VITA/TCE

TaxSlayer Pro Online User Guide

Contents

Getting Started with TaxSlayer Pro Online

Login and Passwords

This chapter covers the following actions:

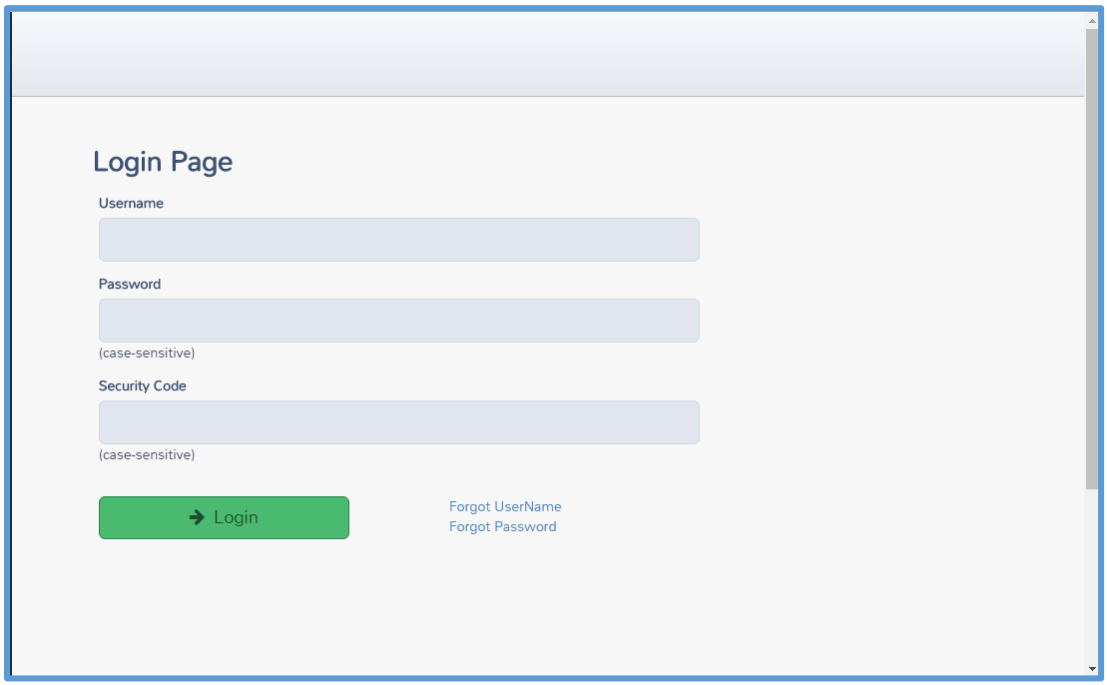
1. Navigate to TaxSlayer Pro Online.
2. List the password requirements.
3. Change your password the first time you log in.
4. Reset your password.

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:

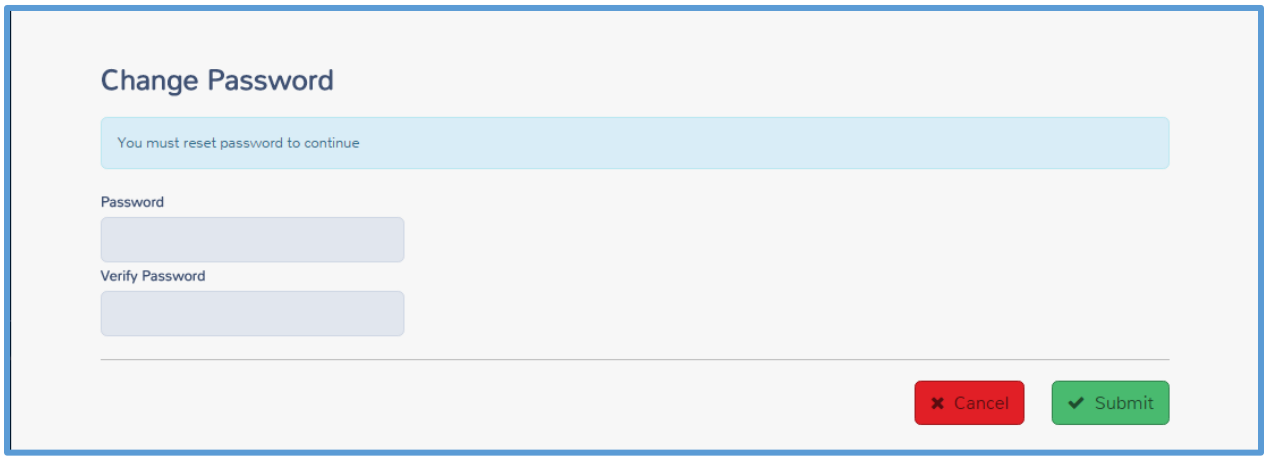


2. In the appropriate boxes, type the user name and password you received from your site administrator.
3. Type the security code you received from your site administrator.

TIP: Passwords and security codes are case-sensitive.

4. Click **Login**.

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



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.

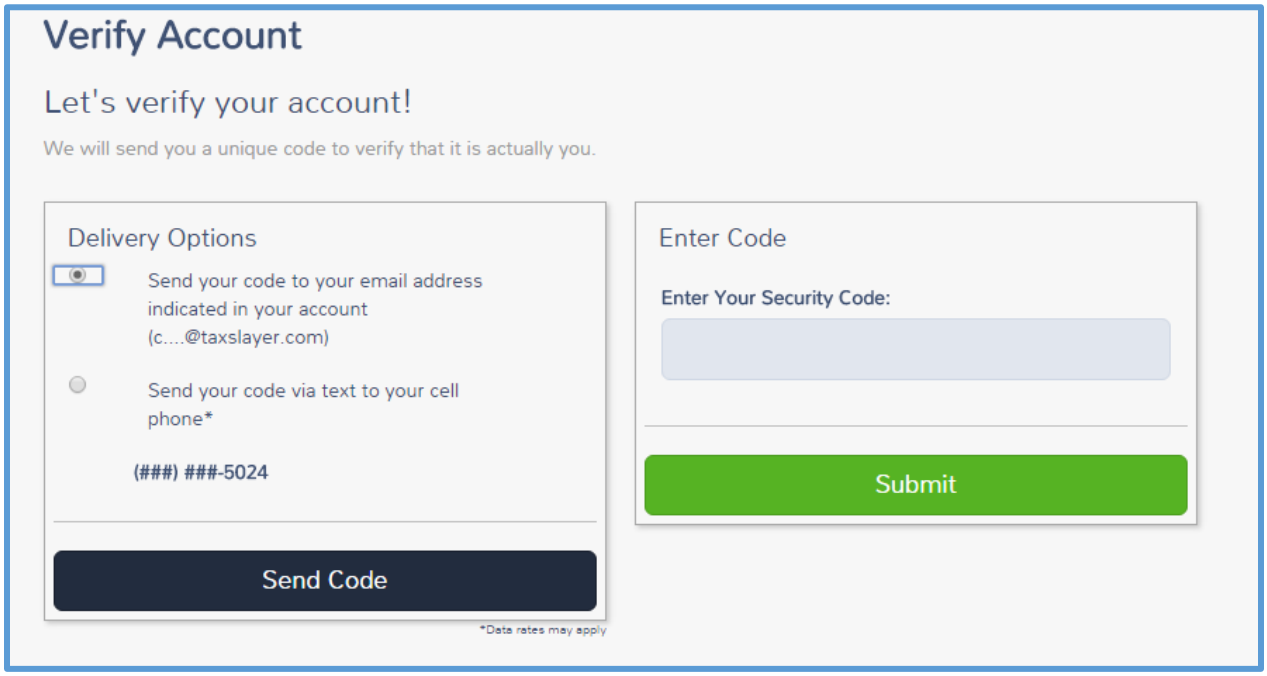
6. Type the password again for verification.
7. Click **Submit**.

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**.

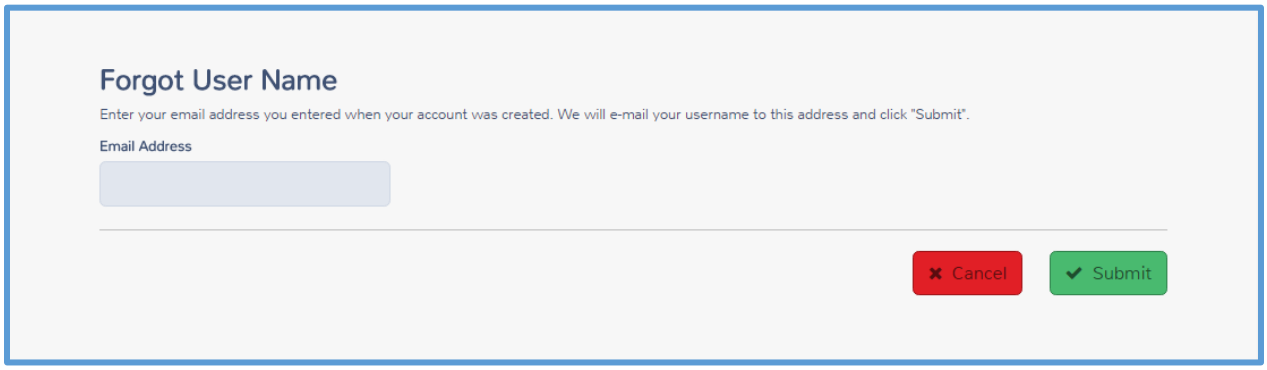
TaxSlayer Pro Online verifies the code and displays the **Welcome** page.

Retrieving Your User Name

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

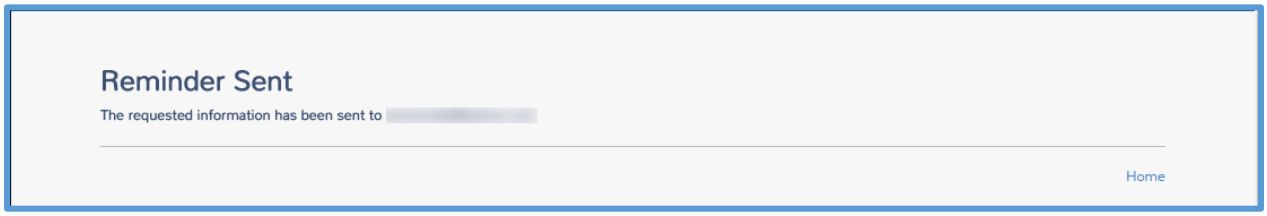
1. Click **Forgot UserName**.

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

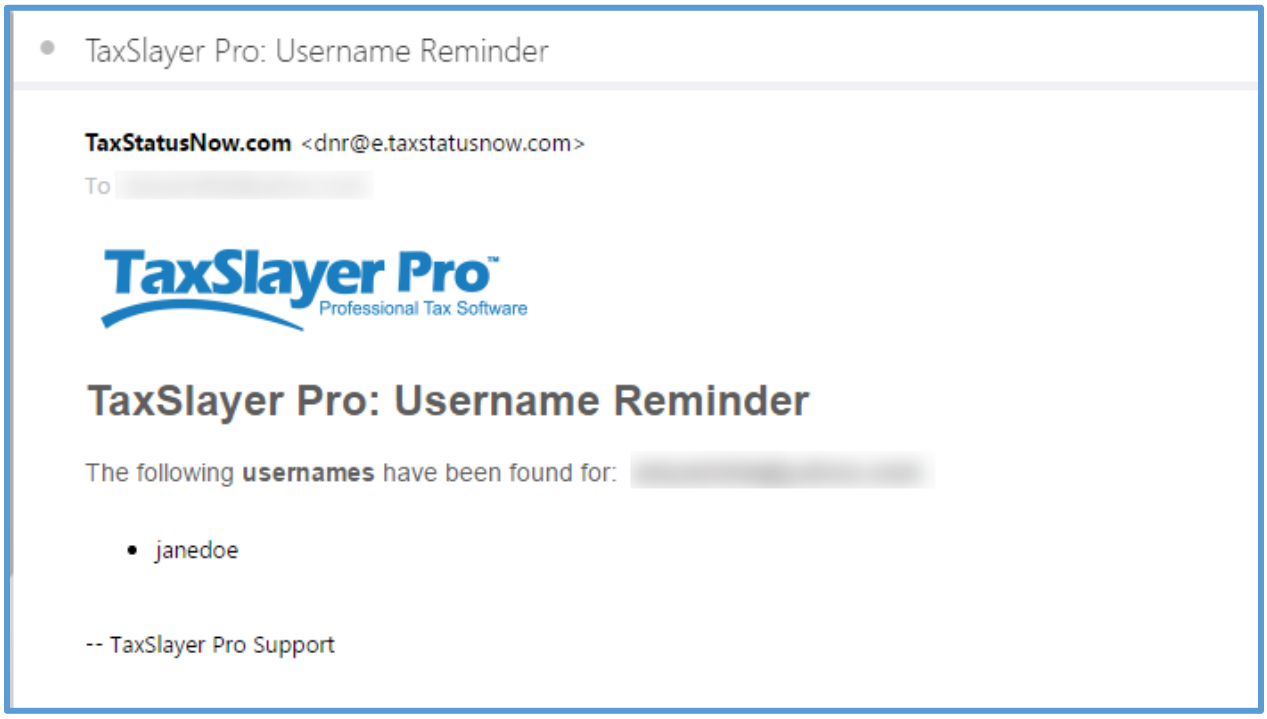


2. Type the email address your site administrator used during setup for your Preparer account.
3. Click **Submit**.

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



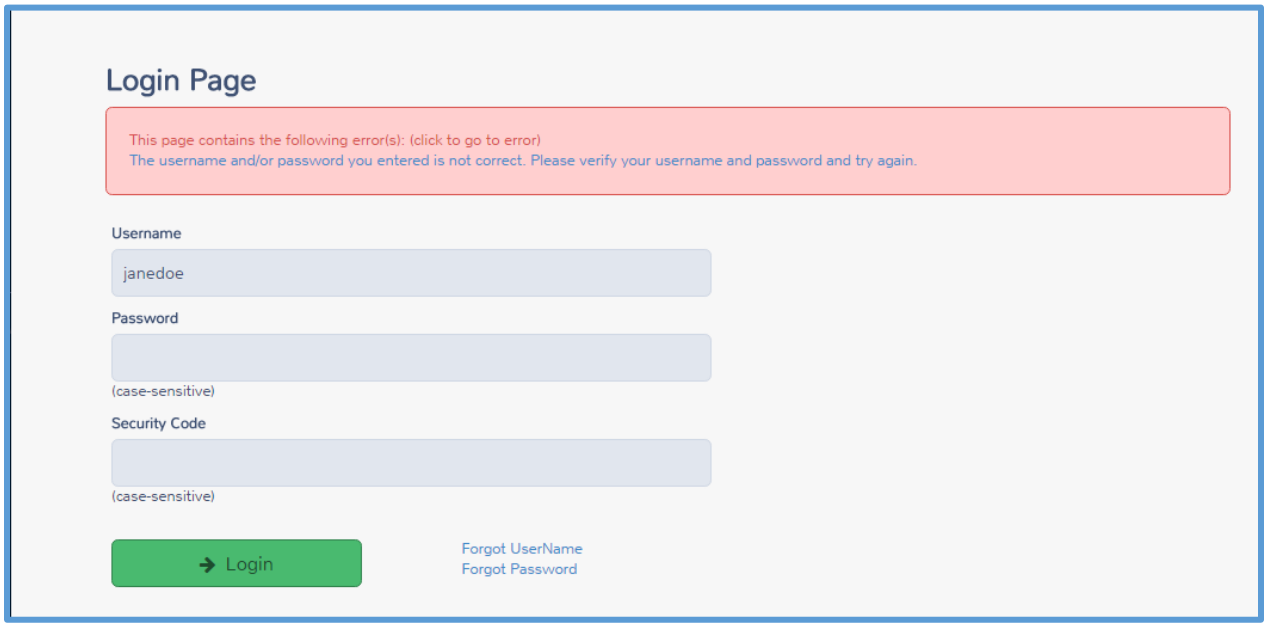
TaxSlayer sends an email, similar to the following:



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

Resetting Your Password

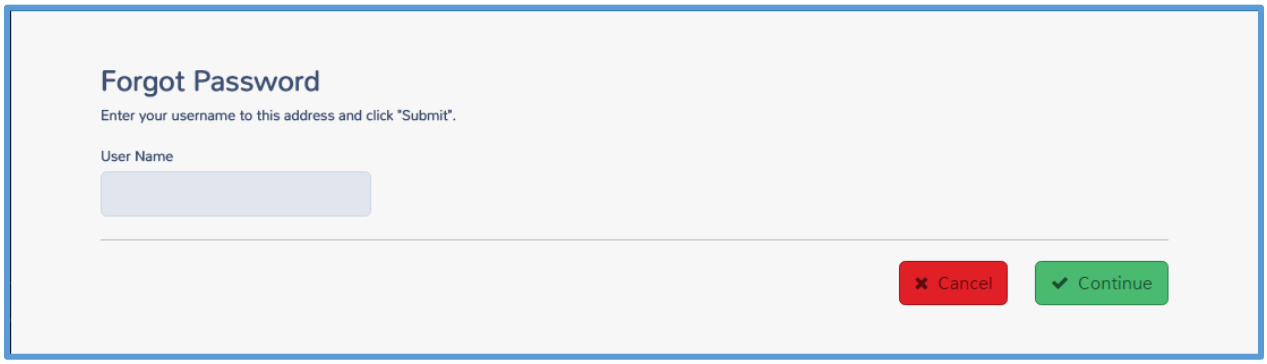
If you type the wrong password, TaxSlayer Pro Online displays the following message:



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:

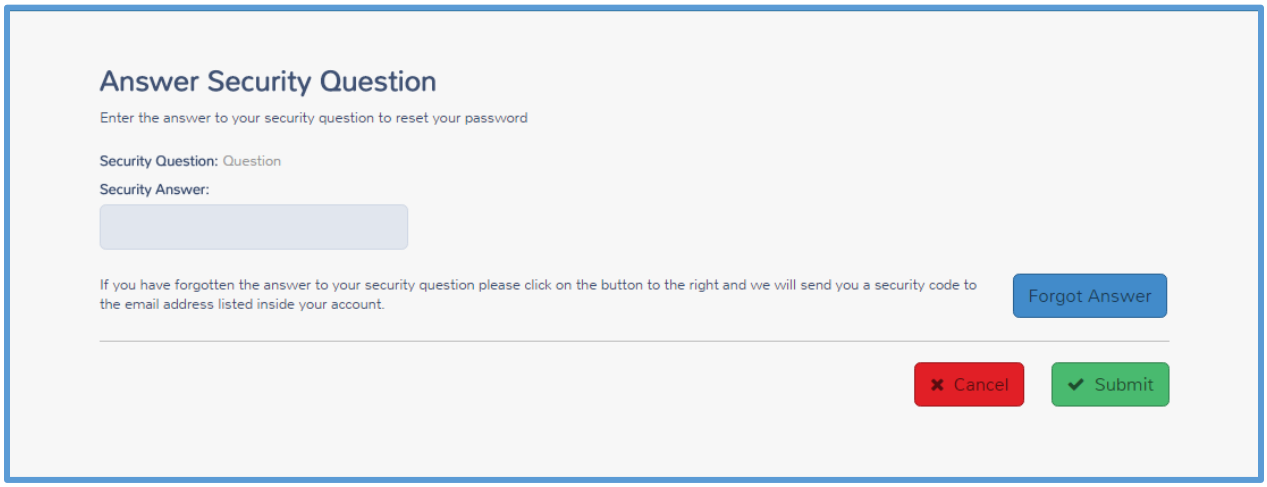
1. Click **Forgot Password**.

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



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

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



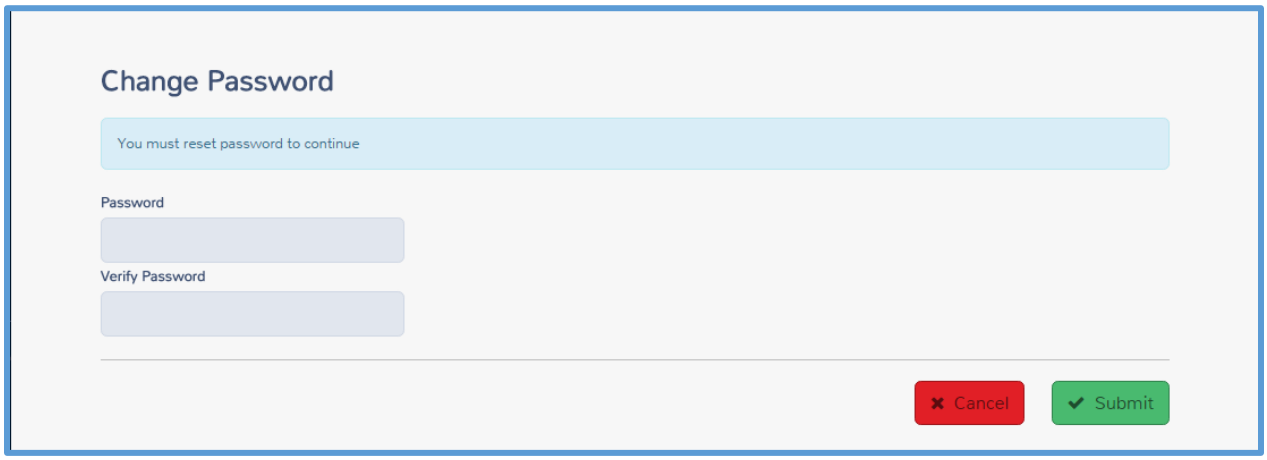
Resetting with Security Question

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:



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

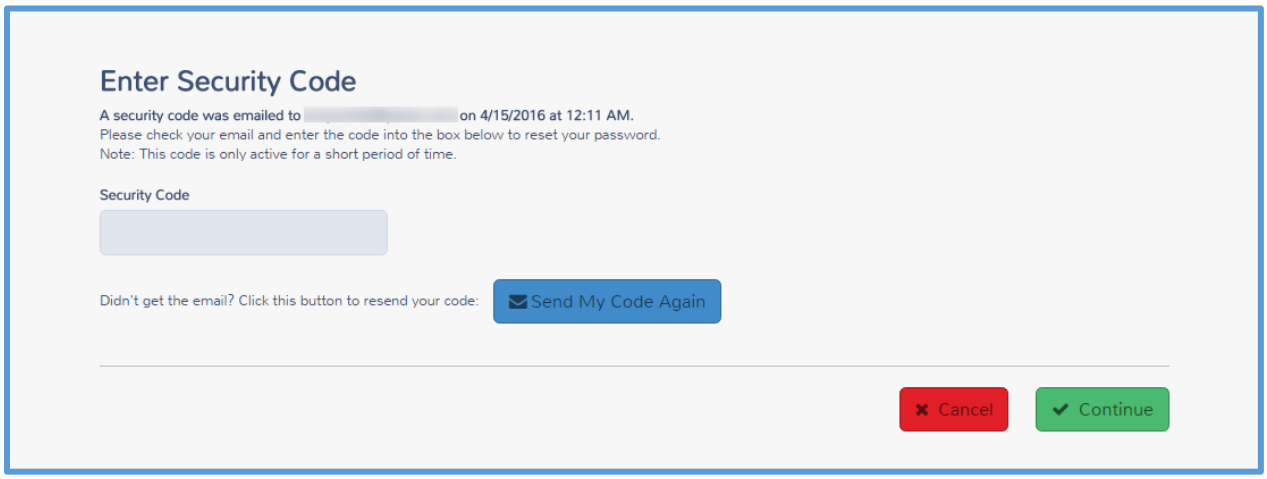
On the TaxSlayer Pro Online **Login Page**, type your user name, new password, and security code, and then click **Login**.

Resetting with Security Code

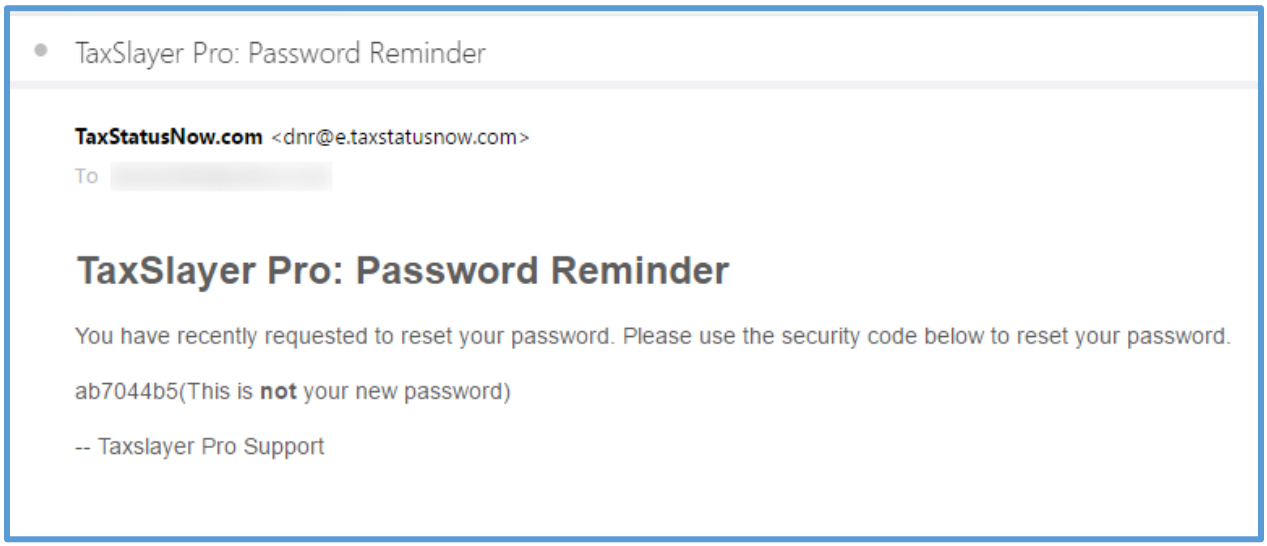
If you do not remember the answer to your security question, reset your password using the following steps:

1. Click **Forgot Answer**.

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

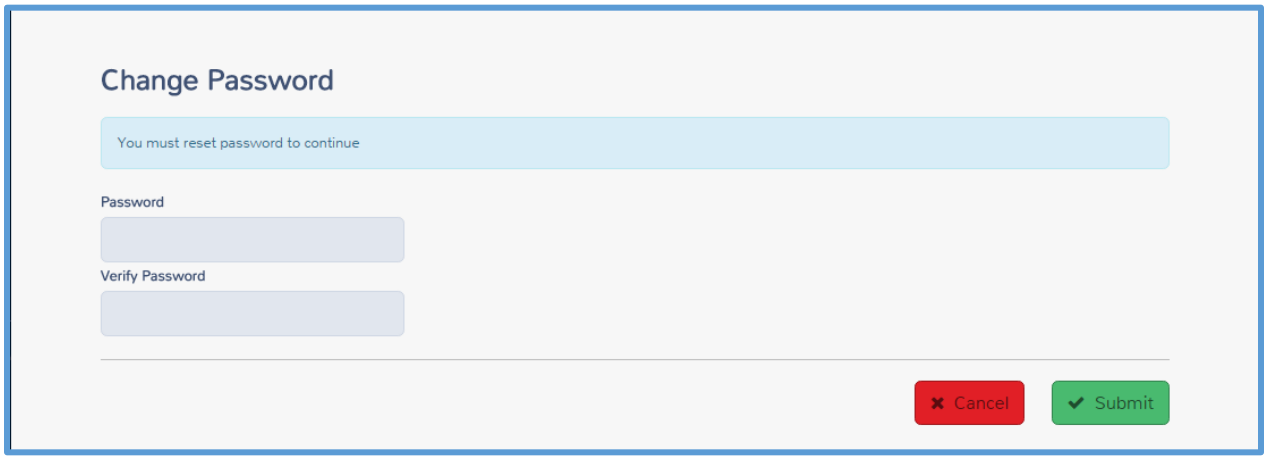


TaxSlayer sends an email to the email address listed on your Preparer account, similar to the following:



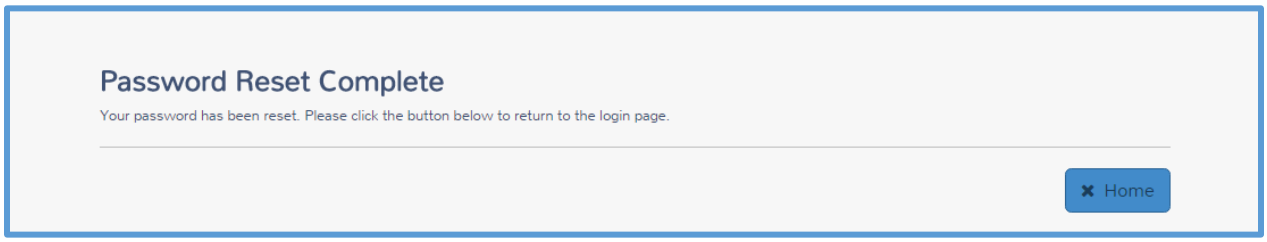
2. Find the security code in the email.
3. Type the security code from the email in the **Security Code** box.
4. Click **Continue**.

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



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

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



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.

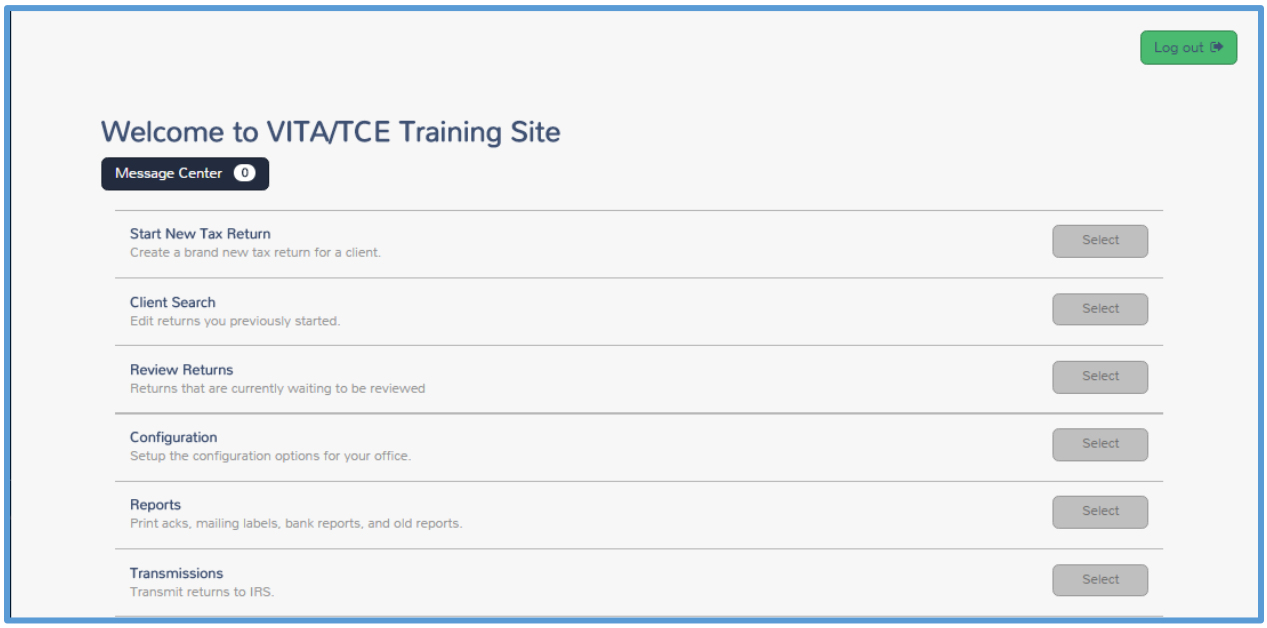
Before you begin using TaxSlayer Pro Online, you need to configure settings. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carry to tax returns so that you only have to type this information once. This includes items such as the firm/site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

Setting up Your Site

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

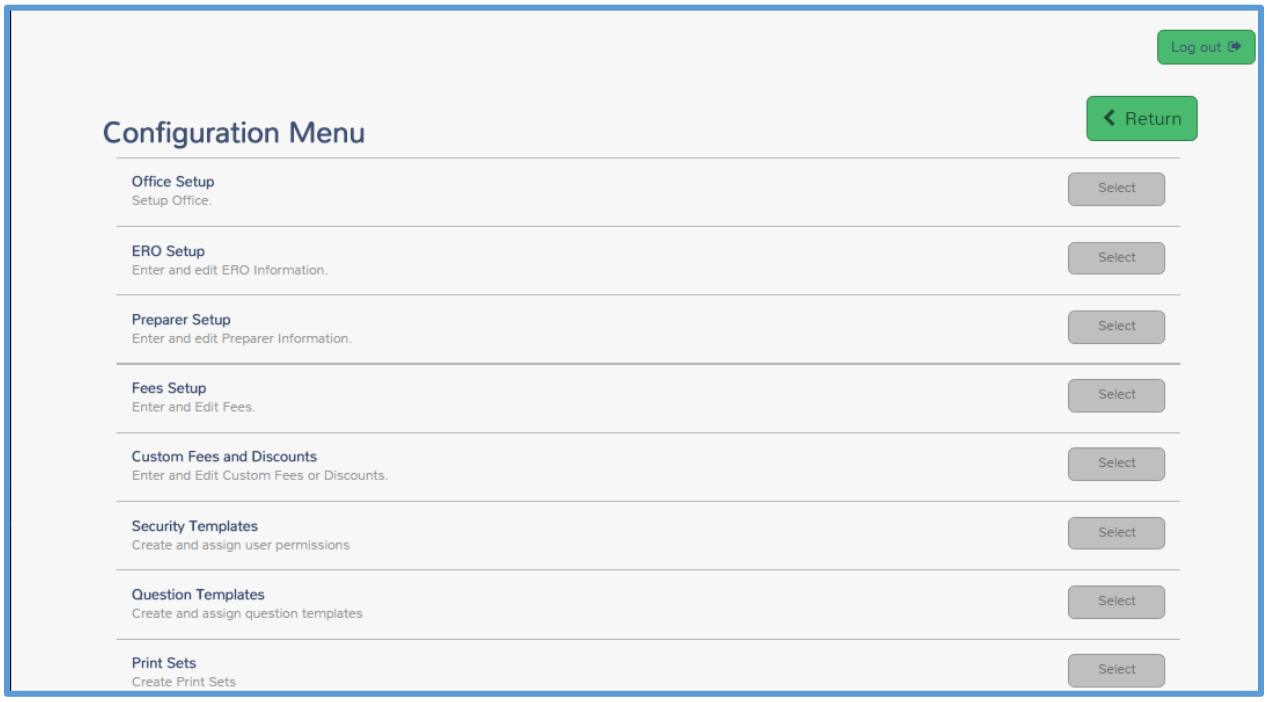
1. Log in to TaxSlayer Pro Online.

