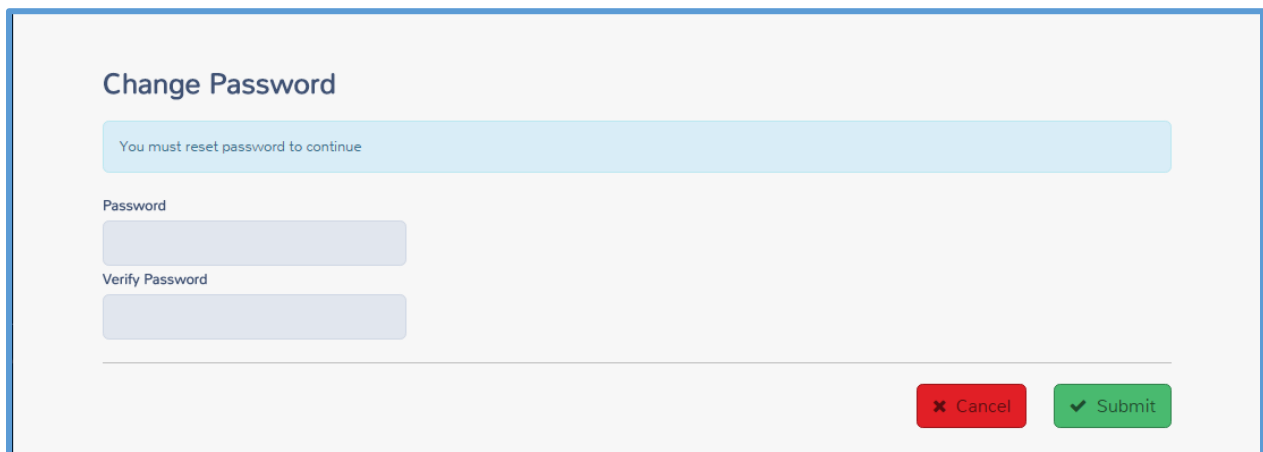
### *Resetting with Security Question*

If you know the answer to your security question, use the steps in this section.

4. Type the answer to your security question.
5. Click **Submit**.

**NOTE:** If you cannot remember the answer to your security question, click **Forgot Answer** to reset using a security code.

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



The screenshot shows the 'Change Password' page. At the top, the title 'Change Password' is displayed in a dark blue font. Below it, a light blue message box contains the text 'You must reset password to continue'. The page contains two labels: 'Password' and 'Verify Password', each followed by a light blue text input field. At the bottom right of the page are two buttons: a red button with a white 'x' icon labeled 'Cancel' and a green button with a white checkmark icon labeled 'Submit'.

6. Type a new password.
7. Type the password again for verification.
8. Click **Submit**.

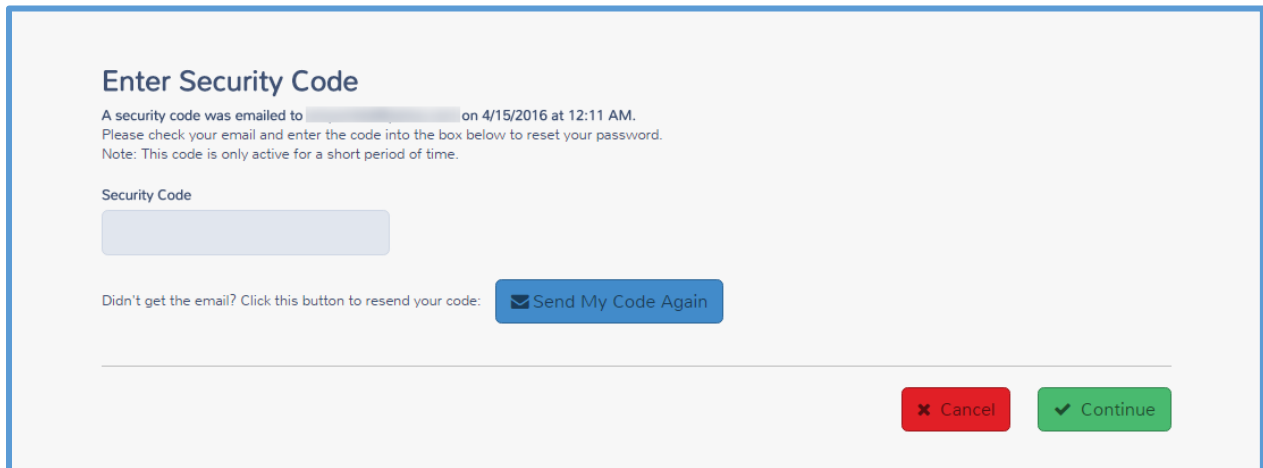
On the TaxSlayer Pro Online **Login Page**, type your user name, new password, and security code, and then click **Login**.

### *Resetting with Security Code*

If you do not remember the answer to your security question, reset your password using the following steps:

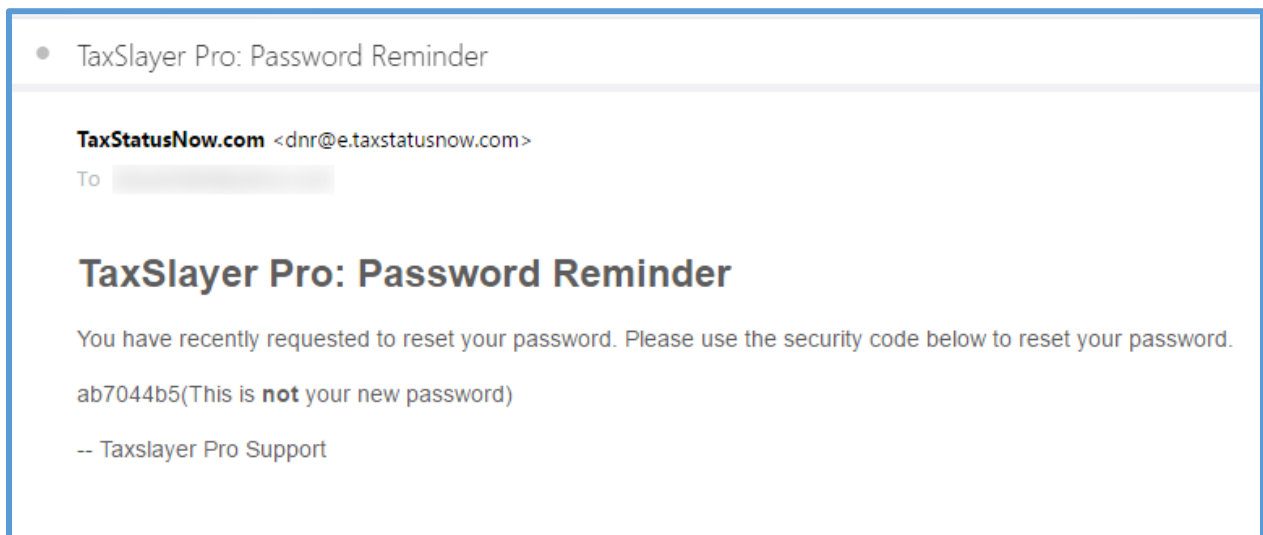
1. Click **Forgot Answer**.

TaxSlayer Pro Online displays the **Enter Security Code** page:



The screenshot shows the 'Enter Security Code' page. At the top, it says 'Enter Security Code'. Below that, it states: 'A security code was emailed to [redacted] on 4/15/2016 at 12:11 AM. Please check your email and enter the code into the box below to reset your password. Note: This code is only active for a short period of time.' There is a text input field labeled 'Security Code'. Below the field, it says 'Didn't get the email? Click this button to resend your code:' followed by a blue button labeled 'Send My Code Again'. At the bottom right, there are two buttons: a red 'Cancel' button and a green 'Continue' button.

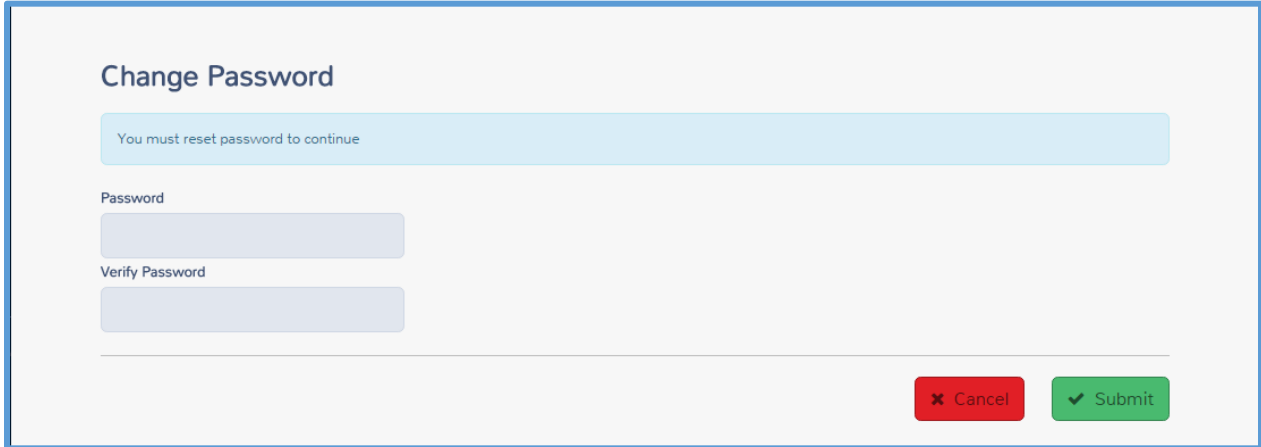
TaxSlayer sends an email to the email address listed on your Preparer account, similar to the following:



The screenshot shows an email titled 'TaxSlayer Pro: Password Reminder'. The sender is 'TaxStatusNow.com <dnr@e.taxstatusnow.com>'. The 'To' field is redacted. The main body of the email says: 'TaxSlayer Pro: Password Reminder'. Below that, it says: 'You have recently requested to reset your password. Please use the security code below to reset your password. ab7044b5(This is **not** your new password)'. At the bottom, it says '-- Taxslayer Pro Support'.

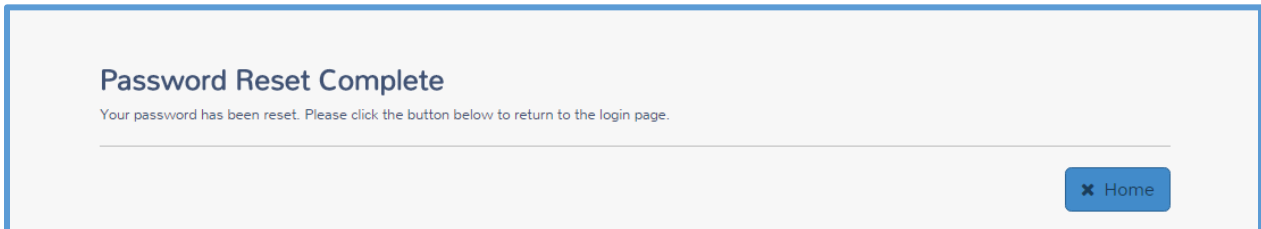
2. Find the security code in the email.
3. Type the security code from the email in the **Security Code** box.
4. Click **Continue**.

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

The screenshot shows the 'Change Password' page. At the top, the title 'Change Password' is displayed. Below it is a light blue message box that says 'You must reset password to continue'. Underneath this, there are two input fields: 'Password' and 'Verify Password'. At the bottom right of the form, there are two buttons: a red 'Cancel' button with a close icon and a green 'Submit' button with a checkmark icon.

5. Type the new password.
6. Type the password again for verification.
7. Click **Submit**.

TaxSlayer Pro Online displays the **Password Reset Complete** page:

The screenshot shows the 'Password Reset Complete' page. The title 'Password Reset Complete' is at the top. Below it is a message: 'Your password has been reset. Please click the button below to return to the login page.' At the bottom right, there is a blue button labeled 'Home' with a close icon.

8. Click **Home** to log in to TaxSlayer Pro Online.

## 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.

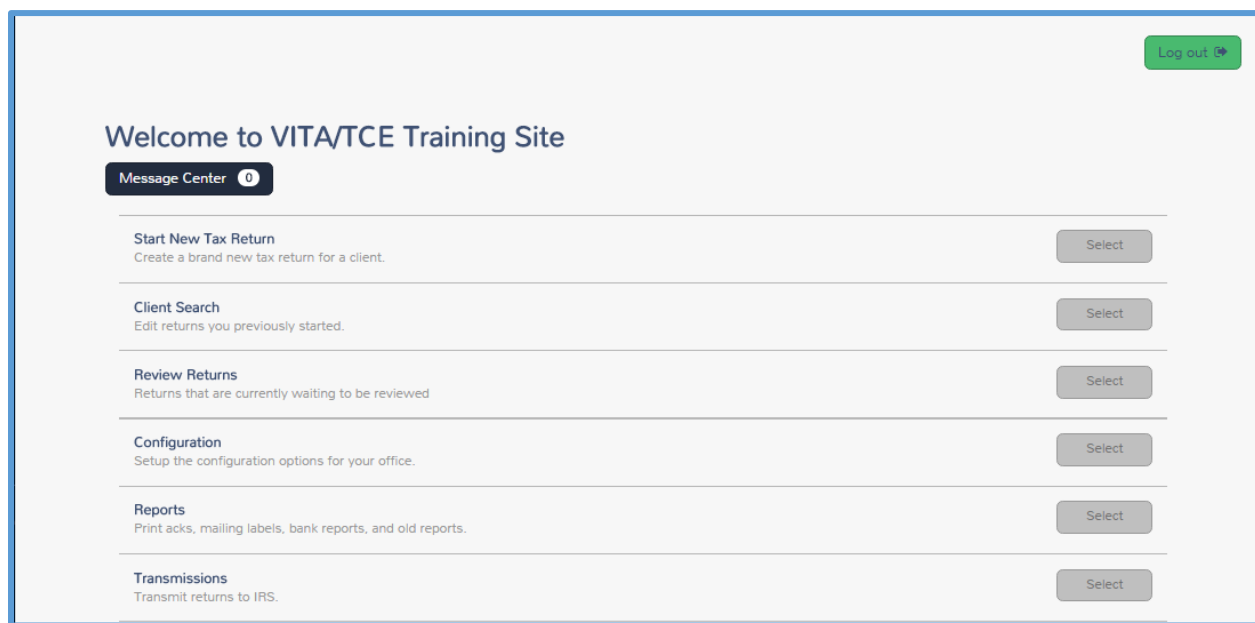
Before you begin using TaxSlayer Pro Online, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carry to tax returns so that you only have to type this information once. This includes items such as the firm/site 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 the 'Configuration Menu' landing page. At the top right, there is a 'Log out' button with a user icon. Below this is a green 'Return' button with a left arrow. The main content area is titled 'Configuration Menu' and contains a list of configuration options, each with a description and a 'Select' button:

Configuration Option	Description	Action
Office Setup	Setup Office.	Select
ERO Setup	Enter and edit ERO Information.	Select
Preparer Setup	Enter and edit Preparer Information.	Select
Fees Setup	Enter and Edit Fees.	Select
Custom Fees and Discounts	Enter and Edit Custom Fees or Discounts.	Select
Security Templates	Create and assign user permissions	Select
Question Templates	Create and assign question templates	Select
Print Sets	Create Print Sets	Select

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

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

**Office Setup** ✕ Cancel ✓ Continue

**Office Information**

☒ Active

Office Name  
VITA/TCE Training Site

Selected Bank  
Please Select ▼

Sales Tax Percentage  
5.00 %

SIDN  
S12333333

Login Security Code  
default

Date to show on printed return  
Current Date ▼

☐ Print Preparer Signature on 1040

☐ Print Firm Information on Cover Page

☒ Disable Third Party Designee Prefill

☒ Offer 8888

4. TaxSlayer populates several boxes on this page based on the information submitted by the IRS. Review this information and make changes as needed.
  - a. The default **Login Security Code** will be sent with the site activation information. We recommend you change this code before you add preparers.
  - b. Select **Disable Third Party Designee Prefill**.
  - c. Select **Offer 8888** if your site will be offering split refunds.



- d. Select **Display Summary using 1040 View** to default to the 1040 view when opening returns.
  - e. Select **Always Print Schedule A** to display the Schedule A in Preview Return
5. 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 is titled "Office Addresses" and contains a table with the following data:

TYPE	STREET ADDRESS	CITY	STATE	ZIP		
Physical	123 VITA/TCE BLVD	Evans	GA	30809	<a href="#">Edit</a>	<a href="#">Delete</a>

Below the table is a green button with a plus icon and the text "+ Add Add Address".

The bottom section is titled "Office Phones" and contains a table with the following data:

TYPE	TELEPHONE	EXT		
Business	(706) 555-8482		<a href="#">Edit</a>	<a href="#">Delete</a>

Below the table is a green button with a plus icon and the text "+ Add Add Phone".

6. Click **Edit** to make any necessary changes to the information.

TaxSlayer Pro Online displays the **Office Information** address page.

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

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

11. Change the phone number in the appropriate boxes.
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:

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:

3. Verify or enter the **ERO's name** and **EFIN** in the appropriate boxes.

**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 TaxSlayer and the IRS if the EFIN is changed. TaxSlayer validates return creation based on the EFIN in our system.

5. Click **Edit** in the **Ero Addresses** section.

TaxSlayer Pro Online displays the **Ero Information** address 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**.
- 13.

TaxSlayer Pro Online displays the **Ero(s) Menu** page with the ERO listed:

The screenshot displays the 'Ero(s) Menu' page. At the top right is a 'Log out' button. Below it are two green buttons: '< Return' and '+ Add'. On the left, there is a 'View Inactive' toggle switch. The main content is a table with the following data:

EFIN	Ero Name	Default	Status
001111	Jane Doe	<input checked="" type="checkbox"/>	Active

Below the table, there is a green '+ Add' button and the text 'Add ERO'. To the right of the table is a blue 'Edit' button. At the bottom right, there is a green '< Return' button.

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

## 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.

In TaxSlayer Pro Online, use security templates to set the permissions for each preparer. You can use predefined security templates, create your own templates, or edit existing templates that were created at your site as needed.

### Predefined Security Templates

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

- Administrator
- Super User
- Preparer Current Year
- Preparer All Years
- Setup Manager
- Interviewer
- Reviewer

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

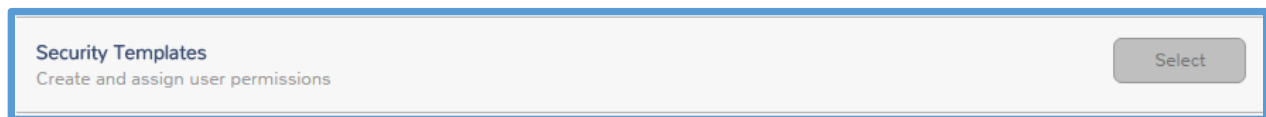
When you set up users/preparers, you can select the security template. See [Adding Preparers](#) for information on selecting security templates for users.

**NOTE:** You cannot edit the predefined security templates and will not see them listed in your site Configuration. You will be able to select a template from them when setting up users.

## Creating Security Templates

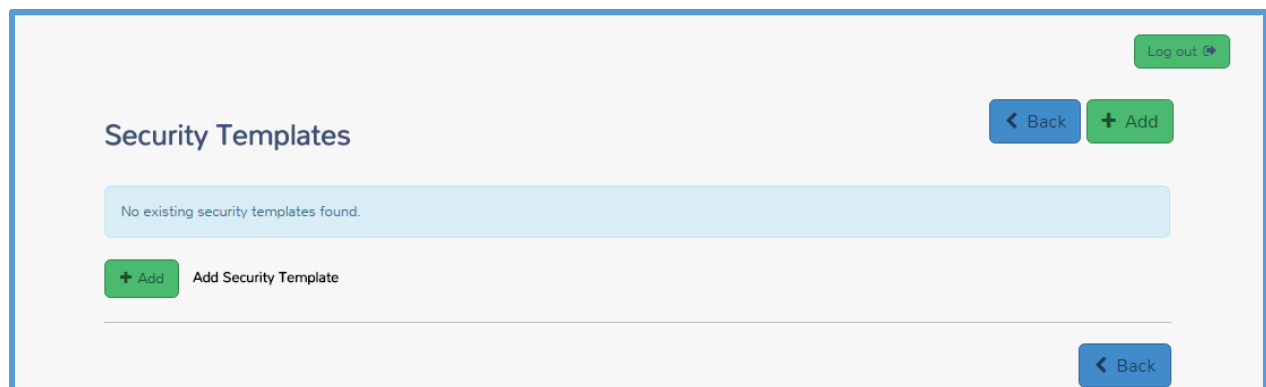
You can create an unlimited number of security templates for your site. To do this, use the following steps from the **Welcome** page:

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



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

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



3. Click **Add**.

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

Log out

### Add Security Template

Cancel Continue

Template Name

Check item to allow access

<input checked="" type="checkbox"/> Check/Uncheck All		
<input checked="" type="checkbox"/> Create Tax Returns	<input checked="" type="checkbox"/> View/Edit Existing Returns	<input checked="" type="checkbox"/> Access Current Year Client List
<input checked="" type="checkbox"/> Access Previous Years Client Lists	<input checked="" type="checkbox"/> Override Return Minimum Preparer Fee	<input checked="" type="checkbox"/> Mark Return Complete
<input checked="" type="checkbox"/> Review Returns and Mark Review Decision	<input checked="" type="checkbox"/> Send Return to IRS	<input checked="" type="checkbox"/> Mark Return for Review
<input checked="" type="checkbox"/> Print Returns	<input checked="" type="checkbox"/> View Client Status	<input checked="" type="checkbox"/> Change Return Preparer
<input checked="" type="checkbox"/> Scanned Documents	<input checked="" type="checkbox"/> Print Return TAA Form	<input checked="" type="checkbox"/> Deactivate Return
<input checked="" type="checkbox"/> Edit Office Setup	<input checked="" type="checkbox"/> View Full SSN	<input checked="" type="checkbox"/> Password Protect Return
<input checked="" type="checkbox"/> Add/Edit Preparers	<input checked="" type="checkbox"/> Add/Edit Fees	<input checked="" type="checkbox"/> Configuration
	<input checked="" type="checkbox"/> Edit ERO Setup	<input checked="" type="checkbox"/> Edit Minimum Preparer Fee
		<input checked="" type="checkbox"/> Change User's Security Template

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.