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



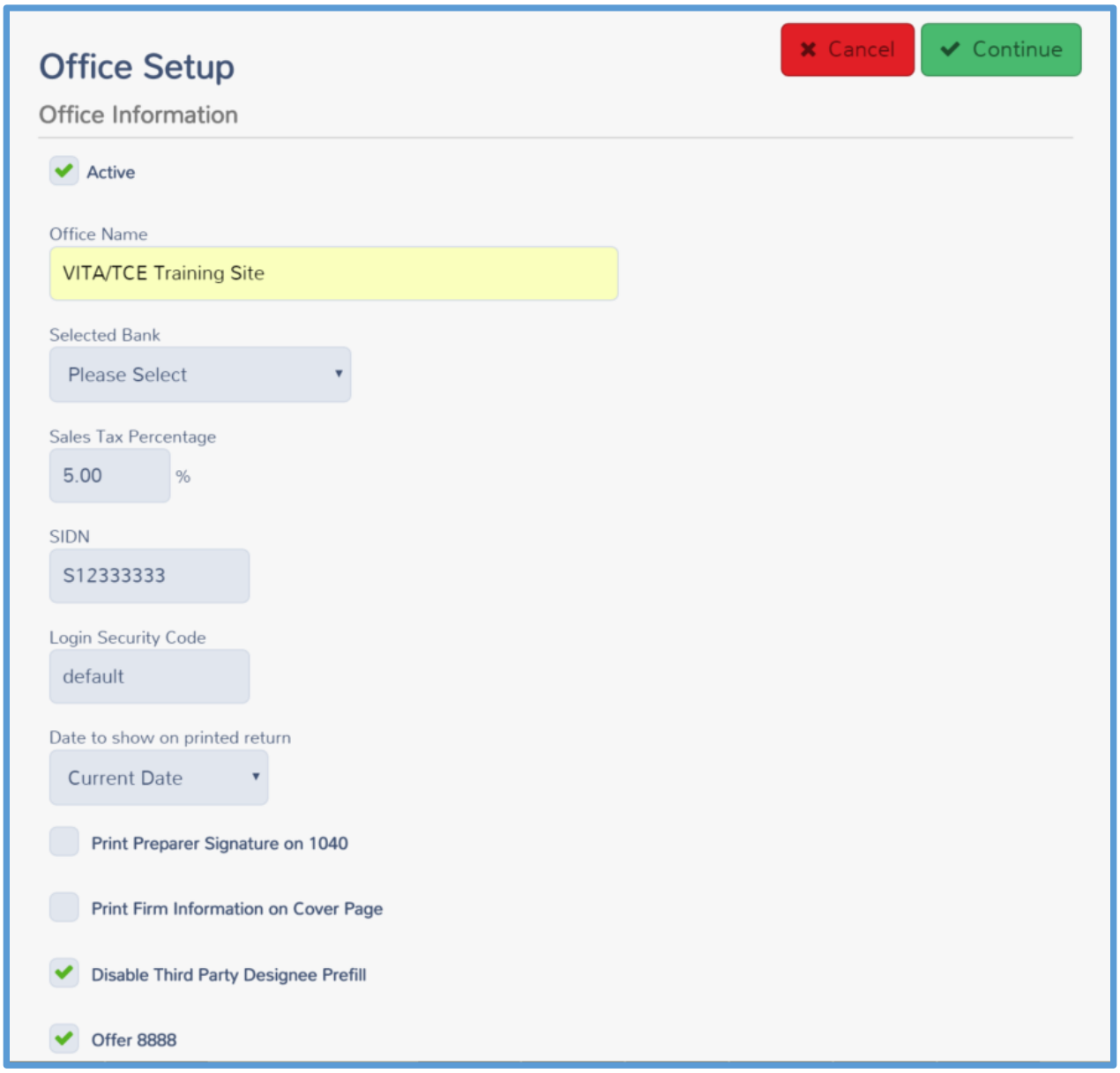
2. Click **Select** on the **Configuration** line.

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



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

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

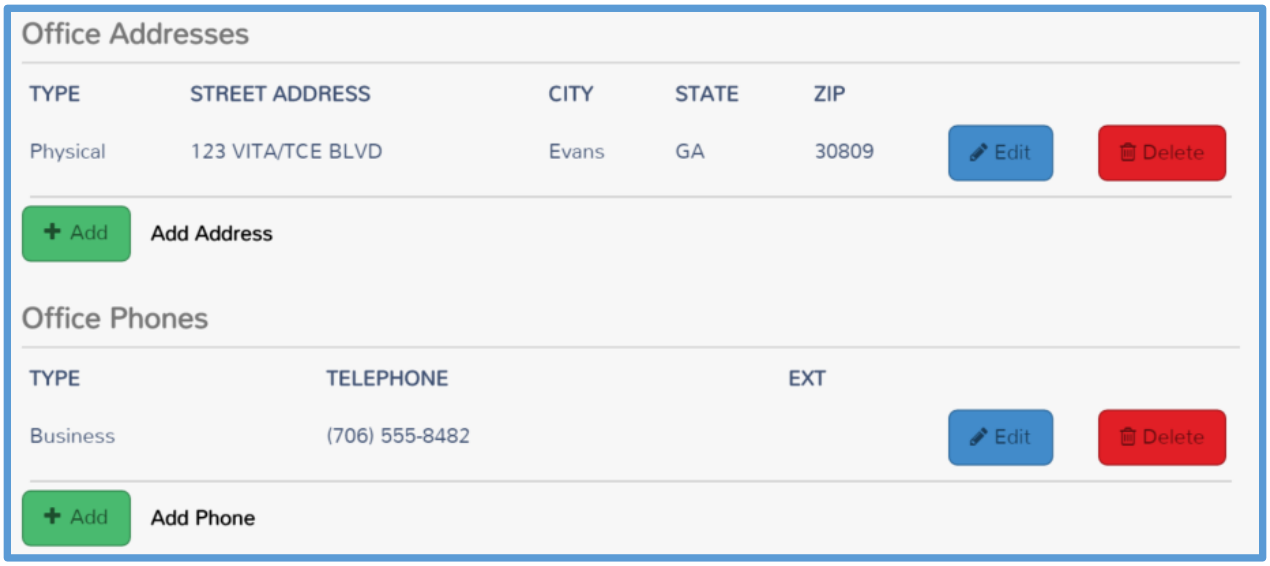


4. TaxSlayer populates several boxes on this page based on the information submitted by the IRS. Review this information and make changes as needed.
    a. The default **Login Security Code** will be sent with the site activation information. We recommend you change this code before you add preparers.
    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:



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.

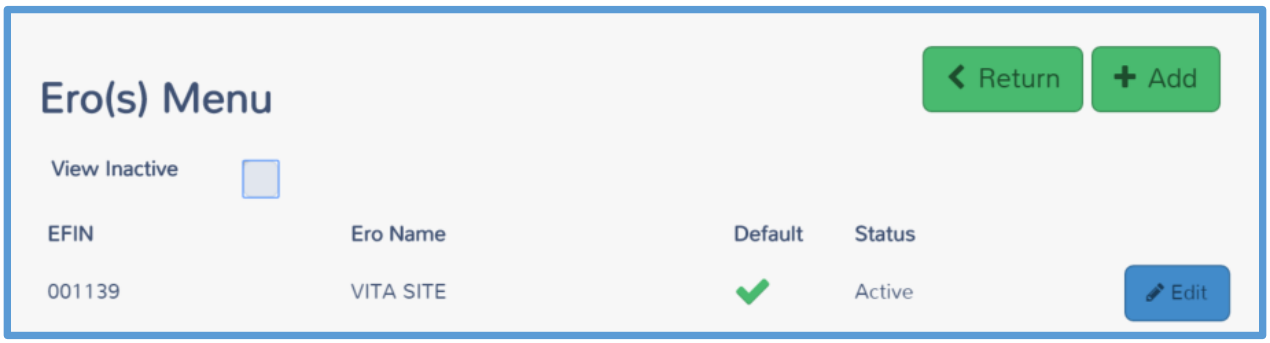
11. Change the phone number in the appropriate boxes.
12. Click **Continue**.
13. When you finish reviewing and adding office information, click **Continue**.

Setting up EROs

To set up EROs, use the following steps:

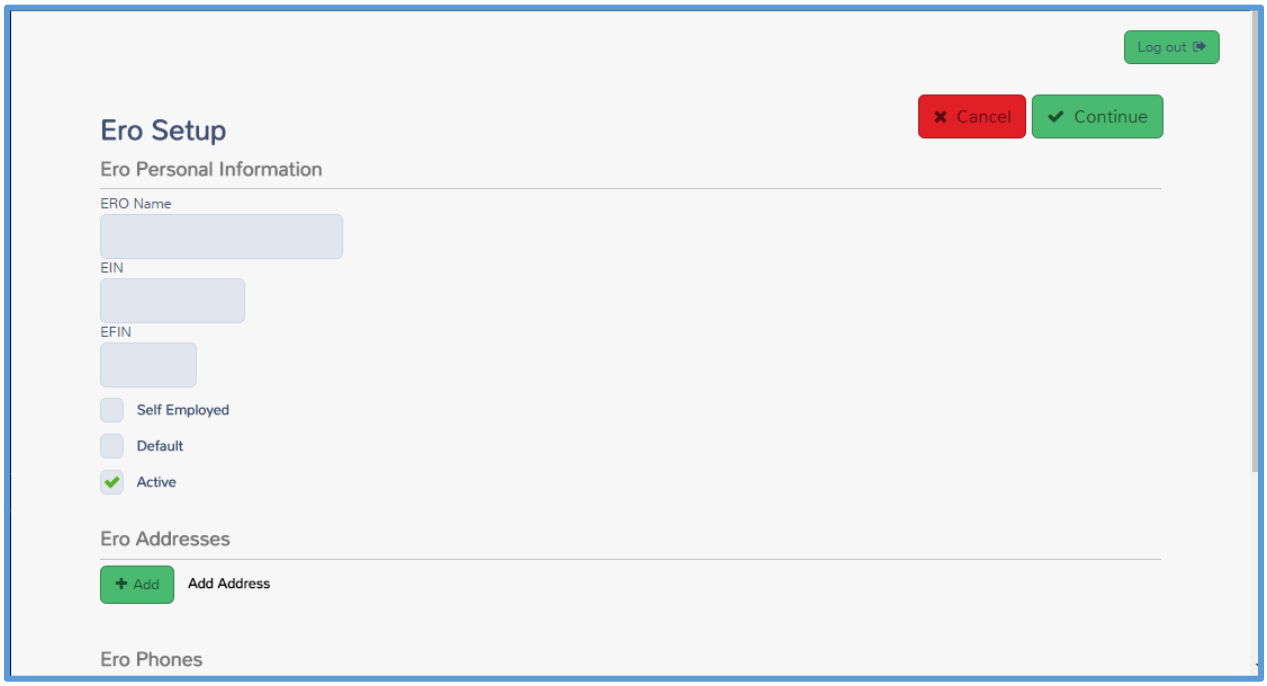
1. Click **Select** on the **ERO Setup** line from the **Configuration Menu** landing page.

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.

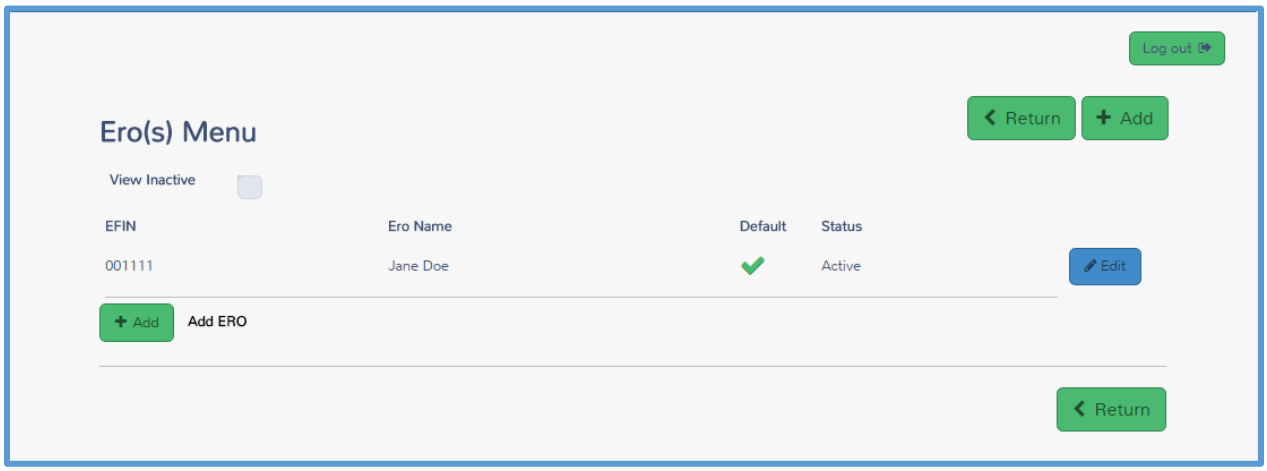
TaxSlayer Pro Online displays the **Ero Information** address page.

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:



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.

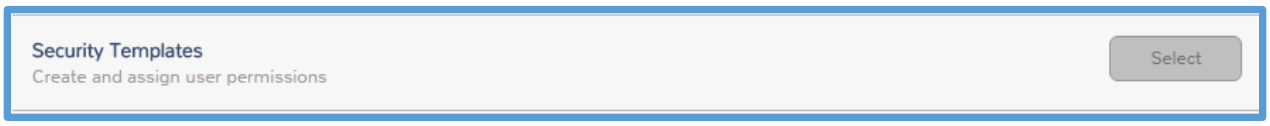
When you set up users/preparers, you can select the security template. See *Adding Preparers* for information on selecting security templates for users.

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

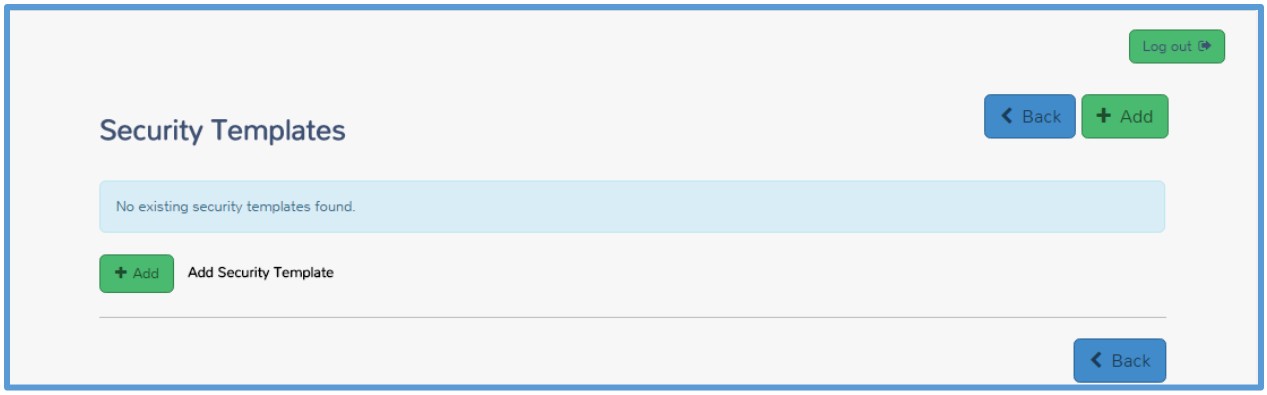
You can create an unlimited number of security templates for your site. To do this, use the following steps from the **Welcome** page:

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



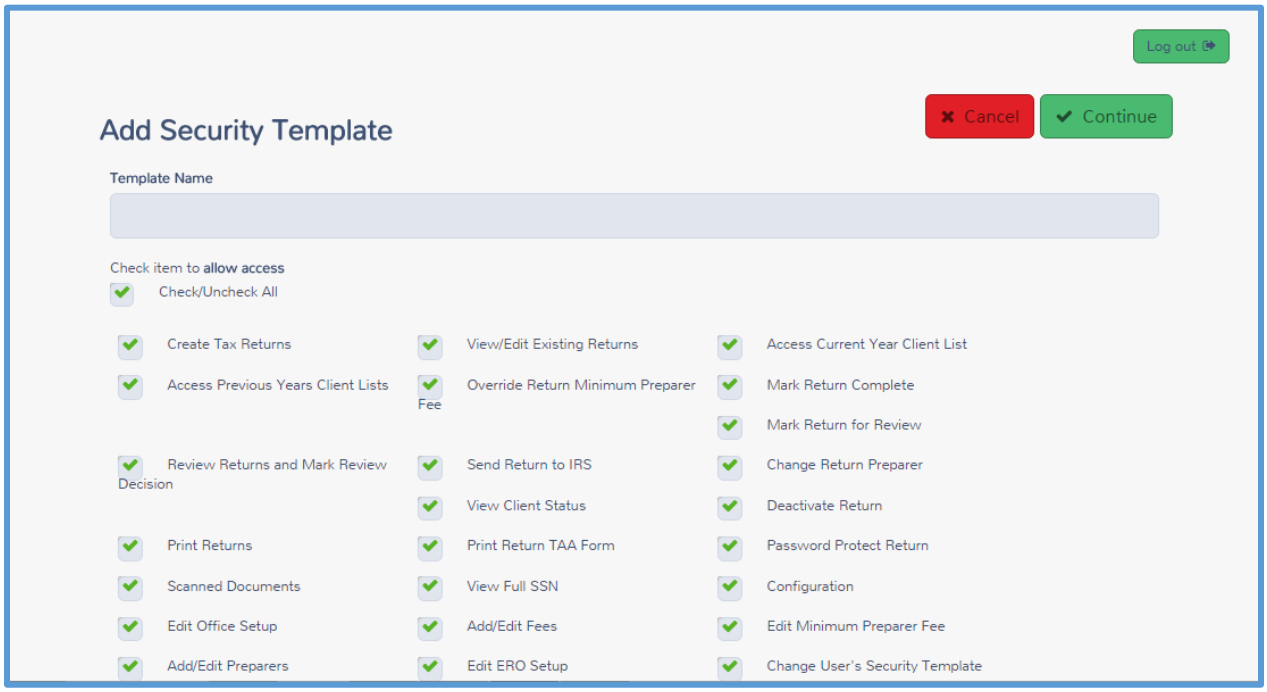
2. Click **Select** on the **Security Templates** line.

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



3. Click **Add**.

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



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

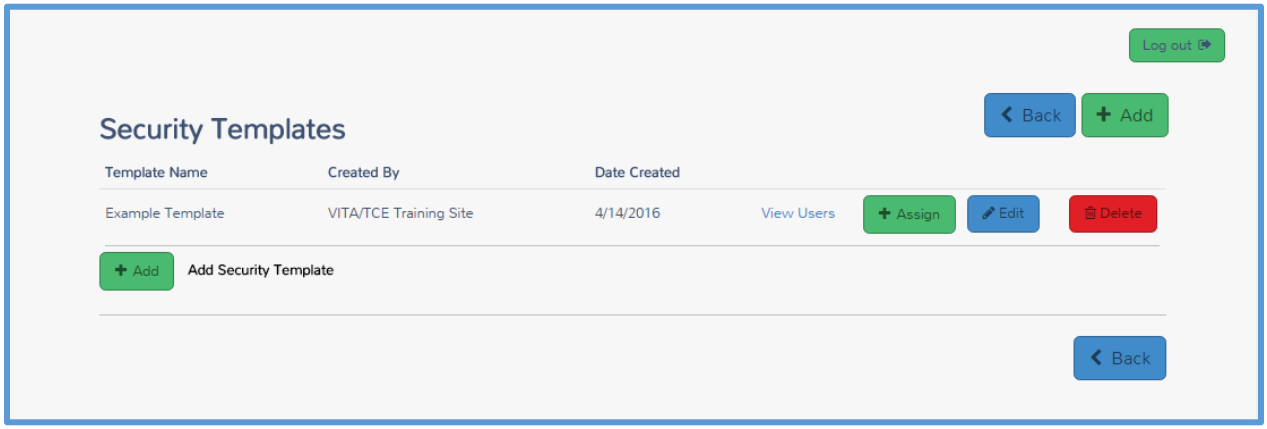
After you add security templates, you can edit those templates. To edit security templates, use the following steps from the **Welcome** page:

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

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

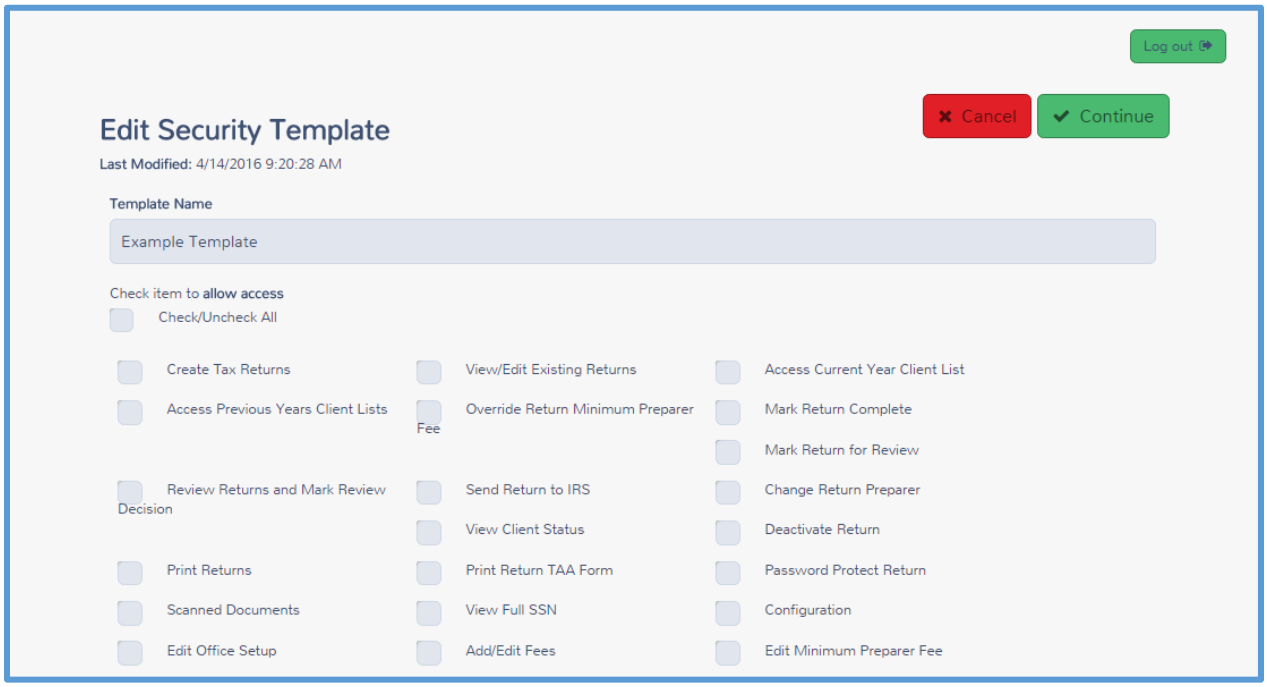
2. Click **Select** on the **Security Templates** line.

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.

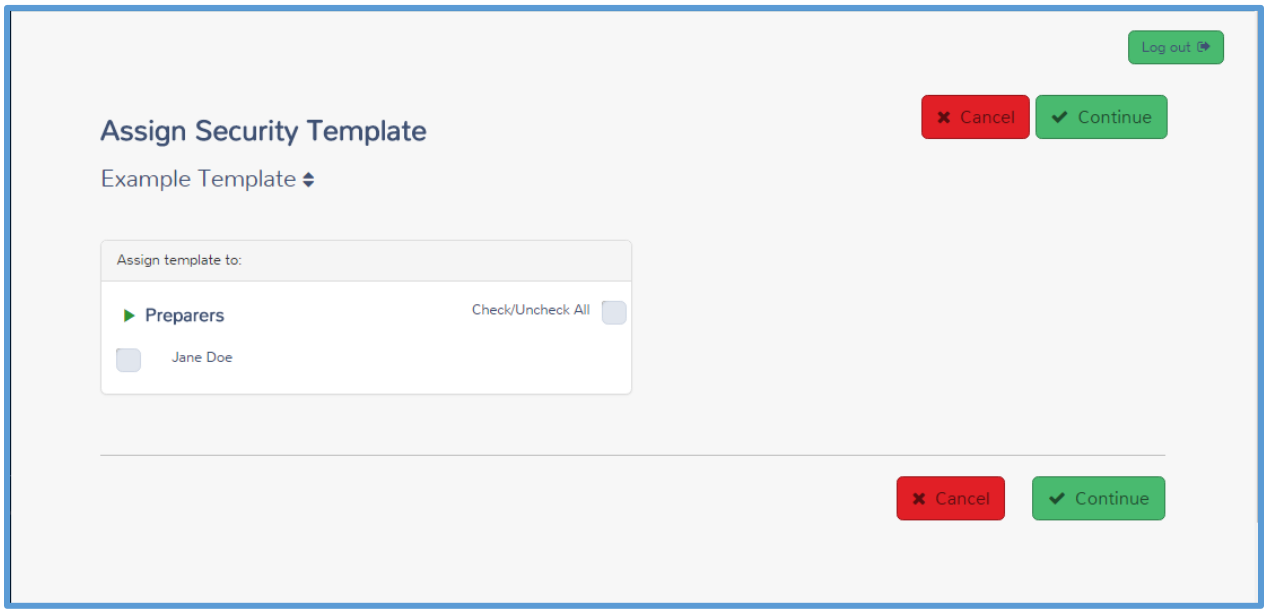
10. When you finish, click **Continue**.

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:



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.

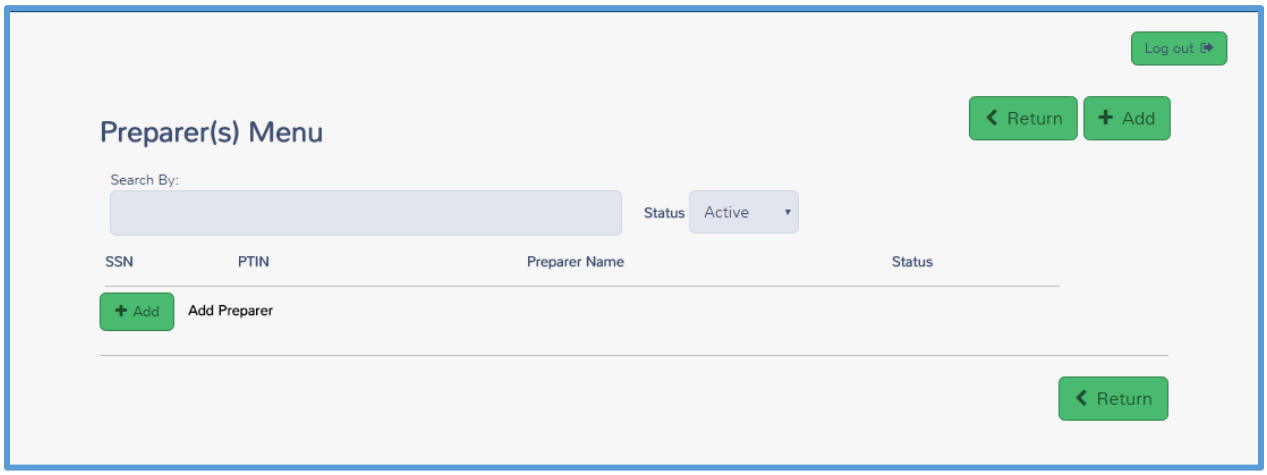
Creating Users

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

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

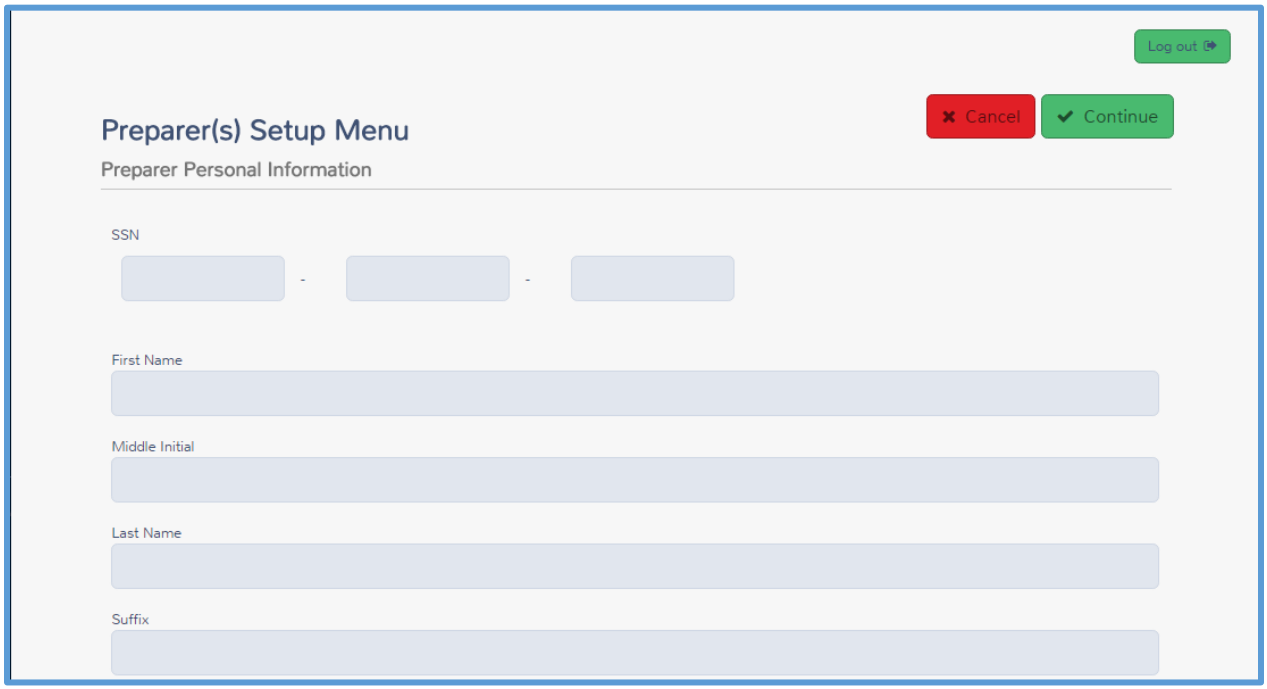
2. Click **Select** on the **Preparer Setup** line.