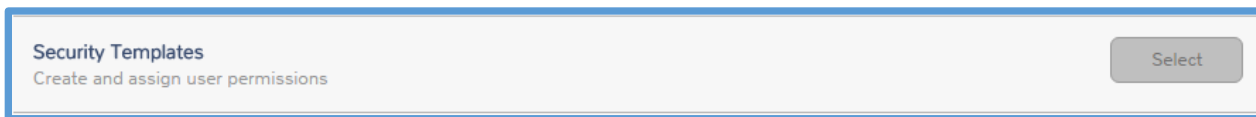
7. If you need to add more security templates, click **Add** and follow the same steps for each security template.
8. When you finish adding security templates, click **Back** to return to the **Welcome** page.

## Editing Security Templates

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

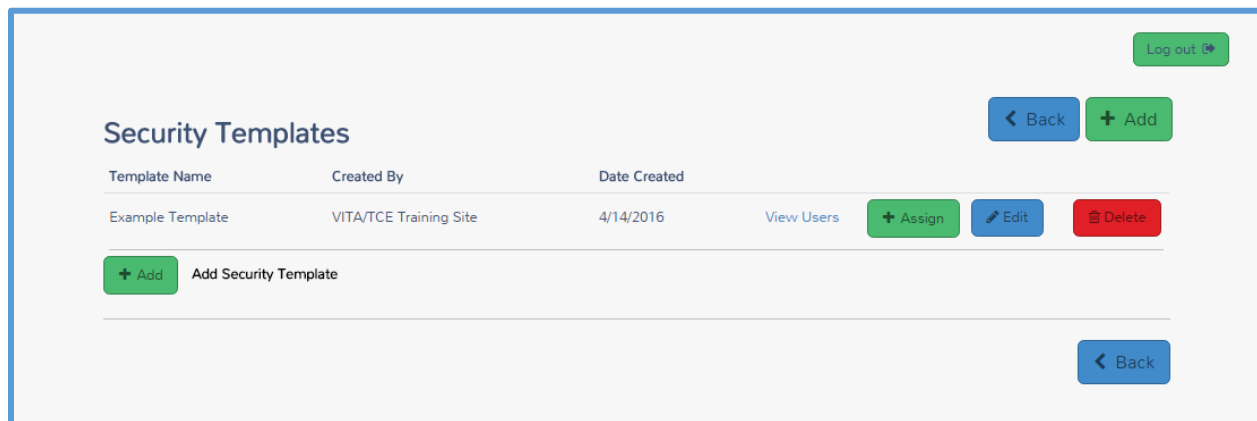
1. Click **Select** on the **Configuration** line.

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



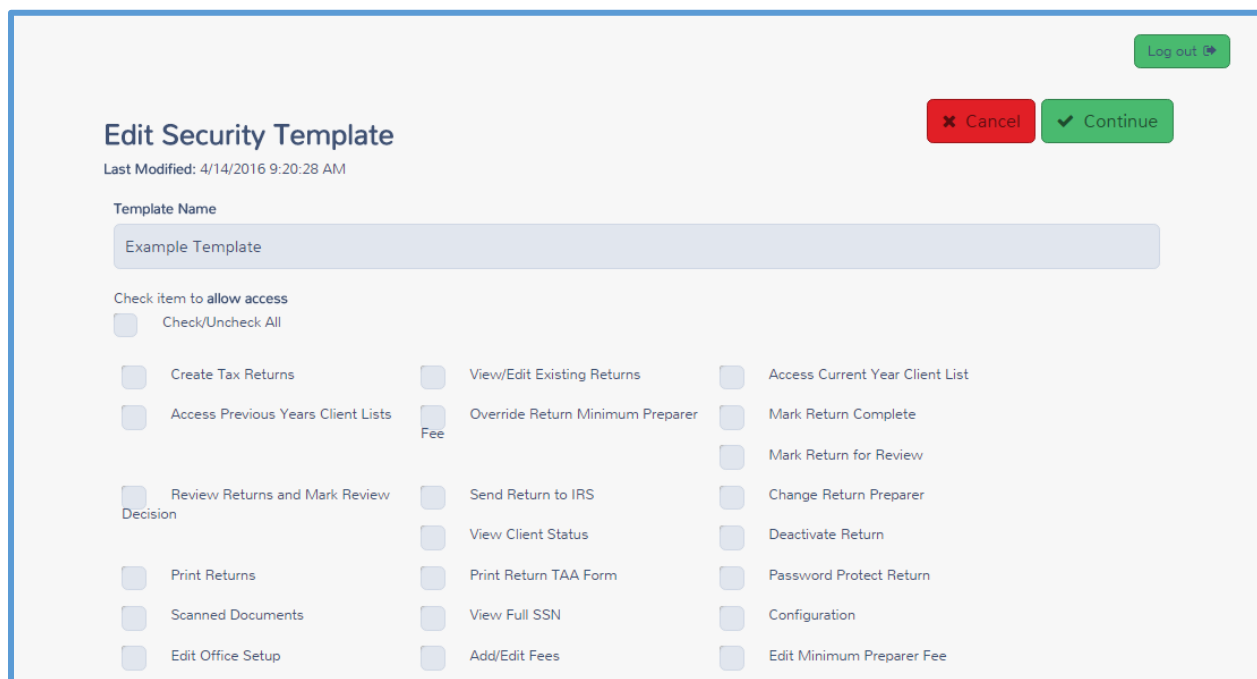
2. Click **Select** on the **Security Templates** line.

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



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

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



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, 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 right, there is a 'Log out' button. Below it, there are 'Cancel' and 'Continue' buttons. The main heading is 'Assign Security Template'. Below this is a dropdown menu labeled 'Example Template'. Underneath, there is a section titled 'Assign template to:'. This section contains a list of preparers. The first preparer is 'Jane Doe', which is preceded by a green right-pointing triangle and followed by an unchecked checkbox. To the right of the preparer list is a 'Check/Uncheck All' button. At the bottom right of the page, there are 'Cancel' and 'Continue' buttons.

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



## Adding Preparers

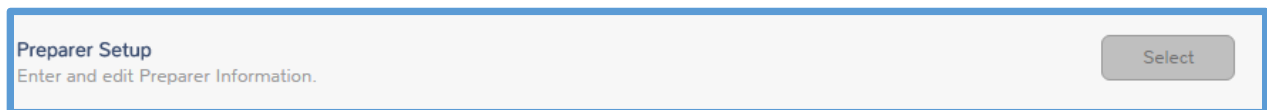
This chapter covers the following actions:

1. Create a user/preparer.
2. Assign a security template.
3. Control return access.
4. List password requirements.

### Creating Users

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

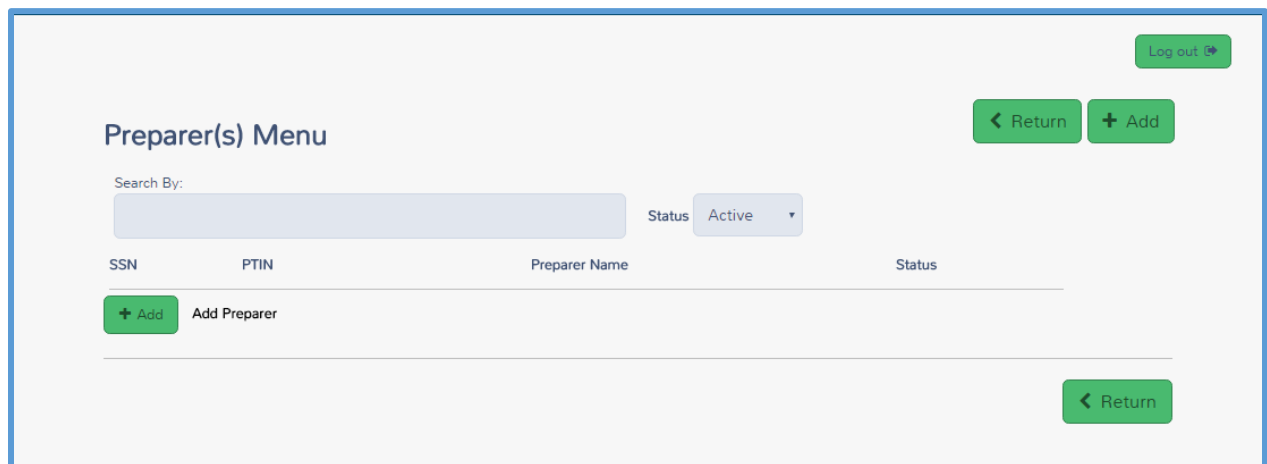
1. Click **Select** on the **Configuration** line.



A screenshot of a web interface showing a button labeled "Preparer Setup" with the subtitle "Enter and edit Preparer Information." To the right of the button is a "Select" button.

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

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



A screenshot of the "Preparer(s) Menu" page. The page has a header with "Log out" and "Return" buttons. Below the header is a search bar with "Search By:" and a "Status" dropdown menu set to "Active". Below the search bar is a table with columns "SSN", "PTIN", "Preparer Name", and "Status". There is an "Add" button next to the "Add Preparer" text. At the bottom right, there is a "Return" button.

3. Click **Add**.

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

The screenshot shows the 'Preparer(s) Setup Menu' page. At the top right, there is a 'Log out' button with a user icon. Below the title, there are 'Cancel' and 'Continue' buttons. The section is titled 'Preparer Personal Information'. It contains several input fields: 'SSN' with three separate boxes, 'First Name', 'Middle Initial', 'Last Name', and 'Suffix', each with a single-line text input field.

4. Do **not** type the preparer's Social Security number.
5. Type the preparer's name in the appropriate boxes.
6. 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 page. It starts with a label 'PTIN OR SIDN' above a text input field containing 'S12333333'. Below this is a checkbox labeled 'Data Entry Only, no PTIN Required'. A link 'Pull from office' is present. Then, there is a label 'Default PIN Number' above a text input field containing '98765'. At the bottom, there are five checkboxes: 'Office Contact?', 'Self Employed', 'Can view own returns only?', 'Required to use Guide?', and 'Prepares NY returns?'.

### *SIDN*

7. From the **PTIN OR SIDN** box, click **Pull from office** to have TaxSlayer Pro Online carry the site's SIDN to the preparer.
8. TaxSlayer Pro Online defaults the PIN to 98765 and carries this PIN to all returns created by this preparer.
9. Do **not** select the **Office Contact** or **Self-Employed** check boxes.

### *Return Access*

10. Select the check box to allow the preparer to view only his or her own returns.
11. Check **Required to use Guide?** if you want to restrict the preparer to using the Guide Me feature for data entry.
12. Select **Prepares NY returns?** and select volunteer tax preparer if you are preparing returns in New York.

### *Login Setup*

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

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

Email Address

Cell Phone Number

Username

Password

Security Question

Please Select a Question ▼

Security Answer

☒ Active

Security Template

Current Template: *not set*

Please Select ▼ [Show Definitions](#)

14. Type the preparer's email address. Use unique email addresses within the site to allow for multi-factor authentication.
15. Enter the preparer's cell phone (optional). The preparer can choose to receive the authentication code via text if a cell phone number is entered.
16. Enter a unique user name.

**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.

### Password Requirements

17. Type a password for the preparer.

**TIP:** When you create a password for the preparer, make sure that you use at least one number, one special character (!@#, etc.), and ensure the password contains at least eight (8) characters.

18. Select the security question from the drop-down list.

19. Type the answer to the security question.

20. 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, as shown below.

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

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

The screenshot displays the 'Preparer(s) Menu' interface. At the top right, there is a 'Log out' button. Below it are '< Return' and '+ Add' buttons. A search bar labeled 'Search By:' is present, along with a 'Status' dropdown menu set to 'Active'. The main table has columns for SSN, PTIN, Preparer Name, and Status. One entry is shown: PTIN S12312322, Preparer Name Jane Doe, Status Active. An 'Edit' button is next to this entry. At the bottom left, there is a '+ Add' button and a link 'Add Preparer'. At the bottom right, there is a '< Return' button.

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

23. When you finish adding preparers, click **Return**.

## Working with Custom Questions

This chapter covers the following actions:

- Configure custom questions and answers.

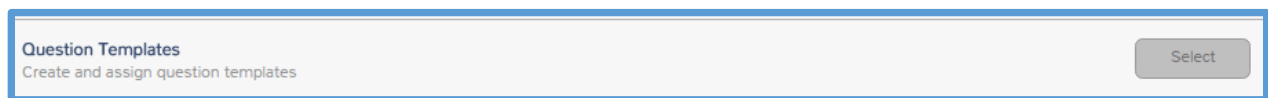
TaxSlayer Pro Online allows you to set up custom questions that preparers can use to capture data during the return preparation process. You can use the predefined questions or add more questions.

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:

**Edit Questions**

Log out

< Back + Add

No existing questions found.

+ Add Add Question

**Assigned Questions**

Question	Required
Other than English what language is spoken in your home?	Yes
Are you or your spouse a Veteran from the US Armed Force?	Yes
Do you or any member of your household have a disability?	Yes

< Back

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:

**Add Question**

Log out

< Back

Question

Is Required

**Available Answers**

Answer

No existing answers found.

+ Add Add Answer

✓ Save < Back

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

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

10. To add more questions, click **Add** and follow the same steps.



## Working with Taxpayer Profiles

This chapter covers the following actions:

- Create taxpayer profiles.
- Add forms to a taxpayer profile.
- Edit taxpayer profiles.
- Delete taxpayer profiles.
- Select a taxpayer profile when starting a new return.
- Locate a list of forms you can add to a taxpayer profile.

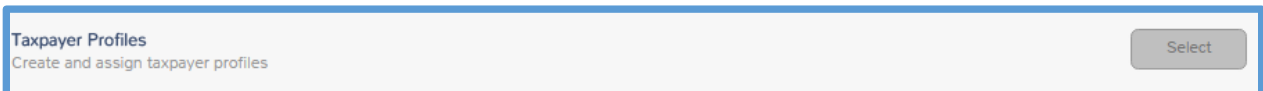
In TaxSlayer Pro Online, you can set up taxpayer profiles. Preparers can select taxpayer profiles when starting a new return to easily navigate through the common forms you use at your site. You can use the **Master Profile** or add additional profiles.

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

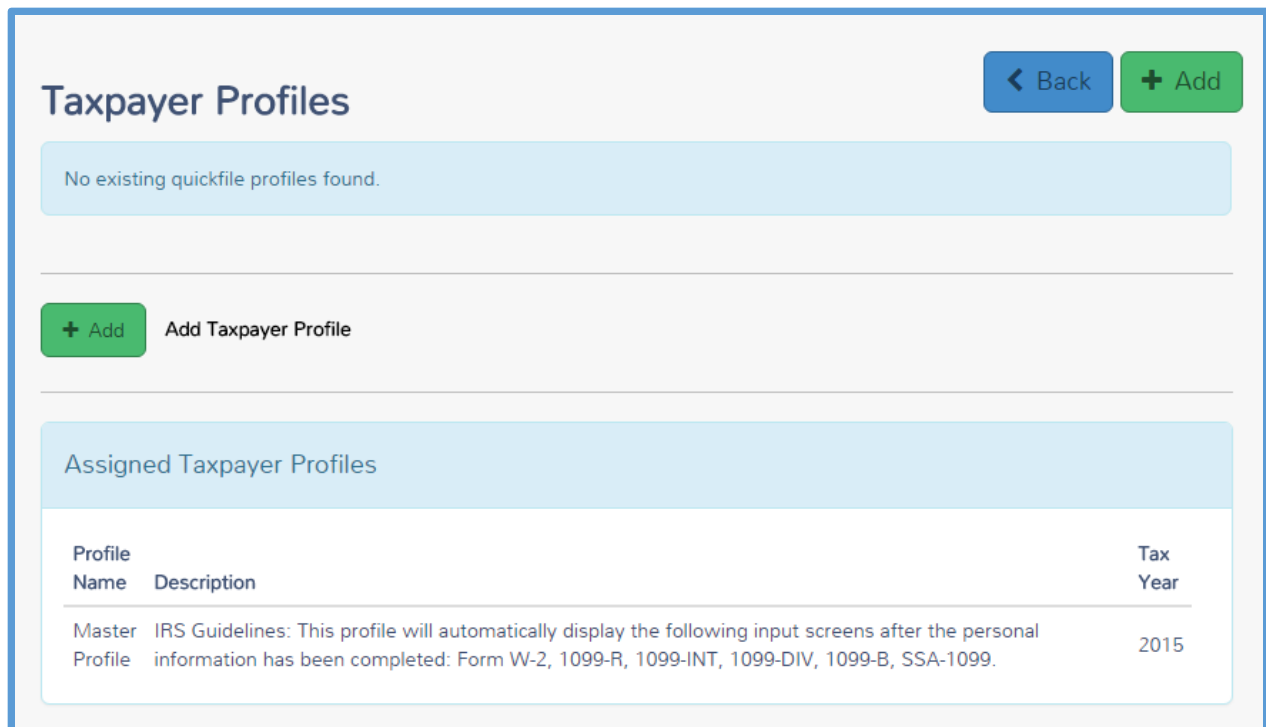
### Adding a Taxpayer Profile

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:



**Taxpayer Profiles** Back Add

No existing quickfile profiles found.

Add Add Taxpayer Profile

**Assigned Taxpayer Profiles**

Profile Name	Description	Tax Year
Master Profile	IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.	2015

**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:

**Edit Taxpayer Profile**

Profile Name

Description

Tax Year 2015 ▼

Tax Form (Lookup)

Selected Tax Forms

#### *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 tax year from the **Tax Year** list.

#### *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 TaxSlayer Pro Online knowledgebase.

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	
↑↓ 1099-INT, Interest Income	✕
↑↓ Contract and Self Employment Income and Losses	✕
↑↓ Payments made for Self-Employed Health Insurance	✕
↑↓ 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:

## Taxpayer Profiles

← Back
+ Add

Profile Name	Description	Tax Year	
Sample Taxpayer Profile	This profile is going to load the following forms after the Basic Information section has been completed: 1099-INT, 1099-INT for Tax Exempt Interest, and 1099-DIV	2015	<span>Edit</span> <span>Delete</span>

+ Add Add Taxpayer 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:

The screenshot shows the 'Edit Taxpayer Profile' page. At the top right are two buttons: a blue '< Back' button and a green '✓ Save' button. The main form area has a title 'Edit Taxpayer Profile' on the left. Below the title are three input fields: 'Profile Name' with the text 'Self-employed', 'Description' with the text 'This taxpayer profile lists common forms for self-employed individuals.', and 'Tax Year' with a dropdown menu showing '2015'. Below these fields is a section titled 'Tax Form (Lookup)' with an empty input field.

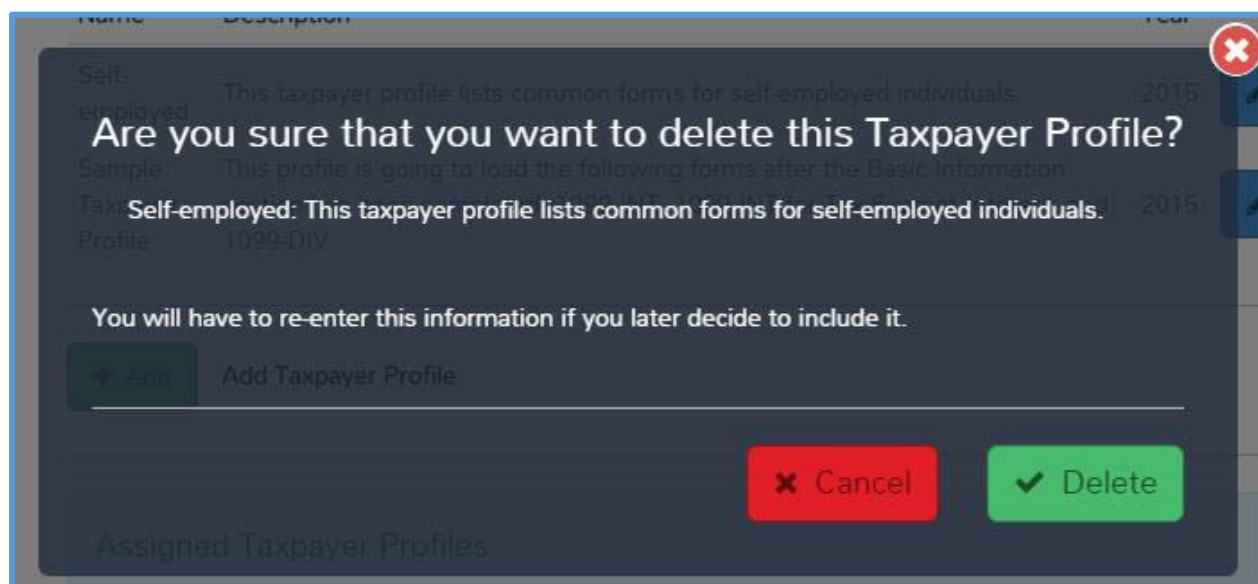
2. Edit the profile name, description, or tax year as needed.
3. Add and sort forms as described previously in this lesson.
4. Click **Save** to save the edited profile.

## 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.

### 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:

- Add a new consent form.
- Edit an existing consent form.
- Delete a consent form.

### 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:

Log out

< Back + Add

### Consent Forms

No existing consent forms found.

+ Add Add Consent Form

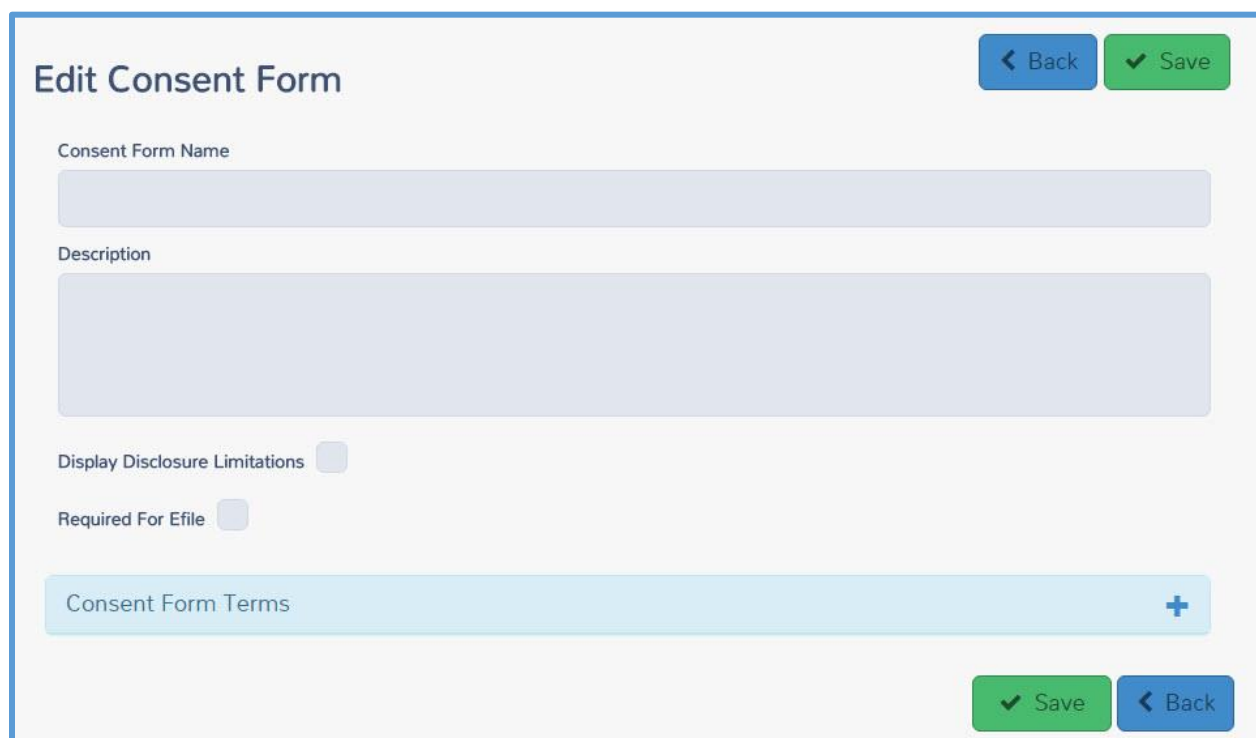
#### Assigned Consent Forms

Name	Description	Required for e-File	Allows Limitations
Consent to send reporting data	We need to send your tax data to another office for reporting purposes	No	Yes

< Back

2. Click **Add**.

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



3. Type a name and description for your consent form.
4. Select the **Display Disclosure Limitations** check box if you need to display the disclosure limitations (optional)
5. If you want to require that the preparer obtain consent using this form before e-filing a return, select the **Required for Efile** check box.
6. Click the **Add** icon in the **Consent Form Terms** section.

TaxSlayer Pro Online expands the **Consent Form Terms** section:





7. Type the term, which is typically 1 year.
8. Do one of the following:
  - a. If you do not want a definition, but want the preparer to be able to input this information instead, select the **Input Only** check box.
  - b. Type the definition. Remember to be descriptive so the preparer and taxpayer can see the exact terms of the consent and knowingly accept those terms. (Recommended option)
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, use the following steps from the **Consent Forms** page:

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

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

**Edit Consent Form** < Back ✓ Save

Consent Form Name  
Test Consent

Description  
Test Consent Description

Display Disclosure Limitations ☒

Required For Efile ☐

Consent Form Terms +

↑↓ This is the term. - Term definition. ✕ ↺

✓ Save < Back

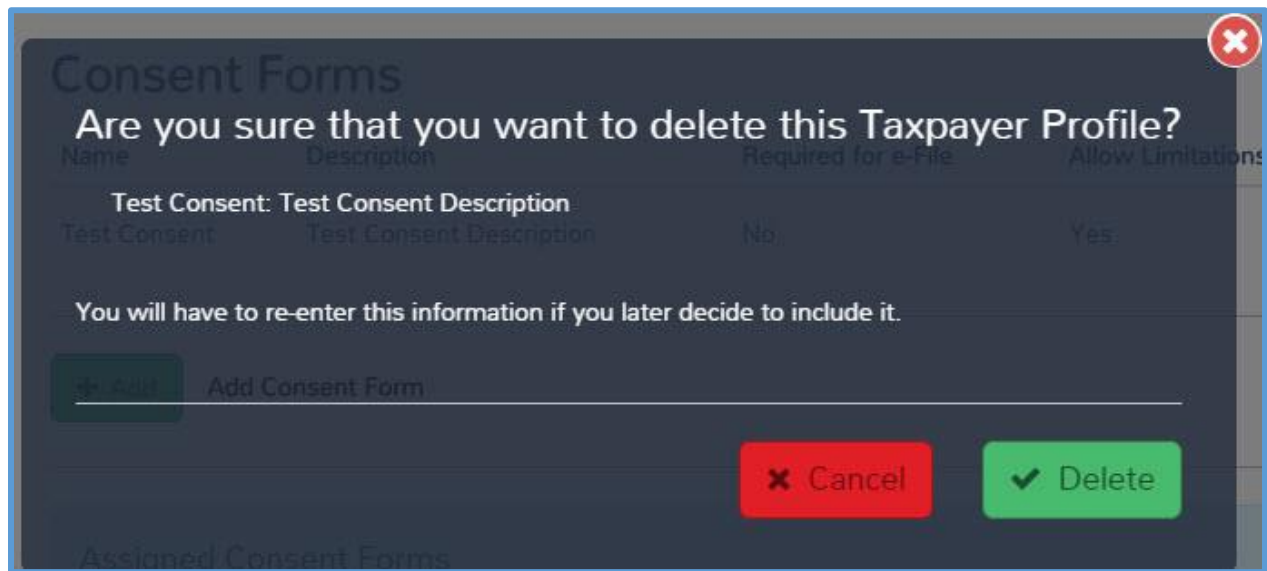
2. Make any changes to the consent the same as when you created a new consent.

## Deleting a Consent

If you later need to delete a consent form, use the following steps from the **Consent Forms** page:

1. Click **Delete** for the consent form you want to delete.

TaxSlayer Pro Online displays a confirmation message:



2. Ensure that you want to delete the consent form, and then click **Delete**.

TaxSlayer Pro Online deletes the consent form and removes it from the list.

**NOTE:** You cannot retrieve a consent form after you delete it. Make sure that you want to delete the consent form to avoid re-entering the information.

TaxSlayer Pro Online prints the consent form with the tax return.

## Configuring Printing

This chapter covers the following actions:

1. List the predefined 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 **MASTER PRINT** sets assigned by TaxSlayer. TaxSlayer Pro designed these print sets to follow the IRS guidelines.

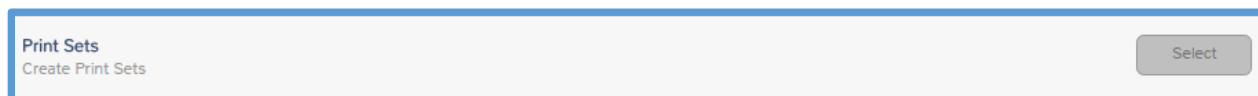
The following print sets will be available for printing the return, but cannot be modified:

- a) One Copy – Federal and State
- b) Two Copies – Federal and State
- c) Three Copies – Federal and State
- d) One Copy – Federal Only
- e) One Copy – 1040 Only
- f) One Copy – State Only
- g) One Copy – Form 8879 Only
- h) Print Invoice

### View Master Print

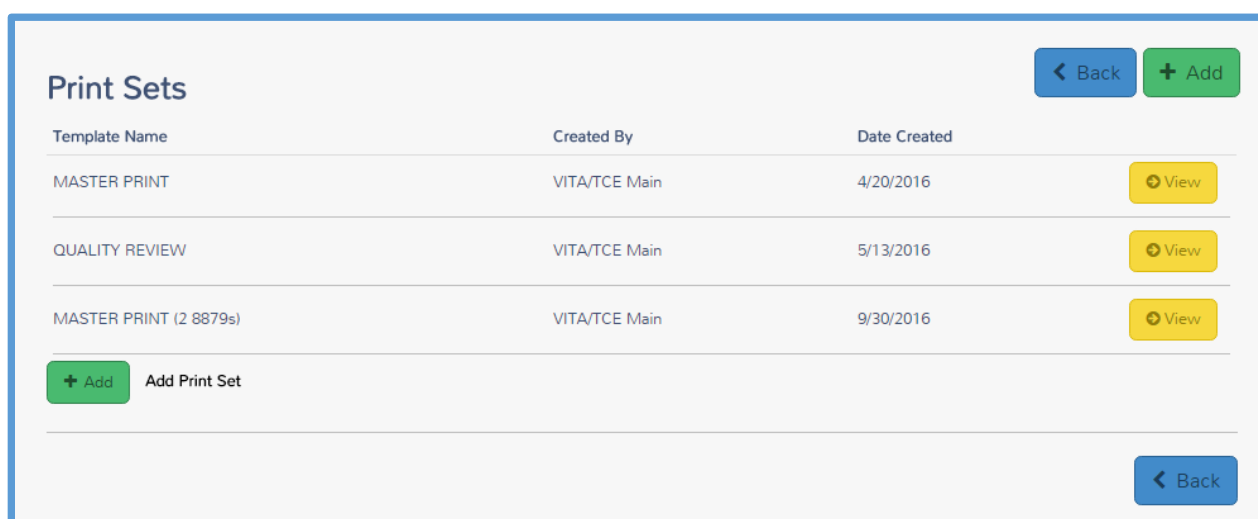
To view the contents of the assigned **Master Print** sets, use the following steps from the **Welcome** page:

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



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

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



3. To view the **Master Print** set, click **View**. You cannot edit this print set. This print set prints one copy of Form 8879 and one copy of each federal and applicable state return.

### 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

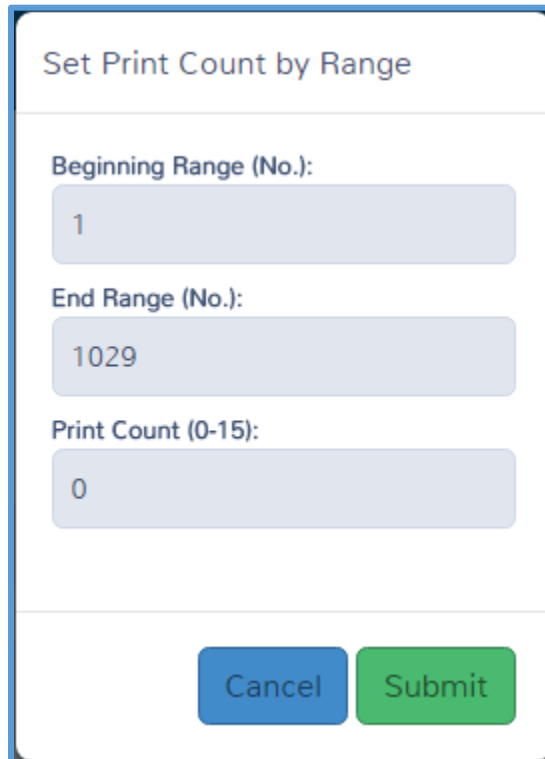
No.	Fed/St	Form/Schedule Name	Number of Copies
1	FD	Client Invoice	0
2	FD	Cover Page	0
3	FD	Federal Electronic Filing	0
4	FD	Instant Loan Filing Fee	0

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.):  
1029

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:

**Print Set Setup**

Log out

< Return   ✓ Save

+ Set Range

Print Set Name

Search forms...

Filter by state

No.	Fed/St	Form/Schedule Name	Number of Copies
1	FD	Client Invoice	2
2	FD	Cover Page	2
3	FD	Federal Electronic Filing	2
4	FD	Instant Loan Filing Fee	2

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:

**Print Sets**

Log out

< Back   + Add

Template Name	Created By	Date Created		
Example	VITA/TCE Training Site	4/14/2016	Edit	Delete
3189 Master Print	IRS	4/11/2016	View	Delete

+ Add   Add Print Set

< Back

9. Click **Add** and follow the same steps for any additional print sets you want to use.

10. When you finish adding print sets, click **Back** to return to the **Configuration Menu** landing page.

## Managing Returns

This chapter covers the following actions:

1. Set up return tags.
2. Filter returns by return tags.
3. Delete returns.
4. Restore returns.
5. Add taxpayer notes.
6. Send messages.

### Working with Return Tags

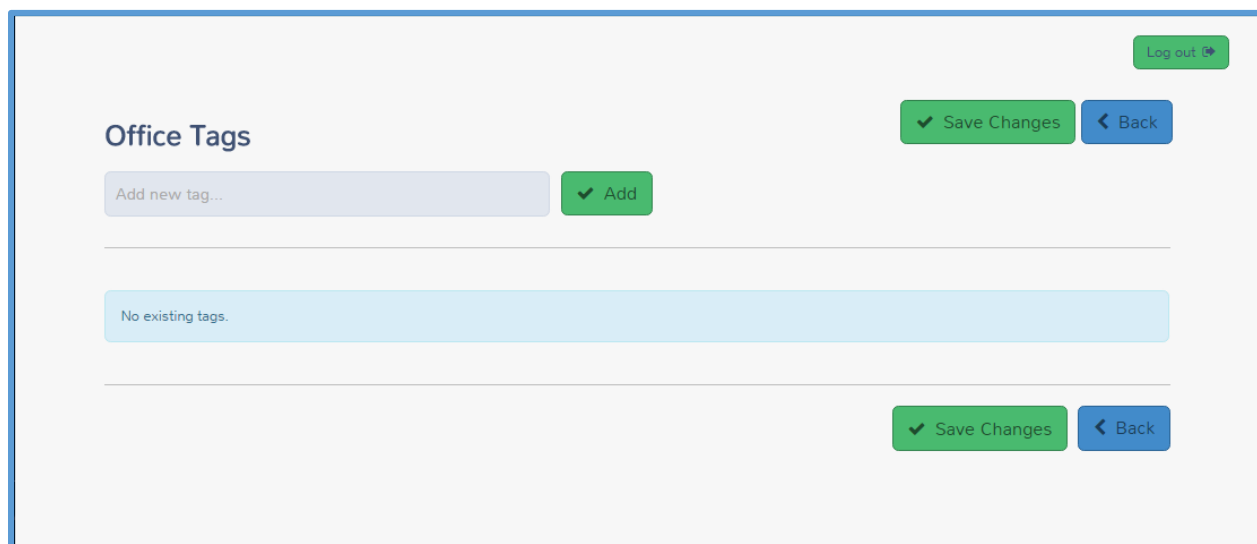
You can create a customized list of return tags to manage the status of the returns at your site.

#### *Setting up Return Tags*

TaxSlayer Pro Online does not have default return tags. You can create these while configuring the site. To add return tags, use these steps from the **Configuration Menu** page:

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

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



2. Type a tag name in the **Add new tag** box; for example: Missing Information.
3. Click **Add**.



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

Log out

Office Tags

✓ Save Changes < Back

Add new tag... ✓ Add

1	Missing Information	Edit	Delete
---	---------------------	------	--------

✓ Save Changes < Back

4. Repeat the steps until you add all the return tags you want.
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](#).

#### *Filtering Returns Using Return Tags*

You can filter returns by return tags. When you do this, you can determine any actions that you need to take to complete returns. To filter returns, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:

Log out

< Back

### Office Client List

2015 Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: Any Tag

Search Client list

Showing 1 to 1 of 1 entries (filtered from 113 total entries)

Previous 1 Next

SSN	NAME	PHONE	PREPARER	STATUS
114-00-1717	Taxpayer Example	(770) 555-3636	Admin Preparer	Complete

Tools Select

2. 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:

Log out

< Back

### Office Client List

2015 Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: WAITING ON SIGNATURE

Search Client list

Showing 1 to 1 of 1 entries (filtered from 113 total entries)

Previous 1 Next

SSN	NAME	PHONE	PREPARER	STATUS
114-00-1717	Taxpayer Example	(770) 555-3636	Admin Preparer	Complete

Tools Select

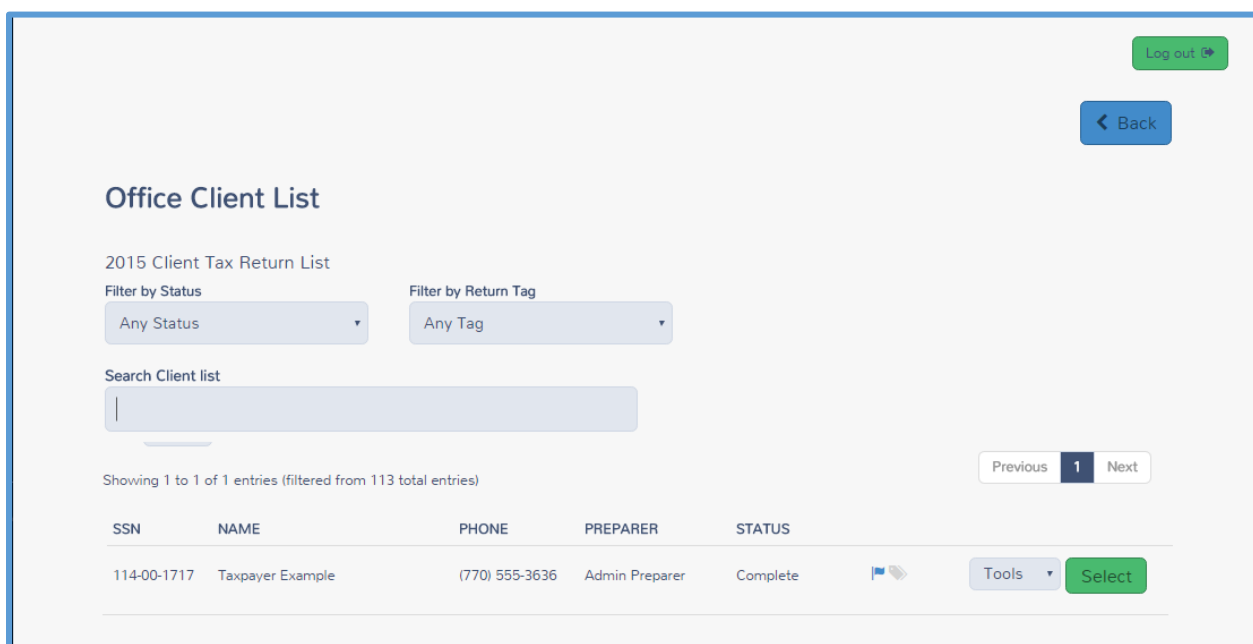
## Deactivating/Deleting Returns

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

When you deactivate a return, TaxSlayer Pro Online makes it unavailable for edits. To deactivate a return, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:



Office Client List

2015 Client Tax Return List

Filter by Status: Any Status

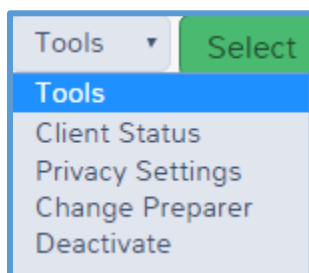
Filter by Return Tag: Any Tag

Search Client list

Showing 1 to 1 of 1 entries (filtered from 113 total entries)

SSN	NAME	PHONE	PREPARER	STATUS	
114-00-1717	Taxpayer Example	(770) 555-3636	Admin Preparer	Complete	<div>Tools Select</div>

2. Find the return you want to deactivate.
3. From the **Tools** drop-down list, select **Deactivate**, as shown below:



Tools Select

Tools

- Client Status
- Privacy Settings
- Change Preparer
- Deactivate

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

Log out

**Deactivate Return**

Are you sure you want to deactivate this return? No ▾

Warning: Once a return is deactivated it cannot be reactivated.

✕ Cancel ✓ Continue

✕ Cancel ✓ Continue

4. Select **Yes** from the drop-down list.
5. Click **Continue**.

TaxSlayer Pro Online deactivates the return and changes the status on the **Office Client List** to **Deleted**:

Showing 1 to 4 of 4 entries (filtered from 155 total entries)

Previous **1** Next

SSN	NAME	PHONE	PREPARER	STATUS	
111-00-1233	Test Return	(770) 555-1212	Admin Preparer	Deleted	

### *Reactivating a Return*

If you later need to prepare a return for this taxpayer, use the following steps:

1. Start a new return.

TaxSlayer Pro Online displays the **Create New Return** page with information on the deactivated return:

The screenshot shows the 'Create New Return' page. At the top, there are two input fields for the Social Security Number (SSN), each with three dots indicating masked digits. Below these is a message: '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
looking changes	Bob Smith	Deleted	09/12/2016	09/13/2016

Below the table are two buttons: 'Remove and Create New' (yellow) and 'Reactivate' (green). At the bottom, there is a red message: 'There is an inactive return using this SSN. You can choose to either reactivate the existing return or replace it with a new one.' and a green button labeled 'Start Return'.

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 Taxpayer Notes

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

taxpayer. You can either add a taxpayer note while in the return or from the return list.

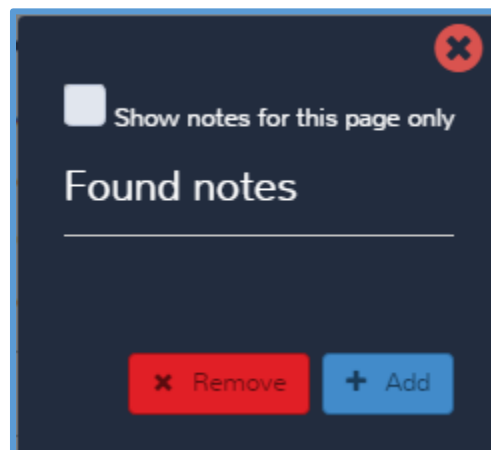
To add a note while in a tax return, use the following steps:

1. Click the **Tools** drop-down list, as shown below:



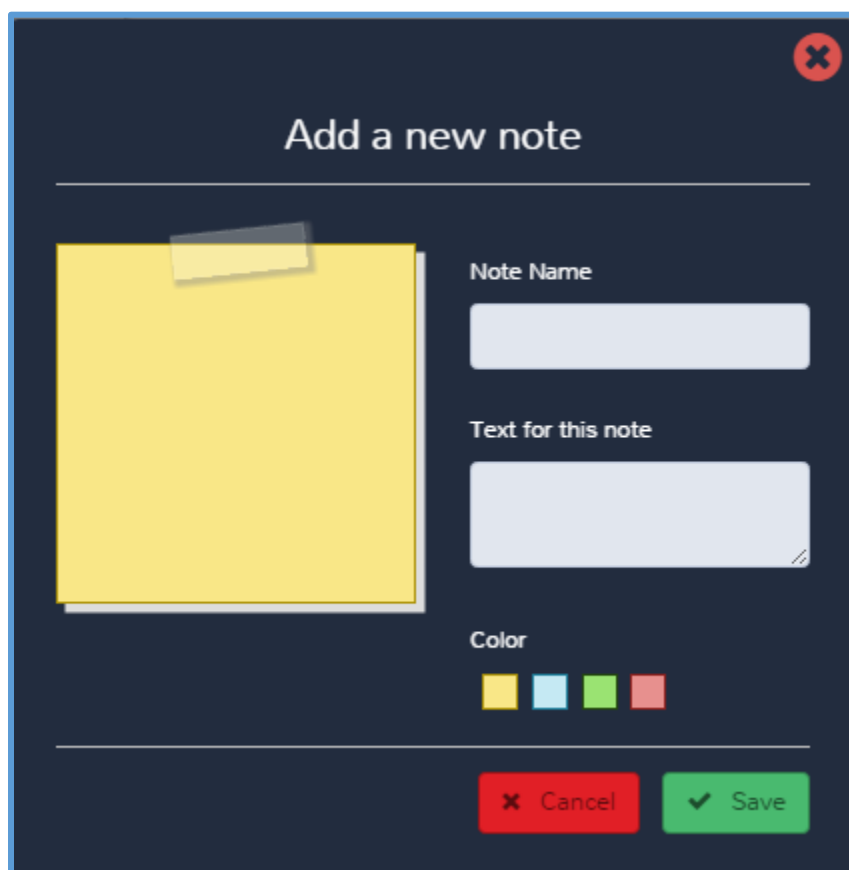
2. Click **Notes**.