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



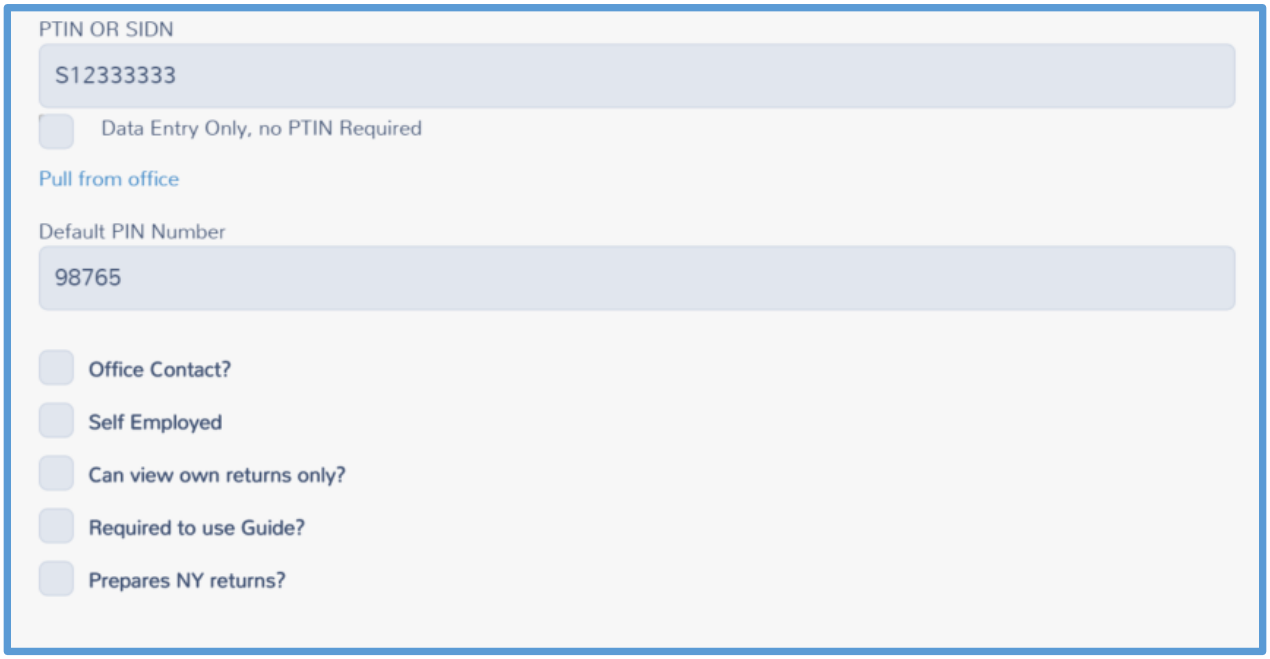
3. Click **Add**.

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



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:



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.

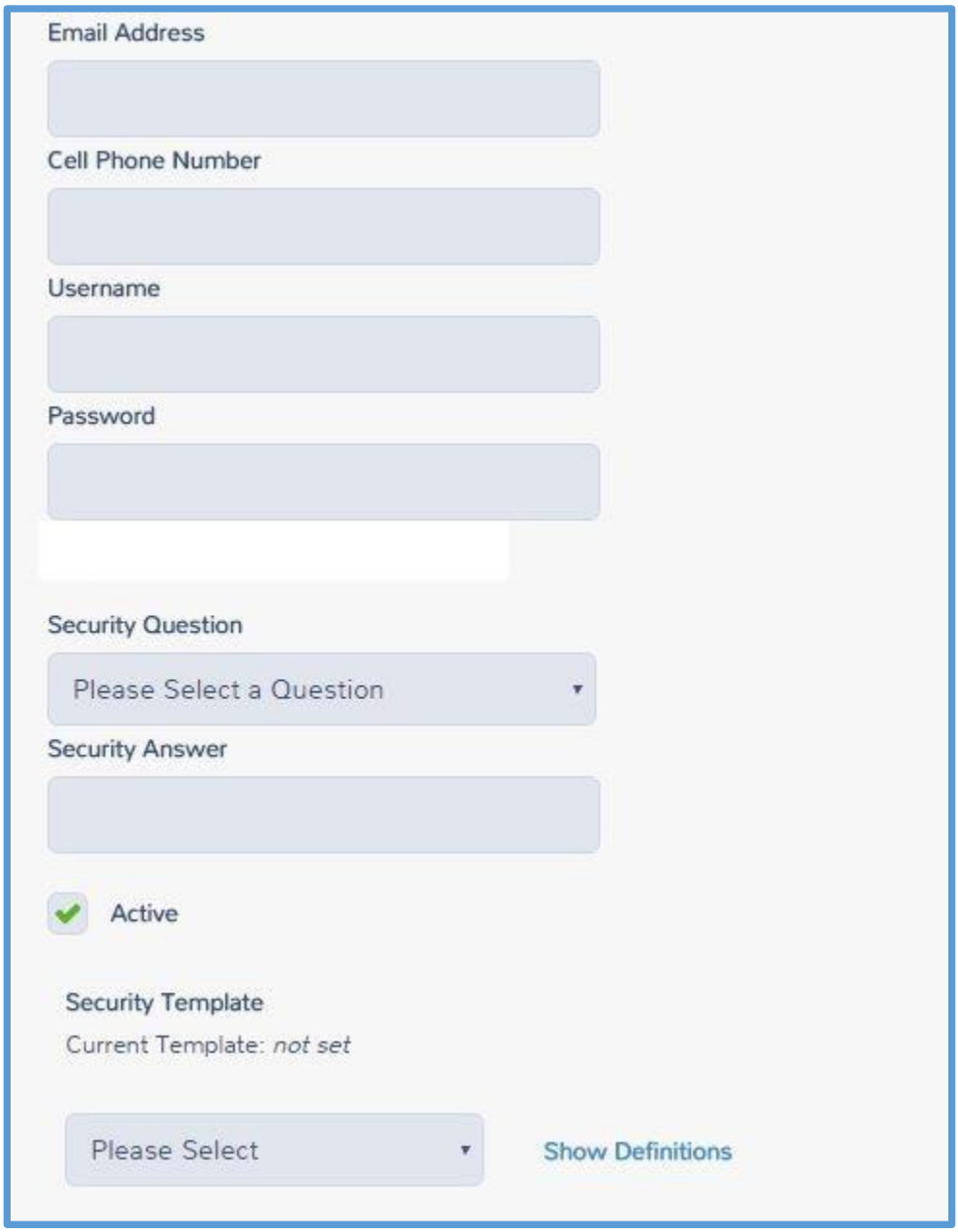
Return Access

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:



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.

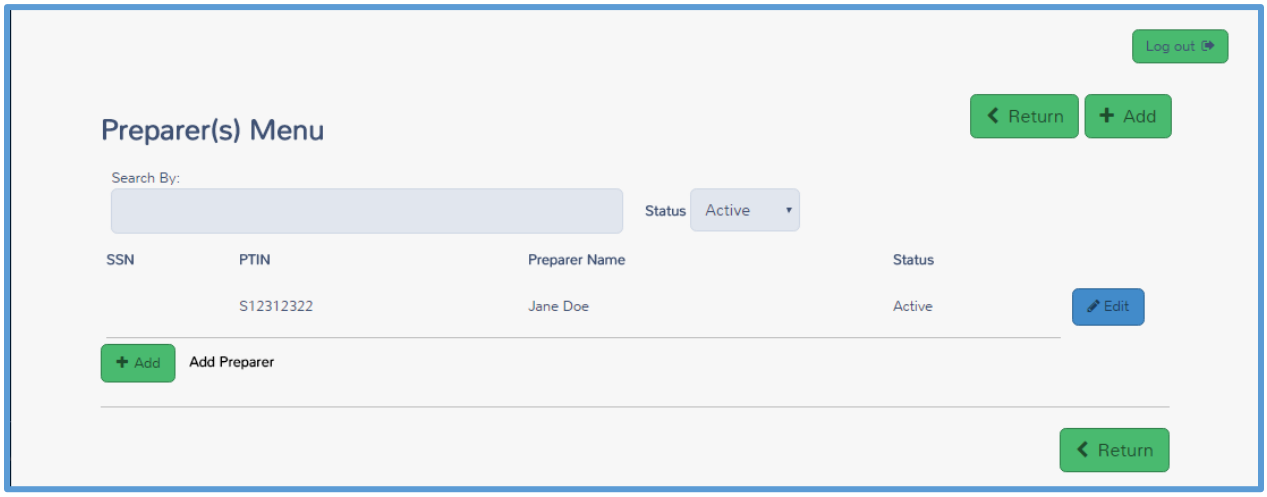
TIP: When you create a password for the preparer, make sure that you use at least one number, one special character (!@#, etc.), and ensure the password contains at least eight (8) characters.

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:



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.

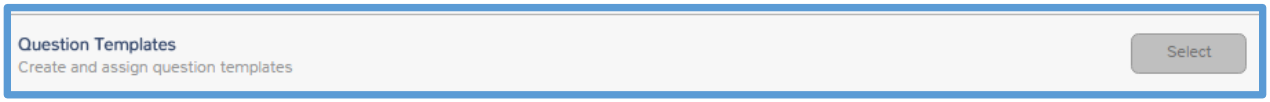
TaxSlayer Pro Online allows you to set up custom questions that preparers can use to capture data during the return preparation process. You can use the predefined questions or add more questions.

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

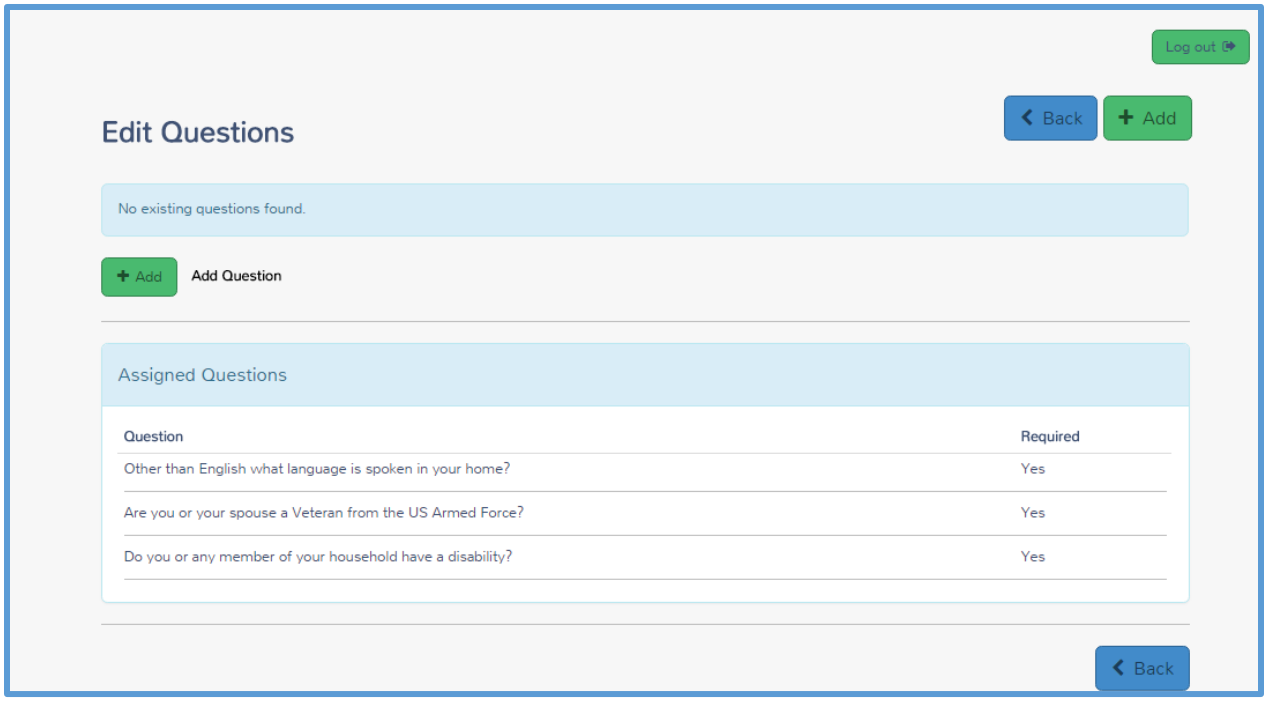
To access custom questions from the **Welcome** page, use the following steps:

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



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

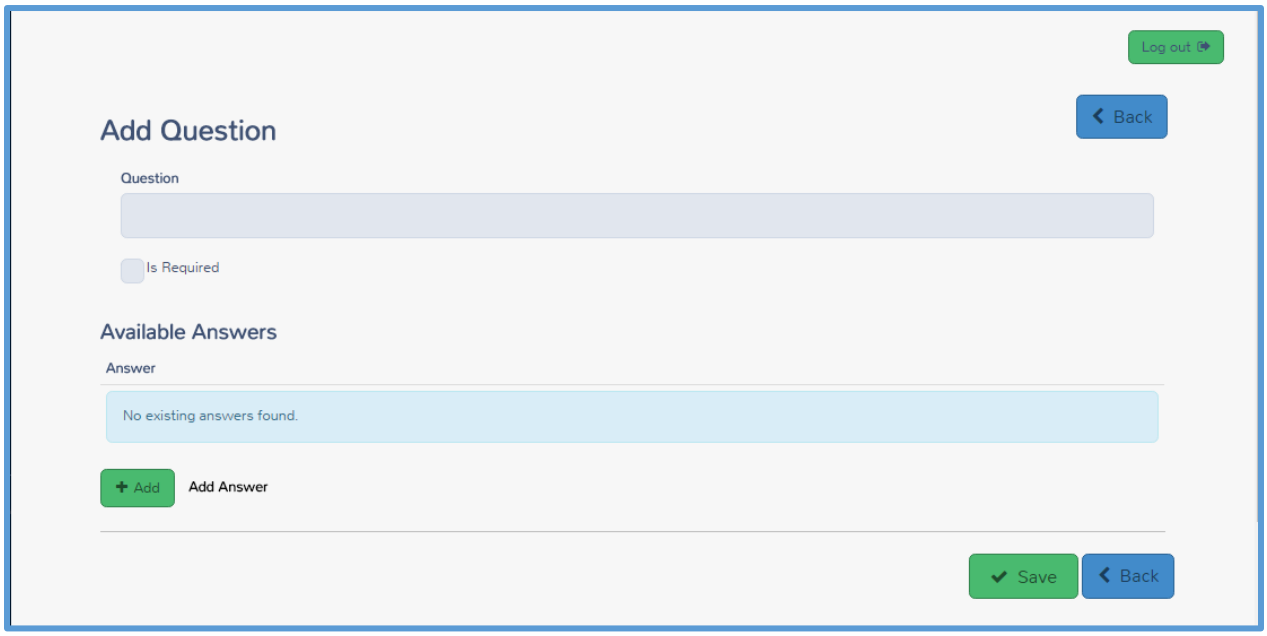
TaxSlayer Pro Online displays the **Edit Questions** page, listing any custom questions your site has been assigned:



3. To add more questions, click **Add**.

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

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



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

TIP: If you require the answer to a question, the preparer **cannot** 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.

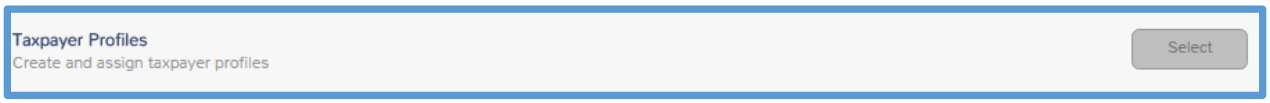
In TaxSlayer Pro Online, you can set up taxpayer profiles. Preparers can select taxpayer profiles when starting a new return to easily navigate through the common forms you use at your site. You can use the **Master Profile** or add additional profiles.

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

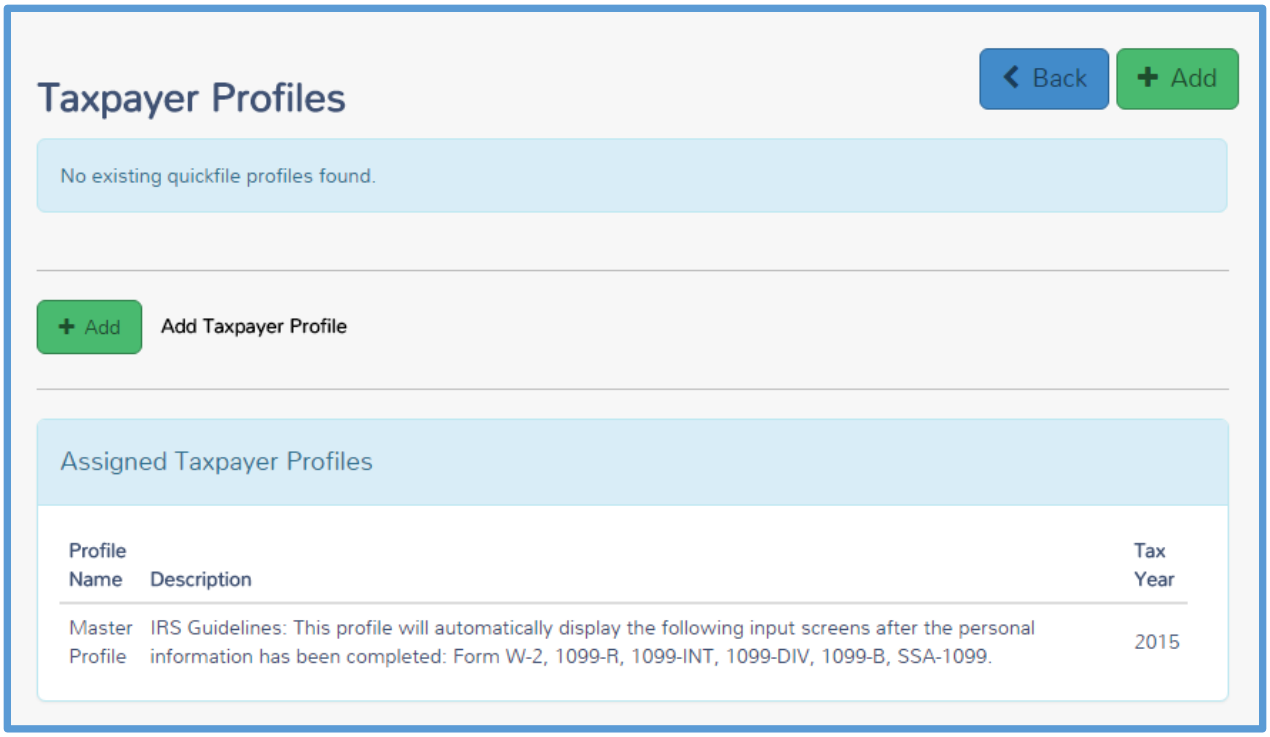
Adding a Taxpayer Profile

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.



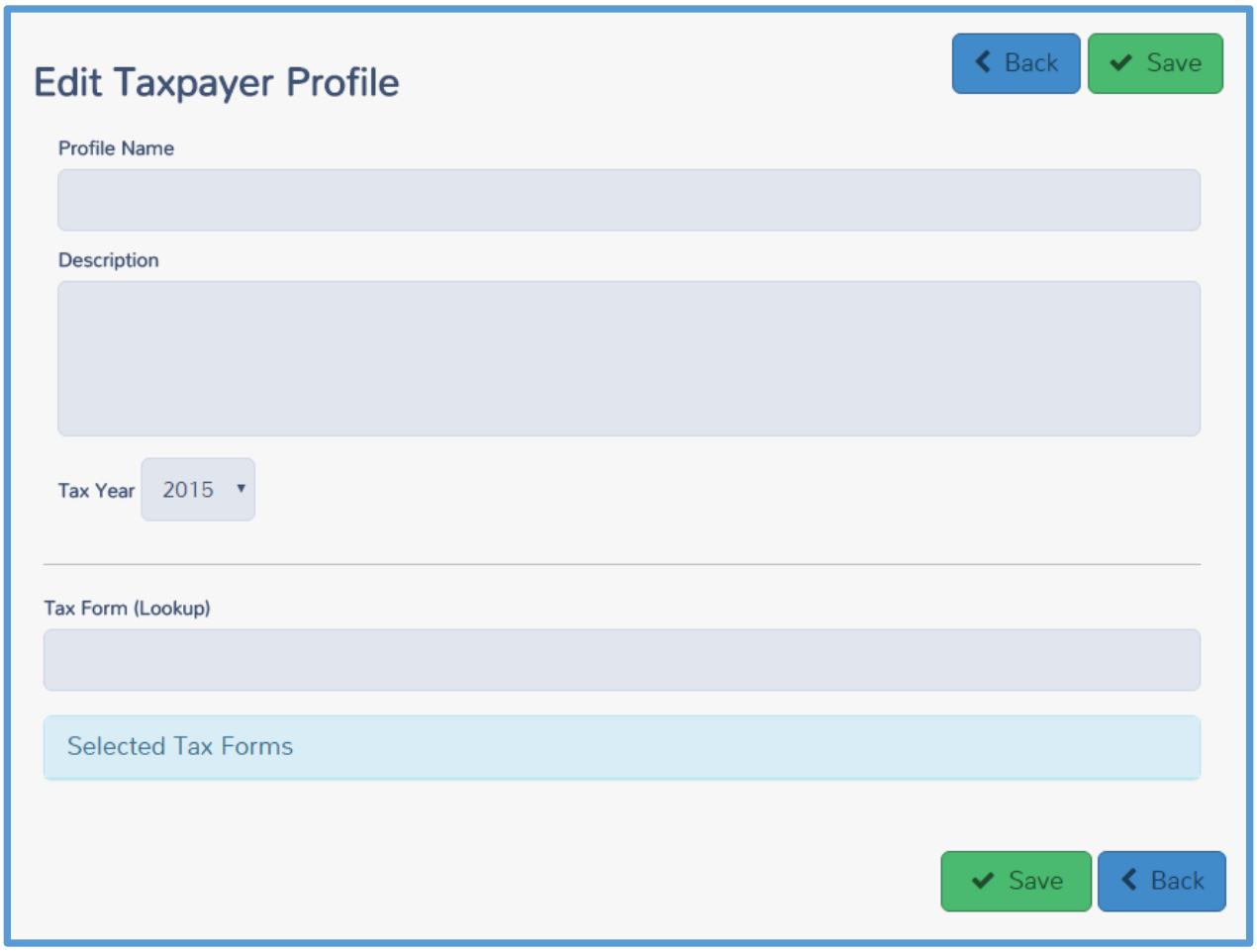
TaxSlayer Pro Online displays the **Taxpayer Profiles** page, listing any taxpayer profiles assigned to your site:



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:



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.

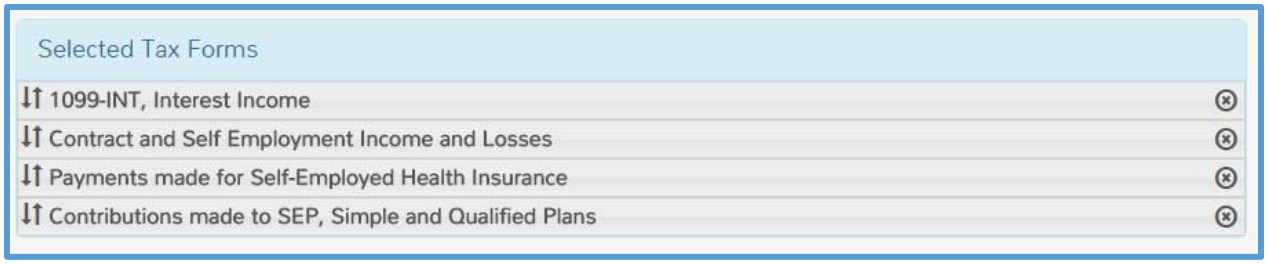
5. Select the tax year from the **Tax Year** list.

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:



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

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

11. To add more taxpayer profiles, click **Add** and follow the same steps.

Editing a Taxpayer Profile

If you later need to edit a taxpayer profile, use the following steps from the **Taxpayer Profiles** page:

1. Click **Edit** on the line for the taxpayer profile you want to edit.

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

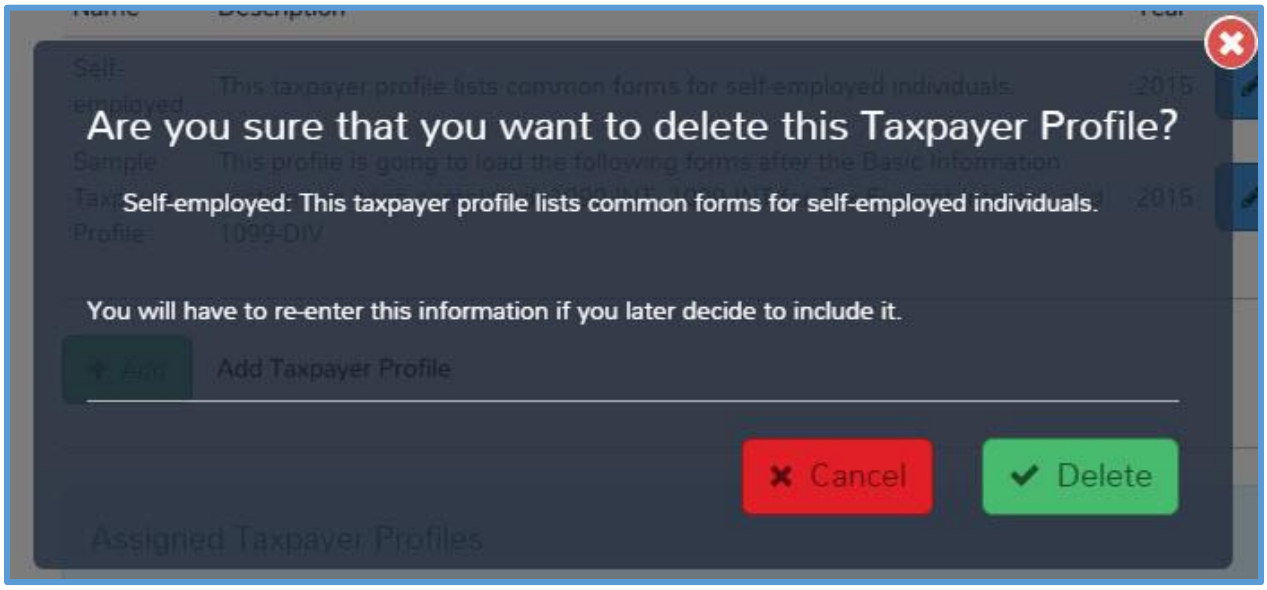
2. Edit the profile name, description, or tax year as needed.
3. Add and sort forms as described previously in this lesson.
4. Click **Save** to save the edited profile.

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.

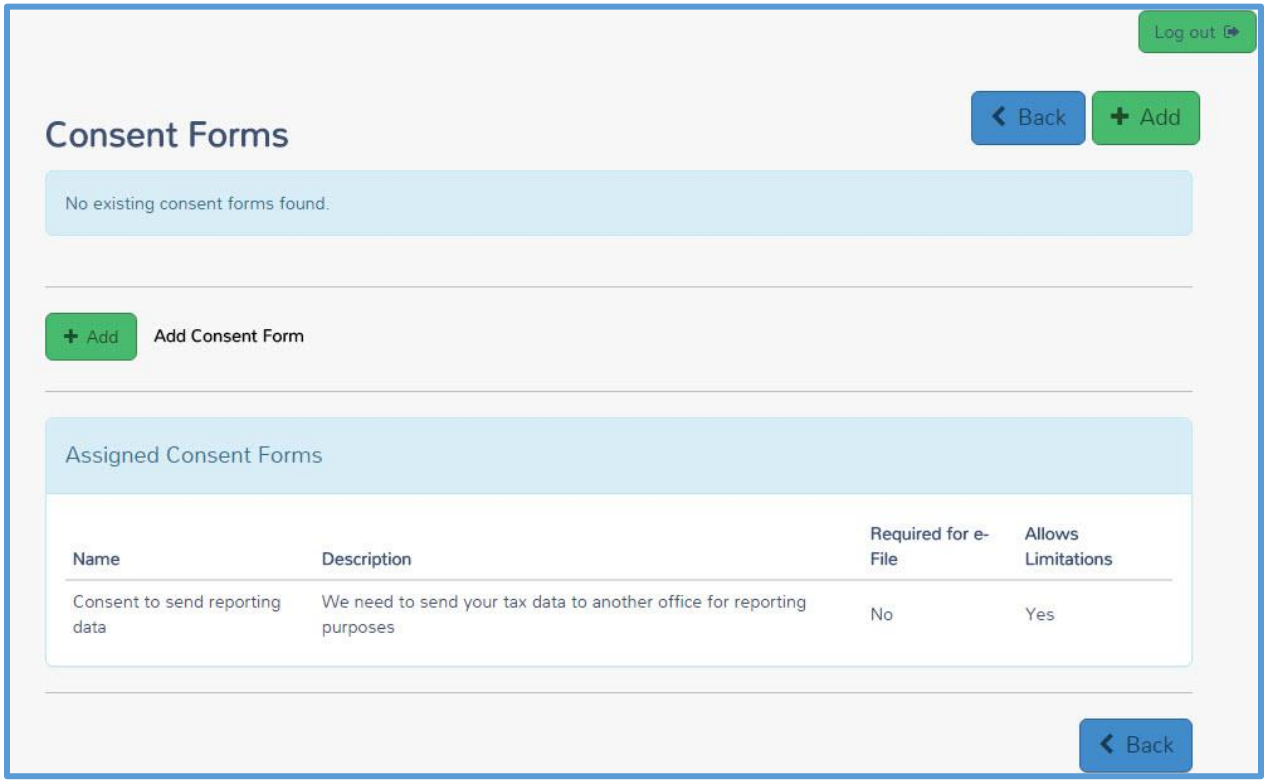
Adding a Consent

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.

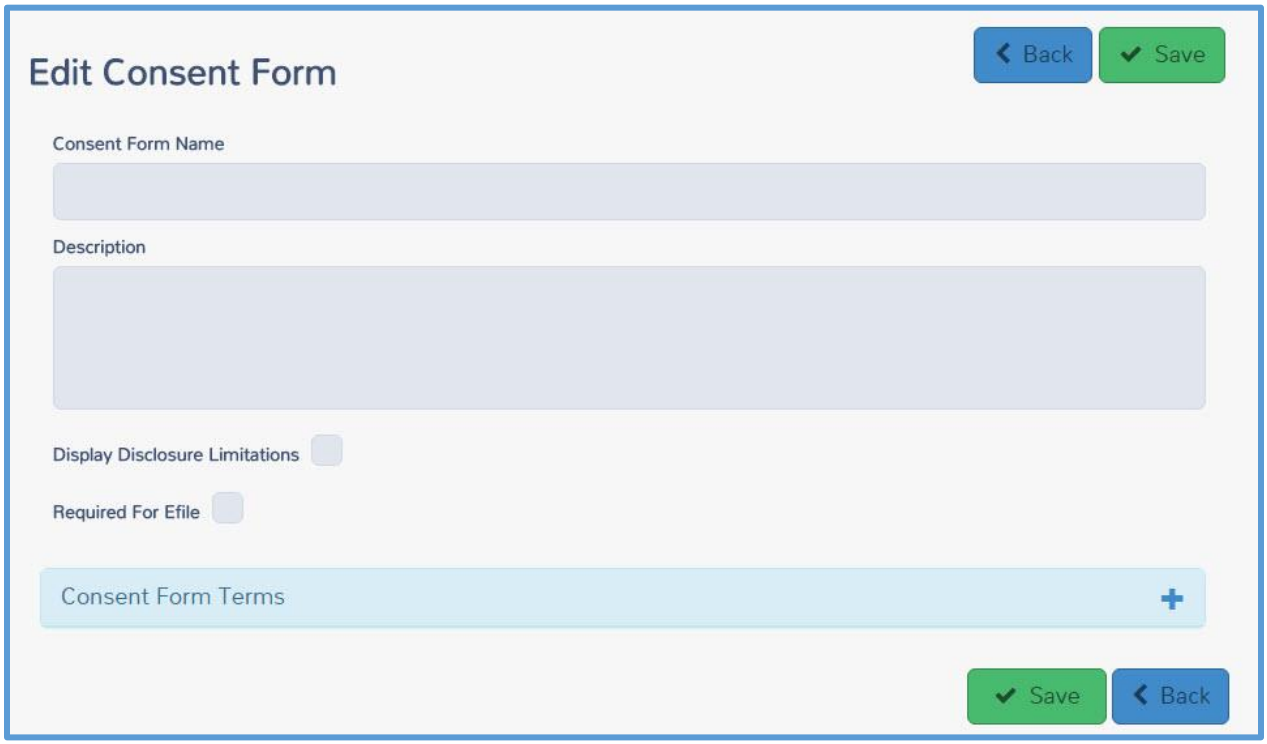
1. Click **Select** on the **Consent Forms** line.

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



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:

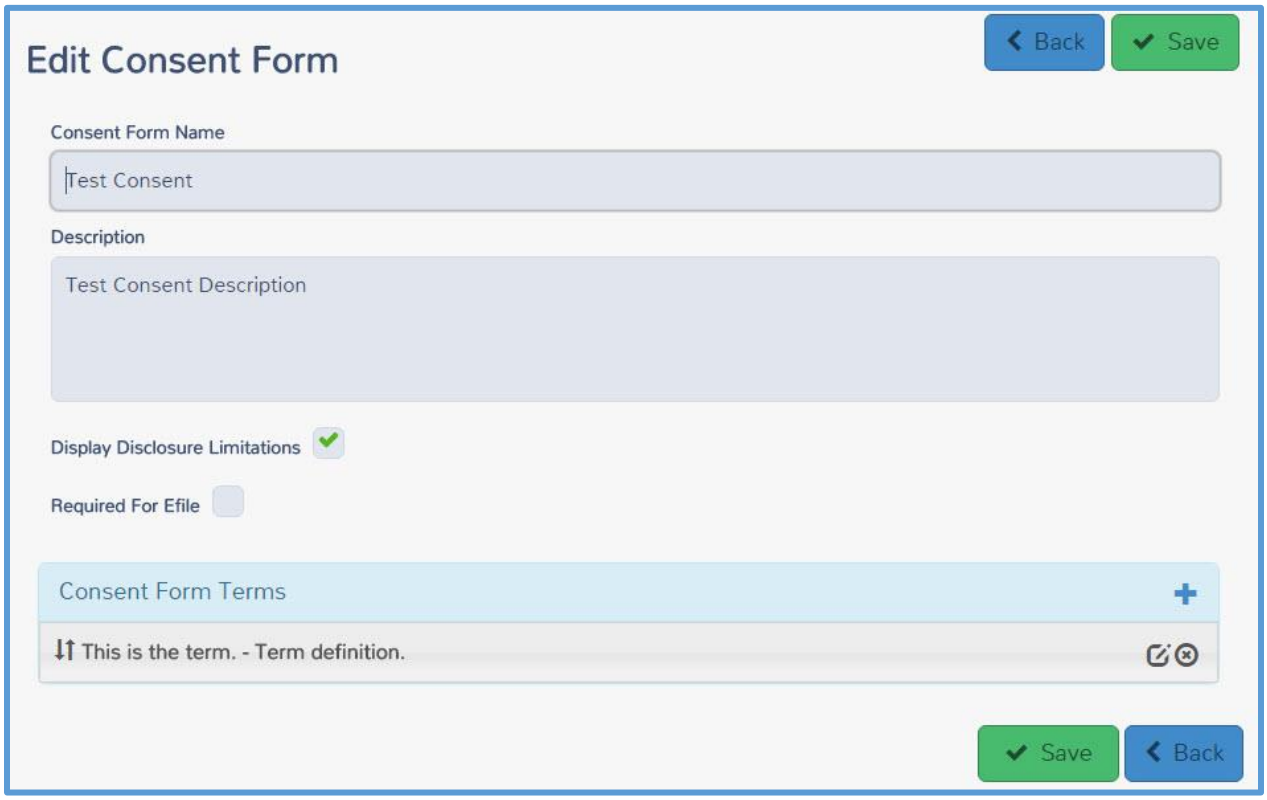
7. Type the term, which is typically 1 year.
8. Do one of the following:
    a. If you do not want a definition, but want the preparer to be able to input this information instead, select the **Input Only** check box.
    b. Type the definition. Remember to be descriptive so the preparer and taxpayer 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:



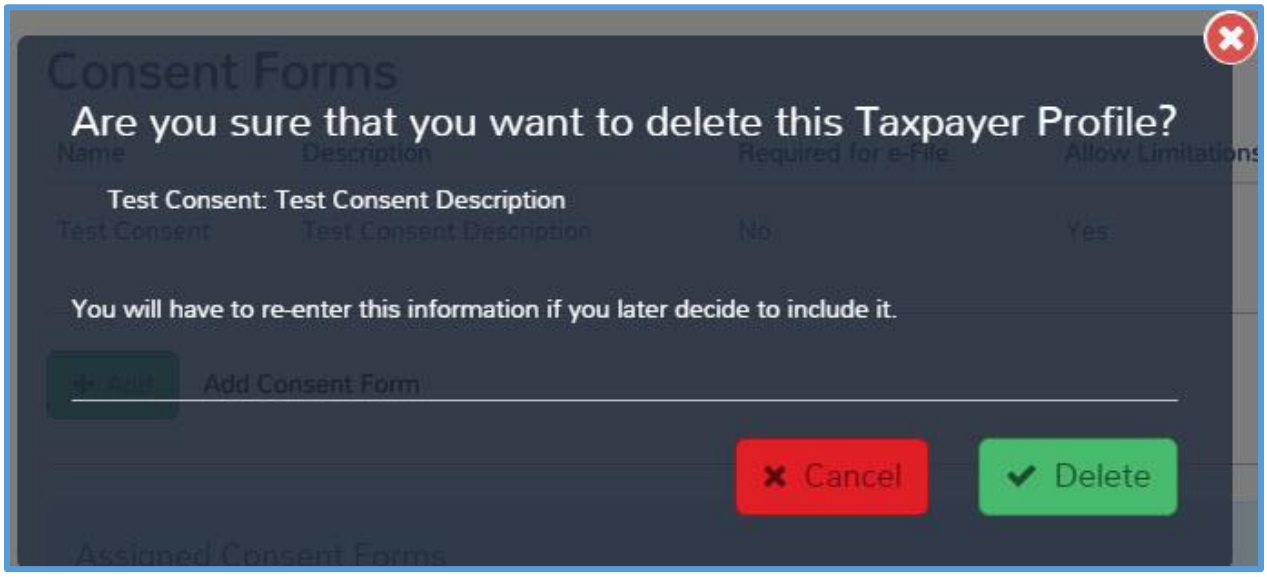
2. Make any changes to the consent the same as when you created a new consent.

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.

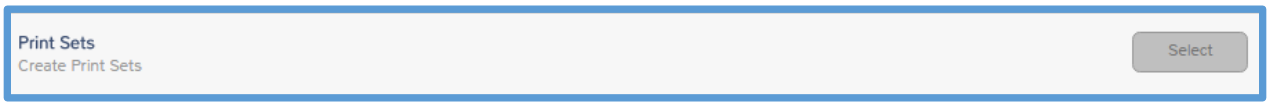
The following print sets will be available for printing the return, but cannot be modified:

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

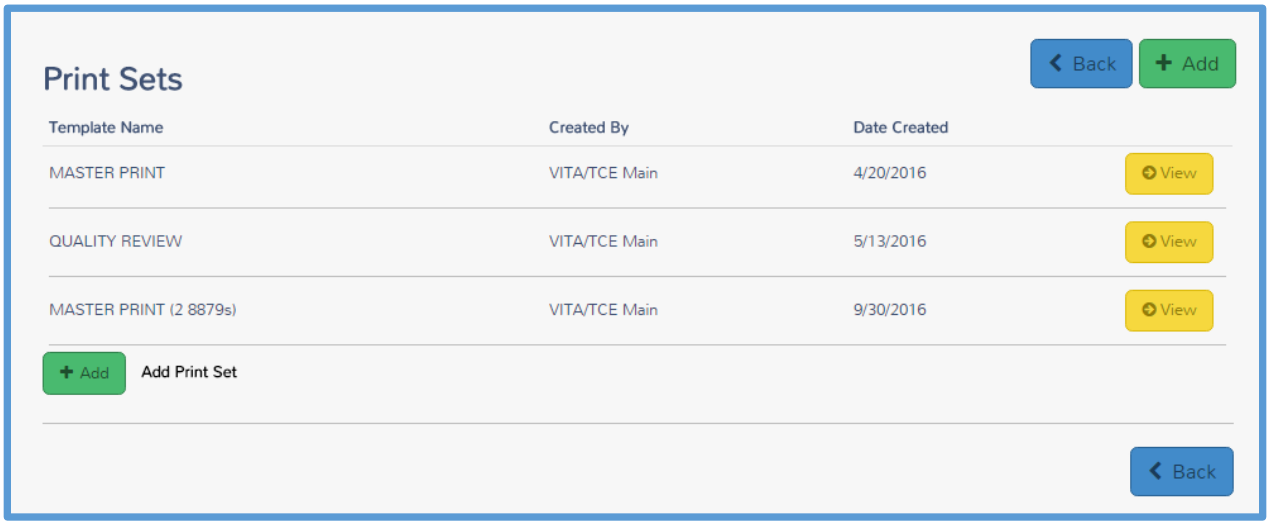
To view the contents of the assigned **Master Print** sets, use the following steps from the **Welcome** page:

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



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

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



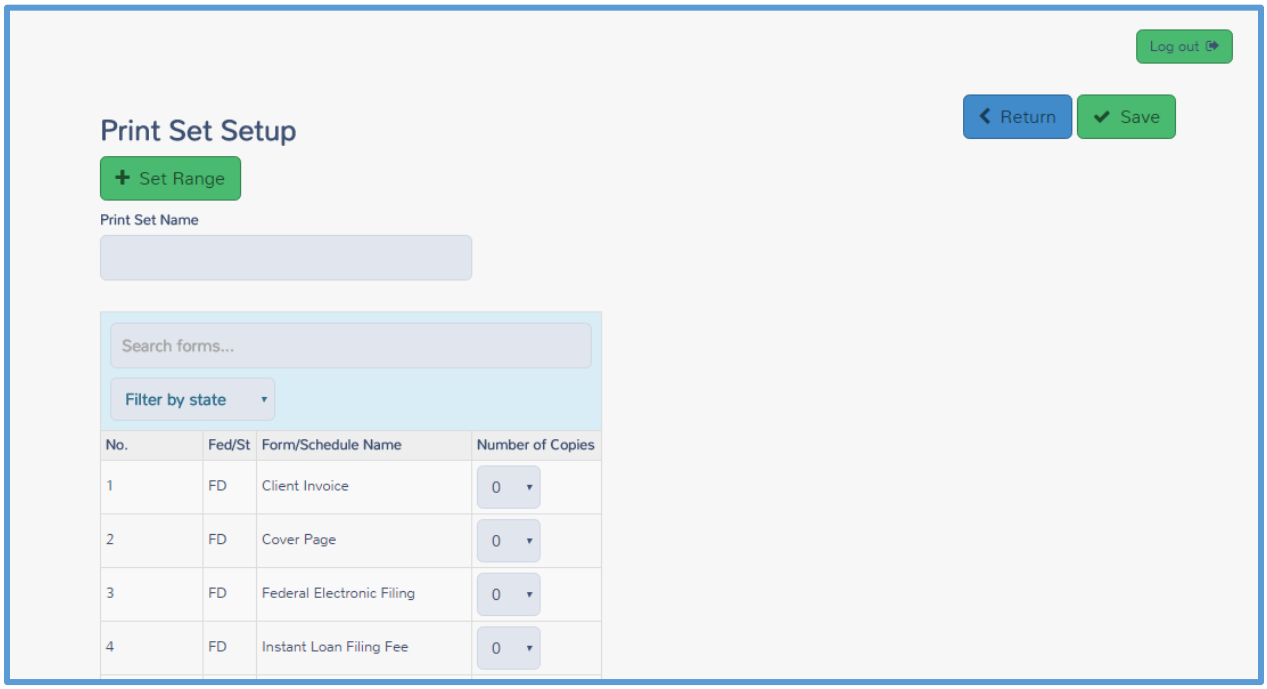
3. To view the **Master Print** set, click **View**. You cannot edit this print set. This print set prints one copy of Form 8879 and one copy of each federal and applicable state return.

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:

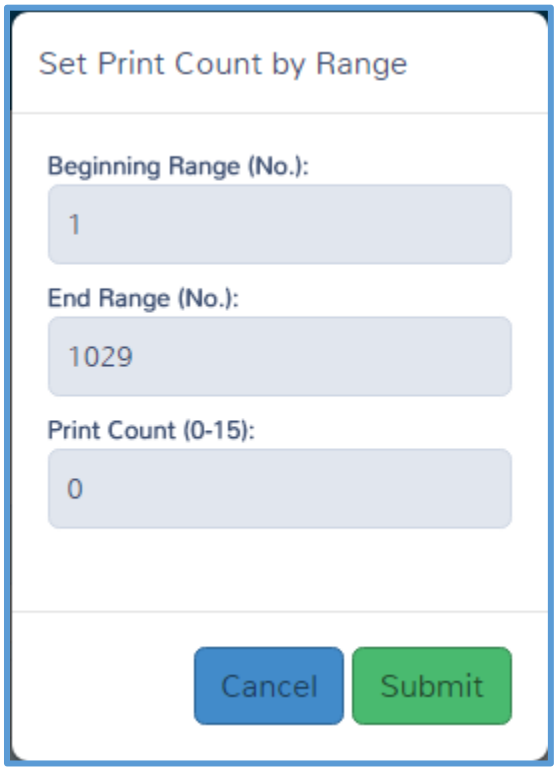


2. Type a name for your print set in the **Print Set Name** box.
3. Change the number of copies for each form you want to include in the print set.

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

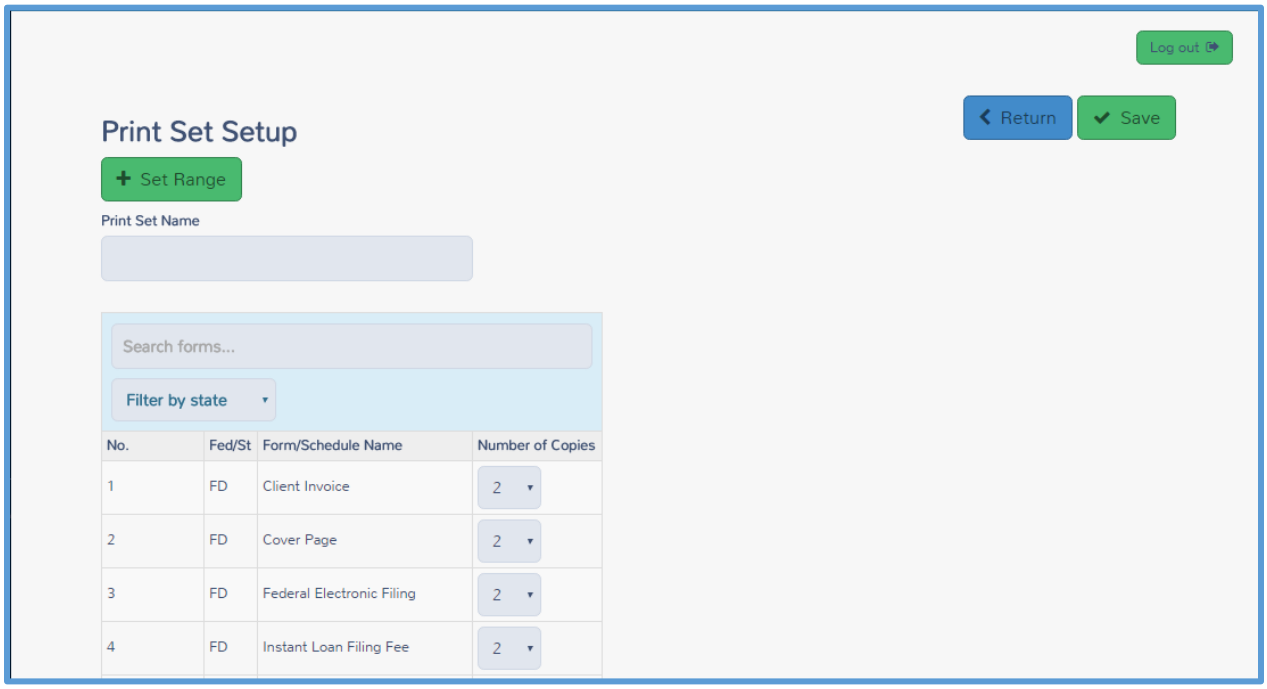
4. If you want to add multiple forms at the same time, click **Set Range**.

TaxSlayer Pro Online displays the **Set Print Count by Range** window:



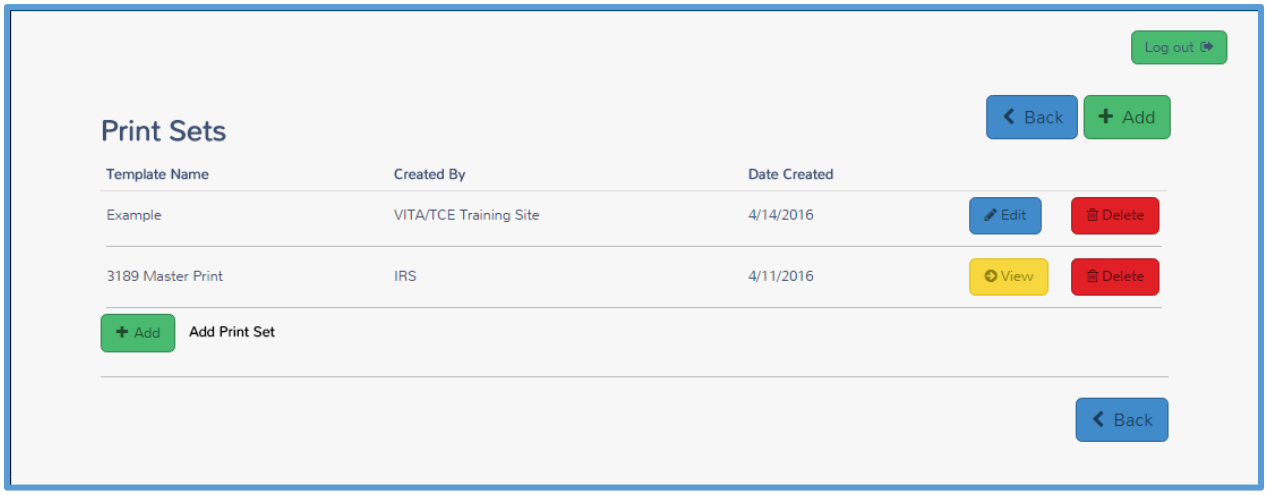
5. Verify the **Beginning Range** and **Ending Range** boxes. These numbers correspond to the number of the form as displayed in the first column of **Print Set Setup** landing page. You can view the number assigned to each form or schedule to change the range. If you want to change the number of copies of all forms for this print set, leave the range as it is.
6. Type the correct number in the **Print Count** box.
7. Click **Submit**.

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



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

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



9. Click **Add** and follow the same steps for any additional print sets you want to use.
10. 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

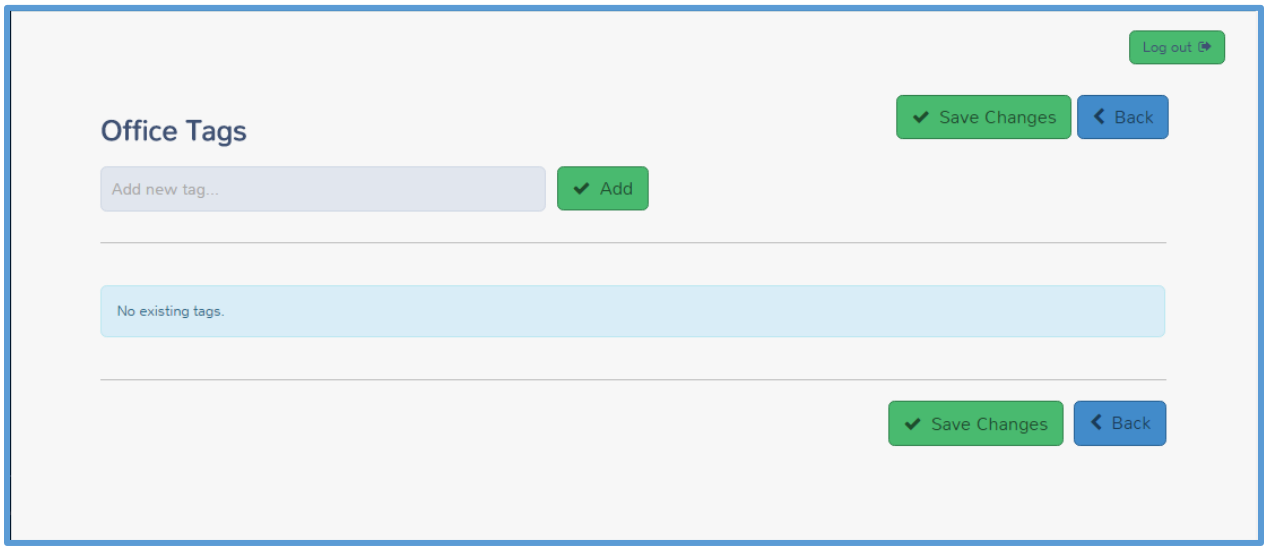
You can create a customized list of return tags to manage the status of the returns at your site.

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:

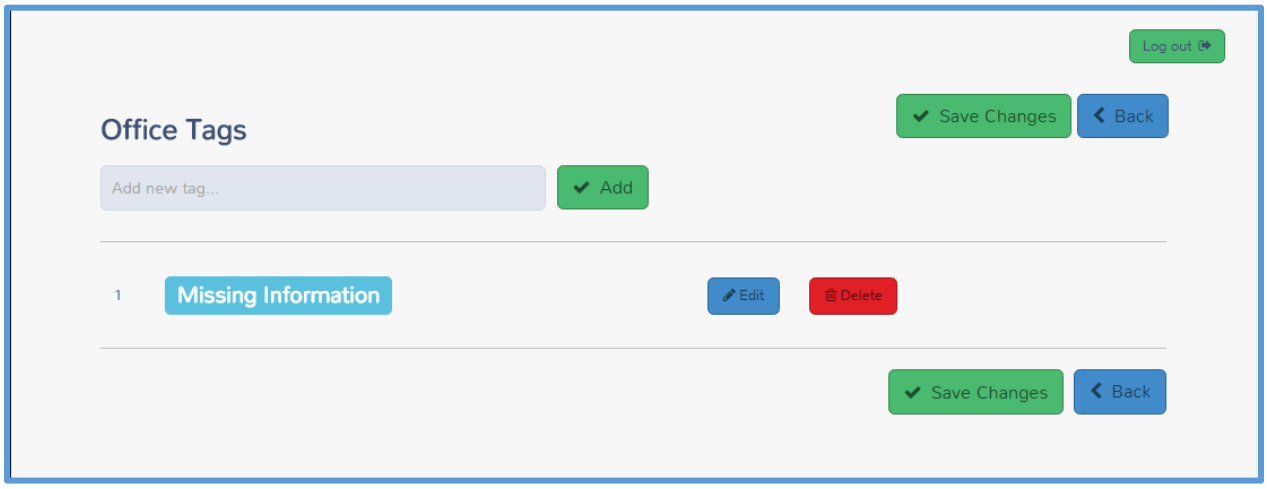
1. Click **Select** on the **Tags** line.

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:



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.

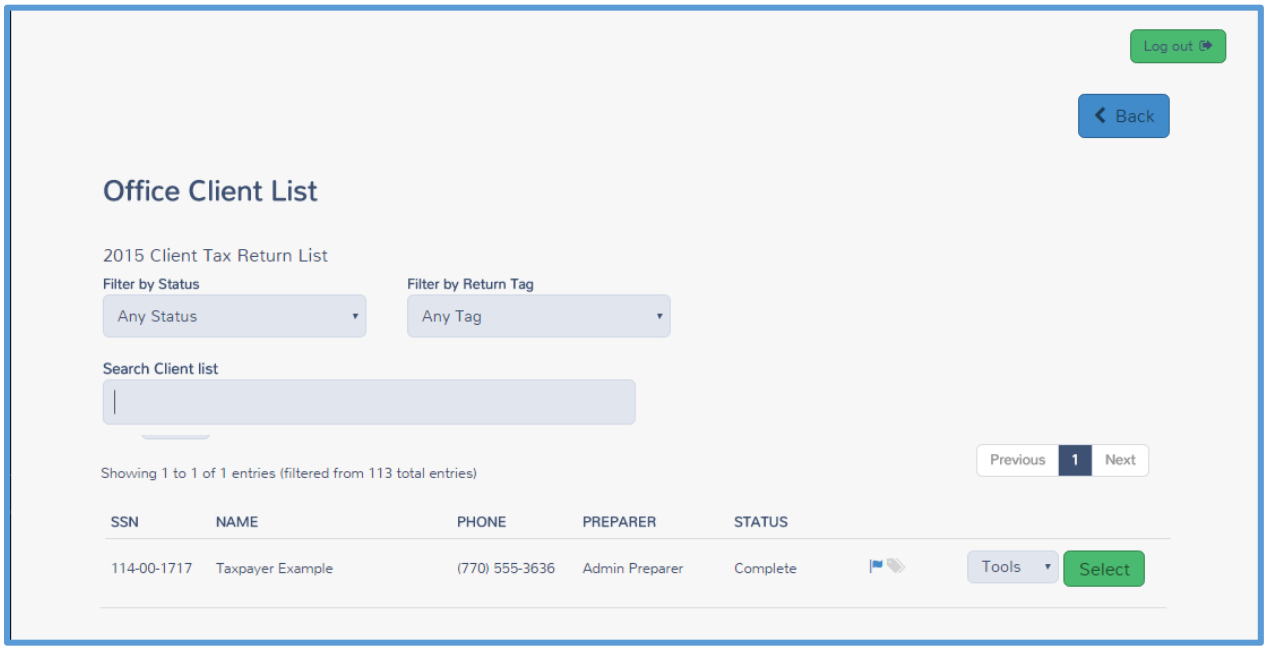
TIP: For information on using return tags as a preparer, see *Marking a Return for e-file*.

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:

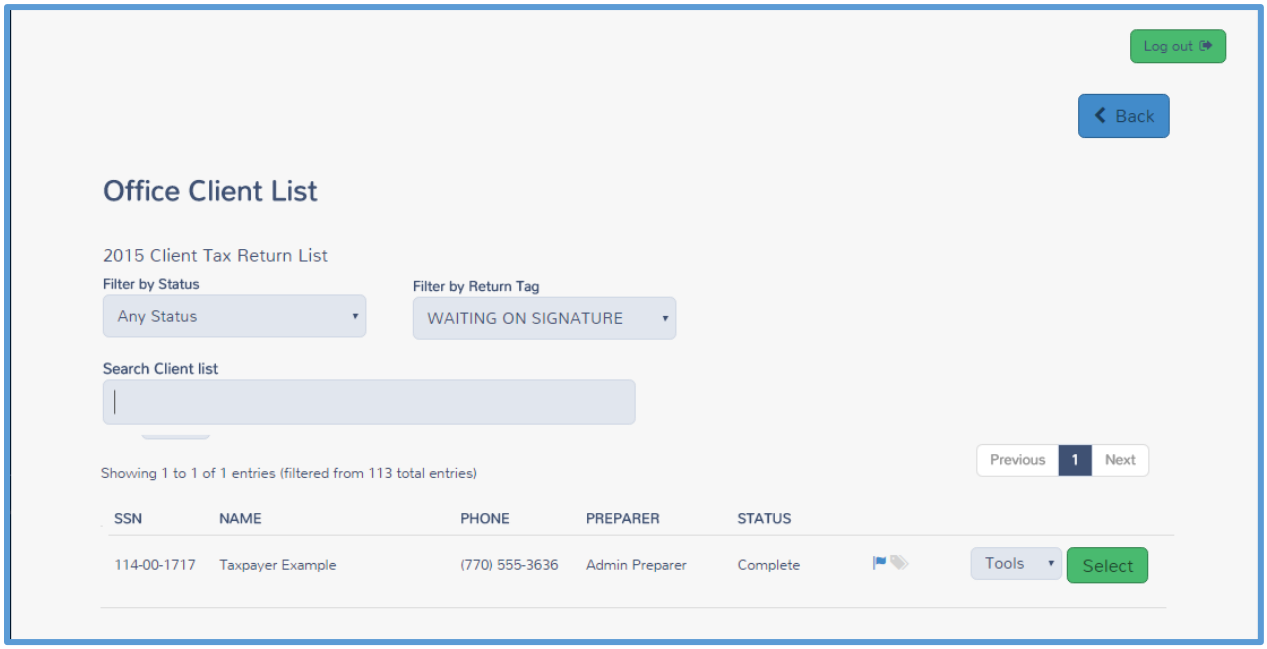
1. Click **Select** on the **Client Search** line.