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



3. Click **Add**.

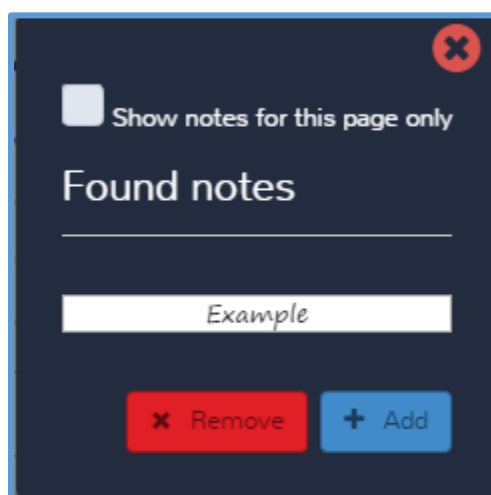
TaxSlayer Pro Online displays the **Add a new note** window:



The screenshot shows a dark-themed window titled "Add a new note" with a red close button in the top right corner. On the left is a large yellow sticky note icon. To the right are two text input fields: "Note Name" and "Text for this note". Below these is a "Color" section with four colored squares (yellow, light blue, green, red). At the bottom are two buttons: a red "Cancel" button with a close icon and a green "Save" button with a checkmark icon.

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:

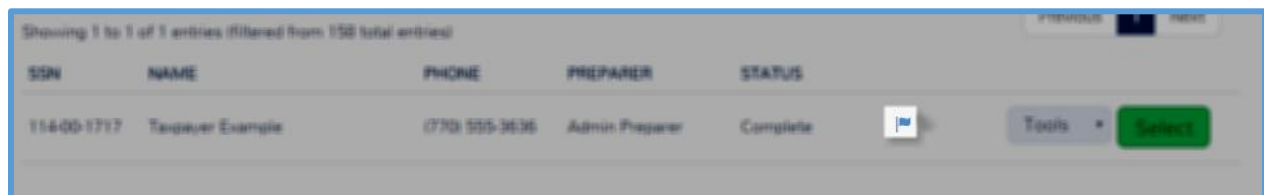


The screenshot shows a dark-themed window titled "Found notes" with a red close button in the top right corner. At the top left is a checkbox labeled "Show notes for this page only". Below the title is a text input field containing the word "Example". At the bottom are two buttons: a red "Remove" button with a close icon and a blue "Add" button with a plus icon.


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**:

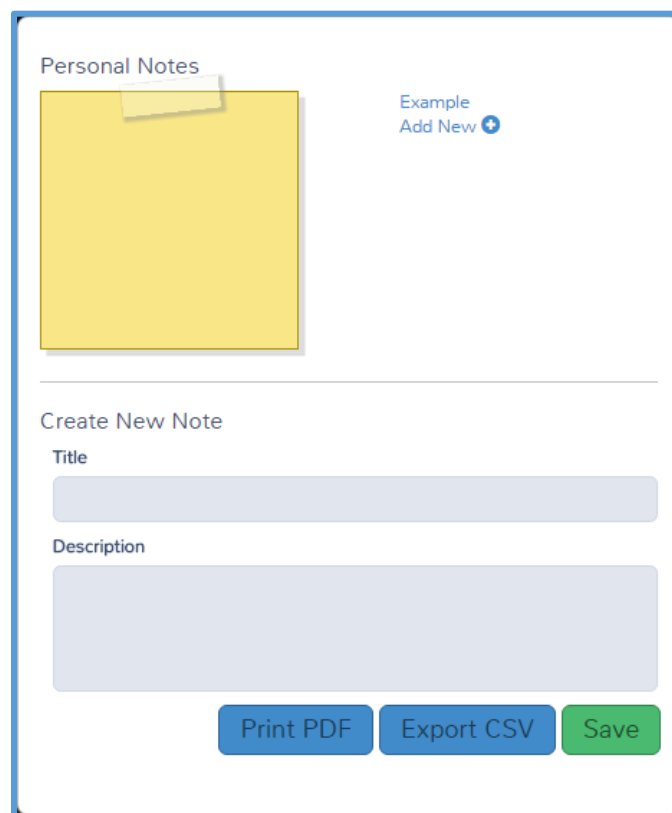
1. Find the taxpayer in the list.
2. Click the **Edit Notes** icon, as shown below:




Showing 1 to 1 of 1 entries (Filtered from 158 total entries)

SSN	NAME	PHONE	PREPARED	STATUS		Tools	Select
11400-1717	Taxpayer Example	(770) 555-3636	Admin Preparer	Complete			

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



Personal Notes

Example  
Add New 

Create New Note

Title

Description

Print PDF Export CSV Save

3. Click existing notes (listed at the upper right) to review them. In the screenshot above, the existing note is named **Example**.
4. To add a new note, type the title and description in the appropriate boxes.



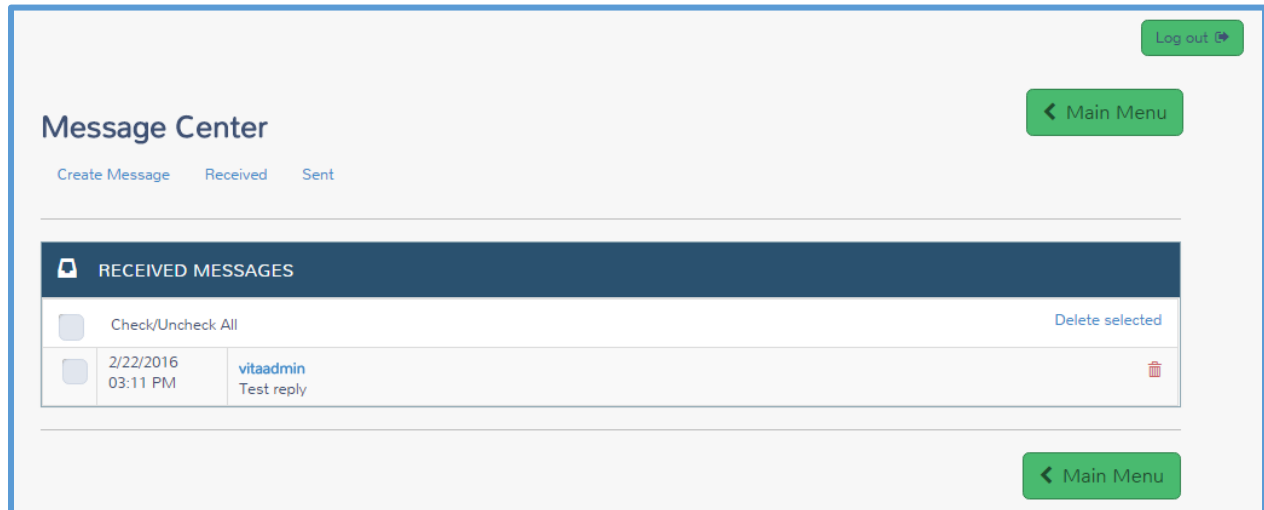
5. Click **Save**.
6. If you need to add more notes, click **Add New** and use the same steps to add the new note.
7. If you need to print or export a note, click **Print PDF** or **Export CSV**.
8. When you finish adding notes, click the **X** to close the window.

## 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's a header with 'Message Center' and a green 'Main Menu' button. Below the header, there are tabs for 'Create Message', 'Received', and 'Sent'. The 'CREATE MESSAGE' section is highlighted with a dark blue bar. Inside this section, there's a green button labeled '+ Select recipients', a checkbox labeled 'allow responses' which is checked, and a large text area for entering the message. Below the text area, it says 'Max 500 characters'. At the bottom of the section, there are two buttons: a green 'Send' button and a red 'Cancel' button. A second green 'Main Menu' button is located at the bottom right of the page.

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**.

## Working with Reports

This chapter covers the following actions:

1. Run reports.
2. Filter reports.
3. Export reports.

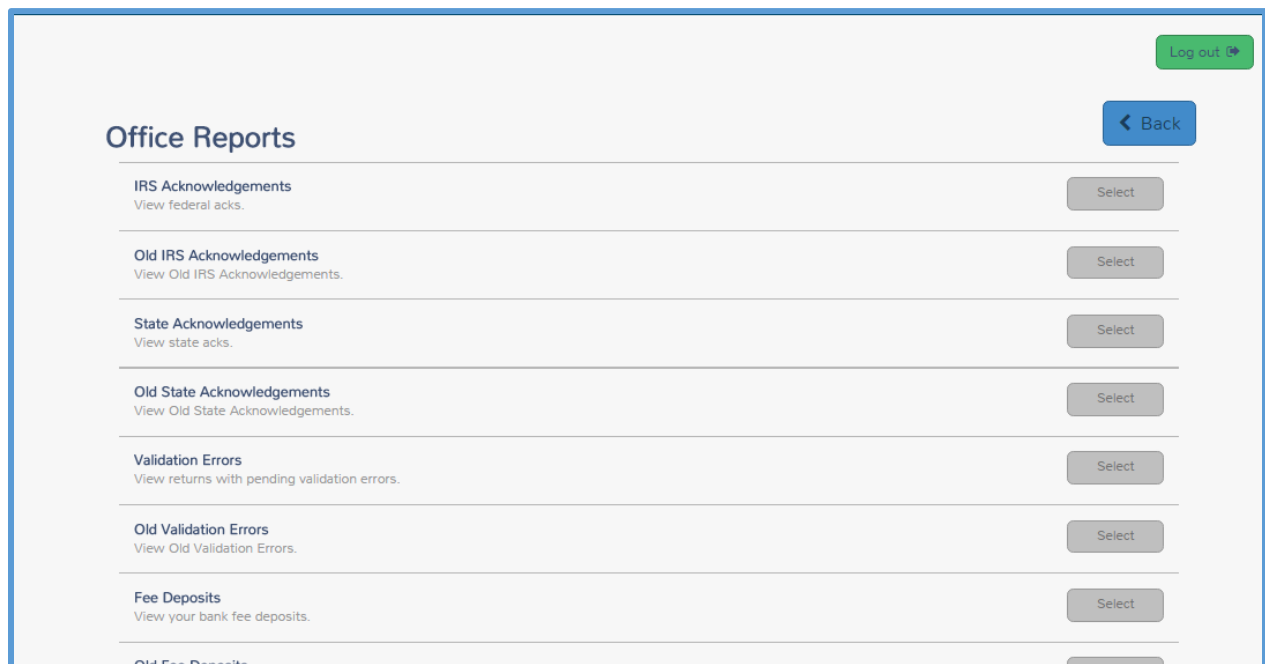
TaxSlayer Pro Online provides several reports that you can run to help manage returns.

### 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 Reports** page:



**NOTE:** TaxSlayer will deliver additional reports to help the management process of the sites.

2. 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:

#	Primary SSN	Office Name	Are you or your spouse a Veteran from the US Armed Force?	Do you or any member of your household have a disability?	Other than English what language is spoken in your home?
1	[REDACTED]	VITA/TCE Practice Lab	NO	NO	NONE
2	[REDACTED]	VITA/TCE Practice Lab	NO	NO	NONE
3	[REDACTED]	VITA/TCE Practice Lab	YES	NO	NONE
4	[REDACTED]	VITA/TCE Practice Lab	YES	NO	CHINESE
5	[REDACTED]	VITA/TCE Practice Lab	NO	YES	TAGALOG
6	[REDACTED]	VITA/TCE Practice Lab	YES	NO	NONE
7	[REDACTED]	VITA/TCE Practice Lab	NO	NO	NONE
8	[REDACTED]	VITA/TCE Practice Lab			

### 3. Review the information on the report.

#### *Searching and Sorting*

4. 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.
5. Click the column heading to sort by that column.

#### *Printing*

6. 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*

7. 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.

## Managing Multiple Sites

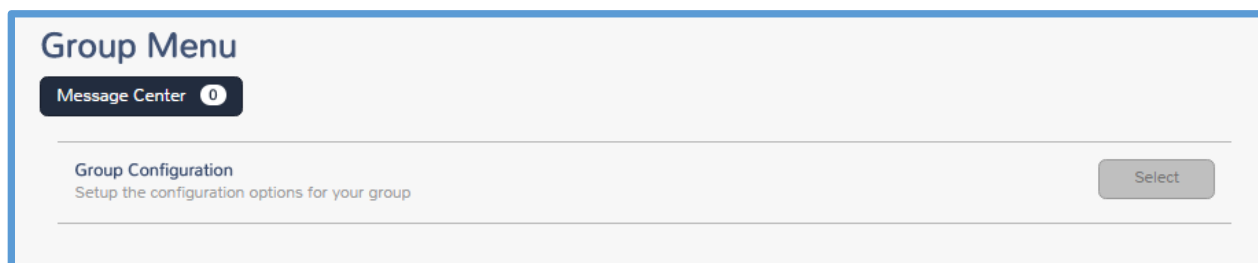
This chapter covers the following actions:

1. Log in as the multi-site administrator.
2. List management options.

If you manage multiple sites, your site 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, password, and security code.

**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:



## 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

For this example, when you set up custom questions, you can assign the questions to groups or offices, as shown below:

**NOTE:** This feature is available to **ALL** multi-site administrators.

Log out

### Assign Questions

Default Question Template

Questions

Other than English what language is spoken in your home?

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

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

Assign template to:

**Groups** Check/Uncheck All

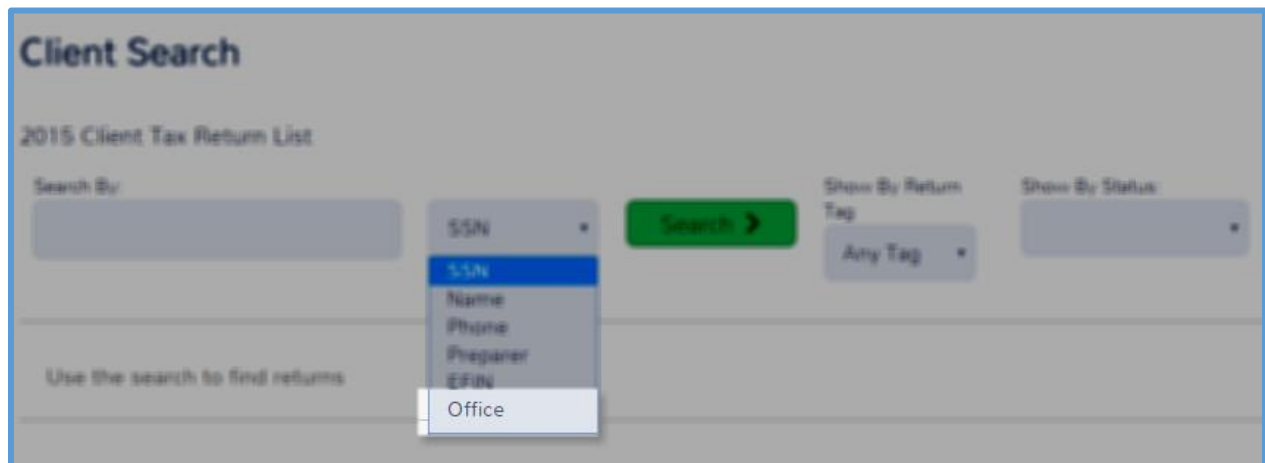
- ☐ aarp
- ☐ Multi Site Admin

**Offices**

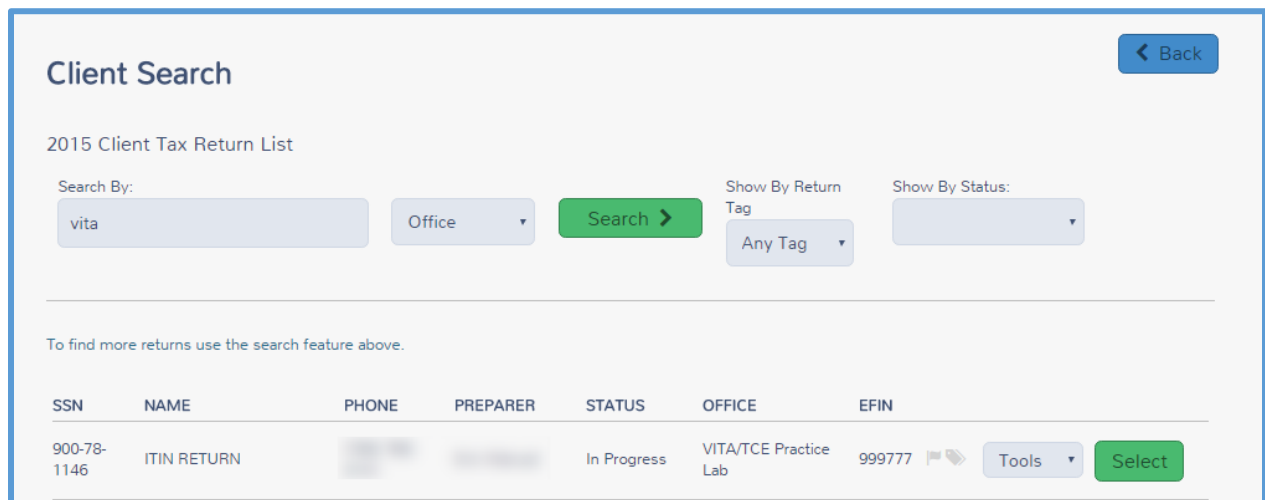
- ☒ Multi site 1
- ☒ Multi Site 2
- ☒ Multi Site 3

### Searching by Office (Relational EFIN required)

In many features, you can search by office. This way, you can run reports or search for clients in one of your offices. For example, on the **Client Search** page, you can search by office, as shown below:



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



### Accessing Offices (Relational EFIN Required)

You can access each of your offices through the multiple site administration if you are using a Relational EFIN. 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:

Log out

### Company's Office(s)

Search By:

OFFICE NAME	LOCATION	EFIN	
Multi site 1	ROME, GA	001139	Edit
Multi Site 2	Unknown		Edit
Multi Site 3	Unknown		Edit
Multi Site 4	Unknown		Edit
Multi Site 5	Unknown	555555	Edit
Multi site 6	ROME, GA	555555	Edit
VITA/TCE Practice Lab	Evans, GA	999777	Edit

2. Click **Edit** for the office you want to access.

TaxSlayer Pro Online displays the **Welcome** page for that office:

Log out

### Welcome to Multi site 1

Message Center 0

Select Another Office  
Use this option to select another office managed by your company. Select

Client Search  
Edit returns you previously started. Select

Review Returns  
Returns that are currently waiting to be reviewed. Select

Configuration  
Setup the configuration options for your office. Select

Reports  
Print acks, mailing labels, bank reports, and old reports. Select

Transmissions  
Transmit returns to IRS. Select

Print Check(s)  
Print ERC checks. Select

3. You can use all of the features for this office just as discussed in the other topics.

4. If you need to select another office to access, click **Select** on the **Select Another Office** line.
5. When you finish working with this office, click **Return** to return to your multiple office **Welcome** page.

# 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.

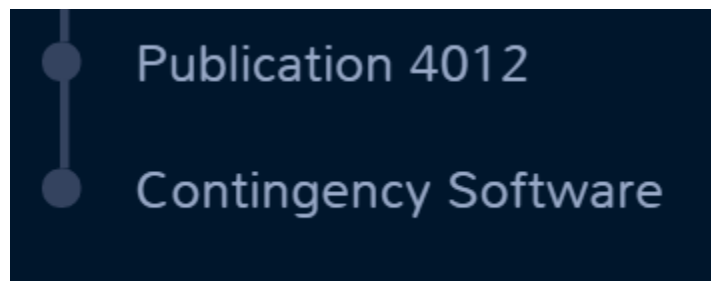
### TaxSlayer Pro

TaxSlayer makes a contingency procedure available in the rare event that the web site becomes unavailable. 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.

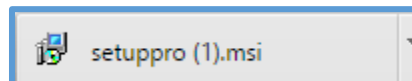
To download the desktop application, use the following steps:

1. Log in to TaxSlayer Pro Online.
2. Click **Contingency Software**, located as shown below:



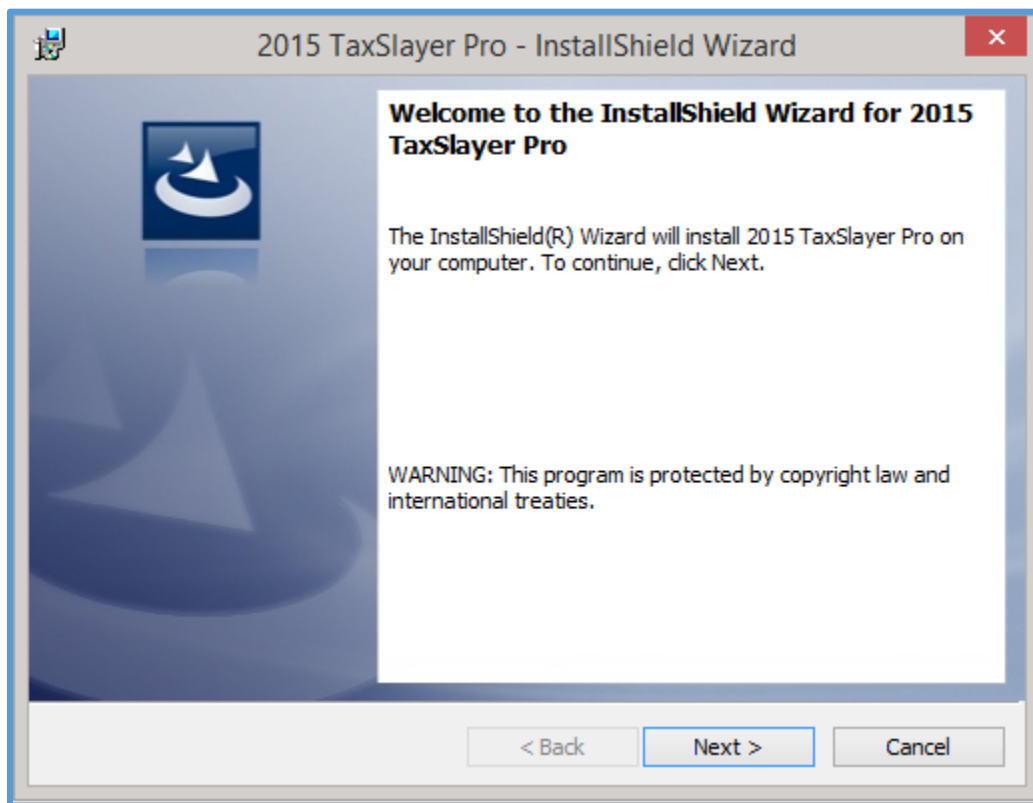
**Note:** TaxSlayer Pro Online directs you to log in to your **My Account** page to download the software.

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.

**Tip:** For a complete listing of contingency options, refer to IRS Publication 4396-A, *Partner Resource Guide*.

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 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

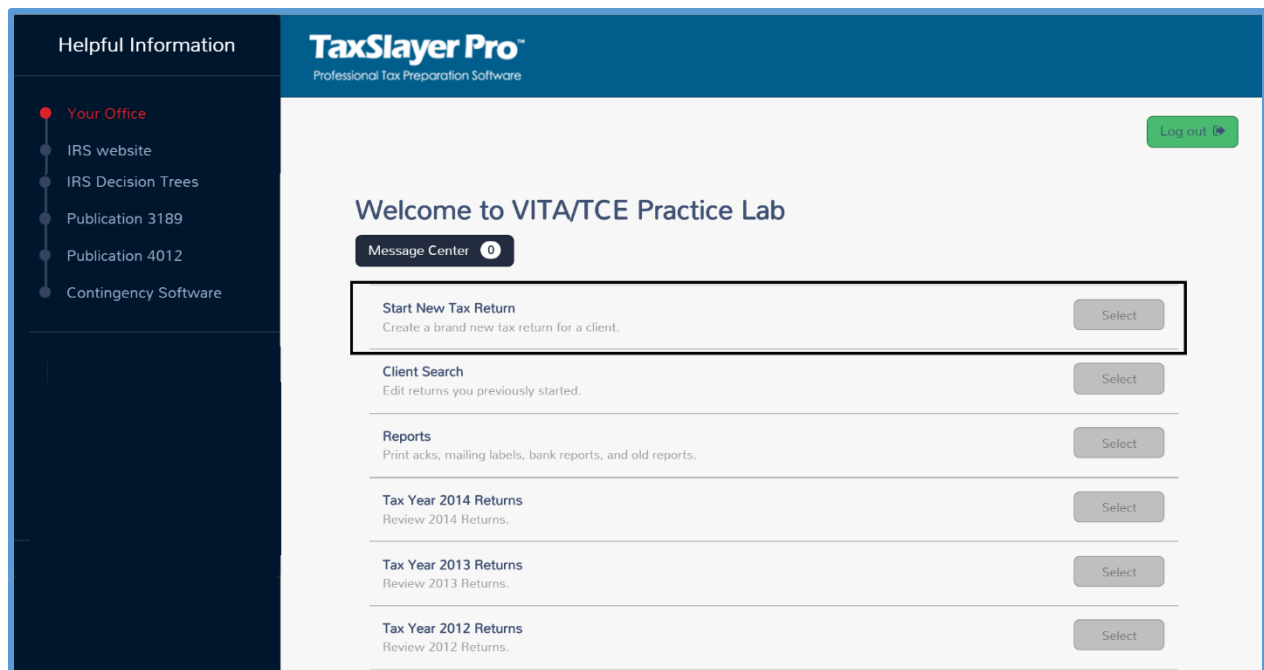
## Starting a Tax Return

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 **Create Tax Return** page:

Available Taxpayer Profiles

**Office Profiles**

[Basic \(No Profile\)](#)  
Create a return without a Taxpayer Profile.

[Sample Taxpayer Profile](#) ✓  
This profile is going to load the following forms after the Basic Information section has been completed: 1099-INT, 1099-INT for Tax Exempt Interest, and 1099-DIV

**Assigned Profiles**

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

Enter Social Security Number

Social Security Number

Confirm Social Security Number

Start Return

1. Select a taxpayer profile, or select **Basic (No Profile)** to prepare the return without a taxpayer profile.
2. Type the taxpayer's Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN).
3. Type the taxpayer's Social Security number or ITIN again for verification. Use the taxpayer's documentation to type the number both times to avoid an incorrect entry.
4. 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:

The screenshot shows the TaxSlayer Pro interface. At the top, there's a blue header with the 'TaxSlayer Pro' logo and 'Professional Tax Preparation Software'. Below the header, there are tabs for 'Filing Status', 'Personal Information', and 'Dependents'. On the left, a dark blue sidebar contains a search bar 'Enter the Form Number...' and a list of navigation items: 'Basic Information' (highlighted with a red dot), 'Federal Section', 'Health Insurance', 'State Section', 'Summary/Print', 'e-File', '2015 Amended Return', 'Save & Log Out', and 'Scanned Documents'. The main content area is titled 'What's your filing status?'. It features five radio button options: 'Single', 'Married Filing Joint', 'Married Filing Separate', 'Head of Household', and 'Qualifying Widow(er) with Dependent Children'. To the right of these options, there's a link 'Need help determining your filing status?' with a 'Filing Status Wizard' button. At the bottom right, there are two buttons: a red 'Cancel' button and a green 'Continue' button.

## Working in the Return

### *Layout and Links*

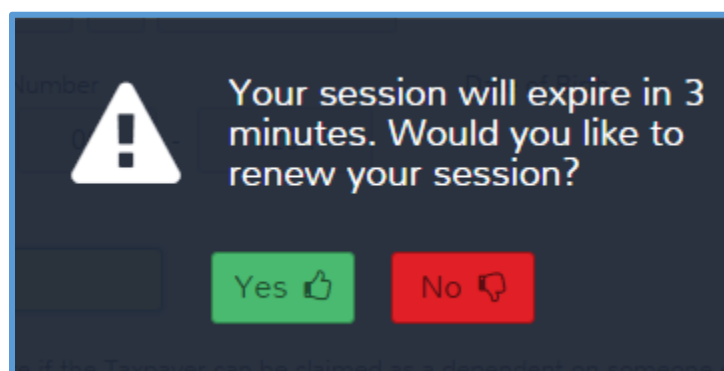
Use the left navigation bar to determine your current section of the tax return. The links at the top of the page show you more detail on the section.

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



### *Session Expiration*

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



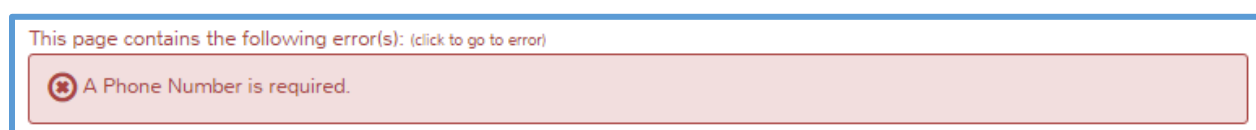


Click **Yes** to remain logged in. If TaxSlayer Pro Online logs you out, you will need to log in again.

**TIP:** TaxSlayer Pro Online saves the data you enter when you click **Continue** on each page. If your session times out before you click **Continue**, TaxSlayer Pro Online does not save the data.

### *Required Information*

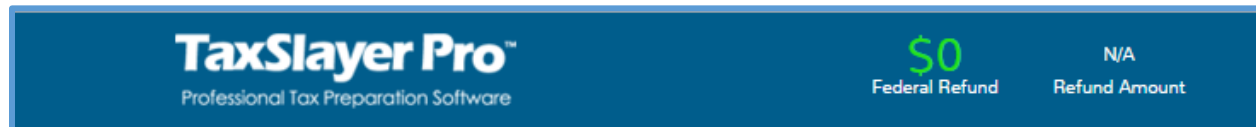
If you do not complete a required box on the page and attempt to continue to the next page, TaxSlayer Pro Online displays a warning in red at the top of the page:



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

### *Refund Amount*

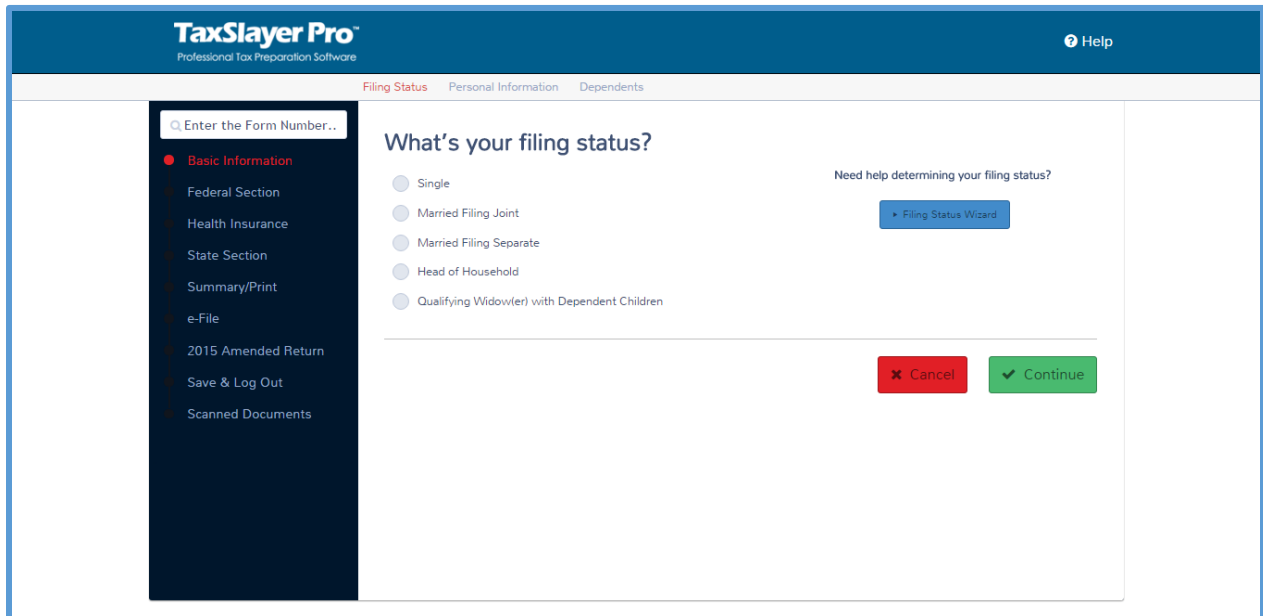
As you work through the return, TaxSlayer Pro displays the federal and state refund amount at the top of the page:



**NOTE:** If you have not added a state, TaxSlayer Pro Online displays **N/A** for the state refund amount.

## 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 TaxSlayer Pro software interface. At the top, there's a blue header with the 'TaxSlayer Pro' logo and 'Professional Tax Preparation Software' text. A 'Help' icon is in the top right. Below the header, a navigation bar shows 'Filing Status' as the active tab, with 'Personal Information' and 'Dependents' as options. On the left, a dark sidebar contains a search bar 'Enter the Form Number..' and a list of menu items: 'Basic Information' (highlighted with a red dot), 'Federal Section', 'Health Insurance', 'State Section', 'Summary/Print', 'e-File', '2015 Amended Return', 'Save & Log Out', and 'Scanned Documents'. The main content area is titled 'What's your filing status?'. It features five radio button options: 'Single', 'Married Filing Joint', 'Married Filing Separate', 'Head of Household', and 'Qualifying Widow(er) with Dependent Children'. To the right of these options, there's a link 'Need help determining your filing status?' with a 'Filing Status Wizard' button. At the bottom right of the main area are two buttons: a red 'Cancel' button and a green 'Continue' button.

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

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

### *Using the Filing Status Wizard*

If you need help determining the filing status, use the following steps:

1. Click **Filing Status Wizard**.

## TaxSlayer Pro Online displays the **Filing Status Wizard**:

The screenshot shows the 'Filing Status Wizard' interface. At the top, there are tabs for 'Filing Status', 'Personal Information', and 'Dependents'. On the left, a dark sidebar contains a search bar 'Enter the Form Number..' and a list of menu items: 'Basic Information' (highlighted with a red dot), 'Federal Section', 'Health Insurance', 'State Section', 'Summary/Print', 'e-File', '2015 Amended Return', 'Save & Log Out', and 'Scanned Documents'. The main content area is titled 'Filing Status Wizard' and contains the question 'Were you considered married on December 31st of last year?'. Below the question is a note: 'Note: You are considered married for tax purposes if your spouse passed away during 2015 and you did not remarry.' At the bottom right of the main area are two buttons: a red 'No' button with an 'X' icon and a green 'Yes' button with a checkmark icon.

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

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

The screenshot shows the 'Filing Status Wizard' interface after the user has completed the questions. The title 'Filing Status Wizard' is at the top. Below it, the text reads: 'Based on your answers, your filing status should be **Single**.' At the bottom left is a blue button with a left arrow and the text 'Previous'. At the bottom right is a green button with a checkmark and the text 'Finished'.

3. Click **Finished**.

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

**What's your filing status?**

☒ Single

☐ Married Filing Joint

☐ Married Filing Separate

☐ Head of Household

☐ Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

[Filing Status Wizard](#)

Based on your answers, your filing status should be **Single**.

[Cancel](#) [Continue](#)

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 and 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.

## Entering State Information

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

If you selected a resident state, 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:

Filing Status Personal Information Dependents

### Just a few more questions.

Is your address different from the return you filed last year? --Select--

I authorize the electronic notification from taxing authorities at the e-mail address provided regarding any updates to my account(s). --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, TaxSlayer Pro Online displays the **Dependents or Qualifying Person(s)** page:

The screenshot shows the 'Dependents or Qualifying Person(s)' page. At the top, there are tabs for 'Filing Status', 'Personal Information', and 'Dependents'. The main heading is 'Dependents or Qualifying Person(s)'. Below it, a question asks: 'Do you have any Dependents or Qualifying Person(s) to claim on your return?'. A horizontal line separates this from a paragraph of explanatory text: '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.' At the bottom right, there are two buttons: a red 'No' button with a red 'X' icon and a green 'Yes' button with a green checkmark icon.

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:

The screenshot shows the 'Dependent / Qualifying Child Information' page. It contains several input fields: 'First Name', 'Middle', and 'Last Name' (each with a text box); 'Date of Birth:' with three dropdown menus for 'MM', 'DD', and 'YYYY'; a checkbox labeled 'Check if the dependent does not have an SSN/ITIN/ATIN'; 'Social Security Number:' with three text boxes separated by hyphens; 'Relationship:' with a dropdown menu showing '- Please Select -'; 'Number of months this person lived in your home during 2015:' with a dropdown menu showing '12'. Below these is a red note: '(Note: If this dependent was born in 2015, you must select 12 months)'. At the bottom, it says 'Please answer the following:' followed by four checkboxes with labels: 'Check if this person was a FULL-TIME student.', 'Check if this person was DISABLED.', 'Check if this qualifying child is NOT YOUR DEPENDENT.', and 'Check if you wish NOT to claim this dependent for Earned Income Credit purposes'.

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
<div><span>✕ Cancel</span><span>✓ Continue</span></div>	

## 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**.
2. Click the **BEGIN** button on the **IRS Identity Theft 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 message: "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 three input fields for PINs, each preceded by a label: "Sarah Test (XXX-XX-1146)", "spouse Test (XXX-XX-1146)", and "Dependent Test (XXX-XX-3315)". At the bottom right of the form are two buttons: a red "X Cancel" button and a green checkmark "Continue" button.

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
- Form 1040
- 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.

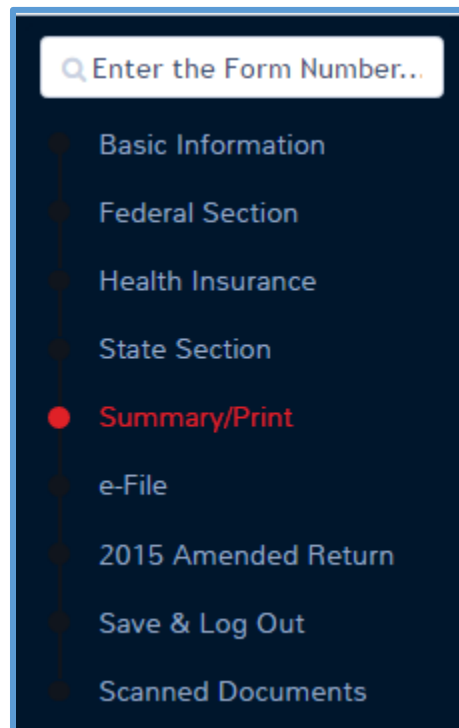


For information on creating a taxpayer profile, see [Working with Taxpayer Profiles](#).

## Form 1040

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.



TaxSlayer Pro Online displays the **Calculation Summary** page:

Reasons for no Earned Income Credit (EIC) [show details](#)

Form 1040 page: **1** **2** Summary View

---

**Form 1040** Department of the Treasury—Internal Revenue Service (99) **2015** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning \_\_\_\_\_, 2015, ending \_\_\_\_\_, 20

See separate instructions.

Your first name and initial <b>TEN FORTY</b>	Last name <b>VIEW</b>	Your social security number [REDACTED]
If a joint return, spouse's first name and initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions.  
**6 MATH DRIVE** Apt. no. ☐ Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).  
**Rome GA 30165**

Foreign country name \_\_\_\_\_ Foreign province/state/county \_\_\_\_\_ Foreign postal code \_\_\_\_\_

**Filing Status**

1 ☒ Single

2 ☐ Married filing jointly (even if only one had income)

3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ☐

4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ☐

5 ☐ Qualifying widow(er) with dependent child

**Exemptions**

6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a

b ☐ Spouse

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input type="checkbox"/> If child under age 17 qualifying for child tax credit (see instructions)
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

If more than four dependents, see instructions and check here ☐

d Total number of exemptions claimed \_\_\_\_\_

**Income**

7 Wages, salaries, tips, etc. Attach Form(s) W-2	7	\$27,500.00
8a Taxable interest. Attach Schedule B if required	8a	\$0.00
b Tax-exempt interest. Do not include on line 8a	8b	\$0.00
9a Ordinary dividends. Attach Schedule B if required	9a	\$0.00

Attach Form(s) **W-2 here. Also**

- Click the line(s) on the return to link to the entry menu for that information.

## Guide Me

You can have the program guide you through the return preparation process. To have TaxSlayer Pro Online guide you through preparing the return, use the following steps:

- Start a new return.
- Apply a taxpayer profile, if desired.
- Add the taxpayer's filing status.
- Add the taxpayer and spouse's personal information, including name, address, and other information.
- Complete entry pages loaded from a selected taxpayer profile, if applicable.

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

The screenshot shows a page titled "Let's look at the money you earned". Below the title is a paragraph: "Money isn't everything, except on your tax return. 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 are familiar with the forms." Below this text are two buttons: "Guide Me" (blue) and "Enter Myself" (gray), separated by "-OR-". At the bottom of the page are two buttons: "< Back" (blue) and "✓ Skip Income" (green).

6. Click **Guide Me**.

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

The screenshot shows a page titled "Income Guide". Below the title is a question: "First up. Do you have any W-2s to enter?". Below this is a paragraph: "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." Below this text are three buttons: "< Back" (blue), "✗ No" (red), and "✓ Yes" (green). At the bottom of the page is a link: "Restart/Exit Income Guide".

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**.

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



Income	
Wages and Salaries (W-2)	BEGIN
State and Local Refunds (1099-G Box 2)	BEGIN
Interest and Dividends (1099-INT, 1099-DIV)	BEGIN
IRA/Pension Distributions (1099-R, 1099-SSA)	BEGIN
Unemployment Compensation (1099-G Box 1)	BEGIN
Form 1099-Misc	BEGIN
Profit or Loss From A Business (Schedule C)	BEGIN
Rents and Royalties (Schedule E)	BEGIN
Capital Gain and Losses (Schedule D)	BEGIN
Profit or Loss From Farming (Schedule F)	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 **Tools** drop-down list, click **Quick File**.



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

### Quick File

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.

Search for tax forms by keyword or title:

1099-MISC

<input type="checkbox"/>	W-2, Wages and ...	
<input type="checkbox"/>	1099-INT, Interest...	
<input type="checkbox"/>	1099-DIV, Dividen...	

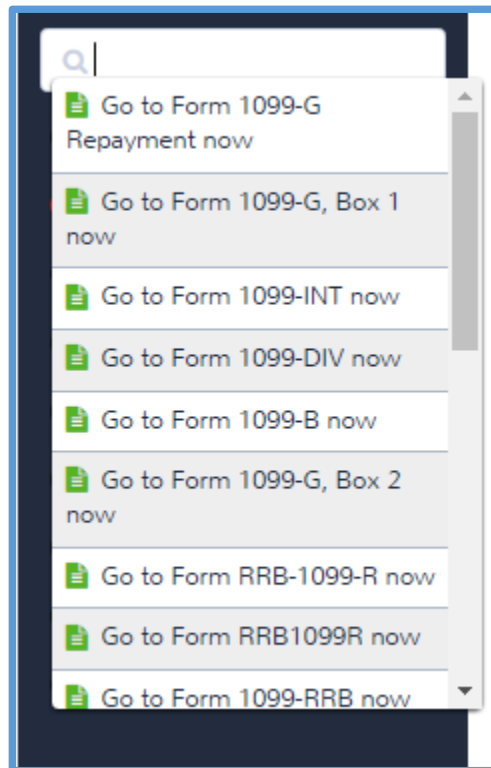
Back

✓ Continue

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.



## Working with the Affordable Care Act

This chapter covers the following actions:

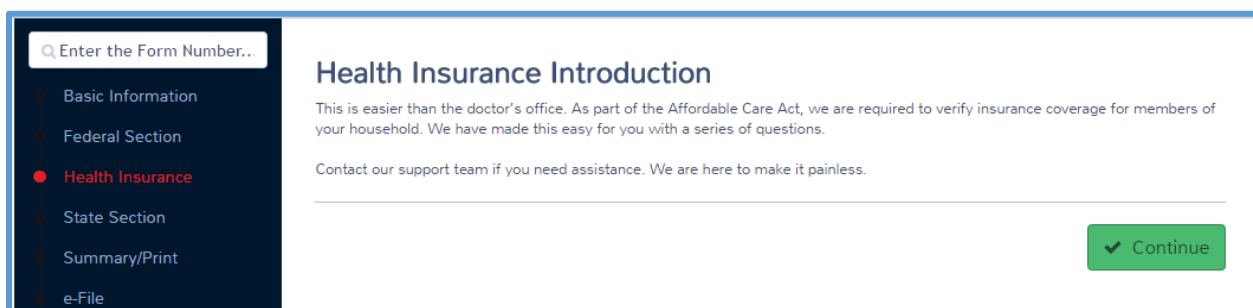
1. Complete the health insurance questionnaire.