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



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:



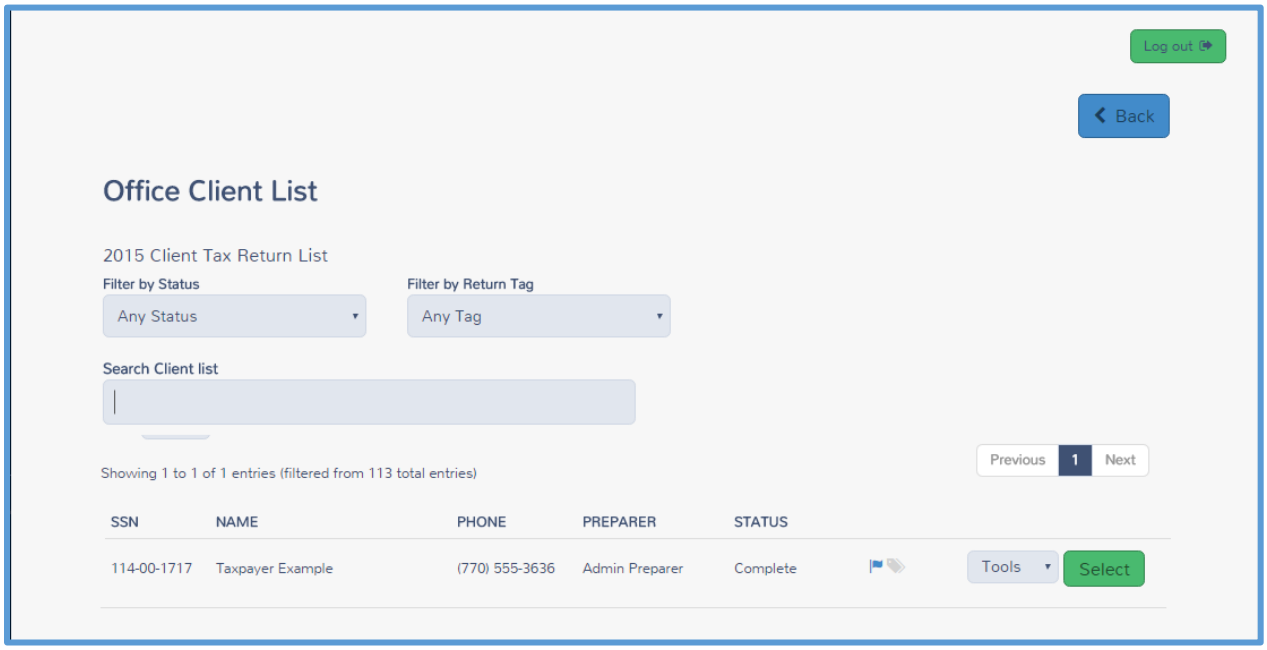
Deactivating/Deleting Returns

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

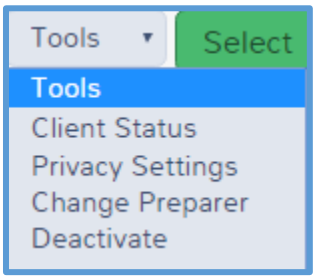
When you deactivate a return, TaxSlayer Pro Online makes it unavailable for edits. To deactivate a return, use the following steps from the **Welcome** page:

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

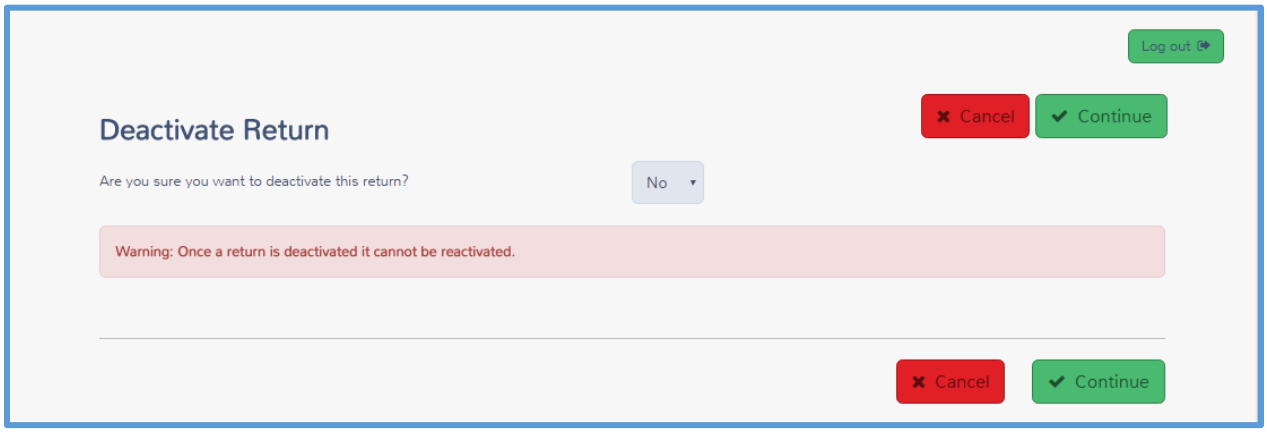
TaxSlayer Pro Online displays the **Office Client List** page:



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

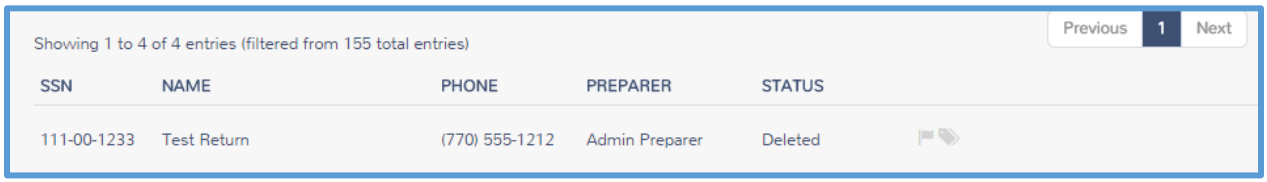


TaxSlayer Pro Online displays the **Deactivate Return** page:



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**:

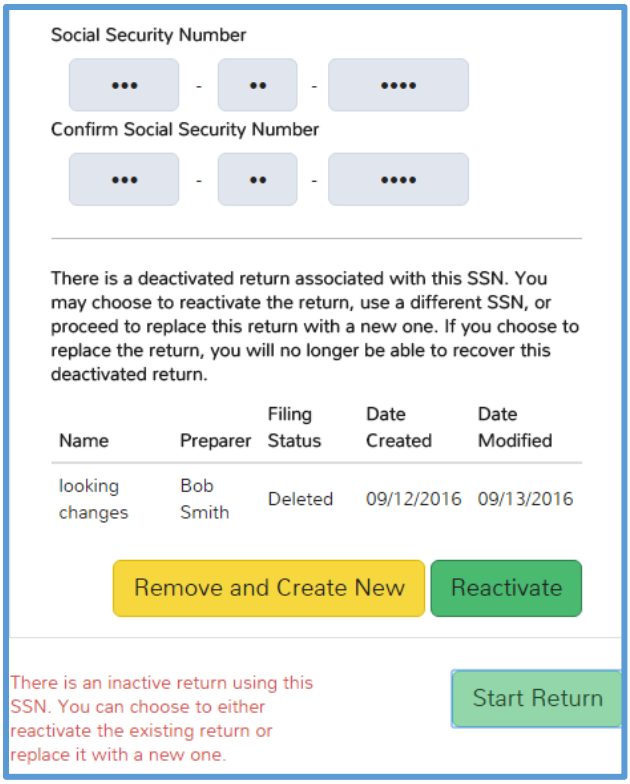


Reactivating a Return

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:



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.

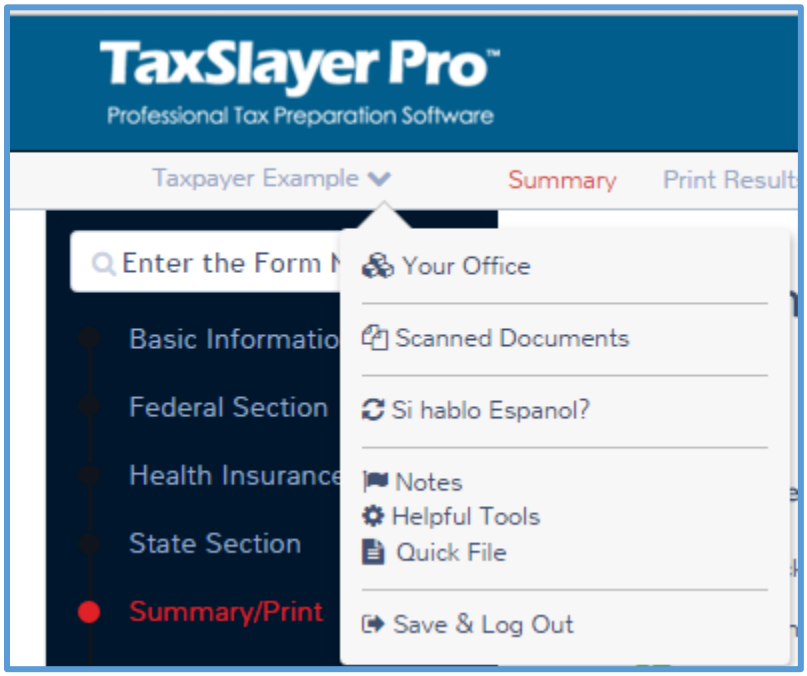
Adding Taxpayer Notes

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.

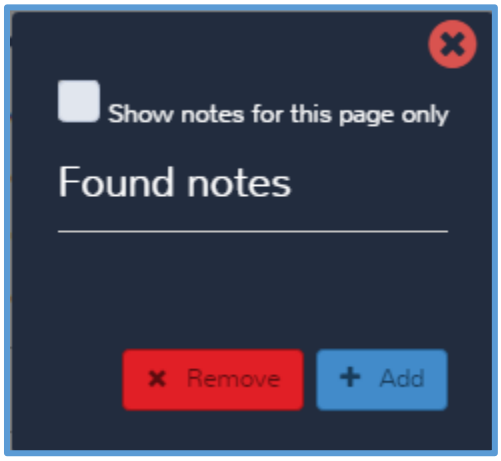
To add a note while in a tax return, use the following steps:

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



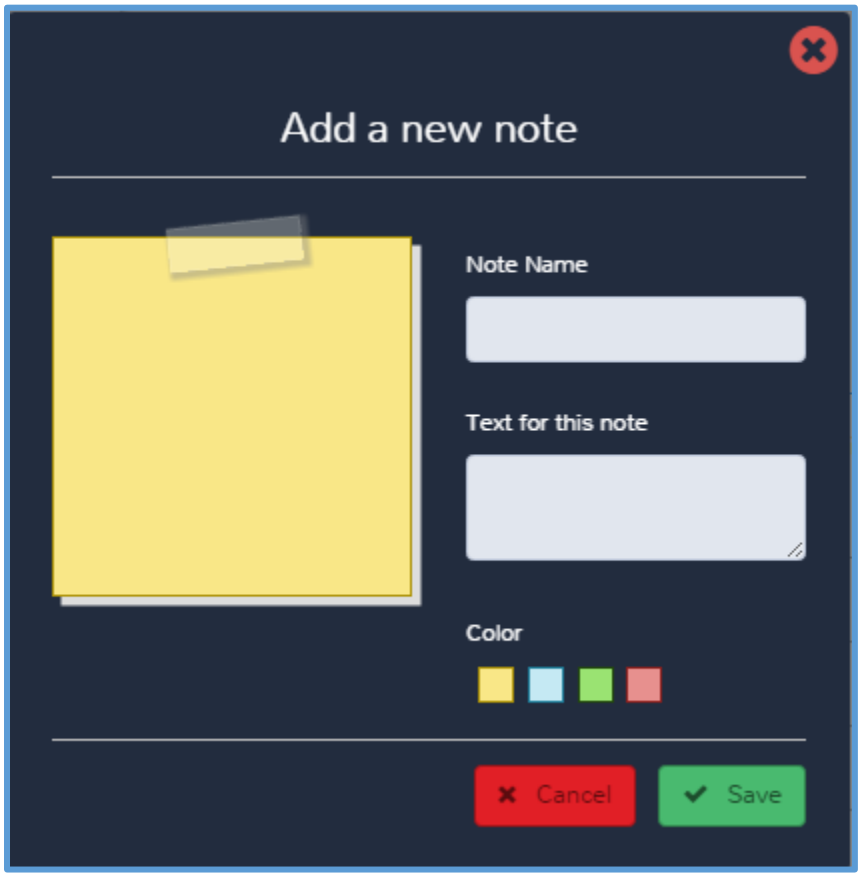
2. Click **Notes**.

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



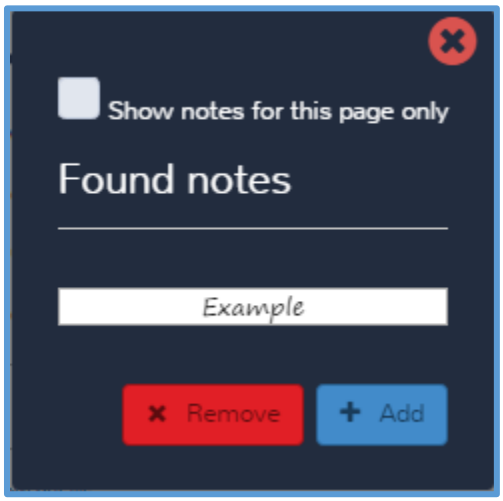
3. Click **Add**.

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



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

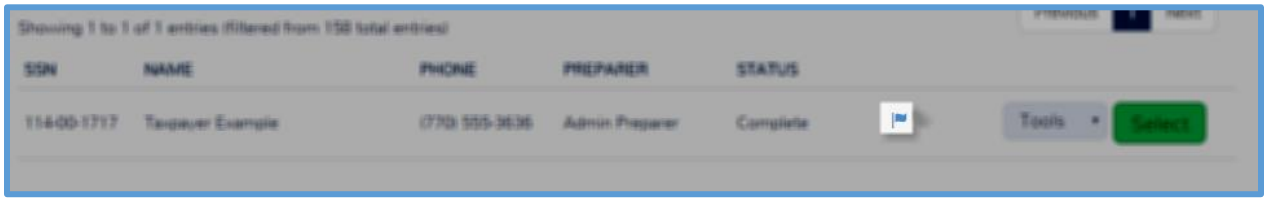
TaxSlayer Pro Online displays the **Found notes** window with the new note listed:



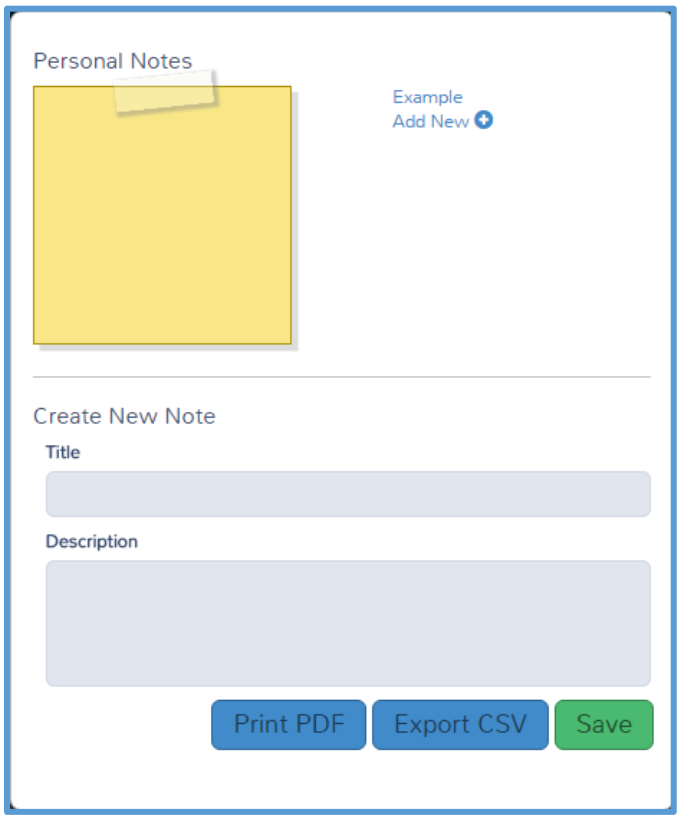
6. If you need to add another note, click **Add** and use the same steps to add the new note.
7. If you need to remove a note, click **Remove**.

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:



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



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.

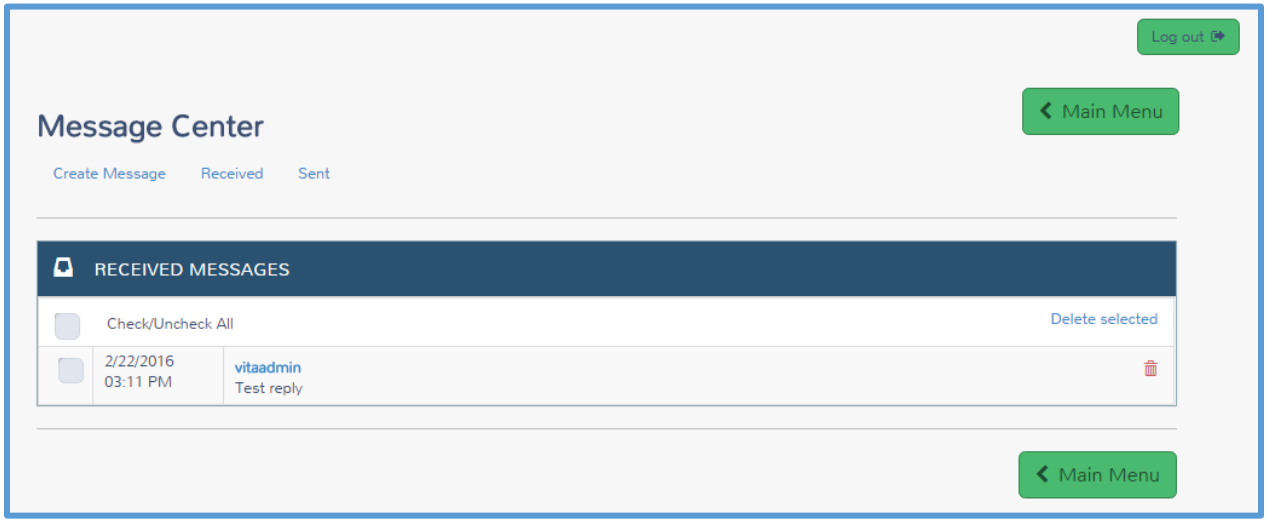
5. Click **Save**.
6. If you need to add more notes, click **Add New** and use the same steps to add the new note.
7. If you need to print or export a note, click **Print PDF** or **Export CSV**.
8. When you finish adding notes, click the **X** to close the window.

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:

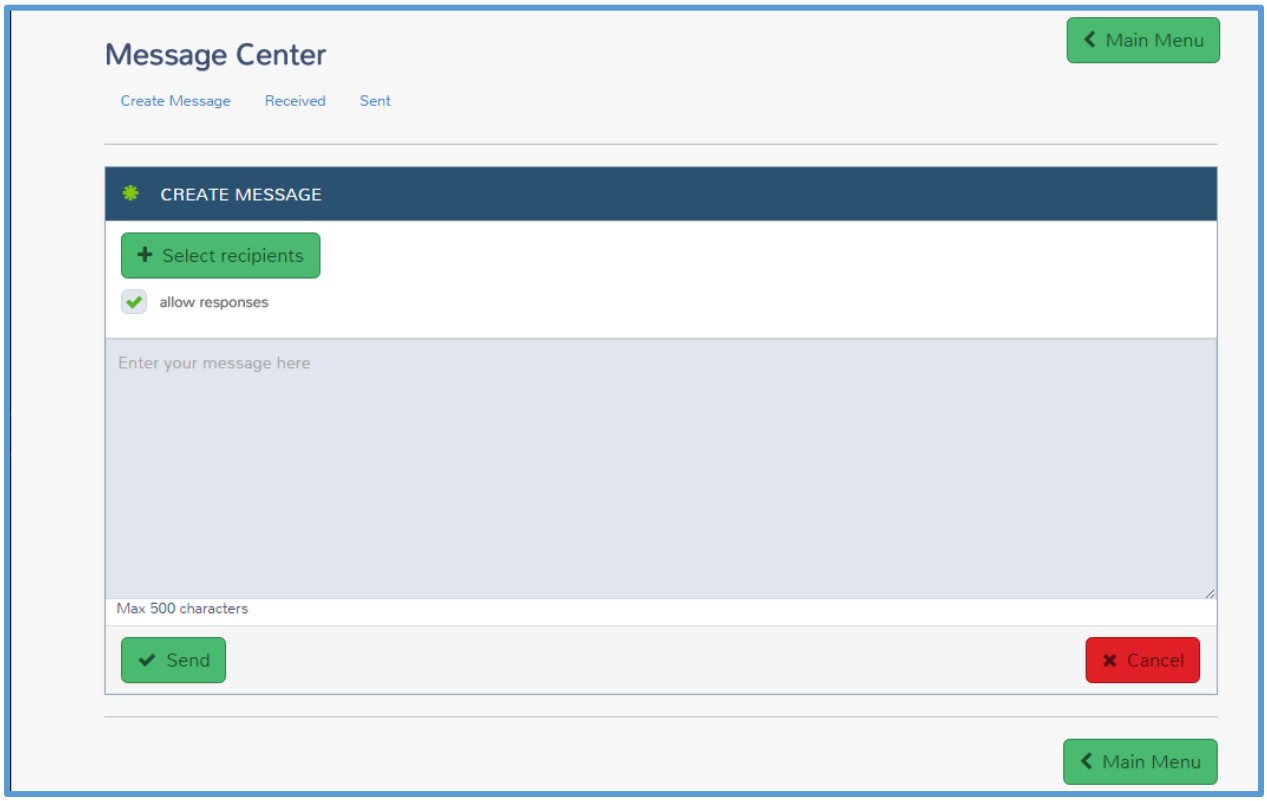
1. Click **Message Center**.

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:



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.

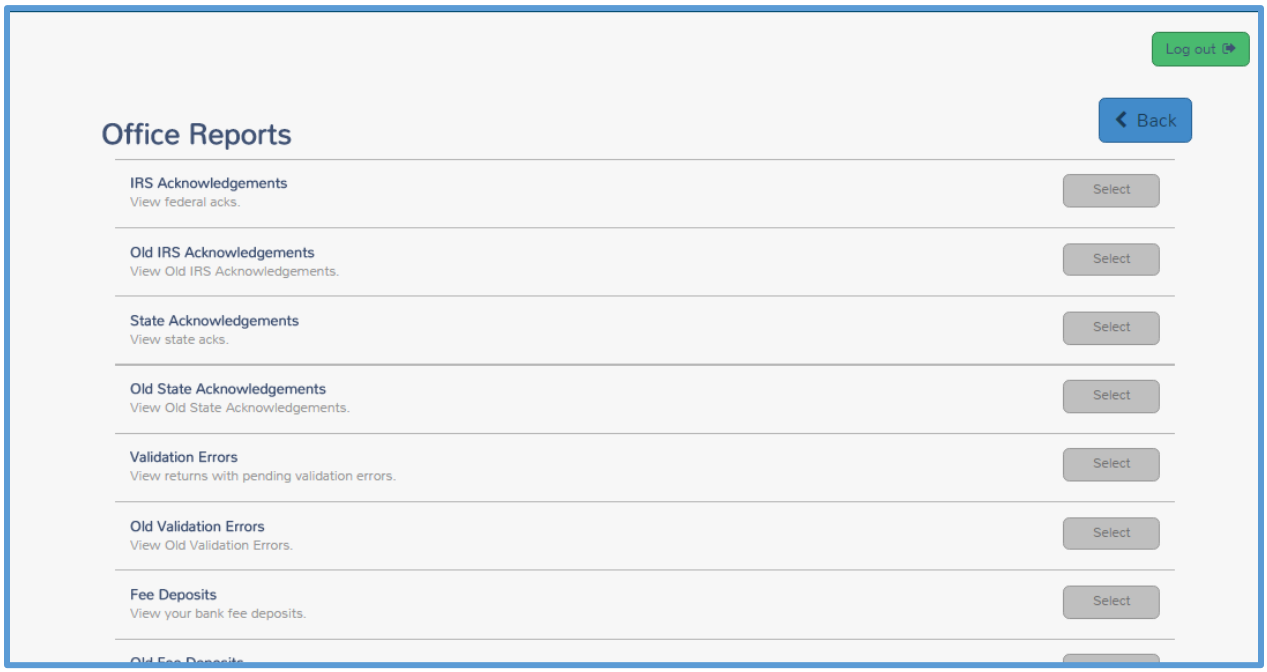
TaxSlayer Pro Online provides several reports that you can run to help manage returns.

Running Reports

To run a report, use the following steps from the **Welcome** page:

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

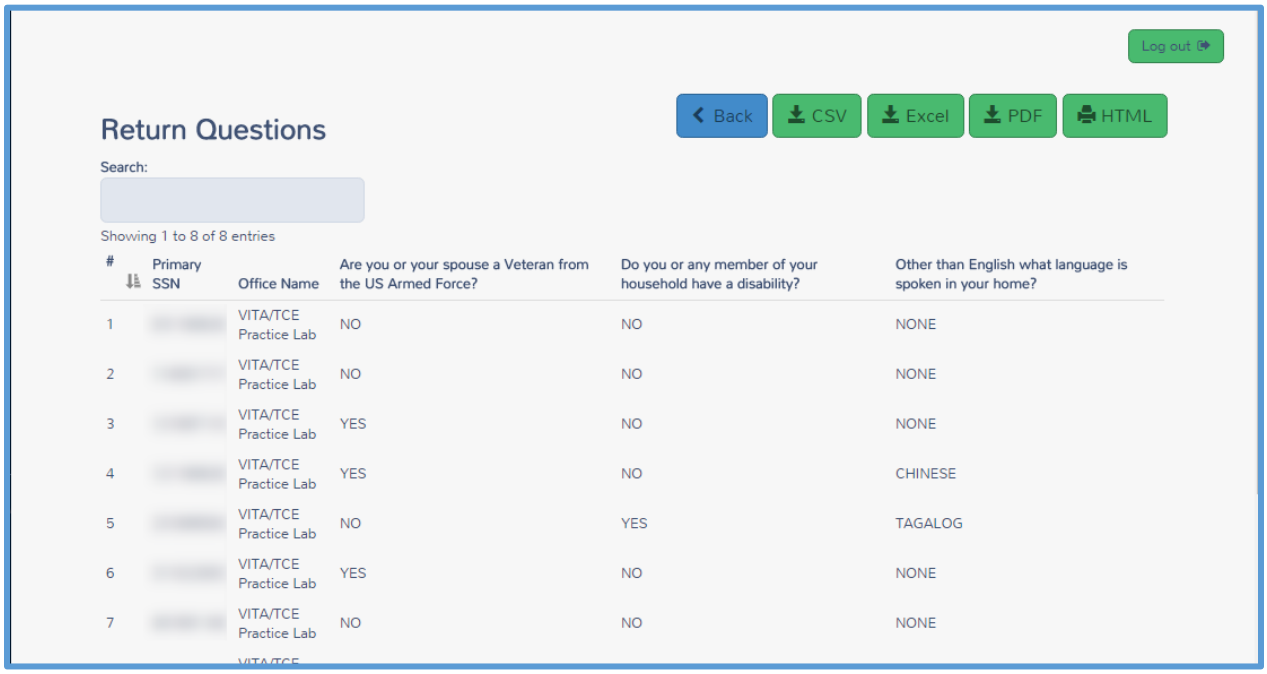
TaxSlayer Pro Online displays the **Office Reports** page:



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		VITA/TCE Practice Lab	NO	NO	NONE
2		VITA/TCE Practice Lab	NO	NO	NONE
3		VITA/TCE Practice Lab	YES	NO	NONE
4		VITA/TCE Practice Lab	YES	NO	CHINESE
5		VITA/TCE Practice Lab	NO	YES	TAGALOG
6		VITA/TCE Practice Lab	YES	NO	NONE
7		VITA/TCE Practice Lab	NO	NO	NONE

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

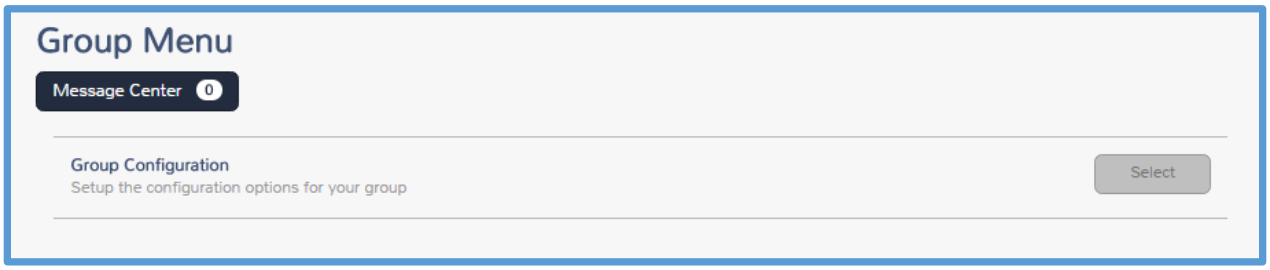
This chapter covers the following actions:

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

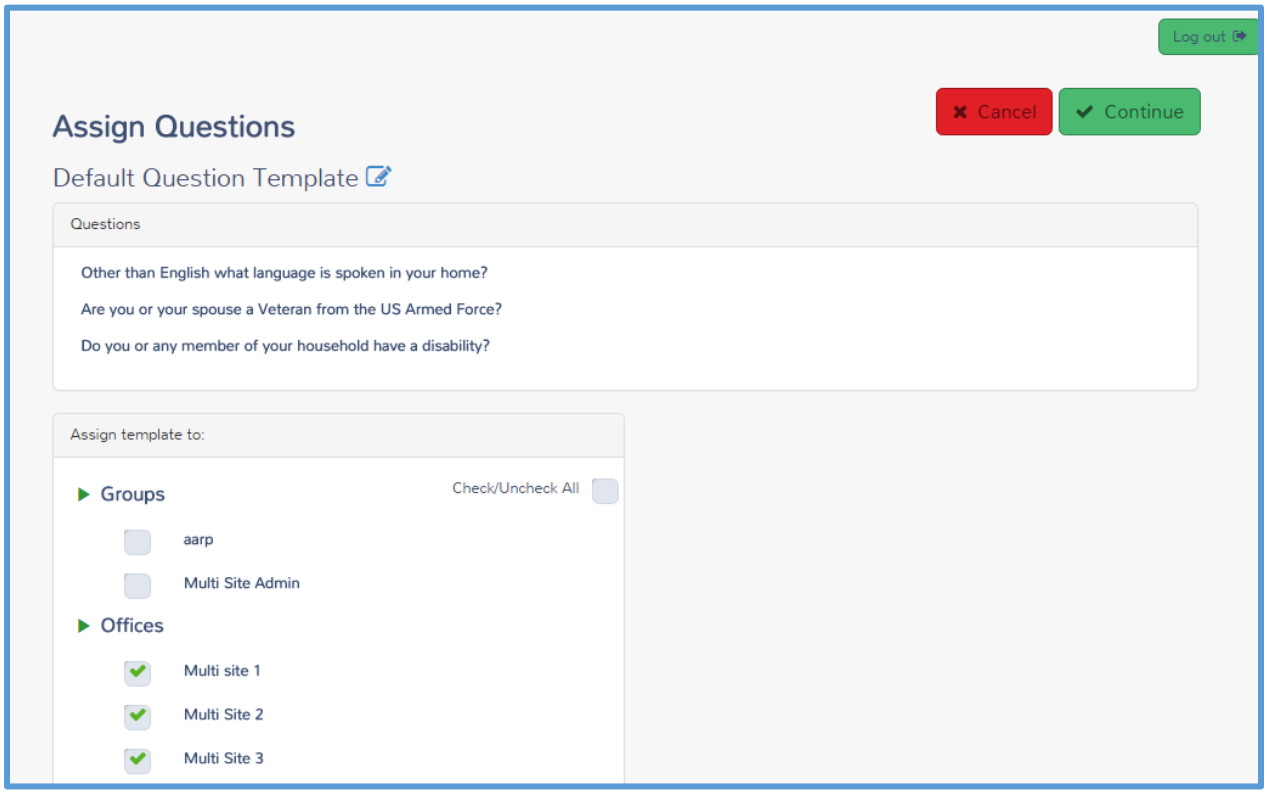
When you configure certain settings, you can assign those to offices. You can assign the following settings:

a) Security Templates
b) Question Templates/Custom Question
c) Taxpayer Profiles
d) Consent Forms

e) Print Sets
f) Return Tags

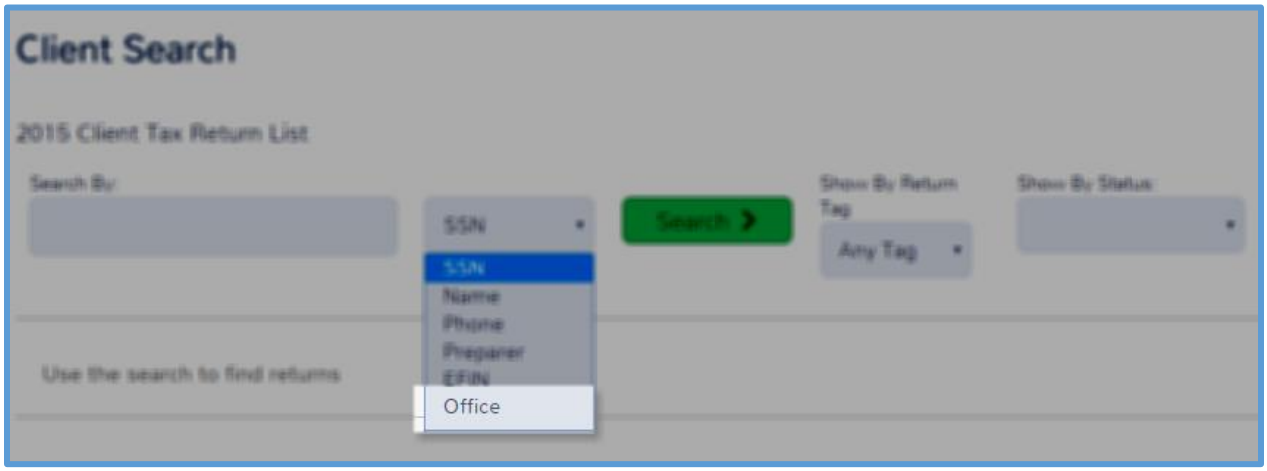
For this example, when you set up custom questions, you can assign the questions to groups or offices, as shown below:

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

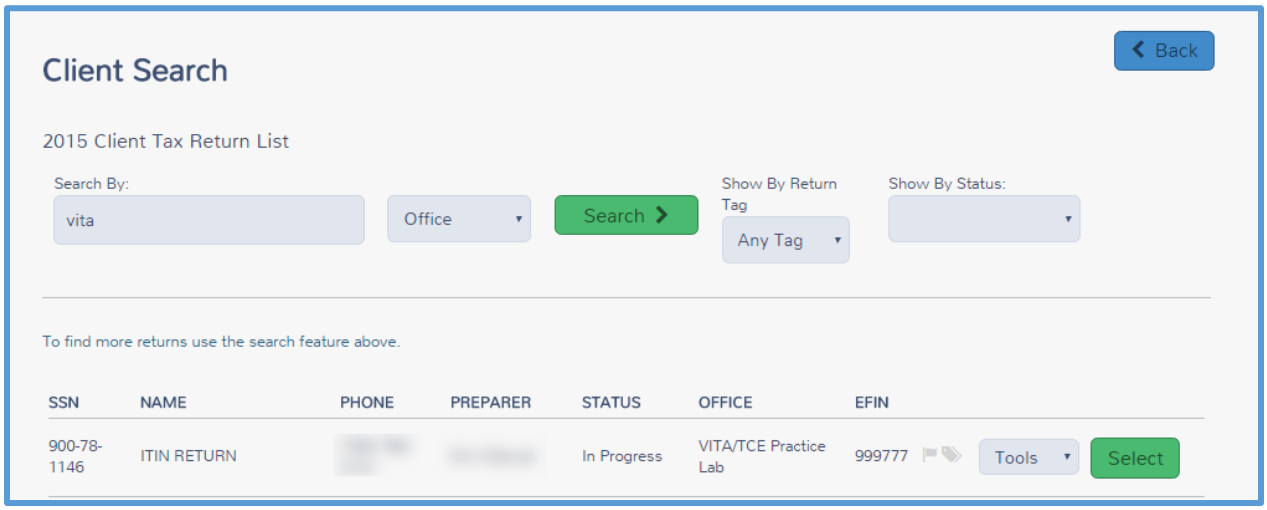


Searching by Office (Relational EFIN required)

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:

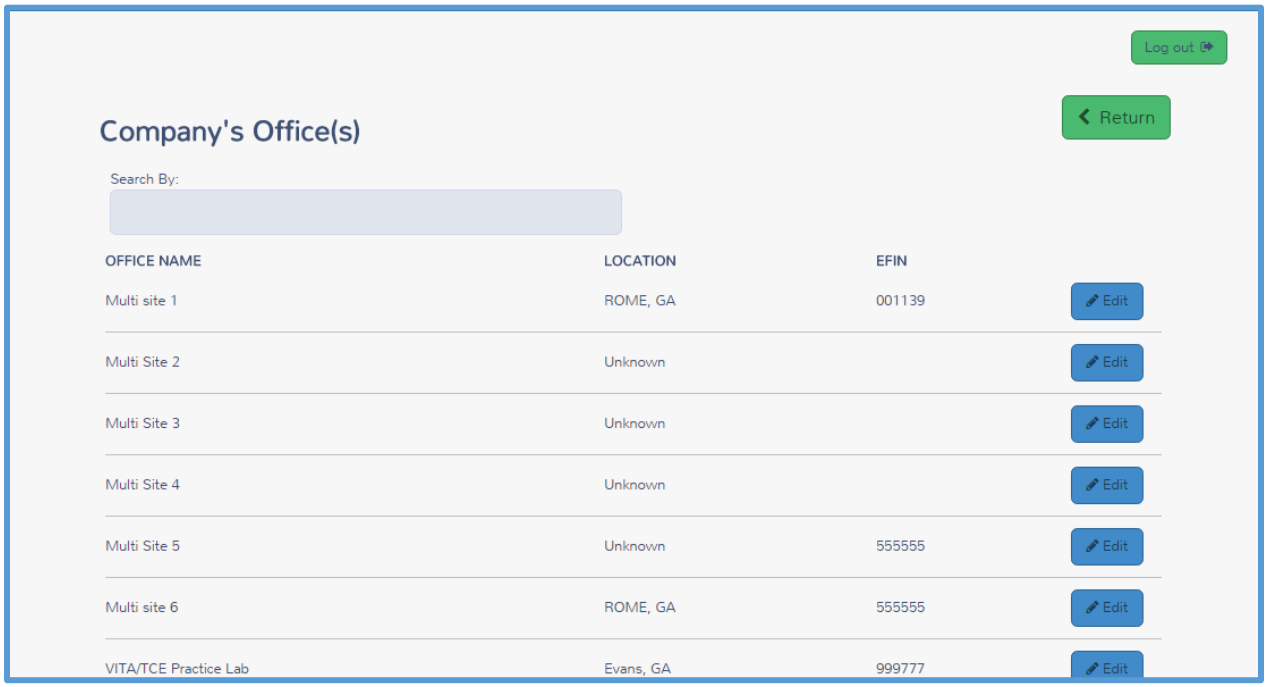


Accessing Offices (Relational EFIN Required)

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:

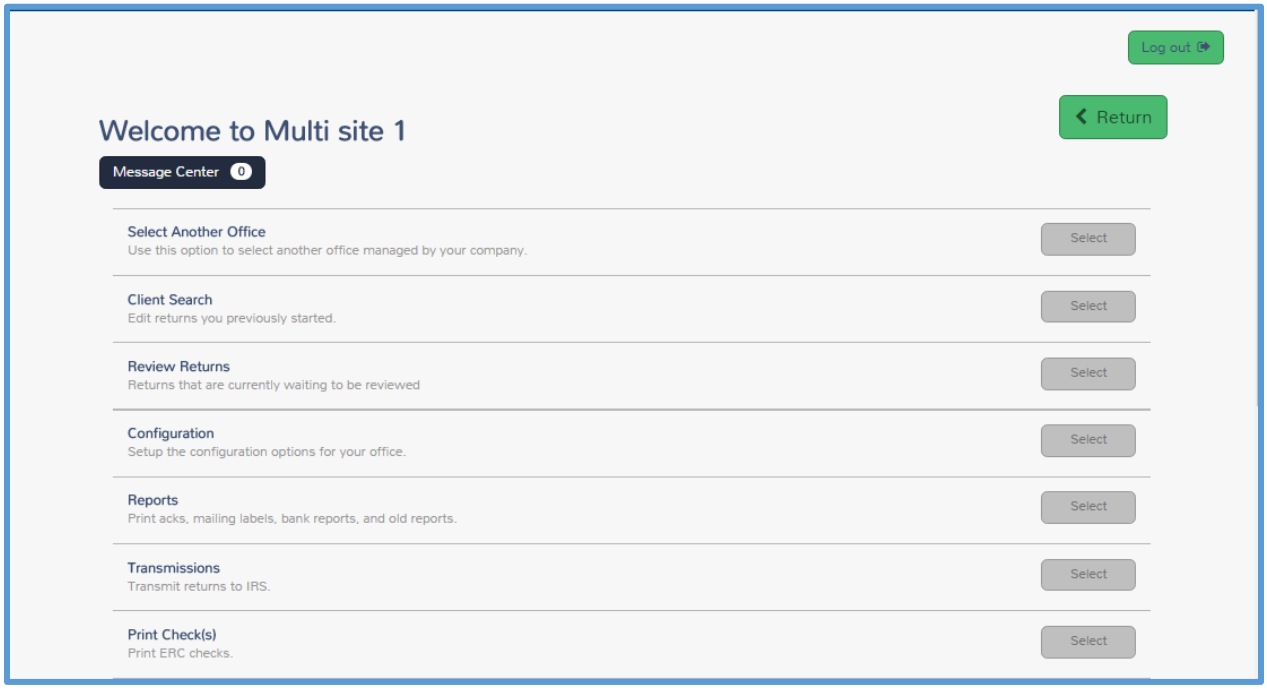
1. Click **Select** on the **Office Access** line.

TaxSlayer Pro Online displays the **Company's Office(s)** page:



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

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



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

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

Working with 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.

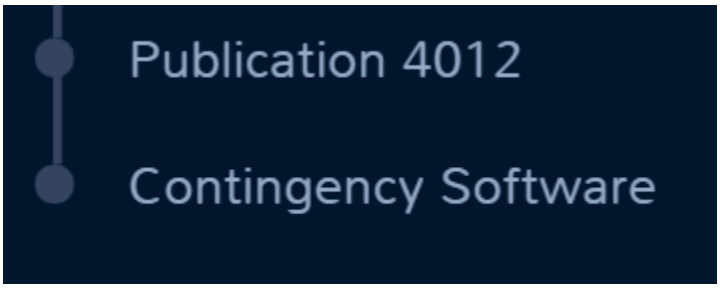
TaxSlayer Pro

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.

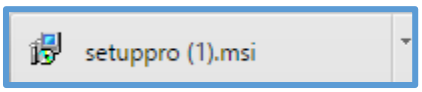
To download the desktop application, use the following steps:

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



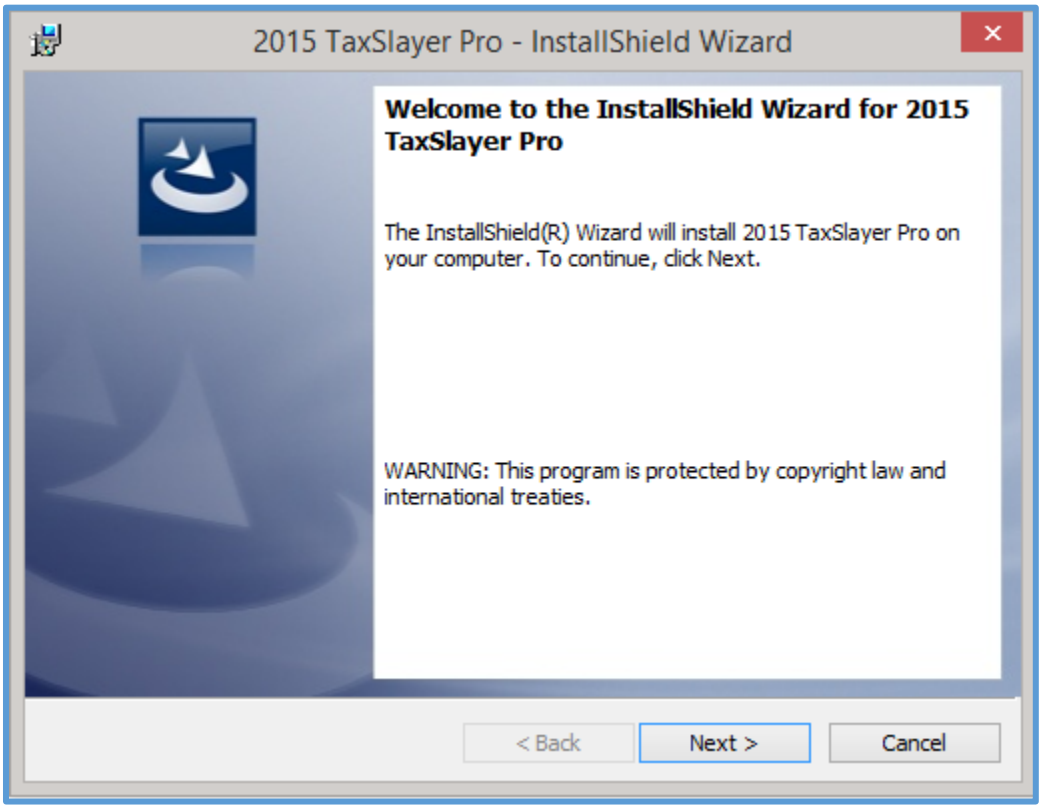
Note: TaxSlayer Pro Online directs you to log in to your **My Account** page to download the software.

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

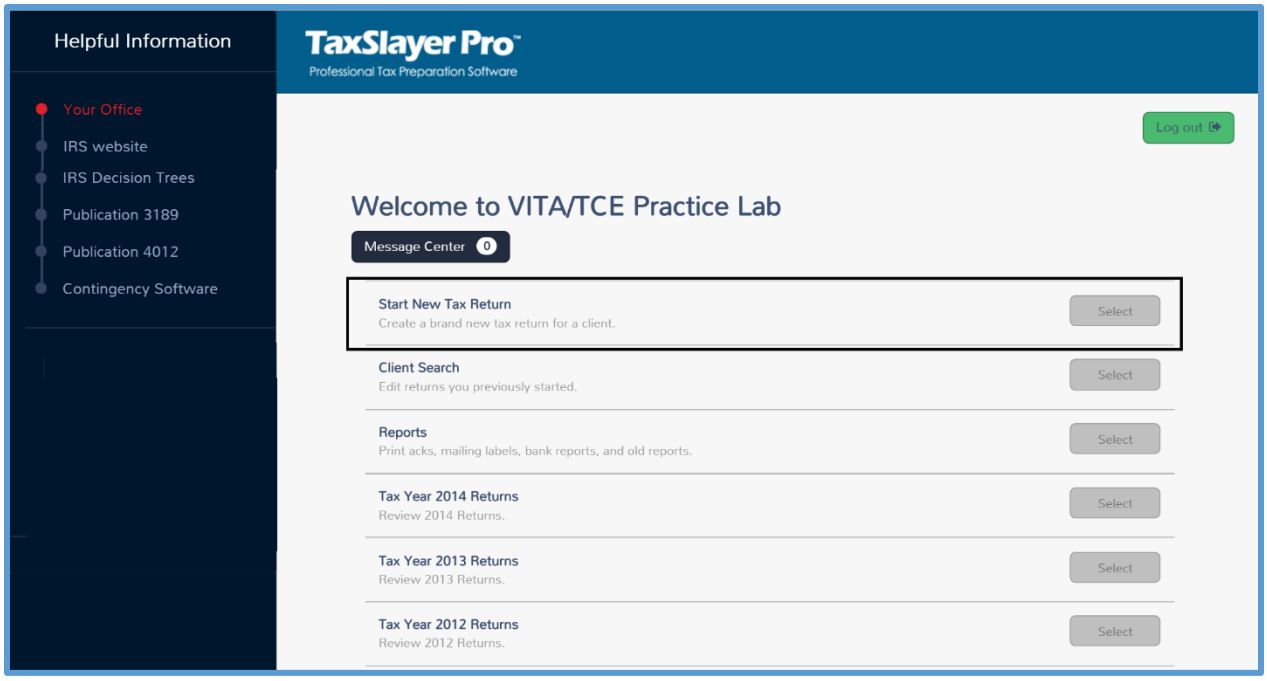
Starting a Tax Return

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

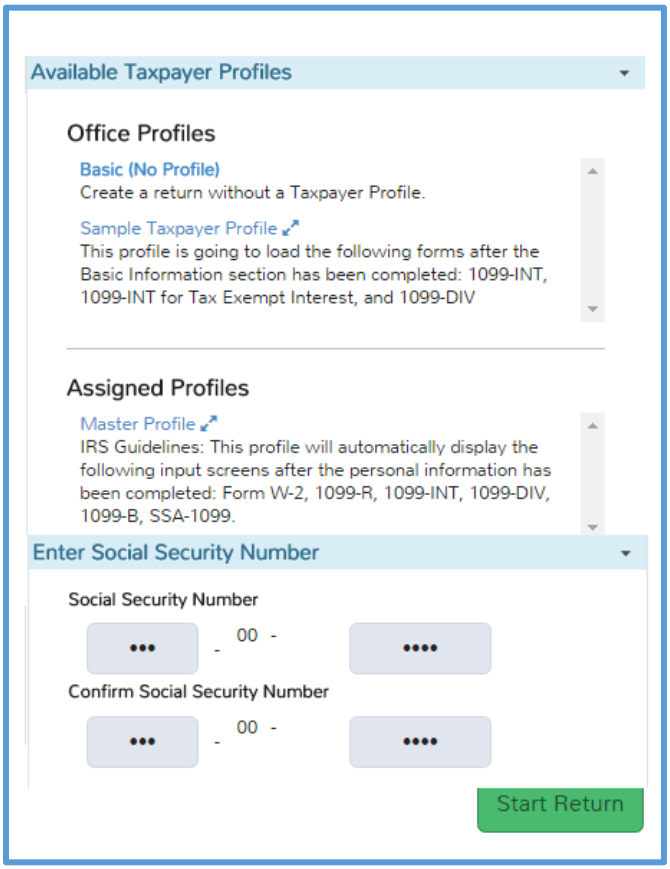
After you log in, TaxSlayer Pro Online displays the **Welcome to…** page:



To start a new return, use the following steps:

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

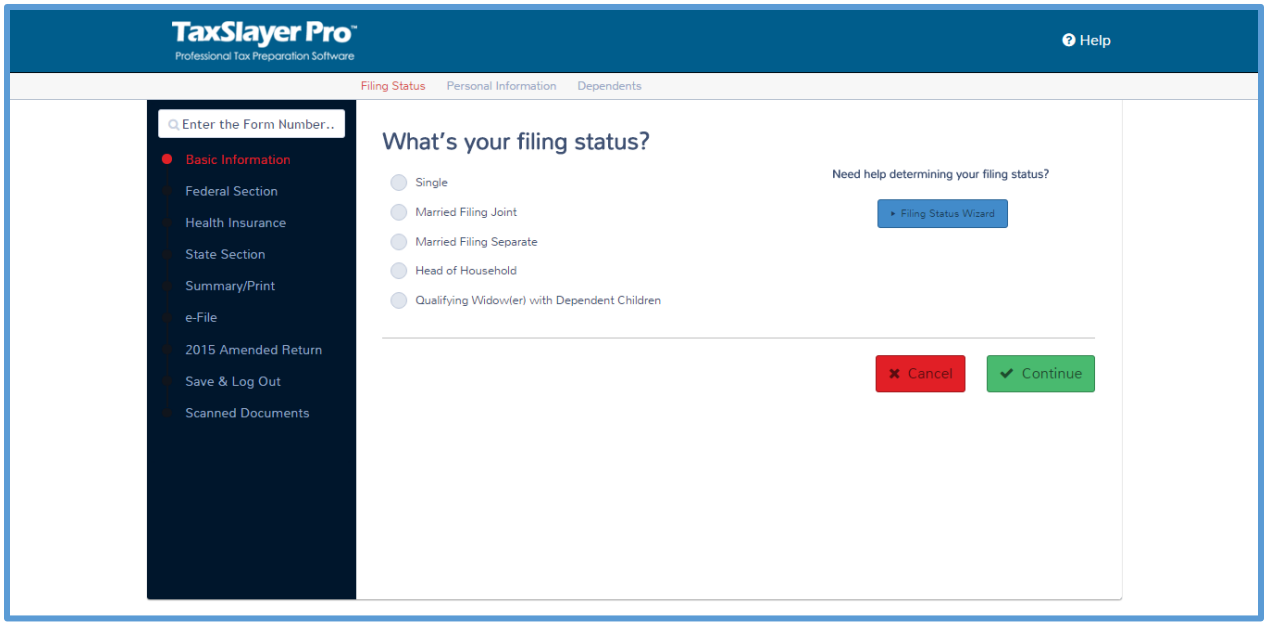
TaxSlayer Pro Online displays the **Create Tax Return** page:



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:



Working in the Return

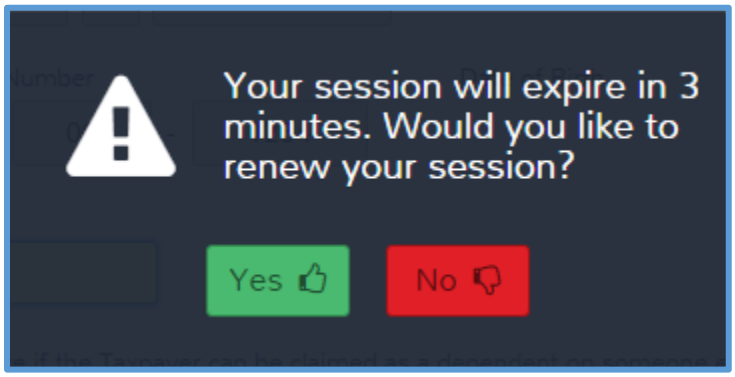
Layout and Links

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.

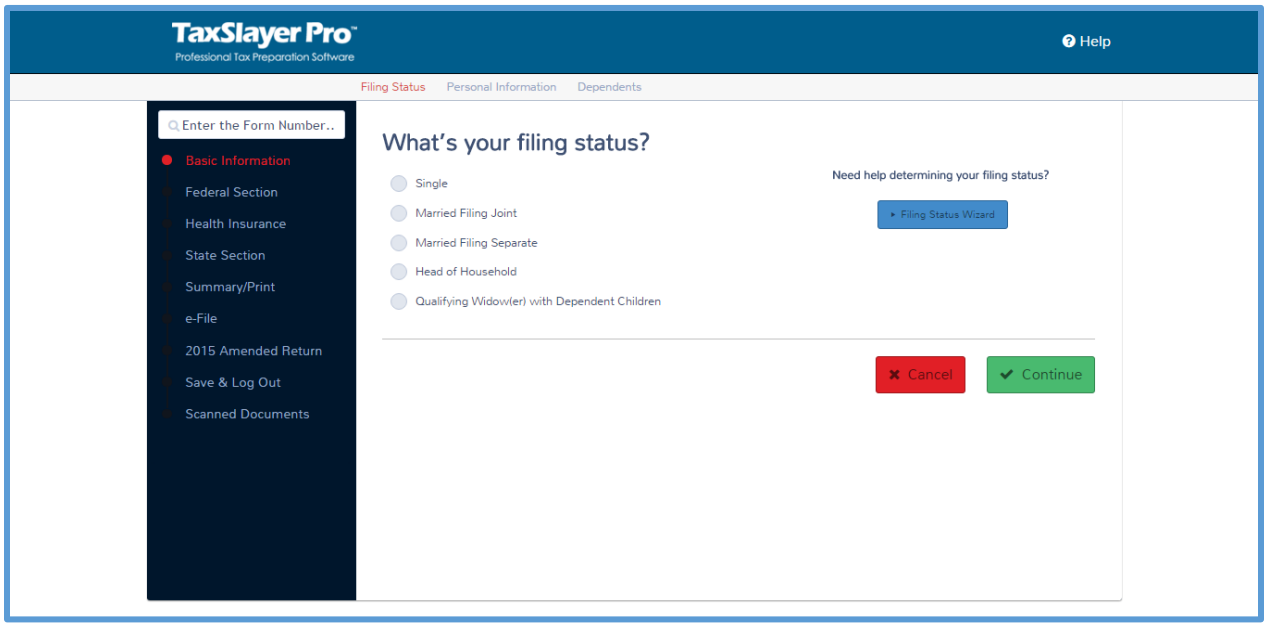
Refund Amount

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:



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

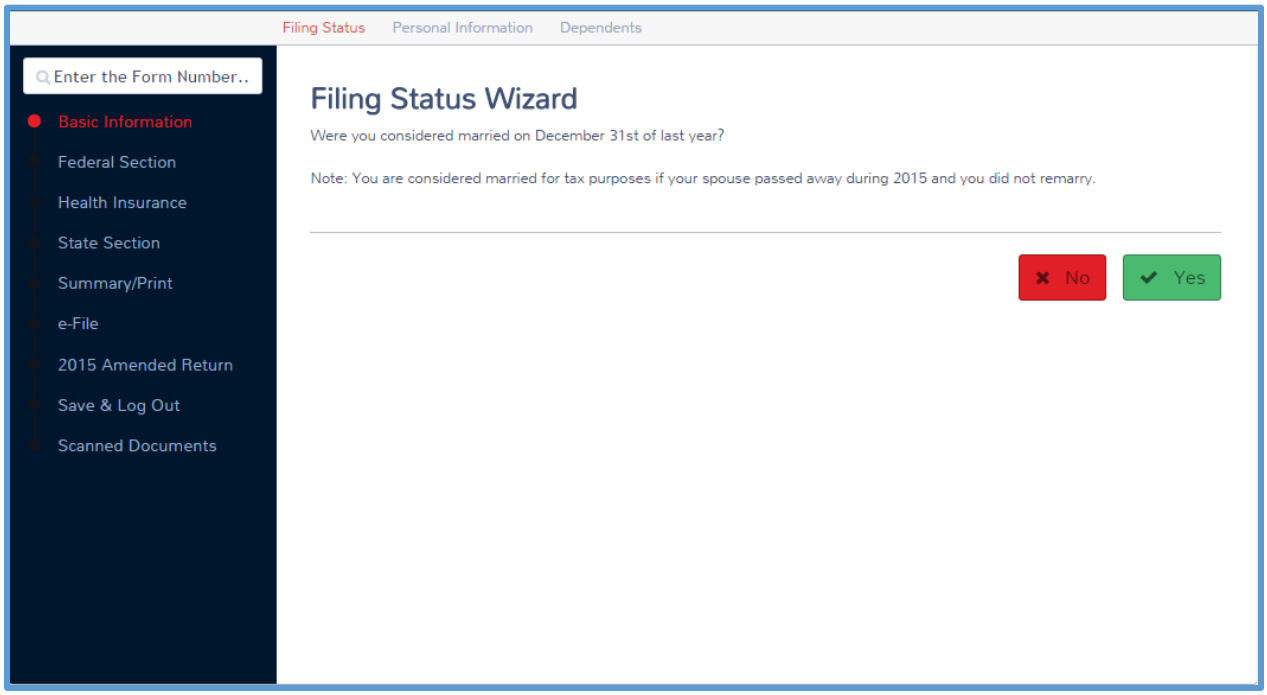
1. Select the appropriate filing status.
2. Click **Continue**.

Using the Filing Status Wizard

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

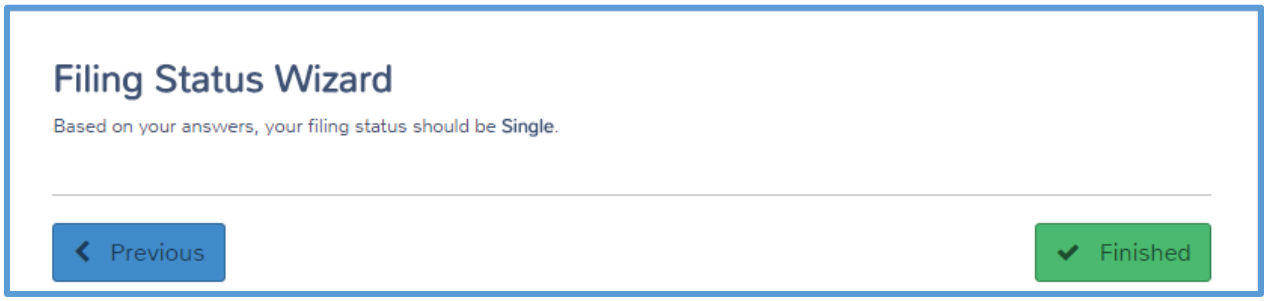
1. Click **Filing Status Wizard**.

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



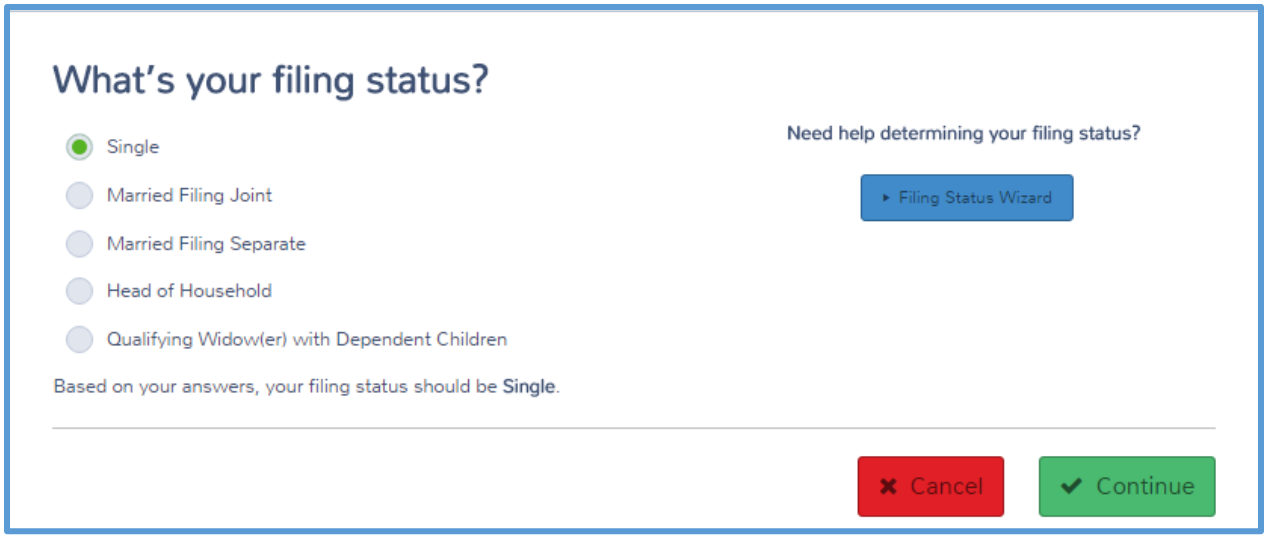
2. Read each question in the wizard to the taxpayer and click the appropriate answer.

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



3. Click **Finished**.

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



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

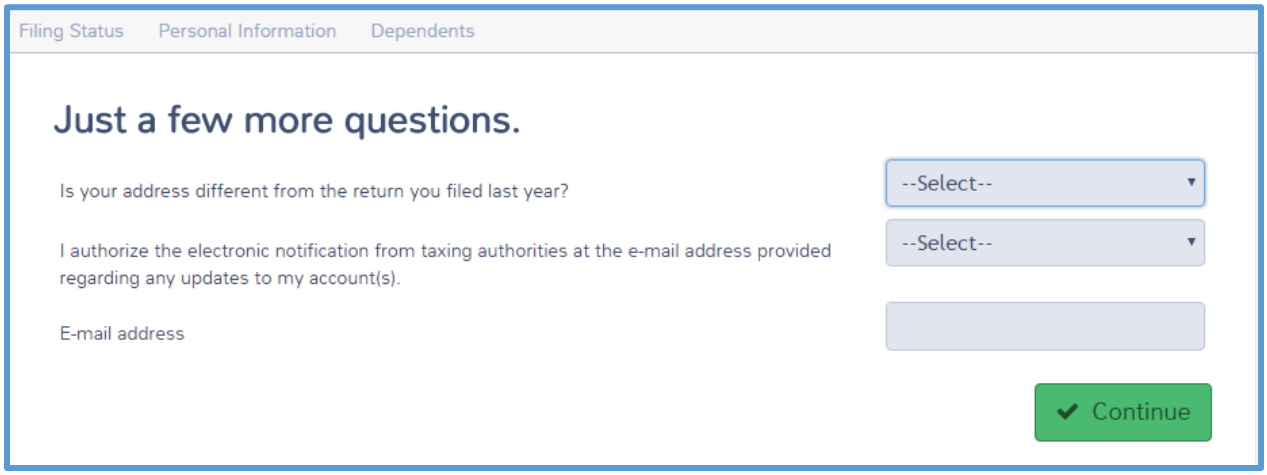
TaxSlayer Pro Online displays the **Spouse Information** section if you selected a Married filing status. Complete the information for the spouse and select any applicable check boxes.