With the Affordable Care Act, taxpayers must include certain information with the tax return to figure any credit or penalty for health insurance. To begin working with the health insurance information required for the Affordable Care Act, use the following steps:

1. Click **Health Insurance** on the left navigation bar.

**1040 View:** Click Line 61 to link to the Health Insurance Introduction page.

TaxSlayer Pro Online displays the **Health Insurance Introduction** page:

The screenshot shows the 'Health Insurance Introduction' page. On the left is a dark blue navigation bar with a search field at the top labeled 'Enter the Form Number...'. Below the search field are several menu items: 'Basic Information', 'Federal Section', 'Health Insurance' (which is highlighted with a red dot), 'State Section', 'Summary/Print', and 'e-File'. The main content area has a title 'Health Insurance Introduction' and a paragraph: 'This is easier than the doctor's office. As part of the Affordable Care Act, we are required to verify insurance coverage for members of your household. We have made this easy for you with a series of questions.' Below this is another line of text: 'Contact our support team if you need assistance. We are here to make it painless.' At the bottom right of the main content area is a green button with a white checkmark and the text 'Continue'.

2. Click **Continue**.

## 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.

When you finish entering information for the federal return, TaxSlayer Pro Online displays the **Your Federal Return is Complete!** landing page:

**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)**.

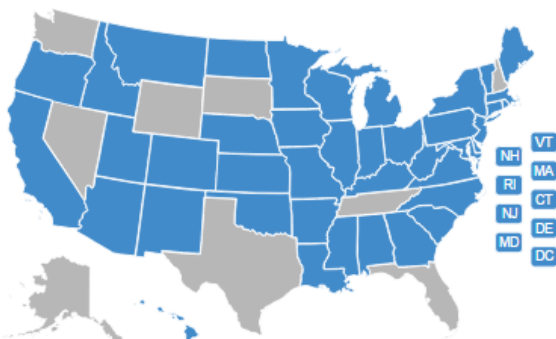
TaxSlayer Pro Online displays the **Select your State Return** page:

## 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 -

VT

NH

MA

RI

CT

NJ

DE

MD

DC

✕ Cancel

✓ Continue

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.

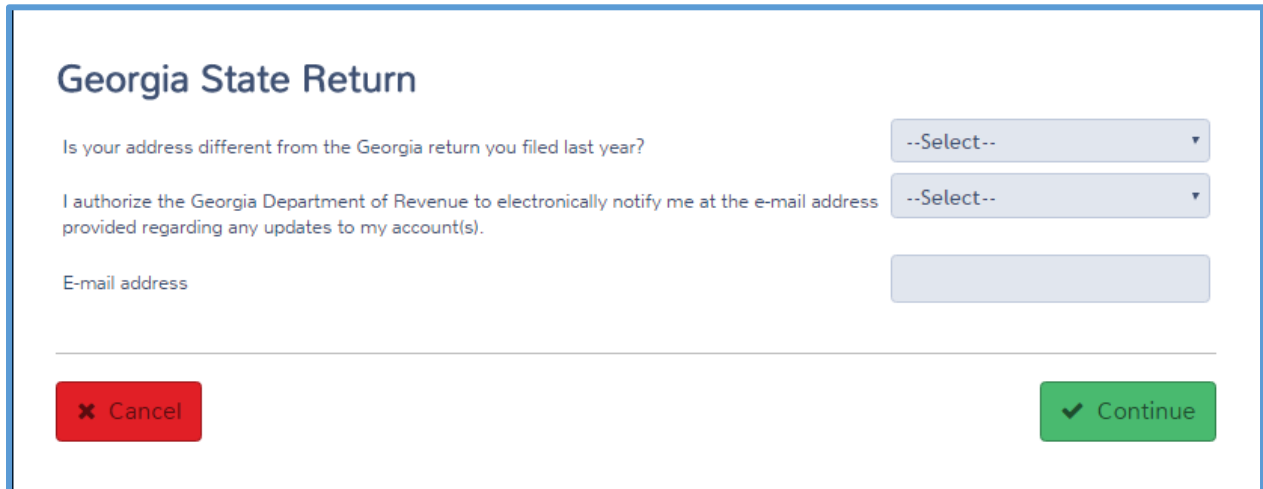
☐ **Non-Resident** You are a Nonresident of Georgia if you do not maintain a permanent place to live in Georgia during the tax year for a minimum of 30 days.

✕ Cancel

✓ Continue

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** page with any additional questions the state requires:



The screenshot shows the "Georgia State Return" page. It contains two dropdown menus and one text input field. The first dropdown menu is labeled "Is your address different from the Georgia return you filed last year?" and has "--Select--" as the selected option. The second dropdown menu is labeled "I authorize the Georgia Department of Revenue to electronically notify me at the e-mail address provided regarding any updates to my account(s)." and also has "--Select--" as the selected option. Below these is a text input field labeled "E-mail address". At the bottom left is a red button with a white "X" icon and the text "Cancel". At the bottom right is a green button with a white checkmark icon and the text "Continue".

6. Read each question carefully and answer the question.
7. Click **Continue**.

TaxSlayer Pro Online prompts you to enter any additional information required to complete the state return.

8. If you do not have additional items to add on the state return, click **No**. Otherwise, see the next section of this lesson.

When you finish adding the first state, TaxSlayer Pro Online displays the **State Return** summary page:

The screenshot shows the 'State Return' summary page. At the top, there is a yellow warning box with a triangle 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, there is a table with two columns: 'State' and 'Return Type'. The first row shows 'Georgia' under 'State' and 'Resident' under 'Return Type'. To the right of the table, there are two buttons: 'Edit' (blue) and 'Delete' (red). Below the table, there is a green button with a plus icon and the text '+ Add' followed by 'Add Another State Return'. At the bottom right, there is a green button with a checkmark icon and the text 'Continue'.

9. If you need to add another state for the taxpayer, click **Add** and use the same steps to add the new state.

**TIP:** You can add an unlimited number of states to the return.

### Adding Information to State Returns

If you need to add items to the state return for the taxpayer, use the following steps:

1. On the **Congratulations** landing page, click **Yes**.

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

**Georgia State Return**

Basic Information	BEGIN
Additions to Income	BEGIN
Subtractions from Income	BEGIN
Retirement Exclusion Worksheet	BEGIN
Credits	BEGIN
Contributions	BEGIN
Payments	BEGIN
Miscellaneous Forms	BEGIN

**Cancel** **Continue**

2. Click **BEGIN** on the line for the information you need to add. For this example, we will click **Additions to Income**.

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

TaxSlayer Pro Online displays the detail page for the line you selected:

The screenshot shows the 'Georgia State Return' page with the 'Additions to Income' section. A light blue box contains a message: 'Your Federal Adjusted Gross Income (AGI) is automatically carried to your state return; however, Georgia taxes certain items of income not taxed by the Federal government. Enter additions to income to the extent they were NOT included in your Federal AGI.' Below this, there is a list of six items, each with a 'BEGIN' button to its right:

Item	Action
Interest and Dividends received on non-Georgia municipal and state bonds	BEGIN
Lump Sum Distributions	BEGIN
Depreciation Adjustment	BEGIN
Net Operating Loss Carry-Overs	BEGIN
Other Additions	BEGIN
Adjust calculated Special Depreciation.	BEGIN

At the bottom right of the form, there is a green 'Continue' button with a checkmark icon.

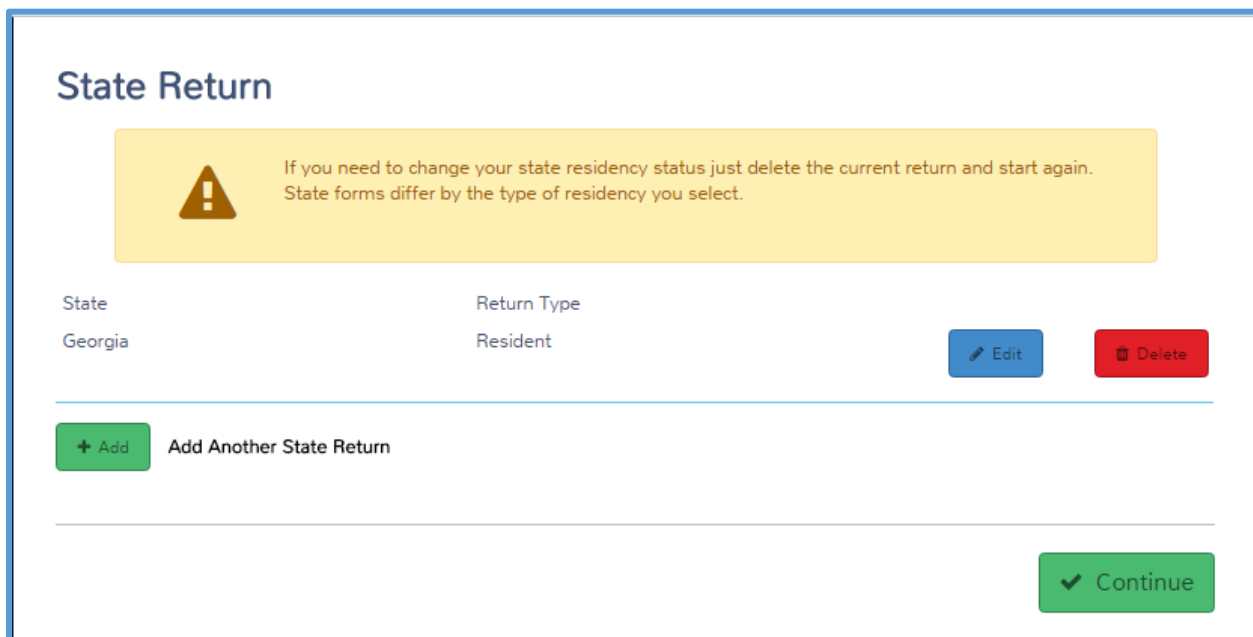
3. Click **BEGIN** on the line for which you need to add information.
4. Follow the instructions for each line on the page.
5. Continue adding information to the state return as needed based on the taxpayer's circumstances.

## Deleting States

If you add a state and later find that you need to delete it from the return, use the following steps:

1. Click **State Section**.

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

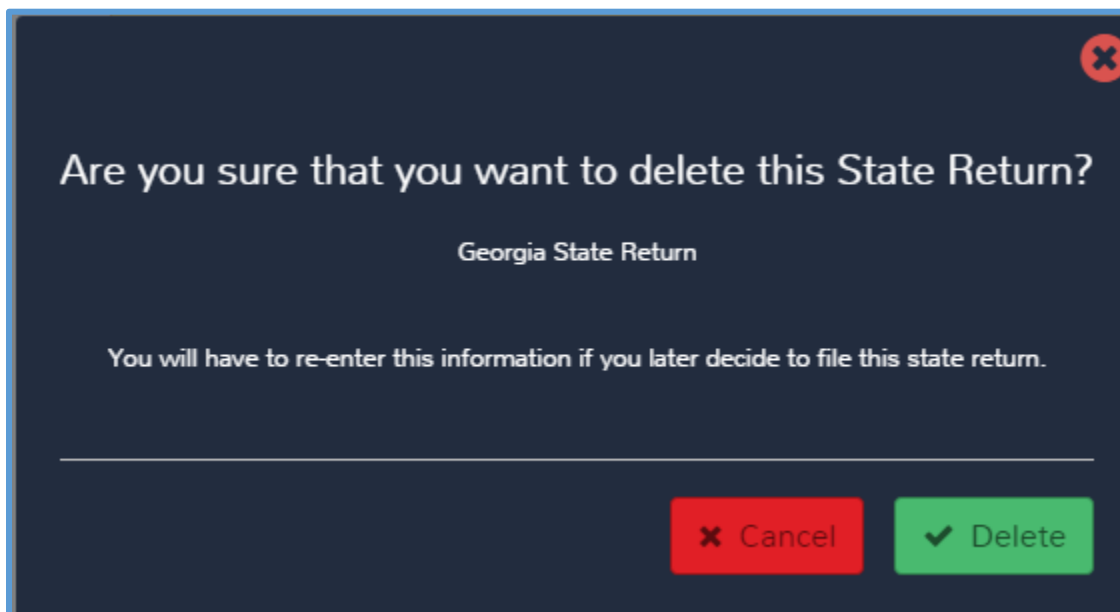


The screenshot shows the 'State Return' page. At the top, there is a yellow warning box with a triangle icon and the text: 'If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.' Below this, there are two columns: 'State' with 'Georgia' and 'Return Type' with 'Resident'. To the right of these columns are two buttons: 'Edit' (blue) and 'Delete' (red). Below the columns is a green button with a plus icon and the text '+ Add Add Another State Return'. At the bottom right, there is a green button with a checkmark icon and the text 'Continue'.

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:



The screenshot shows a dark blue warning confirmation dialog. At the top right, there is a red circle with a white 'X' icon. The main text reads: 'Are you sure that you want to delete this State Return?'. Below this, it says 'Georgia State Return'. Further down, it states: 'You will have to re-enter this information if you later decide to file this state return.' At the bottom, there are two buttons: 'Cancel' (red) and 'Delete' (green).

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.



## 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.

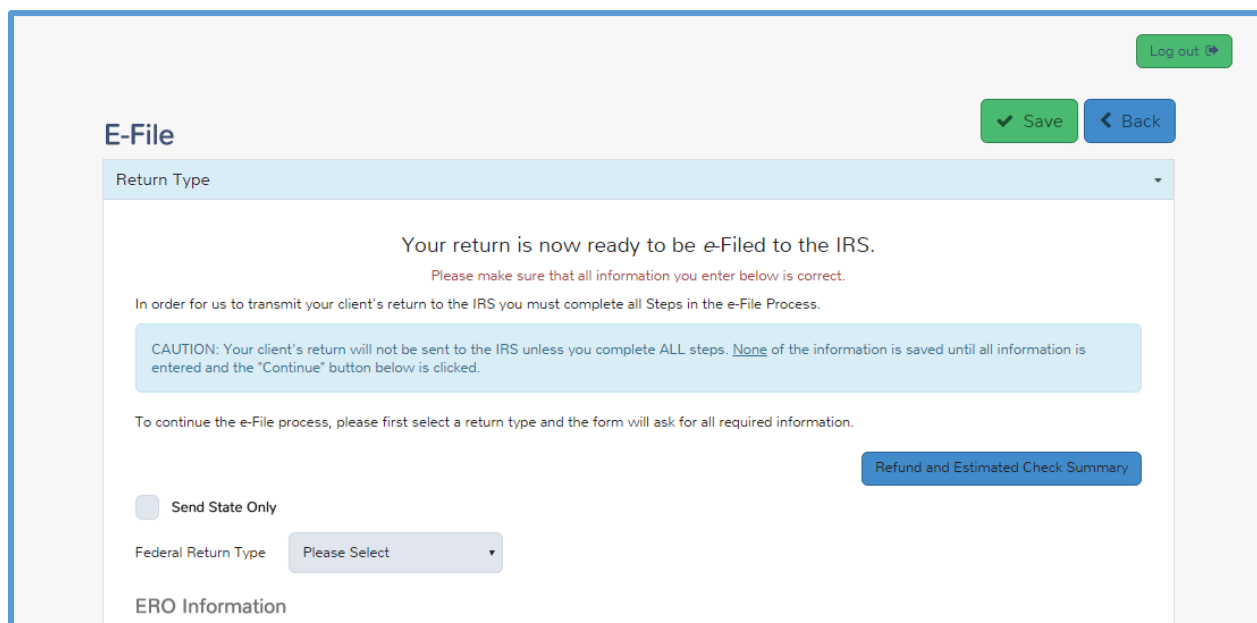
**Note:** TaxSlayer's built-in review process is designed to enhance your existing review process by allowing automated queuing processes. This process is not designed to replace your existing quality review processes.

### 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 the TaxSlayer Pro Online interface. At the top right, there is a 'Log out' button. Below it, on the right side, are 'Save' and 'Back' buttons. The main heading is 'E-File'. Underneath, there is a 'Return Type' dropdown menu. The central message states: 'Your return is now ready to be e-Filed to the IRS. Please make sure that all information you enter below is correct.' Below this, a note says: '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: '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.' Further down, 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 includes an 'ERO Information' section at the very 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 TaxSlayer Pro Submission page. At the top, there is a blue header with the 'TaxSlayer Pro' logo and the text 'Professional Tax Preparation Software'. Below the header, there is a navigation bar with several buttons: 'Print Return', 'Sign', 'Sign', 'Save And Transmit Return to IRS >', '✓ Save And Exit Return', and '< Back'. In the top right corner, there is a 'Log out' button. The main content area is titled 'Submission' and includes a message: 'Please review all information on this screen. To finalize your return please click on the submit button located below.' Below this message, there is a dropdown menu set to 'One Copy - Federal and State' and a 'Print Return' button. The page is divided into several sections: 'Electronic Signature' with 'Taxpayer:' and 'Spouse:' labels, each followed by a 'Sign' button; 'Ero Information' with 'Efin:' and 'Company Name: Multi Site 7'; 'Client Information' with 'Client Name: Taxpayer Example' and 'Email Address:'; and 'Return Information' with 'Type of Return: Electronic Mailed'.

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 TaxSlayer Pro Online Submission page. It includes a 'Mark Complete' checkbox at the top left. Below it, the 'Form 8879' section displays the Taxpayer's Pin (11717), Spouse's Pin (11111), and ERO's Pin (12345). The 'State Return Information' section shows 'GA' as the state, 'Due: \$2,119.00' in red, and 'Paper Return' as the filing method. The 'Referrer' section has a 'Select Referrer' dropdown menu set to 'No Answer' and an 'Other:' text input field. The 'Review Status' section features a 'Ready For Review' checkbox. At the bottom, there is a 'Set Return Tags' link and three buttons: '< Back' (blue), '✓ Save And Exit Return' (green), and 'Save And Transmit Return to IRS >' (green).

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:

Log out

### Review Returns

Select > Select > Select > Select > Select > < Back

5 returns waiting for review

SSN	NAME	PREPARER
	Example, Taxpayer	Admin Preparer

Select >

< Back

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

TaxSlayer Pro Online displays the return.

## 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:

Log out

### Office Client List

< Back

2015 Client Tax Return List

Filter by Status

Any Status

Search Client list

Show 10 entries

Showing 1 to 10 of 112 entries

Previous 1 2 3 4 5 ... 12 Next

SSN	NAME	PHONE	PREPARER	STATUS
-----	------	-------	----------	--------

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

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

Office Client List

2015 Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: Any Tag

Search Client list

Showing 1 to 1 of 1 entries (filtered from 113 total entries)

SSN	NAME	PHONE	PREPARER	STATUS
	Taxpayer Example	(770) 555-3636	Admin Preparer	Complete

Tools Select

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

## 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:

The screenshot shows the 'E-File' page in TaxSlayer Pro. At the top right is a 'Log out' button. Below it are 'Save' and 'Back' buttons. The main heading is 'E-File'. Underneath is a 'Return Type' dropdown menu. The central message states: '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 box contains a caution: '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 left, there is a 'Send State Only' checkbox and a 'Federal Return Type' dropdown menu currently set to 'Please Select'. The bottom section is labeled 'ERO Information'.

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. The top header is 'TaxSlayer Pro Professional Tax Preparation Software'. At the top right is a 'Log out' button. Below it are several buttons: 'Print Return', 'Sign', 'Sign', 'Save And Transmit Return to IRS', 'Save And Exit Return', and 'Back'. The main heading is 'Submission'. Below it is a message: 'Please review all information on this screen. To finalize your return please click on the submit button located below.' There is a dropdown menu set to 'One Copy - Federal and State' and a 'Print Return' button. The page is divided into sections: 'Electronic Signature' with 'Taxpayer:' and 'Spouse:' each having a 'Sign' button; 'ERO Information' with 'Efin:' and 'Company Name: Multi Site 7'; 'Client Information' with 'Client Name: Taxpayer Example' and 'Email Address:'; and 'Return Information' with 'Type of Return: Electronic Mailed'.

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 portion of the TaxSlayer Pro Submission page. At the top, it displays 'Total Fees: \$0.00' and two unchecked checkboxes: 'Mark Paid' and 'Mark Complete'. Below this is the 'Form 8879' section, which includes the Taxpayer's Pin (11717), Spouse's Pin (11111), and ERO's Pin (12345). The 'State Return Information' section shows 'GA' as the state, a due date of '\$2,119.00' in red, and 'Paper Return' as the filing method. The 'Referrer' section has a 'Select Referrer' dropdown menu set to 'No Answer' and an 'Other:' text input field. The 'Review Status' section shows a checked 'Ready For Review' checkbox and three buttons: 'Approved' (green), 'Failed' (green), and 'Not yet reviewed' (text). At the bottom, there is a 'Set Return Tags' link and three main action buttons: '< Back' (blue), '✓ Save And Exit Return' (green), and 'Save And Transmit Return to IRS >' (green).

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.

## 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.

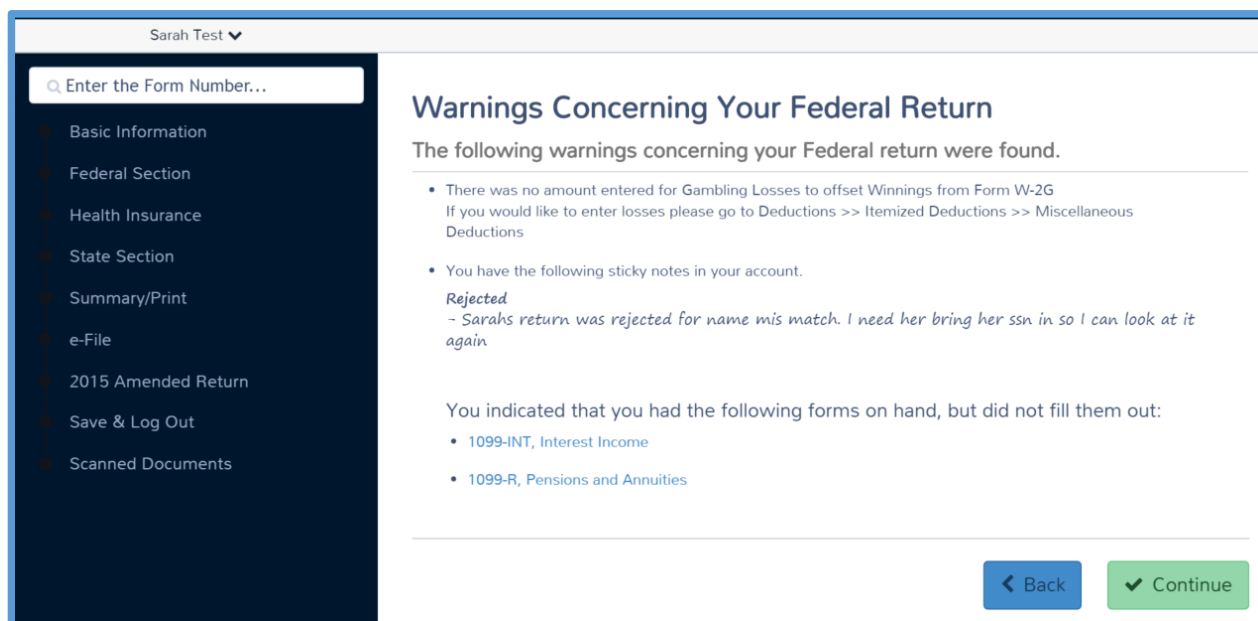
When you complete a return, you need to print a copy for the taxpayer. Depending on how your site handles printing, you can print either from within the return or from the client's status.

### 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:



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:

Part I Tax Return Information— Tax Year Ending December 31, 2015 (Whole Dollars Only)		
1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4)	9516
2	Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12)	449
3	Federal income tax withheld (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7)	1875
4	Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a)	1426
5	Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14)	

**Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)**

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2015, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

5. Click the **Print** icon in Adobe Reader to print the return.

## Printing a Return from Client Status

If you need to print a return, but you are not in the return, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:

The screenshot shows the 'Office Client List' page. At the top right is a 'Log out' button. Below it is a '< Back' button. The main heading is 'Office Client List'. Underneath is '2015 Client Tax Return List'. There is a 'Filter by Status' dropdown menu set to 'Any Status'. Below that is a 'Search Client list' text input field. Further down is a 'Show 10 entries' dropdown menu. Below that is a pagination bar showing 'Showing 1 to 1 of 1 entries (filtered from 113 total entries)' with 'Previous', '1', and 'Next' buttons. The main content is a table with columns: SSN, NAME, PHONE, PREPARER, and STATUS. The table has one row for 'SARAH PRACTICE' with phone '(706) 766-4141' and preparer 'Bob Smith'. The status is 'In Progress'. To the right of the table row are icons for a flag, a hand, a printer, and a 'Tools' dropdown menu. A green 'Select' button is at the bottom right of the table area.

SSN	NAME	PHONE	PREPARER	STATUS
	SARAH PRACTICE	(706) 766-4141	Bob Smith	In Progress

2. Find the client in the list.
3. Click the **Printer** icon.
4. Select a print set from the drop down list.
5. Click **Print Return**.

# 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

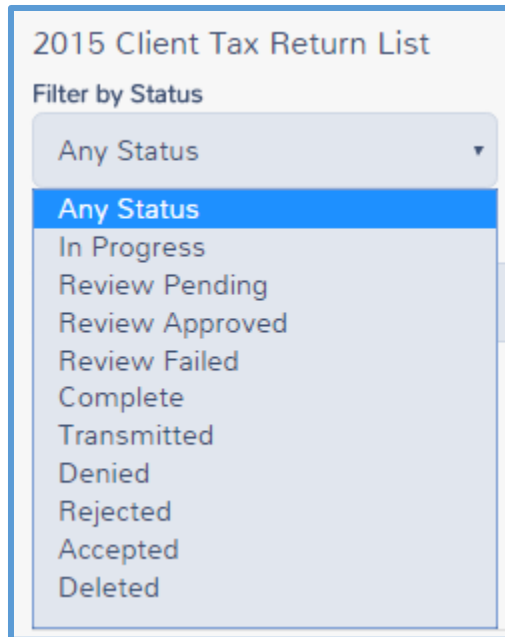
If you need to open an existing return, you can do that from the **Office Client List** page. To search for and open a return, use the following steps from the **Welcome** page:

1. Click **Select** on the **Client Search** line.

TaxSlayer Pro Online displays the **Office Client List** page:

The screenshot shows the 'Office Client List' page. At the top right is a green 'Log out' button. Below it is a blue '< Back' button. The main heading is 'Office Client List'. Underneath is '2015 Client Tax Return List'. A 'Filter by Status' dropdown menu is set to 'Any Status'. Below that is a 'Search Client list' text input field. Further down is a 'Show 10 entries' dropdown menu. At the bottom left, it says 'Showing 1 to 10 of 112 entries'. At the bottom right is a pagination bar with 'Previous', '1' (highlighted), '2', '3', '4', '5', '...', '12', and 'Next'. Below the pagination bar is a table header with columns: SSN, NAME, PHONE, PREPARER, and STATUS.

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



The screenshot shows a web interface titled "2015 Client Tax Return List". Below the title is a section labeled "Filter by Status". Inside this section is a dropdown menu. The dropdown menu is currently open, showing a list of status options. The top option, "Any Status", is highlighted in blue. Below it are the following options: "In Progress", "Review Pending", "Review Approved", "Review Failed", "Complete", "Transmitted", "Denied", "Rejected", "Accepted", and "Deleted".

Filter by Status
Any Status
In Progress
Review Pending
Review Approved
Review Failed
Complete
Transmitted
Denied
Rejected
Accepted
Deleted

3. Type client information in the **Search Client List** box. You can search the client list using one of the following:
  - a. Social Security number
  - b. Name
  - c. Phone number
  - d. Preparer
  - e. Status

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

Office Client List

2015 Client Tax Return List

Filter by Status  
Any Status

Search Client list  
admin preparer

Show 10 entries

Showing 1 to 8 of 8 entries (filtered from 113 total entries)

SSN	NAME	PHONE	PREPARER	STATUS		
	Test Return	(770) 555-1212	Admin Preparer	In Progress	Select	- Select Option -
	Test Taxpayer	(770) 555-1214	Admin Preparer	In Progress	Select	- Select Option -

**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:

Reasons for no Earned Income Credit (EIC) [show details](#)

Form 1040 page: **1** 2 Summary View

---

**Form 1040** Department of the Treasury—Internal Revenue Service (99) **2015** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning , 2015, ending , 20

See separate instructions.

Your first name and initial **TEN FORTY** Last name **VIEW** Your social security number

If a joint return, spouse's first name and initial Last name Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. **6 MATH DRIVE** Apt. no. ☐ Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). **Rome GA 30165**

Foreign country name Foreign province/state/county Foreign postal code

**Filing Status** 1 ☒ Single 4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. 2 ☐ Married filing jointly (even if only one had income) 3 ☐ Married filing separately. Enter spouse's SSN above and full name here. 5 ☐ Qualifying widow(er) with dependent child

Check only one box.

**Exemptions** 6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a. b ☐ Spouse

**Dependents:** (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) ☐ If child under age 17 qualifying for child tax credit (see instructions)

If more than four dependents, see instructions and check here ☐

d Total number of exemptions claimed

**Income** 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 **\$27,500.00** 8a Taxable interest. Attach Schedule B if required 8a **\$0.00** b Tax-exempt interest. Do not include on line 8a 8b **\$0.00** 9a Ordinary dividends. Attach Schedule B if required 9a **\$0.00**

Attach Form(s) W-2 here. Also

## Viewing a Taxpayer's Return History

If you need to view the history of a return, you can do that from the **Office Client List** page. To find the return history, use the following steps from the **Office Client List** page:

Search Client list

**11100**

Show **10** entries

Showing 1 to 4 of 4 entries (filtered from 113 total entries)

SSN	NAME	PHONE	PREPARER	STATUS	
	Test Return	(770) 555-1212	Admin Preparer	In Progress	<div>Select</div> <div>- Select Option -</div>

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

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

**Client Status**

Primary (Taxpayer Example) Federal Type No information  
Secondary IRS Transaction date No Information  
Home Phone Office  
Cell Phone  
Address

Transmitted Fee Summary

Preparation Fee	Documentation Fee	E-file Fee	Total Fees
\$0.00	\$0.00	\$0.00	\$0.00

Client Return History

Action Taken - CreateReturn	Return Information -
Log Time - 3/16/2016 4:08:45 AM	Filing Status -
Preparer - Admin Preparer	AGI - 0
Ero - Multi Site 7	Return Fees -
SSN	

2. Review the return history in the **Client Return 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:

IRS Transmissions					
Description	Date	Service Center	SubmissionId	Refund	Extension?
Electronic Mailed	09/20/2016	Kansas City	3692582016264010	\$8,354.00	N

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.

IRS Acknowledgements			
Ack Date	Status	Refund	Additional Information
09/20/2016	Rejected	\$8,354.00	<div>- Submission Id: 3692582016264010</div> <div><div>Reject Code R0000-093-02 Message If 'SpouseSSN' in the Return Header has a value, then it must be within the valid range of SSN/ITIN and must not be an ATIN. Data Value 101000418</div><div>Reject Code R0000-500-01 Message 'PrimarySSN' and 'PrimaryNameControlTxt' in the Return Header must match the e-File database. Data Value 100[REDACTED]</div></div>



# 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. Complete the EIC checklist
4. Review reminder notes.
5. Review warning messages.
6. Select a federal return type.
7. Enter direct deposit information or split a refund.
8. Confirm ERO information.
9. Verify Form 8879 information.
10. Mark a state for e-file.
11. File a Credit Only state return.
12. 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.

## Reviewing Warnings and Notes

TaxSlayer Pro Online displays the following:

- Warnings in the return.
- Notes you added to the return:

### Warnings Concerning Your Federal Return

The following warnings concerning your Federal return were found.

- There is no information entered for your state income and withholdings in your W-2.  
If you would like to enter this now, please go to Income >> Wages and Salaries >> Edit next to your W-2 and enter the state information in boxes 15 – 20.  
If you reside in AK, FL, NH, NV, SD, TN, TX, WA or WY, boxes 15-20 may be blank on your W-2. Please select Continue E-filing below.
- You have the following sticky notes in your account.  
*Example*  
- This is an example note.

[< Back](#)[✓ Continue](#)

2. Review any warnings.
3. 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.
4. Review your notes. If you need to change something in the return, click the appropriate section in the left navigation bar and make changes.
5. 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.

### 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.

You cannot file Form 8815, Exclusion of Interest from Series EE and I US Savings Bonds, without an amount in Interest on U.S. Savings Bonds and Treasury Obligations on at least one of your Form 1099-INT items (Schedule B). Please remove the Form 8815 entries from your return, or enter the appropriate amount in your Form 1099-INT item.

Visit

Visit

< Back

6. If TaxSlayer Pro Online displays an error on the return, read the error carefully and click **Visit** for that error.
7. Make corrections to the return to eliminate the error.
8. Click **e-File** again.
9. 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.

### Completing the Earned Income Credit Checklist

If the taxpayer qualifies for the earned income credit (EIC), there are a series of questions on the EIC checklist that you need to complete. When you clear any electronic filing errors in the return, you can answer additional questions that were not calculated from Basic Information.

To complete the additional EIC information, use the following steps:

1. Click **e-File**.

TaxSlayer Pro Online displays the **EIC Checklist**:

### EIC Checklist

#### Qualifying Information


Was the taxpayer a nonresident alien for any part of the year? ☐ Yes ☒ No

Is the taxpayer (or spouse) a qualifying child of another person? ☐ Yes ☒ No

Did you complete form 8867 and/or perform the due diligence required based on current information provided by the taxpayer or reasonably obtained by you? ☒ Yes ☐ No

Did you ask this taxpayer any additional questions that are necessary to meet your knowledge requirement? Does Not Apply ▼

Did you comply with the EIC due diligence knowledge requirements? ☒ Yes ☐ No




To comply with the EIC knowledge requirement, you must not know or have reason to know that any information used to determine the taxpayer's eligibility for, and the amount of, the EIC is incorrect. You must not ignore the implications of information furnished to or known by you, and you must make reasonable inquiries if the information furnished appears to be incorrect, inconsistent, or incomplete. At the time you make these inquiries, you must document in your files the inquiries you made and the taxpayer's responses.

2. Carefully read and answer the questions in the **Qualifying Information** section. These questions confirm the taxpayer and spouse's eligibility for earned income credit, including questions about the taxpayer's residency status, whether the taxpayer or spouse is a qualifying child of another person, and how you, as the preparer, obtained the information used to complete the return.
3. Scroll to the **Records** section, as shown below:

### Records

Did you keep the records found below? -- Please Select ▼



- Form 8867 (or your own form or files).
- The EIC worksheet(s) or your own worksheet(s).
- Record of how, when, and from whom the information used to prepare the form and worksheet(s) was obtained.

4. In the **Records** section, carefully read and answer questions about the taxpayer's records. Even though you are not required to maintain the records, verifying the information leads to a more accurate tax return.

5. Scroll to the **Qualifying Children** section (if the taxpayer has qualifying children), as shown below:

Qualifying Child #1 - Child Taxpayer

Is this child currently, or intended to be, a qualifying child on any other individual's tax return?

-- Please Select

Qualifying Child #2 - Qualifying Taxpayer

Is this child currently, or intended to be, a qualifying child on any other individual's tax return?

-- Please Select

6. Answer the question concerning whether the child could be considered a qualifying child for another individual.

If you answer **Yes** to the question, TaxSlayer Pro Online displays additional questions to determine whether the child is this taxpayer's qualifying child for EIC:

Qualifying Child #1 - Child Taxpayer

Is this child currently, or intended to be, a qualifying child on any other individual's tax return?


Yes

Child's relationship to other person

-- Please Select

Under the tiebreaker rules, is the child treated as the taxpayer's qualifying child?

-- Please Select



**TIEBREAKER RULES:** To determine which person can treat the child as a qualifying child, the following tiebreaker rules apply:

1. If only one of the persons is the child's parent, the child is treated as the qualifying child of the parent.
2. If the parents do not file a joint return together but both parents claim the child as a qualifying child, the IRS will treat the child as the qualifying child of the parent with whom the child lived with for the longer period of time during the year. If the child lived with each parent for the same amount of time, the IRS will treat the child as the qualifying child of the parent who had the higher adjusted gross income (AGI) for the year.
3. If no parent can claim the child as a qualifying child, the child is treated as the qualifying child of the person who had the highest AGI for the year.
4. If a parent can claim the child as a qualifying child but no parent does claim the child, the child is treated as the qualifying child of the person who had the highest AGI for the year, but only if that person's AGI is higher than the highest AGI of any of the child's parents who can claim the child.

7. Answer the questions about the child's relationship to the other - question and the tiebreaker rules.

8. Scroll to the **Documents used to determine Residency** section, as shown below:

**Documents used to determine Residency**

☐ School records or statement

☐ Landlord or property management statement

☐ Health care provider statement

☐ Medical records

☐ Child care provider records

☐ Placement agency statement

☐ Social service records or statement

☐ Place of worship statement

☐ Indian tribal official statement

☐ Employer Statement

☐ Other

☐ Did not rely on any documents, but made notes in file

☐ Did not rely on any documents

9. Select the appropriate check box(es) to show what documents you used. Since you are not required to maintain documents as an IRS volunteer, you can select the **Did not rely on any documents** checkbox.
10. Click **Continue**.

TaxSlayer Pro Online displays the **Form 8867 – EIC Checklist** page, showing whether the taxpayer qualifies for earned income credit and any sections of the form you completed:

### Form 8867 - EIC Checklist

Questions for All Taxpayers	Qualifies
Part II - Taxpayer with a Qualifying Child	Qualifies
Part III - Taxpayer without a Qualifying Child	N/A
Residency of Qualifying Child(ren) Documents	Answered
Disability of Qualifying Child(ren) Documents	N/A
Schedule C Documents and Other Information	N/A

[← Make Changes](#)[✓ Continue](#)

11. Review the information on the checklist.

12. Click **Continue**.

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

The screenshot shows the 'Miscellaneous Statement' page. At the top, the title 'Miscellaneous Statement' is displayed in a dark blue font. Below the title, there is a 'Title:' label followed by a light blue text input field. Underneath the title field is a 'Note:' label followed by a large, light blue text area for entering notes. In the bottom right corner of the note area, it says 'characters remaining: 1050'. At the bottom left, there is a checkbox labeled 'This is a private statement'.

13. If you want to document notes you took, type them in the statement.
14. Select the **This is a private statement** check box.
15. Click **Continue**.

TaxSlayer Pro Online displays the **Miscellaneous Statement** summary page:

The screenshot shows the 'Miscellaneous Statement' summary page. At the top, the title 'Miscellaneous Statement' is displayed in a dark blue font. Below the title, there is a table with two columns: 'Title' and 'Statement'. The 'Title' column has a sub-column 'EIC'. The 'Statement' column has a sub-column 'Notes'. To the right of the table, there are two buttons: a blue 'Edit' button and a red 'Delete' button. Below the table, there is a green '+ Add' button and the text 'Add a Miscellaneous Statement'. At the bottom right, there are two buttons: a blue '< EIC Checklist' button and a green 'Continue' button.



16. Click **Continue**.

**Note:** TaxSlayer Pro Online does not submit the information you type in this section to the IRS with the electronic file. The purpose of this section is to ask the additional questions required to determine EITC eligibility.

## 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 what the following the taxpayer wants to do.

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

TaxSlayer Pro Online displays additional information depending on your selection.

**TIP:** TaxSlayer Pro Online defaults to electronically filing the return. You must select **Paper Return** if you want the taxpayer to mail the return to the IRS.

## 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:

State	Refund/Due	Return Type
GA	Refund: \$ 681.00	Not Selected ▼

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 knowledgebase 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	Refund/Due	Return Type
AL	Refund: \$ 1707.00	Not Selected ▼

Taxpayer ID Information

Type	DMV/BMV State Id ▼
Number	
IssueDate	mm/dd/yyyy
ExpireDate	mm/dd/yyyy
IssueState	Please Select ▼

Next

### *Entering Direct Deposit Information when Form 8888 is not selected*

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:

The screenshot shows the 'Taxpayer Bank Account Information' section of the TaxSlayer Pro Online interface. At the top, there are four expandable menu items: 'Return Type', 'Tax Preparation and E-File Information', 'State Return(s)', and 'Taxpayer Bank Account Information'. The 'Taxpayer Bank Account Information' menu is currently expanded, showing a light blue header. Below the header, a note states: 'Note: This bank information MUST be accurate for your return to process correctly.' The form contains five input fields: 'Type of Account' (a dropdown menu currently set to 'Checking'), 'Routing Transit Number', 'Confirm Routing Transit Number', 'Bank Account Number', and 'Confirm Bank Account Number'. Each of the four number fields has a corresponding light blue input box. At the bottom left of the form is a green 'Next' button.

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. TaxSlayer Pro Online requires that you type these numbers twice for accuracy.
5. Click **Next**.

**TIP:** To ensure accuracy, you should enter the information from the taxpayer's document during the initial entry and the verification entry.

**Note:** The **Name of Bank** box is not required for electronic filing.

### *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 and purchase up to 3 savings bonds. The total deposits and savings bond purchases must equal your total refund of \$7,132.00

### Bank Accounts

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

Bank Name	Routing Number	Account Number	Deposit Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 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.

**TIP:** If you only want to deposit the refund into one account, type the RTN, Account and Deposit Amount on the first line. At this point, TaxSlayer Pro Online does not utilize Form 8888.

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

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

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

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?

6. 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:

ERO Information

Efin#

EroName#: Multi Site 7

Self Prepared

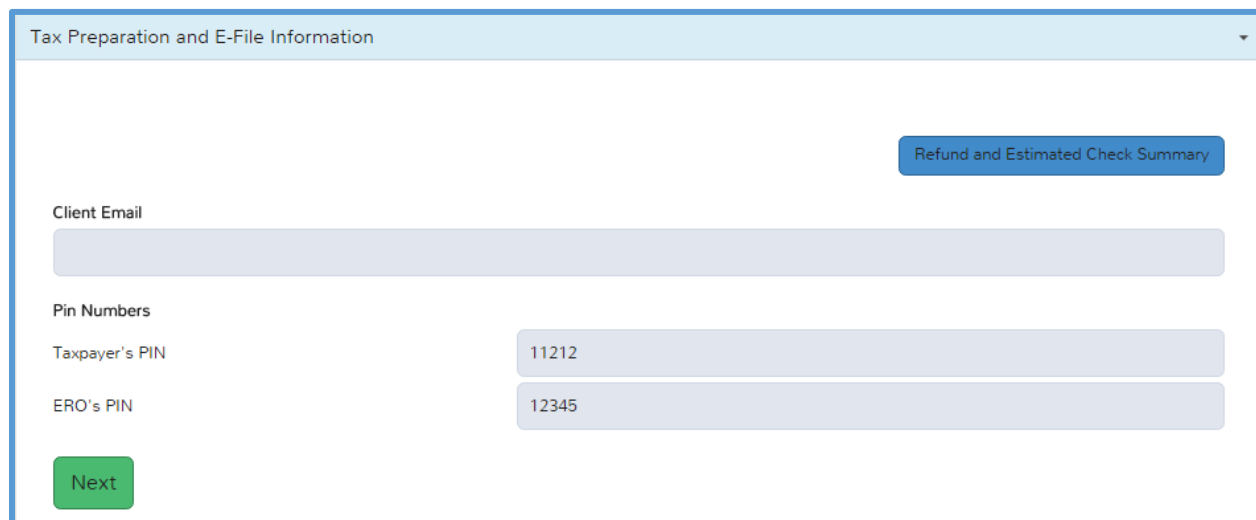
Self Prepared: ☐

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

**Note:** TaxSlayer Pro Online carries this information from ERO Setup for the site associated with the preparer's login.