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.

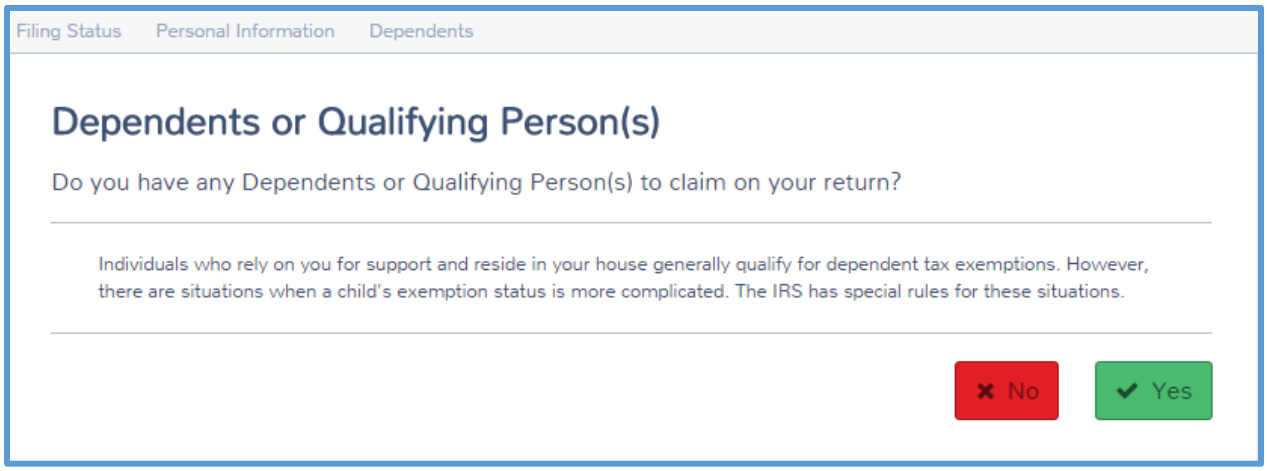
If you selected a resident state, TaxSlayer Pro Online displays the **Just a few more questions** page with additional questions required by the resident state that are not necessarily captured when completing the Federal return:



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

Entering Dependent Information

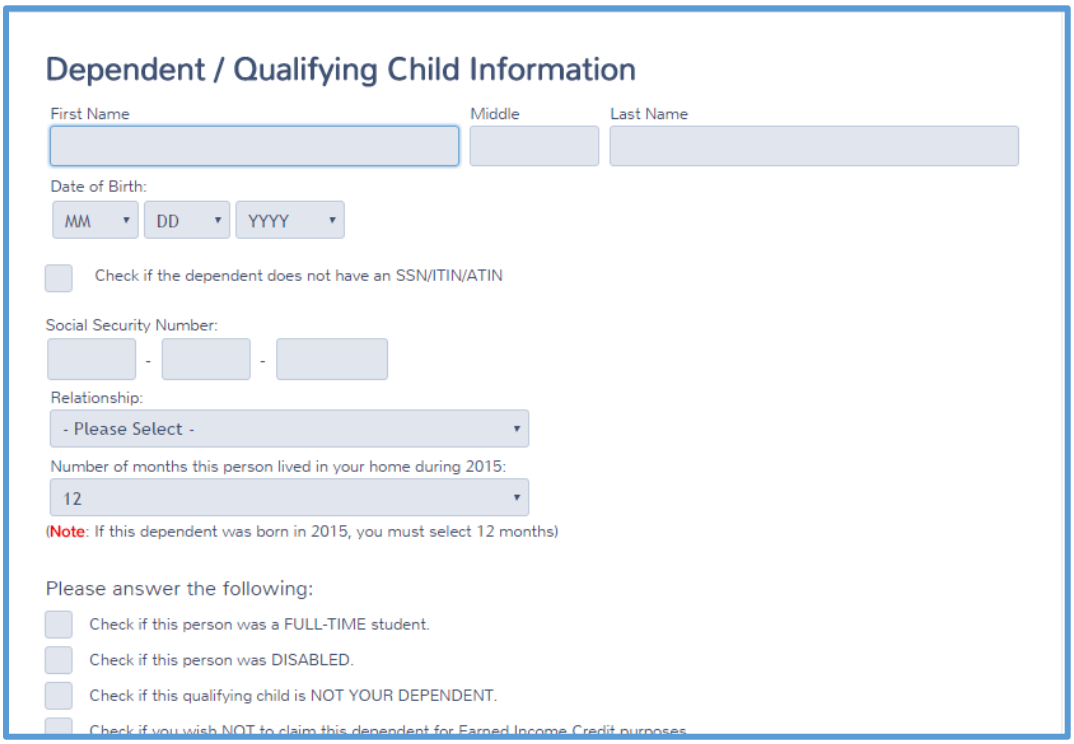
When you complete the personal information, TaxSlayer Pro Online displays the **Dependents or Qualifying Person(s)** page:



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:



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:

Ending a Section

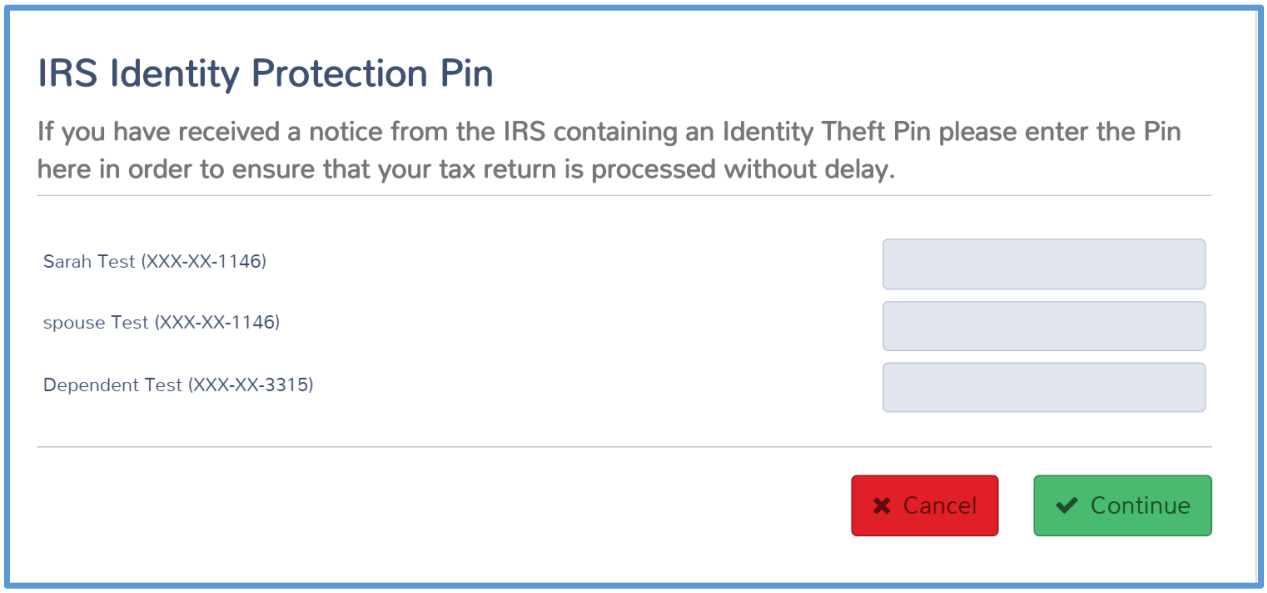
As you work through a return, TaxSlayer Pro Online displays a menu at the end of each section. Review and edit any information for that section using this menu, and then click **Continue**.

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:



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.

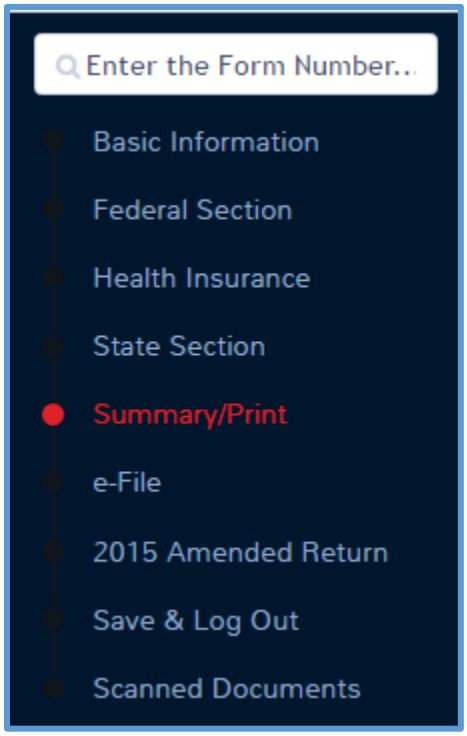
If you applied a taxpayer profile when creating the return, TaxSlayer Pro Online displays the entry forms in the designated order.

For information on creating a taxpayer profile, see *Working with Taxpayer Profiles*.

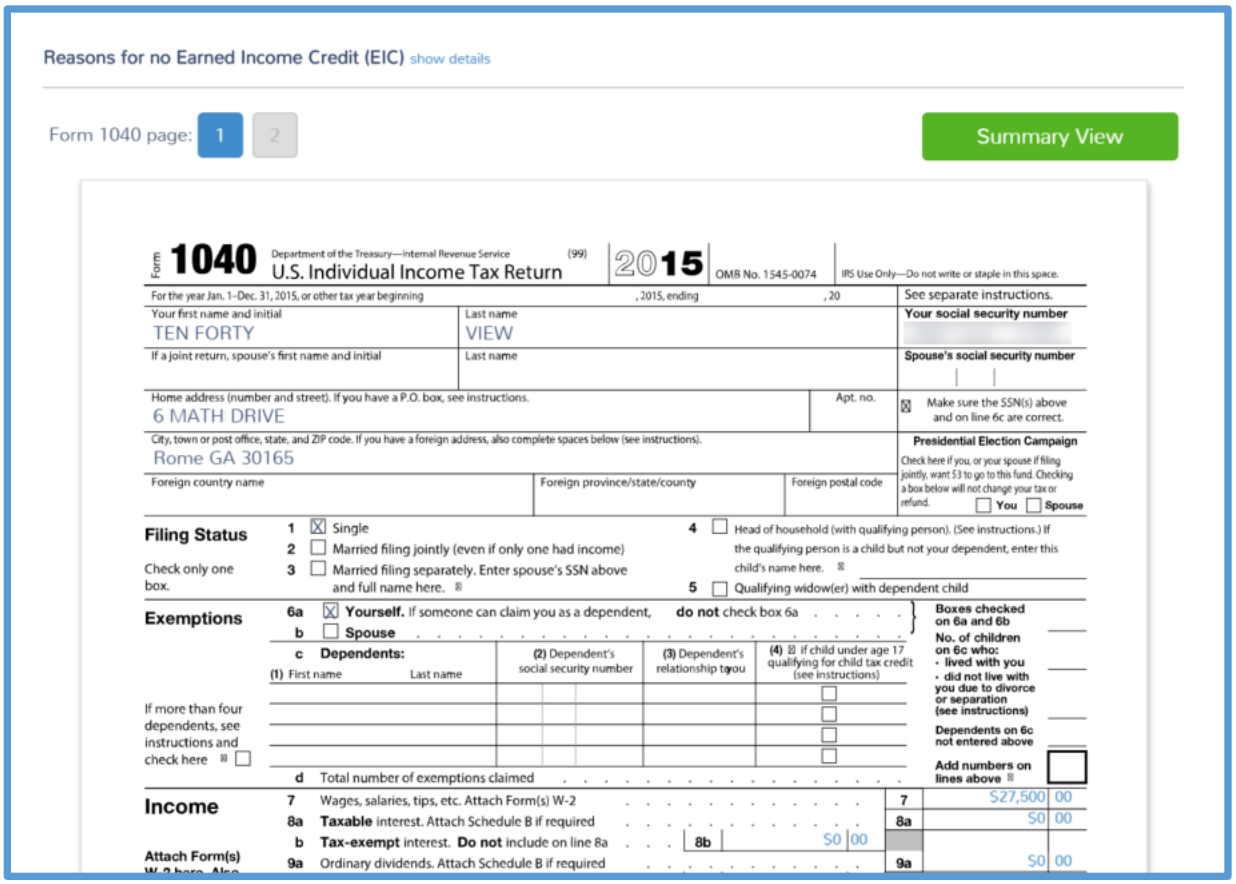
Form 1040

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:



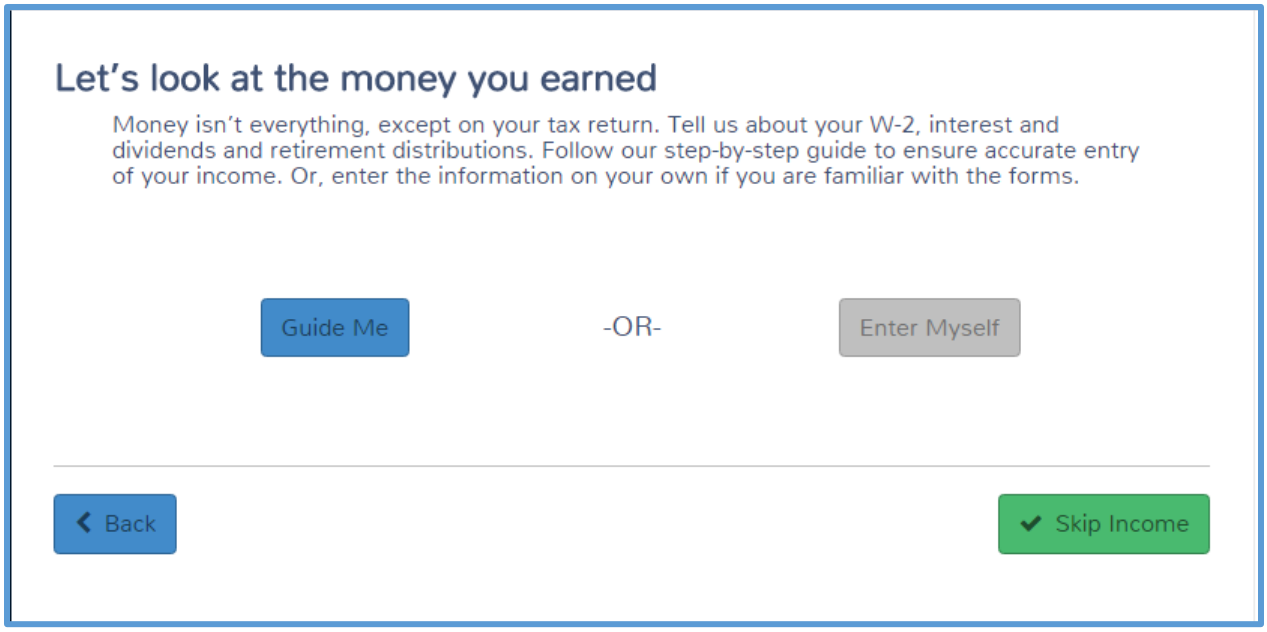
2. Click the line(s) on the return to link to the entry menu for that information.

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:

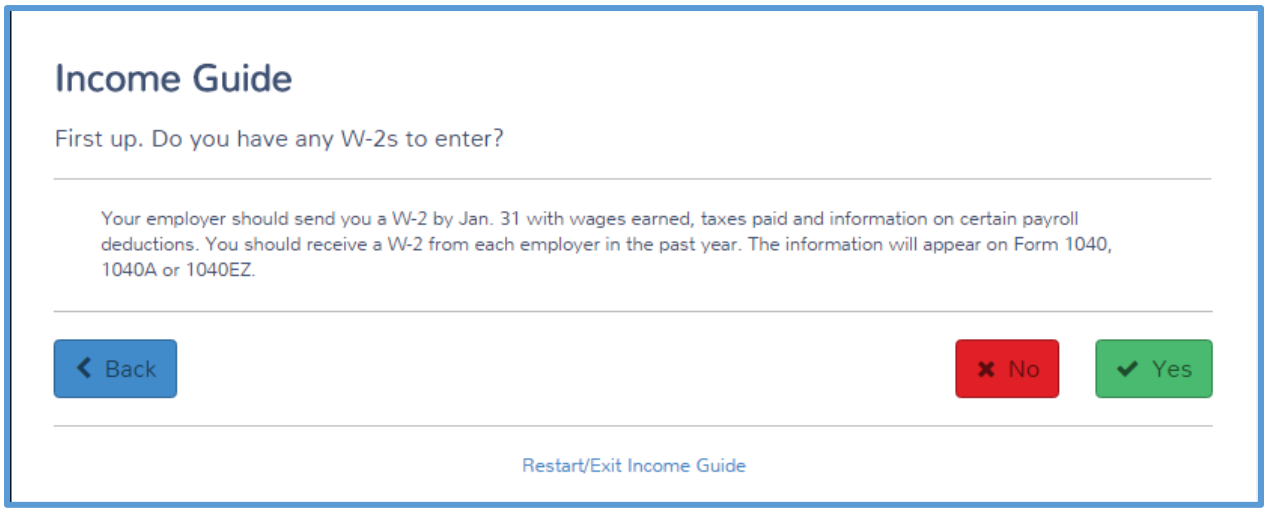
1. Start a new return.
2. Apply a taxpayer profile, if desired.
3. Add the taxpayer's filing status.
4. Add the taxpayer and spouse's personal information, including name, address, and other information.
5. Complete entry pages loaded from a selected taxpayer profile, if applicable.

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



6. Click **Guide Me**.

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



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:

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.

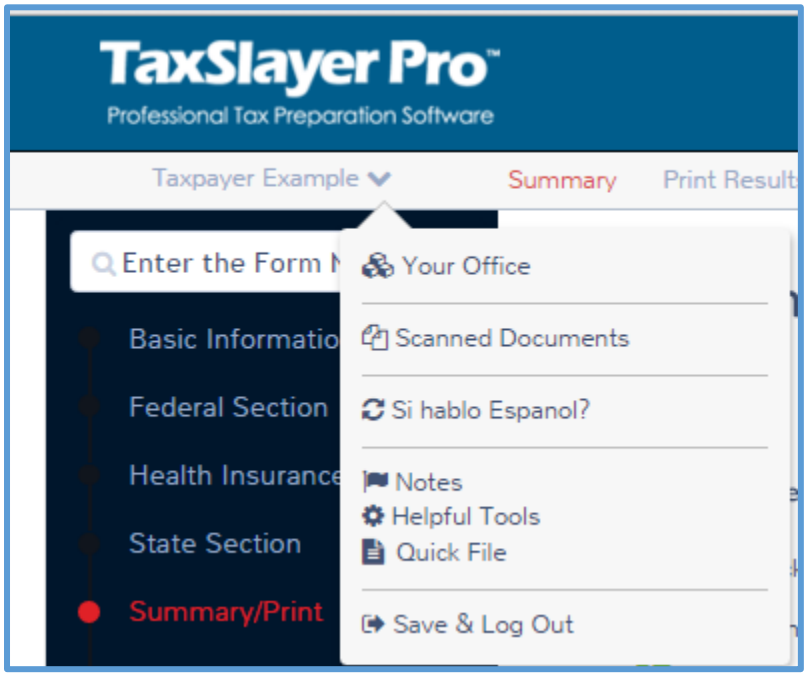
Quick File

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

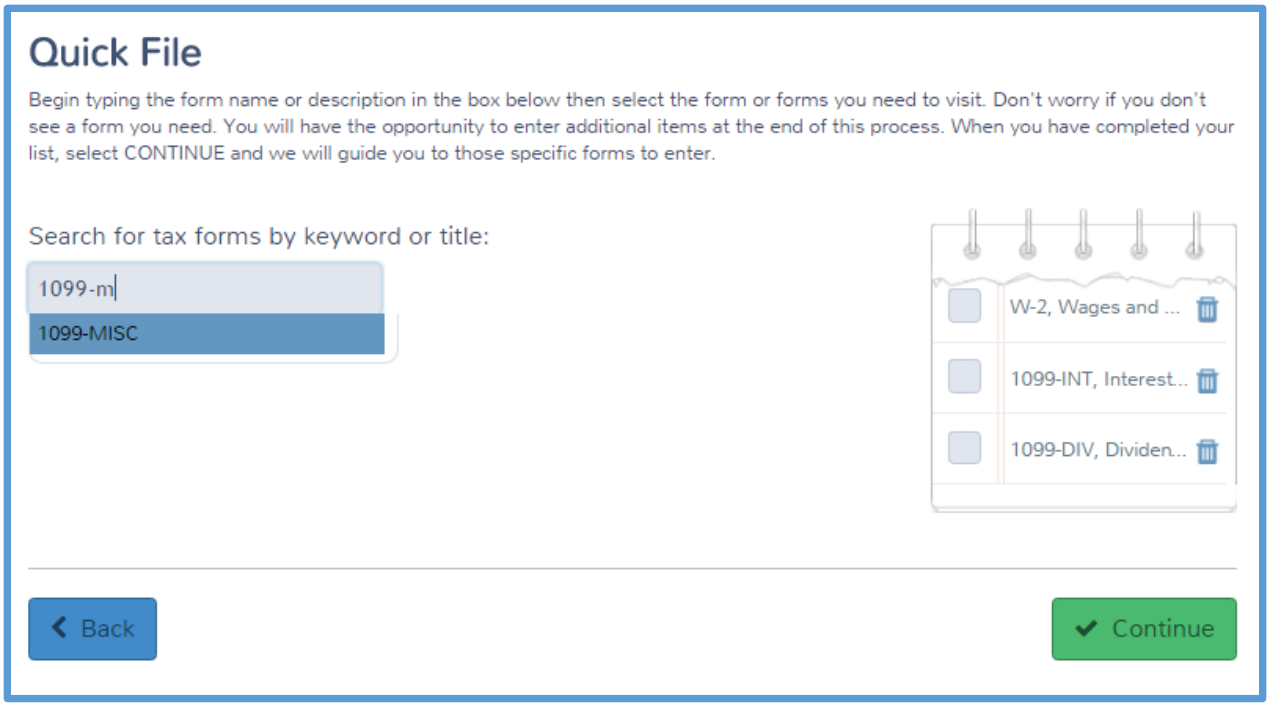
pre-created list. You can still enter additional information to the return after you complete the necessary forms displayed by the Quick File.

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

1. From the **Tools** drop-down list, click **Quick File**.



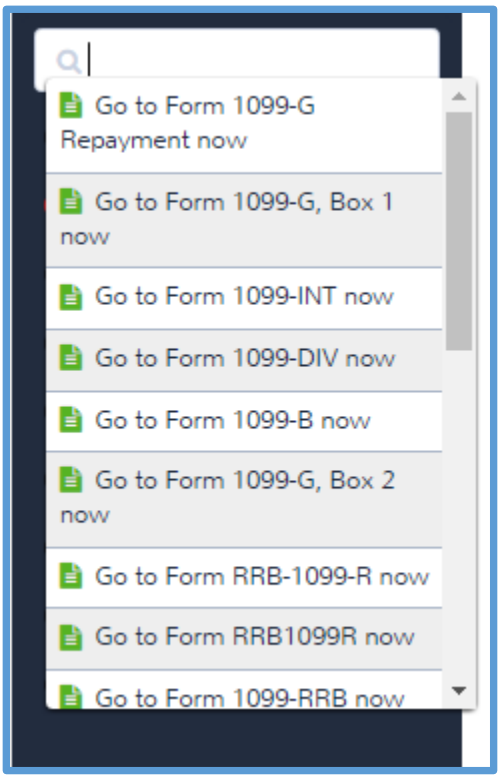
2. Type the name of the form(s) in the **Search** box to build a list of forms.



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:

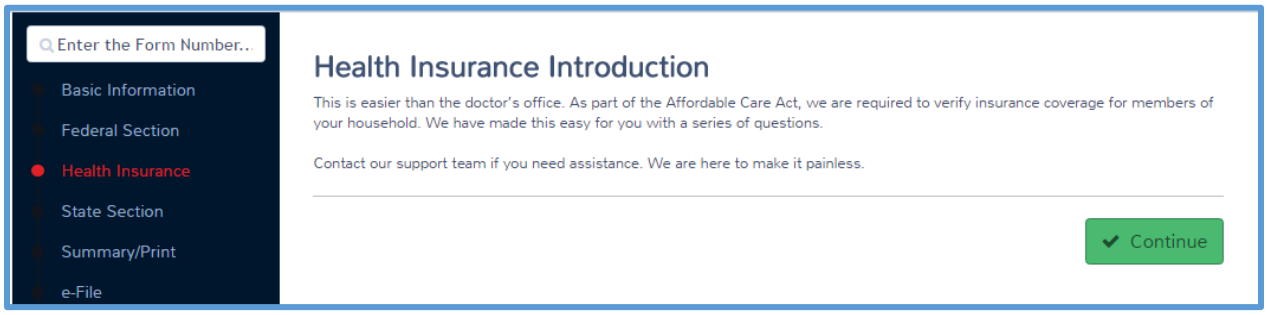
1. Complete the health insurance questionnaire.

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:



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.

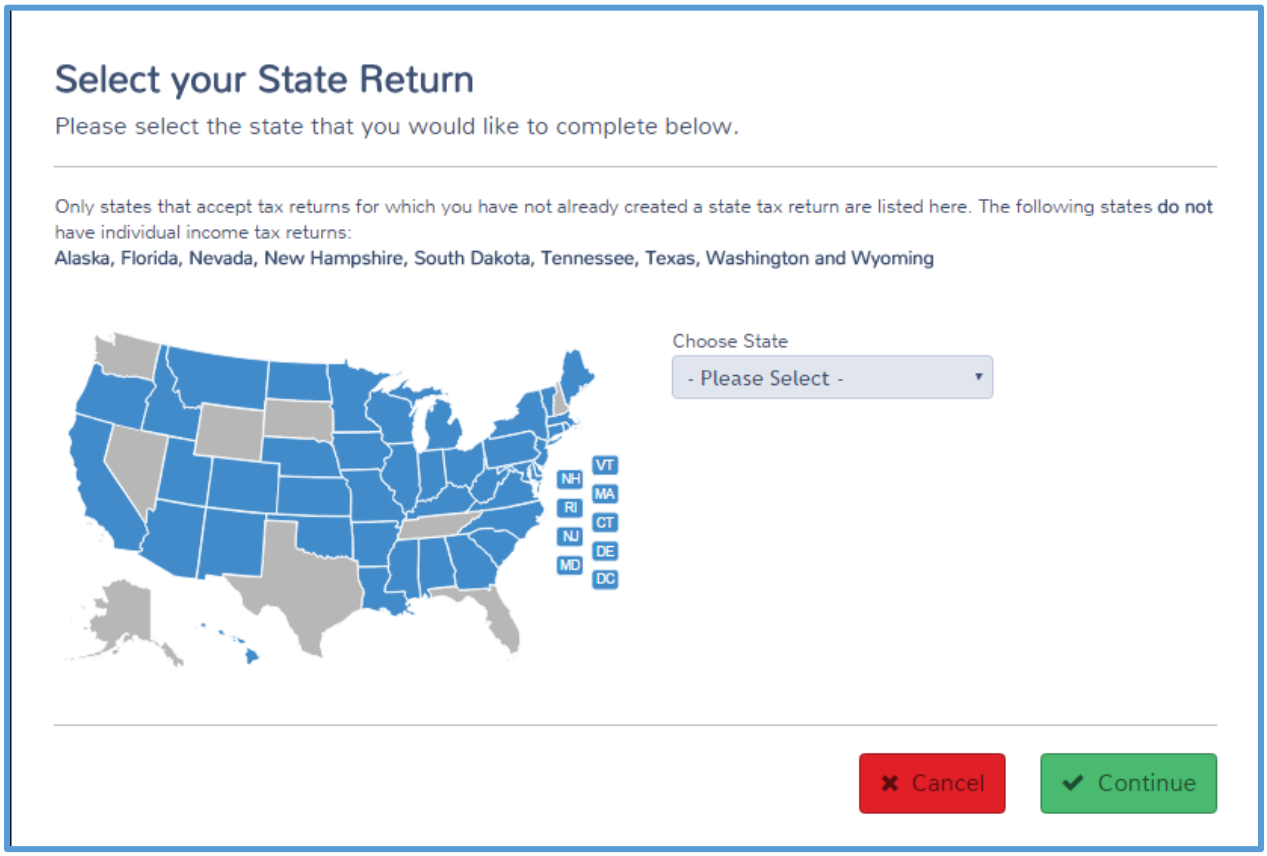
When you select a state on the **Personal Information** page, TaxSlayer Pro Online adds the state return. If the taxpayer does not need to add another state, click **Continue to Summary**. Otherwise, use the information in this lesson to add another state return.

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:

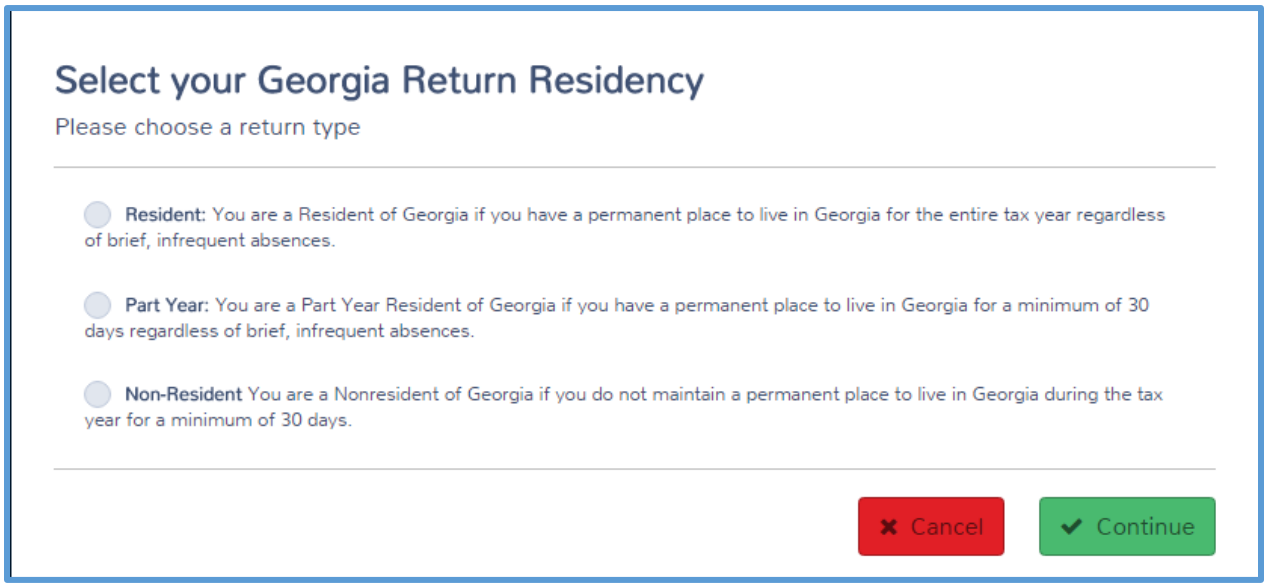
1. Click **Add State Return(s)**.