## Confirming Form 8879 Information

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



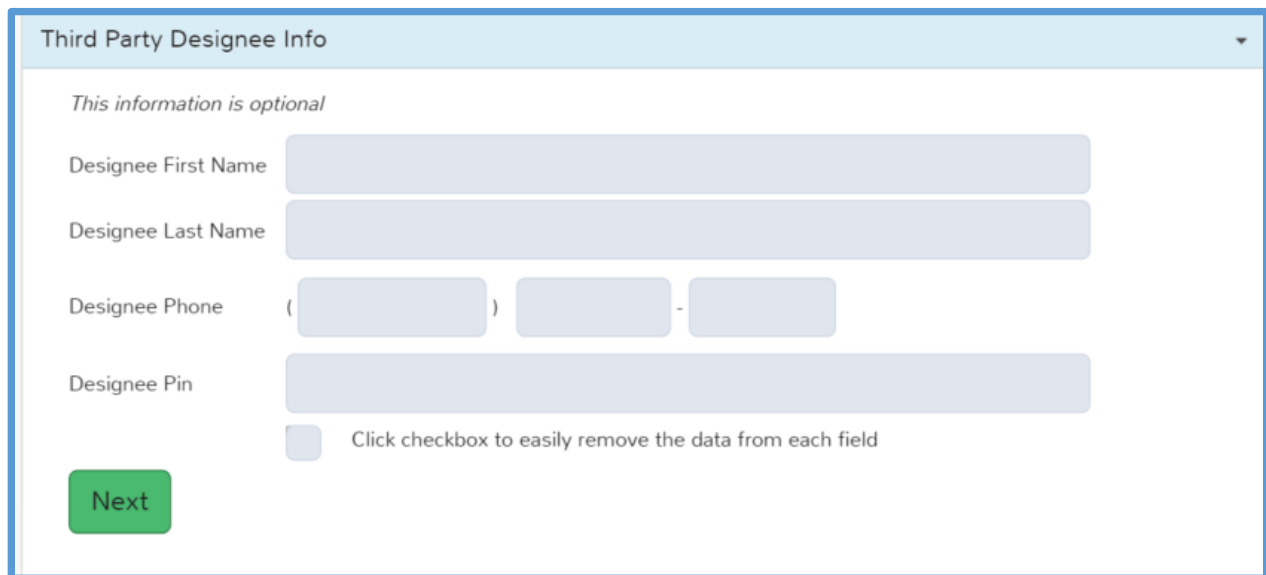
The screenshot shows a web interface titled "Tax Preparation and E-File Information". In the top right corner, there is a blue button labeled "Refund and Estimated Check Summary". Below this, the "Client Email" field is represented by a long, empty light blue input box. Under the "Pin Numbers" section, there are two rows: "Taxpayer's PIN" with a light blue input box containing the text "11212", and "ERO's PIN" with a light blue input box containing the text "12345". At the bottom left of the form area, there is a green button labeled "Next".

3. 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.
4. Click **Next**.

## Third Party Designee Information

TaxSlayer Pro Online does not populate the third party designee information. If you need to enter another taxpayer as the third party designee, click **Third Party Designee Info** and complete the appropriate information.

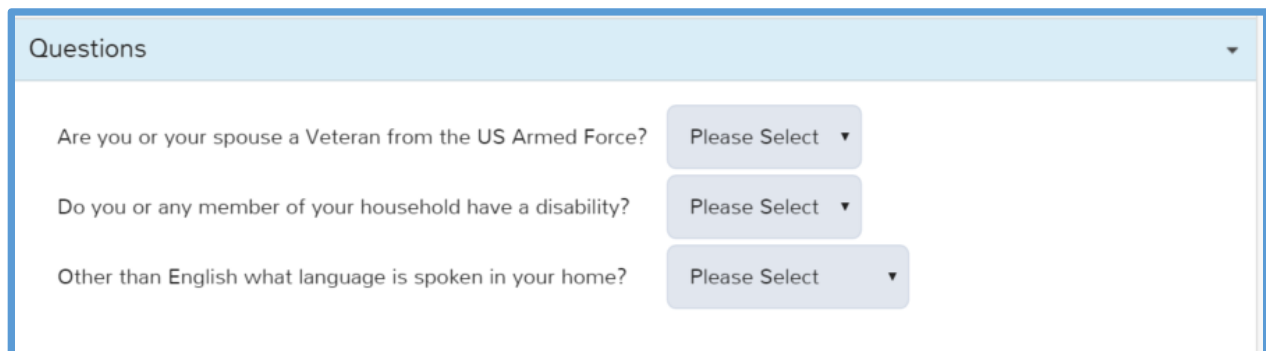
**NOTE:** You cannot enter a volunteer preparer as the third party designee.



The screenshot shows a form titled "Third Party Designee Info" with a dropdown arrow. Below the title, it says "This information is optional". The form contains four input fields: "Designee First Name", "Designee Last Name", "Designee Phone" (with a format of ( ) - ), and "Designee Pin". Below these fields is a checkbox with the text "Click checkbox to easily remove the data from each field". At the bottom left of the form is a green "Next" button.

## Answering Custom Questions

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



The screenshot shows a section titled "Questions" with a dropdown arrow. It contains three questions, each with a "Please Select" dropdown menu:

- Are you or your spouse a Veteran from the US Armed Force?
- Do you or any member of your household have a disability?
- Other than English what language is spoken in your home?

5. Answer each question in this section by selecting the appropriate answer from the drop-down list.

**TIP:** If your site administrator marked a question as **Required**, you must answer the question to continue.

6. Click **Save**.

## Consent to Use/Consent to Disclose

TaxSlayer Pro Online displays the Consent to Use and Consent to Disclose pages next, if your site is required to use these forms.

The following is a sample consent page:

The screenshot shows a web form titled "Office Consent". It contains the following sections:

- Defined Terms**
  - Office Location** - 123 Support Lane, Augusta GA, 30907
  - Office** - Refers to Office and Preparer
  - Disclosure** - Taxpayer allows Office to send required reports and detail information about tax return for the current tax year.
- USE**
  - A large, empty light blue rectangular box for input.
- Consent Status**
  - Two radio button options:
    - Option 1: "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 "Office Consent" as stated above." (The word GRANT is highlighted in green).
    - Option 2: "I / we, the Taxpayer have read the above information. By typing in my / our taxpayer PIN(s) and checking this input, I / we hereby **DENY** consent to "Office Consent" as stated above." (The word DENY is highlighted in red).
  - A third line of text: "I / we, the Taxpayer also understand that by **DENYING** consent to "Office Consent", my tax return cannot be e-Filed." (The word DENYING is highlighted in red).
- Primary PIN (enter 5 numbers)** and **Date** (with an empty input box for the date).
- Secondary PIN (enter 5 numbers)** and **Date** (with an empty input box for the date).
- A green **Next** button at the bottom left.

Follow your site procedures when completing the Consent pages.

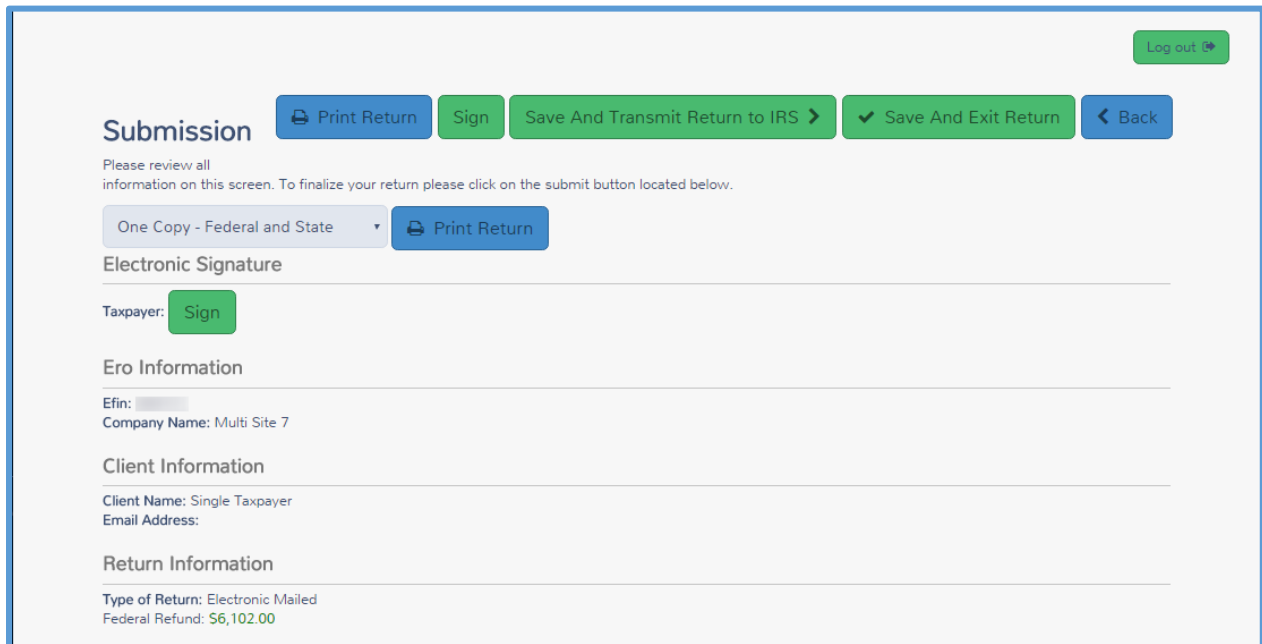
**TIP:** If your site has a Relational EFIN, you must complete the Reporting Consent before creating the e-file. If the taxpayer denies the consent, paper file the return.

**NOTE:** The Consent forms print with taxpayer and spouse signature lines.



## Completing the Submission Page

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



The screenshot shows the 'Submission' page in TaxSlayer Pro Online. At the top right is a 'Log out' button. Below it is a row of buttons: 'Print Return' (blue), 'Sign' (green), 'Save And Transmit Return to IRS >' (green), '✓ Save And Exit Return' (green), and '< Back' (blue). The main heading is 'Submission'. Below it is a message: 'Please review all information on this screen. To finalize your return please click on the submit button located below.' There is a dropdown menu showing 'One Copy - Federal and State' and a 'Print Return' button. The page is divided into sections: 'Electronic Signature' with a 'Taxpayer: Sign' button; 'Ero Information' with 'Efin:' and 'Company Name: Multi Site 7'; 'Client Information' with 'Client Name: Single Taxpayer' and 'Email Address:'; and 'Return Information' with 'Type of Return: Electronic Mailed' and 'Federal Refund: \$6,102.00'.

### 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 lesson, you need to determine what happens to the return from this point. To mark the next step, use the following steps:

1. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the sections of the page:

The screenshot displays the TaxSlayer Pro Online interface for Form 8879. At the top, there are two unchecked checkboxes: "Mark Paid" and "Mark Complete". Below these is the "Form 8879" section header. Underneath, it shows "Taxpayer's Pin: 11212" and "ERO's Pin: 12345". The "State Return Information" section follows, displaying "GA", "Refund: \$681.00", and "Paper Return". The "Referrer" section includes a "Select Referrer:" dropdown menu with "No Answer" selected, and an "Other:" text input field. The "Review Status" section at the bottom has an unchecked checkbox labeled "Ready For Review". At the very bottom, there are three buttons: "Set Return Tags" (a link), "< Back" (a blue button), "✓ Save And Exit Return" (a green button), and "Save And Transmit Return to IRS >" (a green button).

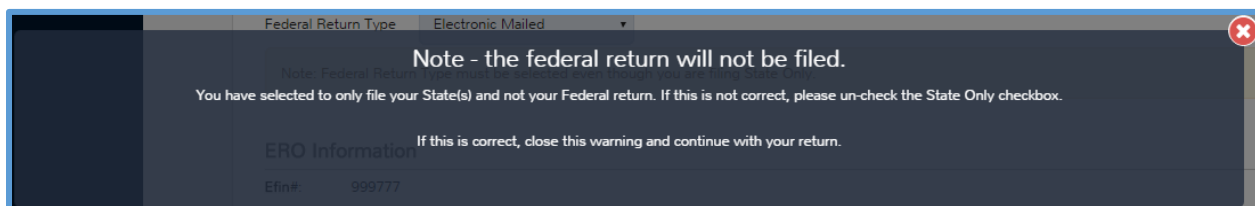
2. Do one of the following:
  - a. If the return is complete and ready to be e-filed, select the **Mark Complete** check box above the **Form 8879** section.
  - b. If another person needs to review the return and you are using the built-in review process before it can be marked complete, select the **Ready for Review** check box at the bottom of the page.
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 on the **E-File** page:

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 the **Federal Return Type**. You need to select from this drop-down list even if you are not electronically filing the federal return.
4. Complete the remainder of the information on the **E-File** and **Submission** pages.

## Sending State Returns

TaxSlayer creates and sends the Federal and State return(s) to the TaxSlayer Processing Center at the same time unless you select to send the state as **Send State Only**.

TaxSlayer holds the state(s) at the Processing Center until the IRS accepts the Federal return. If the IRS rejects the Federal return, TaxSlayer discards the state discarded-file. When you correct and resend the federal e-file, TaxSlayer Pro Online also creates and sends a new state e-file. This helps prevent state rejects and the need to amend state returns.

## 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:

**Transmissions**  
Tax Return Transmissions

Log out

Transmit selected return(s) to IRS > < Back

	SSN	NAME	PHONE	PREPARER	STATUS
<input type="checkbox"/>	[REDACTED]	Taxpayer Example		Admin Preparer	Complete

Add Returns Check All Uncheck All Delete Selected Delete All Transmit selected return(s) to IRS >

2. Select the check box(es) for the returns you want to transmit.
3. If you want to select all returns, click **Check All**.
4. If you have rejected returns and need to resubmit them, click **Add Returns**.

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

	SSN	NAME	PHONE	PREPARER	STATUS
<input type="checkbox"/>	-4672	CYNDI		Donna	Rejected
<input type="checkbox"/>	-7051	KYLE		Krystal	Rejected
<input type="checkbox"/>	-4829	JAMES		Kristi	Accepted
<input type="checkbox"/>	-7016	KRYSTAL		Krystal	Accepted
<input type="checkbox"/>	-3236	Twana		Krystal	Accepted
<input type="checkbox"/>	-9560	NATALIE		Krystal	Accepted
<input type="checkbox"/>	-5580	CHARLES		Krystal	Accepted
<input type="checkbox"/>	-0024	DARRELL		Krystal	Accepted

5. Select the return(s) you want to add to the transmission list.

6. Click **Add Returns**.

**TIP:** Mark the return **Ready to Retransmit** after you correct any rejects. After you correct returns, you can also retransmit them from the e-file section if the user has the appropriate rights.

Review/Retransmit Status

☐ Ready for Retransmit

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

1 return transmitted.

[Back](#)

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:

	Mary Test	(706) 868-	Christopher	In Progress
	John Taxpayer	(706) 651-	Christopher	Transmitted
	First Last	(706) 586-	Christopher	In Progress

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 Processing Center reject.

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:

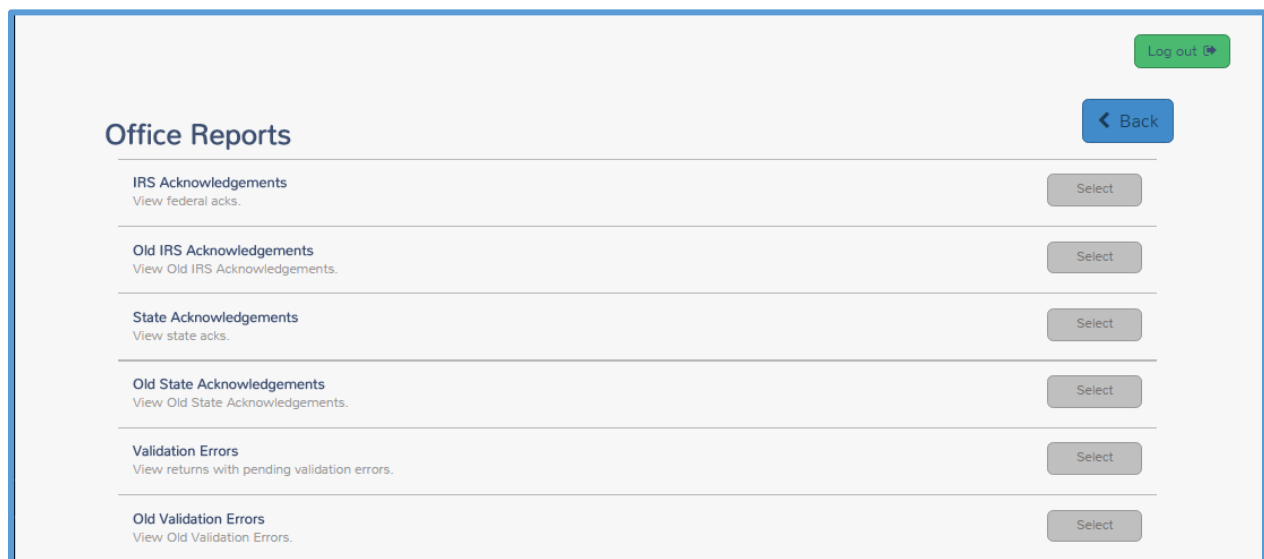
1. Receive acknowledgements.
2. Print an acknowledgement report.
3. Review processing center rejects.

## 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 **Welcome** page:

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

TaxSlayer Pro Online displays the **Office Reports** landing page:



2. Click **Select** on either the **IRS Acknowledgements** or **State Acknowledgements** line.

TaxSlayer Pro Online displays the **IRS Acknowledgements** page, listing all acknowledged returns:

**IRS Acknowledgements**

Search by:

Efin	SSN	Last Name	Status	Reject Code
2855		MATHIESEN	Accepted - 02/01/16	N/A
7722		SHEPARD	Accepted - 02/01/16	N/A
6407		MIXON	Accepted - 02/01/16	N/A
5750		GIBSON	Accepted - 02/01/16	N/A
0224		RIDLEY	Accepted - 02/01/16	N/A
8908		LONG	Accepted - 02/01/16	N/A
6525		FIELDS	Accepted - 02/01/16	N/A
1839		WIMPEY	Accepted - 02/01/16	N/A
9383		BEARDEN	Accepted - 02/01/16	N/A
7051		COCHRAN	Rejected - 02/02/16	

Document Id  
DOC257617051ID1040A

Each 'DependentSSN' and the corresponding 'DependentNameControlTxt' that has a value on Line 6c(2) of the return, must

Data Value: 1308

Print HTML Print PDF Export to Excel < Back

3. 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.
4. Print your acknowledgement report. Click **Print PDF**.
5. Click **Open** in the browser's dialog box. This dialog box varies depending on what browser you use.

Do you want to open or save Validation Errors-Print.pdf from ntstaxonline.cloudtaxoffice.com?

Open Save Cancel

TaxSlayer Pro Online displays the acknowledgement report as a PDF.

6. When you finish reviewing acknowledgements and printing the report, click **Back**.

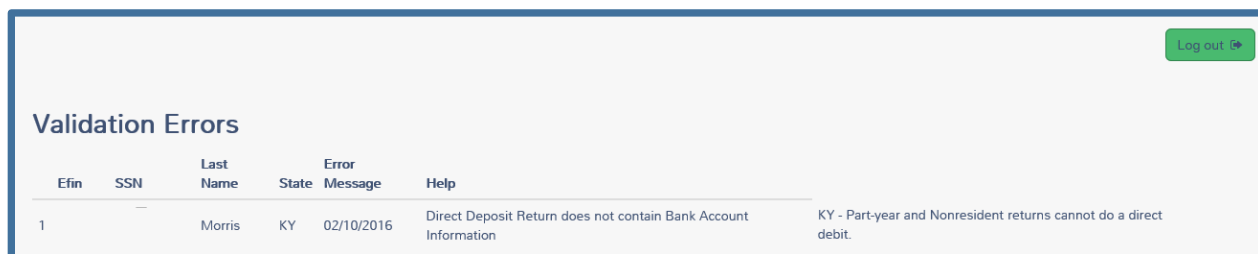


## Reviewing Processing Center Rejects

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 Reports** landing page:

1. Click **Select** on the **Validation Errors** line.

TaxSlayer Pro Online displays the **Validation Errors** page:



Efin	SSN	Last Name	State	Error Message	Help
1		Morris	KY	02/10/2016 Direct Deposit Return does not contain Bank Account Information	KY - Part-year and Nonresident returns cannot do a direct debit.

2. 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**.

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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

Custom Questions – Site Administrator can create questions and answers that preparers can use to capture data during the return preparation process

Deactivate Return – Users/Preparers with a Security Template that enables deactivation can deactivate/delete a return; returns can only be deactivated/deleted if the status is **In Progress** or **Review Failed**

EFIN – Electronic Filing Identification Number

EIN Database – A feature that auto-populates the employer name and address when you type a previously entered EIN on Form W-2, 1099-R, 2441, etc.

Enter Myself – Entry method displaying submenus allowing for quick navigation to specific entry sections

ERO – Electronic Return Originator

ERO Setup – A TaxSlayer menu listing the ERO name, EFIN, address, and phone number

Federal Return Type: Direct Debit – A return type selection to indicate that the return is electronically filed and the amount owed is directly debited from the taxpayer's account

Federal Return Type: Direct Deposit – A return type selection to indicate that the return is filed electronically and the taxpayer's refund is deposited in their bank account

Federal Return Type: Electronic Mailed – A return type selection to indicate that the return is filed electronically and the taxpayer receives the refund as a mailed check

Federal Return Type: Mail Payment – A return type selection to indicate that the return is electronically filed and the taxpayer mails a check for the amount owed

Federal Return Type: Paper Return – A return type selection to indicate that the return is printed and mailed and the taxpayer either receives the refund via mail or mails a balance due

Federal Return Type: Paper Return with Direct Deposit – A return type selection to indicate that the return is printed and mailed; the taxpayer's refund is deposited into their bank account

Fees Setup – set prices for forms to run reports at the end of tax season, etc. showing the amount of return prep fees saved

Filing Status Wizard – A questionnaire that takes the preparer through a series of questions to determine the taxpayer's filing status

Forms Search – Entry method that takes the preparer to specific entry pages based on a form number search

Group Administrator – A user name assigned to site designated as the Multi-Site Administrator through the order process; grants the ability to assign configurable items to designated sites

Guide Me – Interview style entry method that takes the preparer through a series of Yes/No questions

Is Required – Indicates that a Custom Question is required to be answered before TaxSlayer creates an e-file

Login Security Code – Additional level of security required for logging into the site; the code is configurable by the site administrator

Message Center – A one way communication from TaxSlayer to the sites, or between the users at a site

Multi-Factor Authentication (MFA) – A requirement utilizing something other than what you know to authenticate yourself; Users/Preparers are required to use an code sent via email and/or text at first login from a device

Multi-Site Administrator – A user who can assign configurable items to designated sites; designated during the ordering process

MyRA – A savings initiative from the Department of the Treasury

Office Setup – A TaxSlayer menu listing the site name, address, phone number, SIDN, and login security code

Preview Return – Generates the forms used in the return

Print Sets (Assigned) – A print set assigned by TaxSlayer or a Multi-Site Admin site; assigned print sets cannot be modified or deleted

Print Sets (Custom) – A print set in which the site admin, and anyone assigned the role, can create print sets to include the desired forms and number of copies printed for each form

Privacy Settings – An option to make a return private by requiring a password for accessing it; the site administrator enables privacy settings through Security Templates

Processing Center Rejects – Returns that fail secondary validation at the Processing Center

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