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



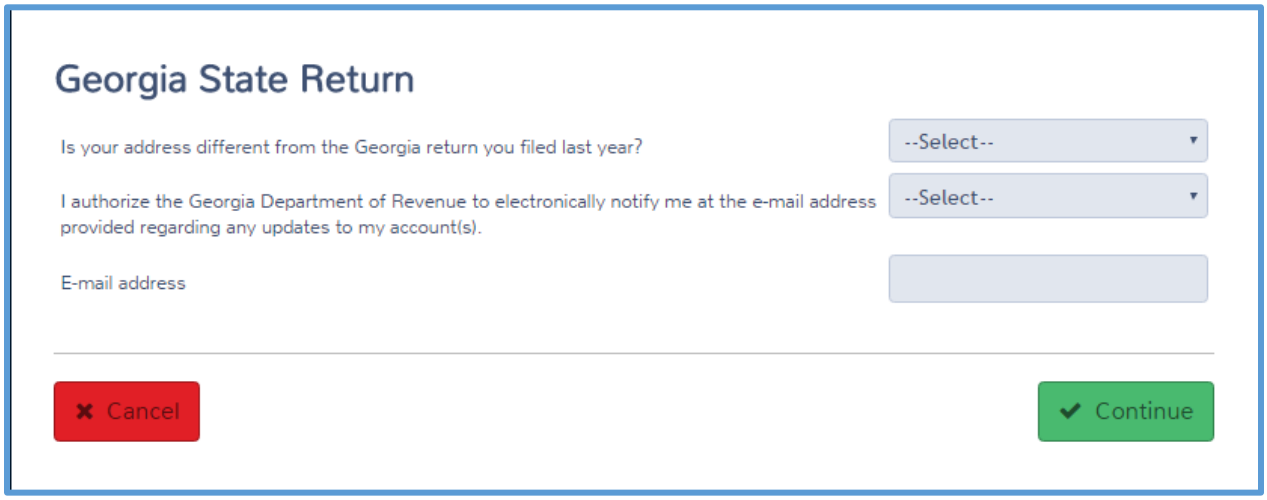
2. Select the state from the drop-down list or click your state in the map.
3. Click **Continue**.

TaxSlayer Pro Online displays the **Select Your Return Residency** page:



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:

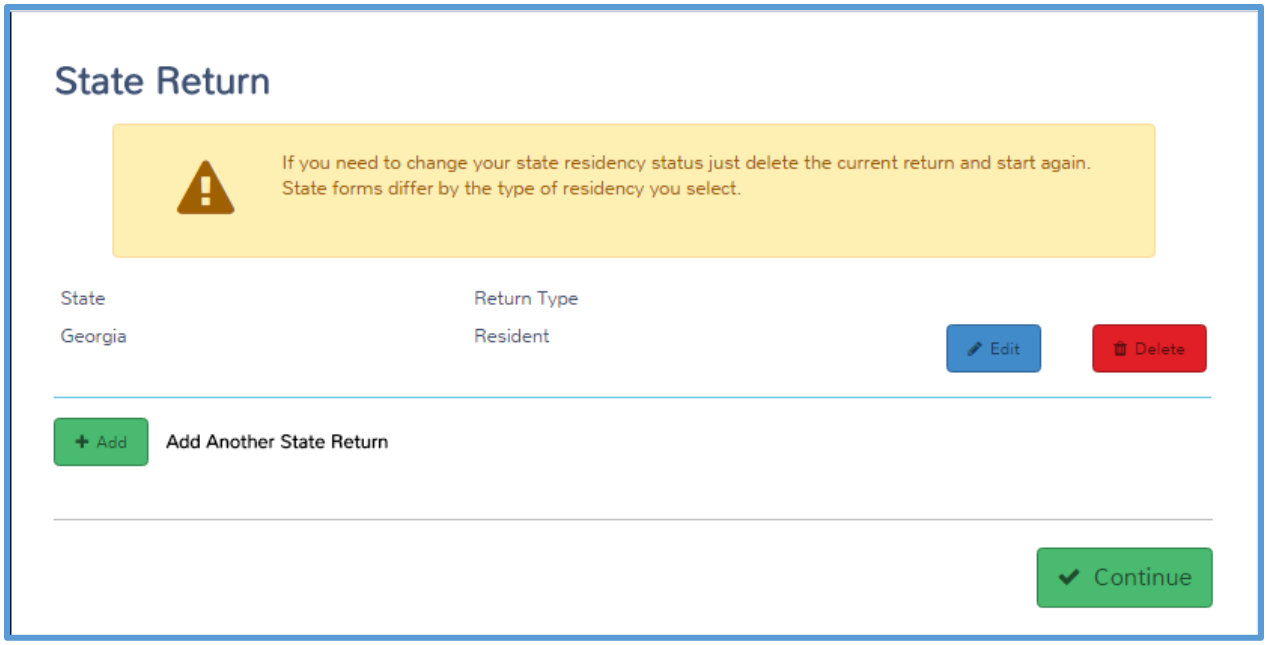


6. Read each question carefully and answer the question.
7. Click **Continue**.

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:



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

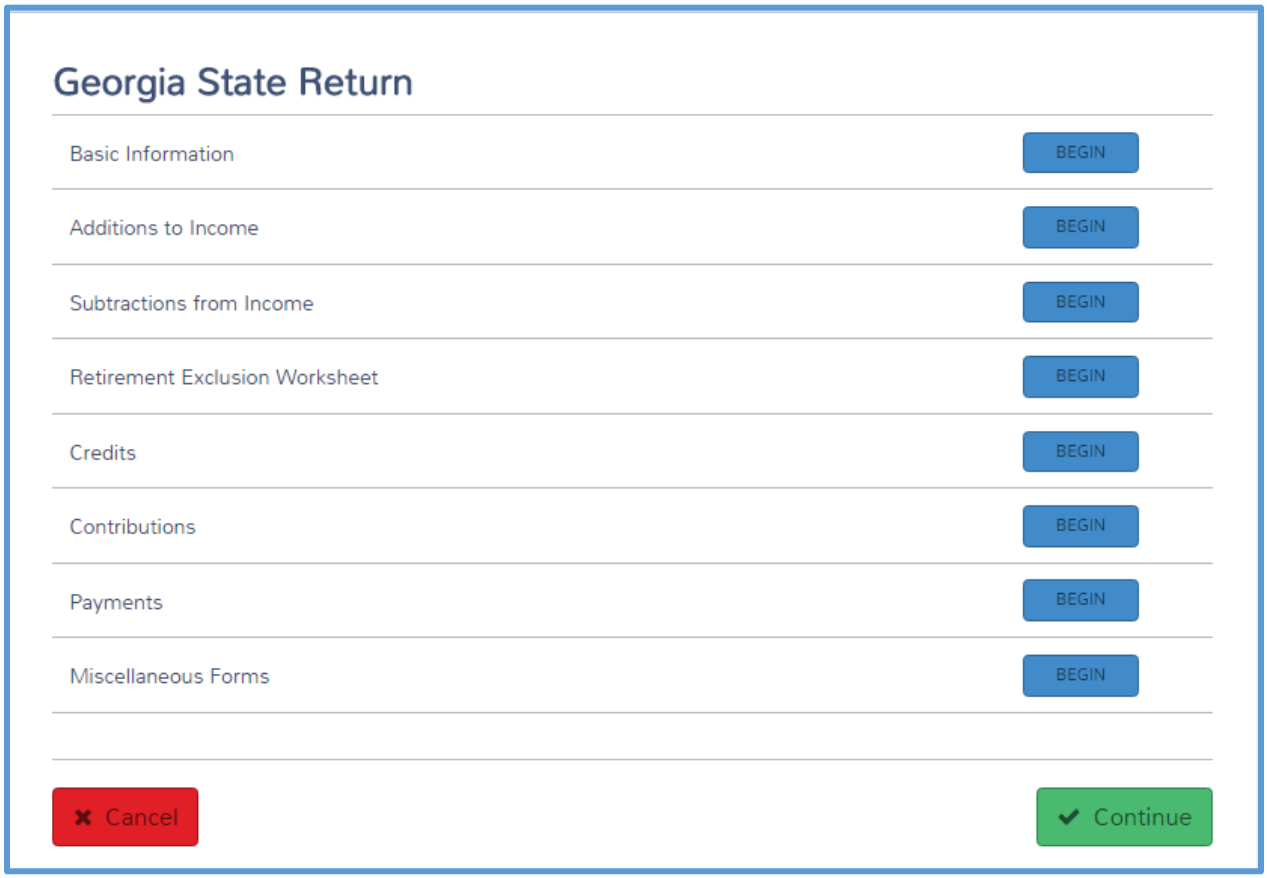
TIP: You can add an unlimited number of states to the return.

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**.

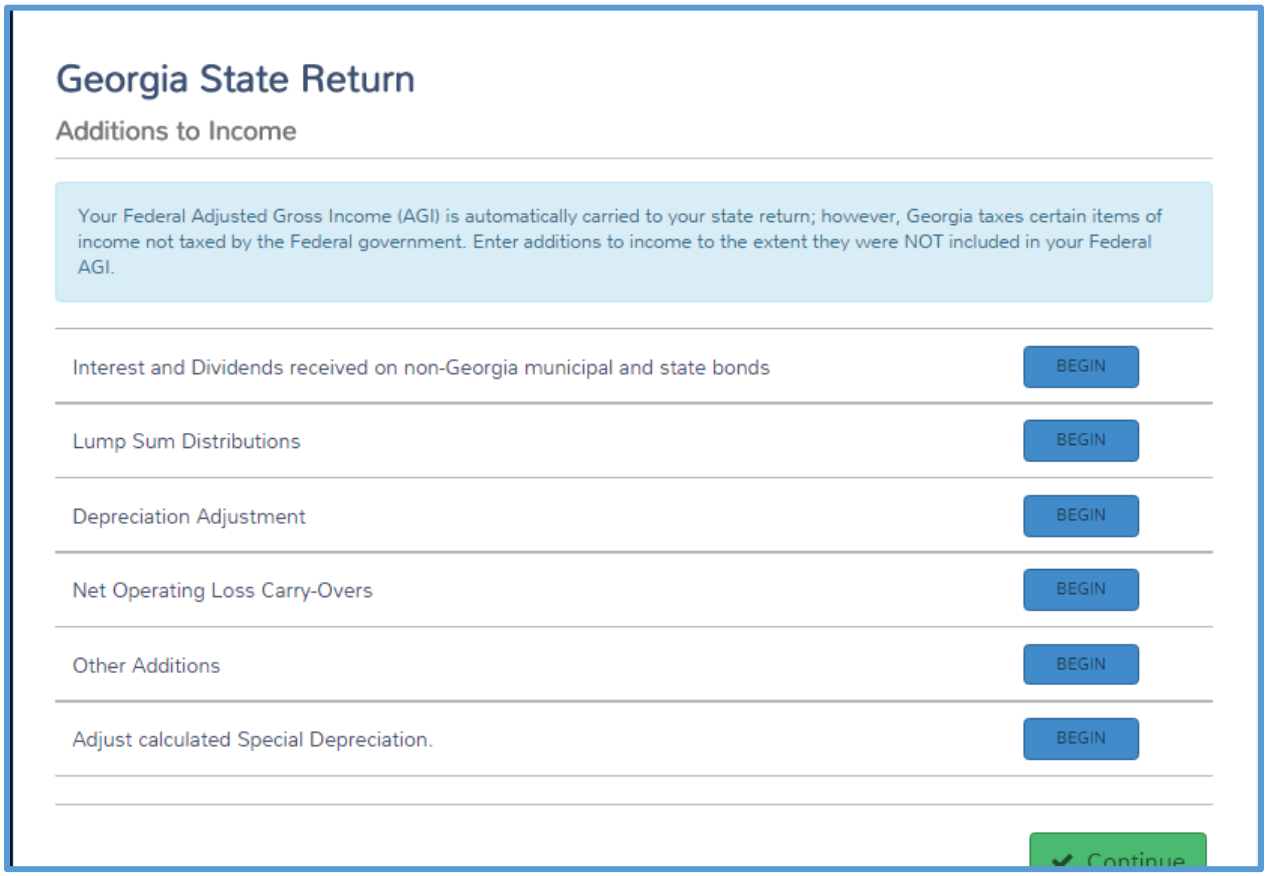
TaxSlayer Pro Online displays the **State Return** page:



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:



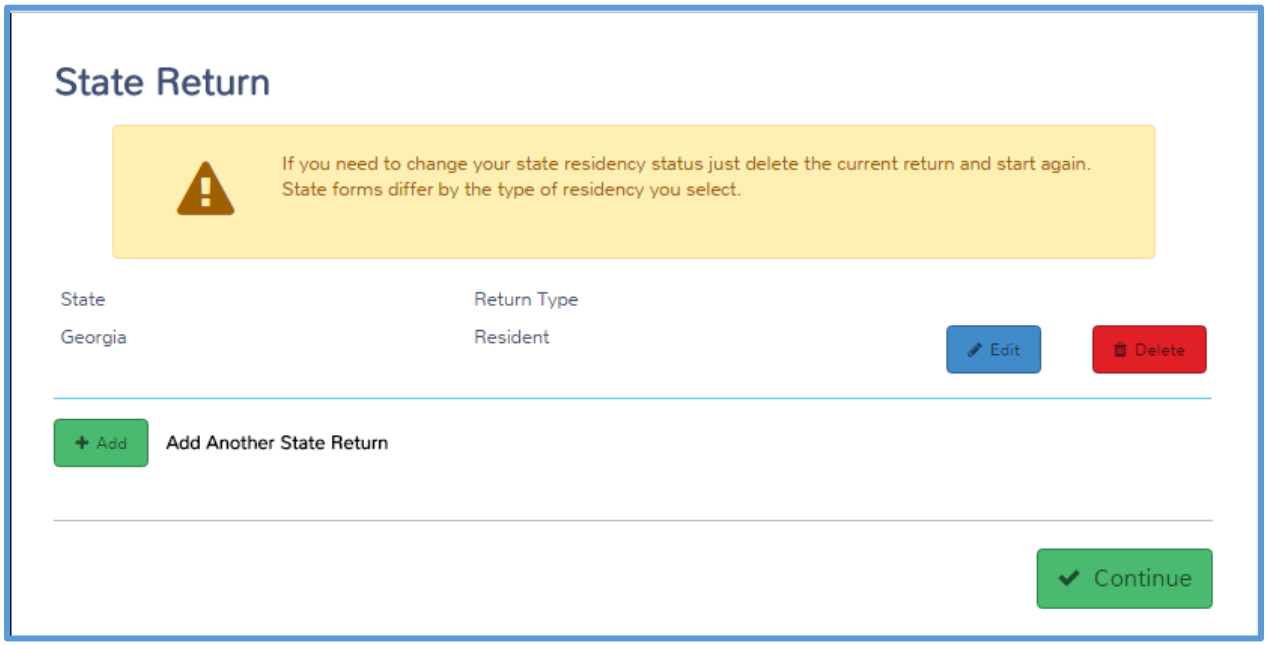
3. Click **BEGIN** on the line for which you need to add information.
4. Follow the instructions for each line on the page.
5. Continue adding information to the state return as needed based on the taxpayer's circumstances.

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**.

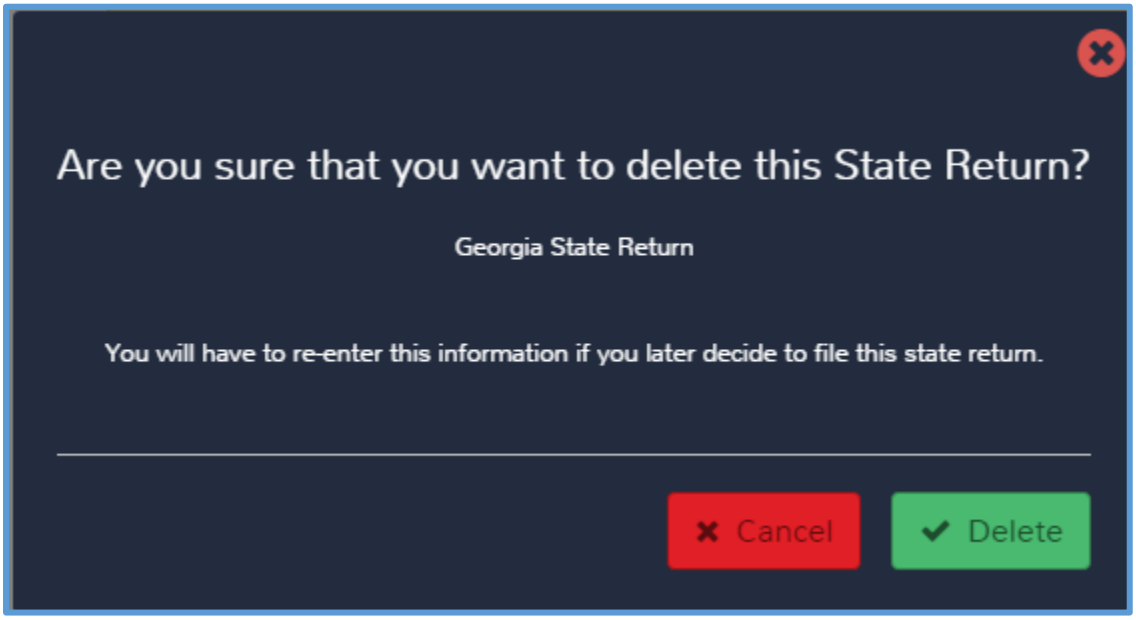
TaxSlayer Pro Online displays the **State Return** page:



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:



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.

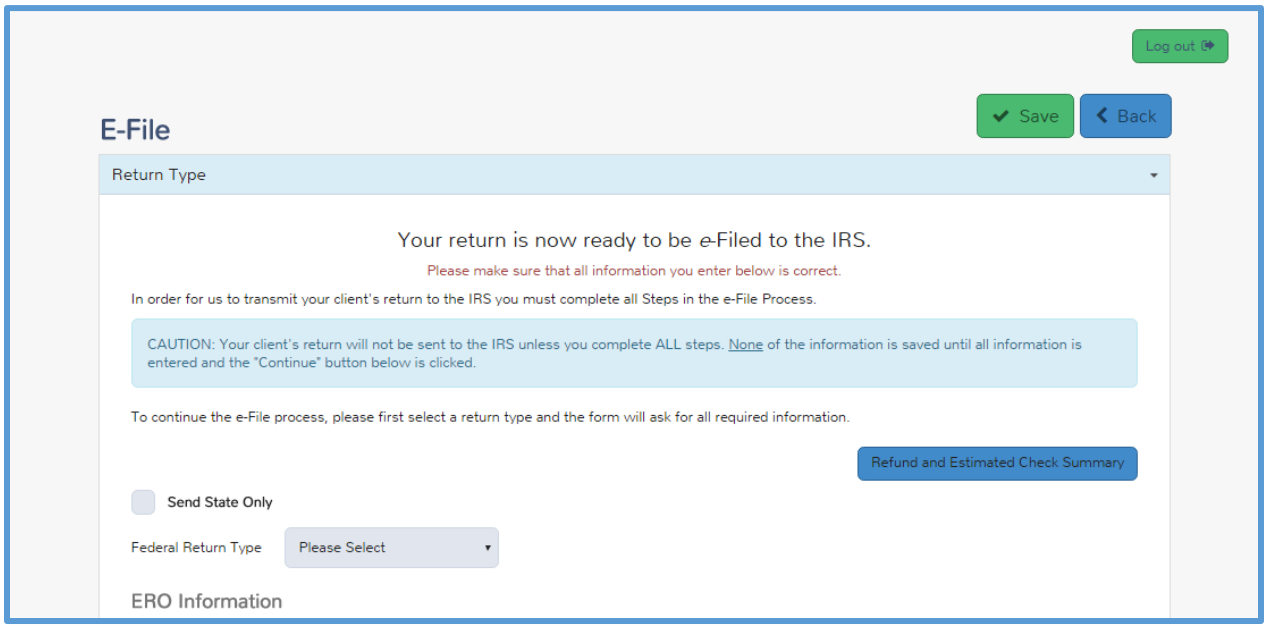
Note: TaxSlayer's built-in review process is designed to enhance your existing review process by allowing automated queuing processes. This process is not designed to replace your existing quality review processes.

Marking a Return for Review

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

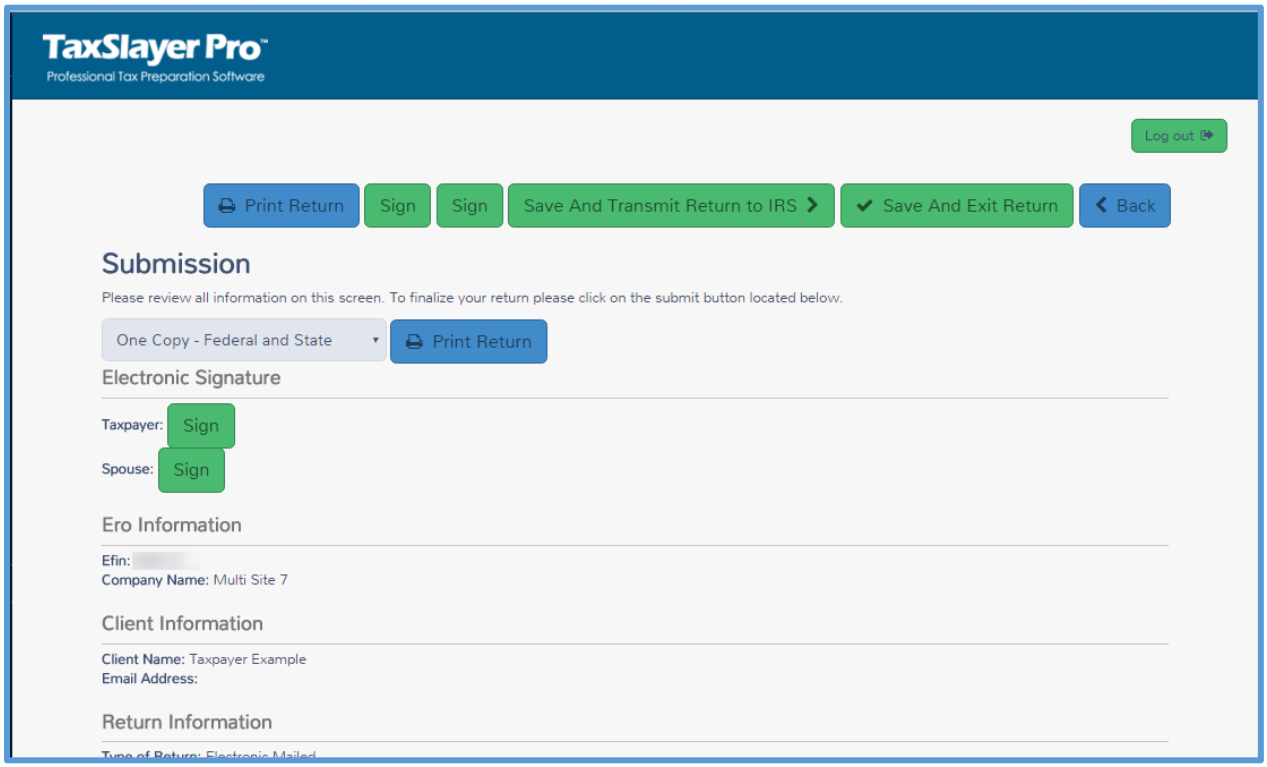
1. From the left navigation bar, click **e-File**.

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



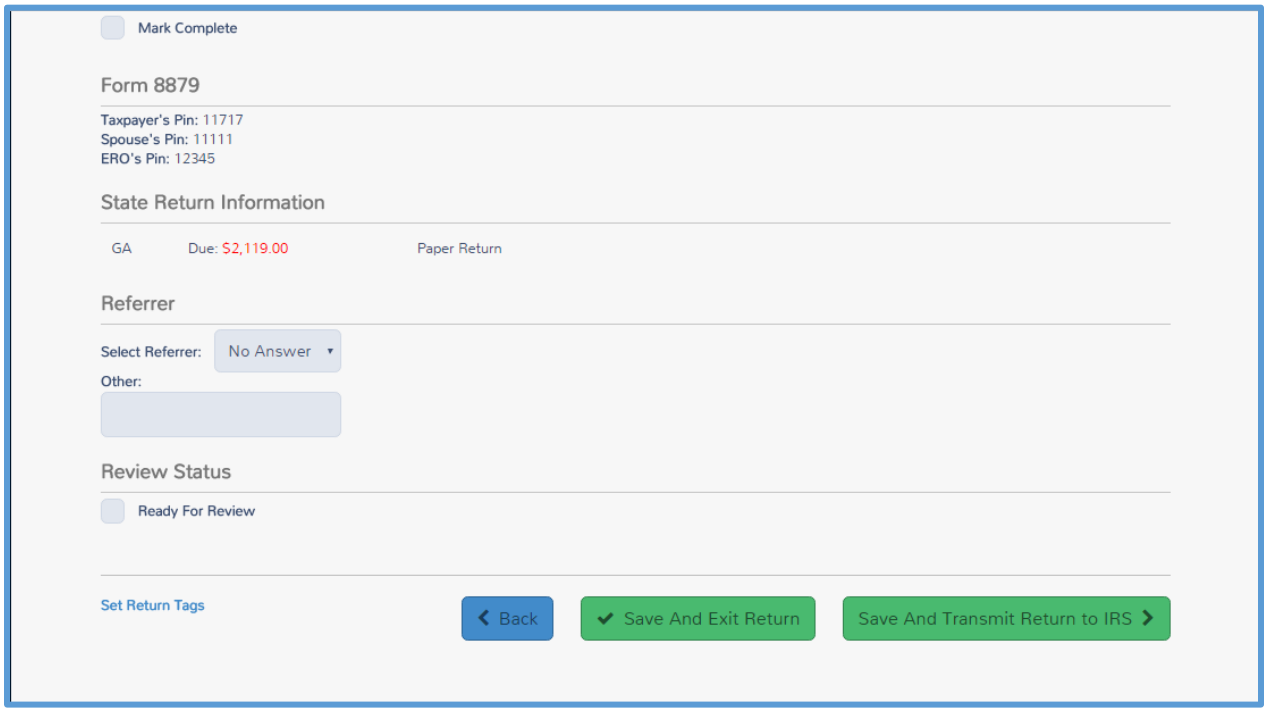
2. Complete any required information on this page. See the *Electronic Filing* section for more information.
3. Click **Save**.

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



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:



5. Select the **Ready For Review** check box in the **Review Status** section.
6. Click **Save And Exit Return**.

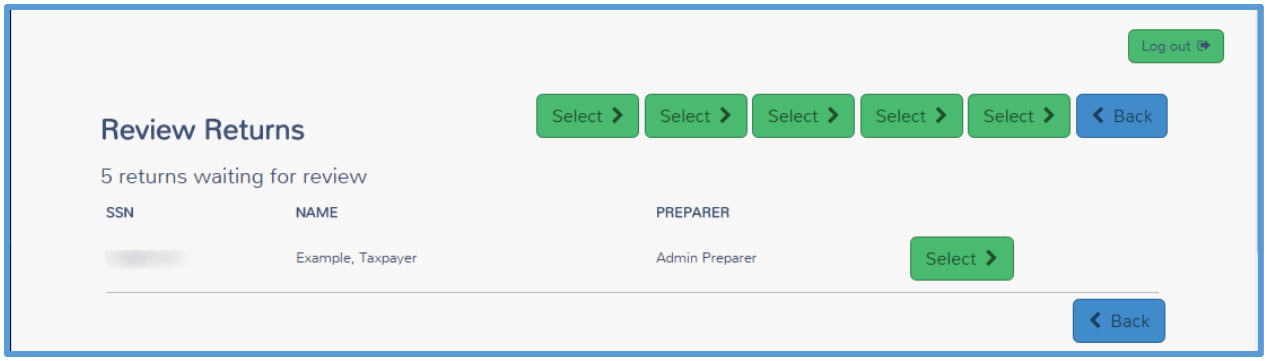
TaxSlayer Pro Online closes the return.

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:



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

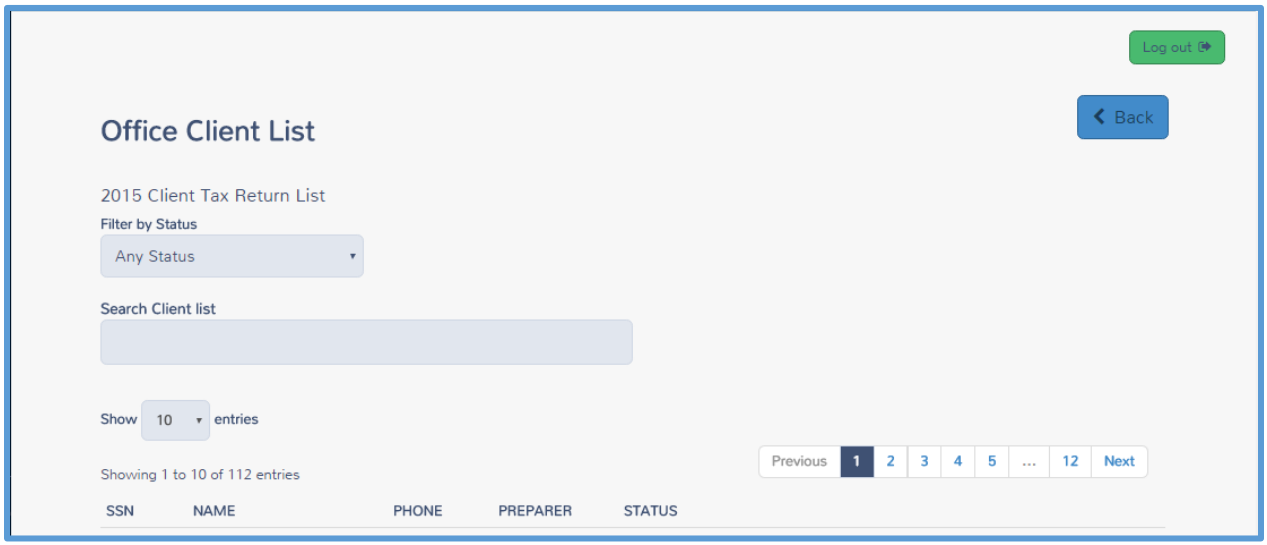
TaxSlayer Pro Online displays the return.

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:

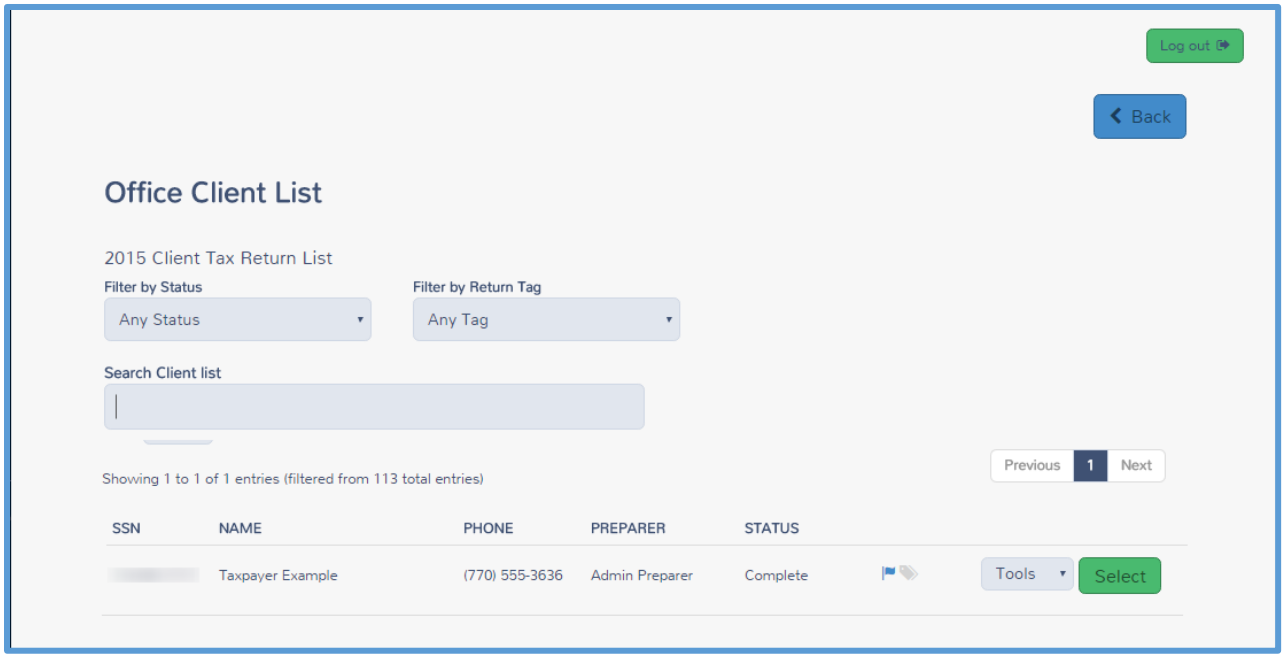
1. Click **Select** on the **Client Search** line.

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



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

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



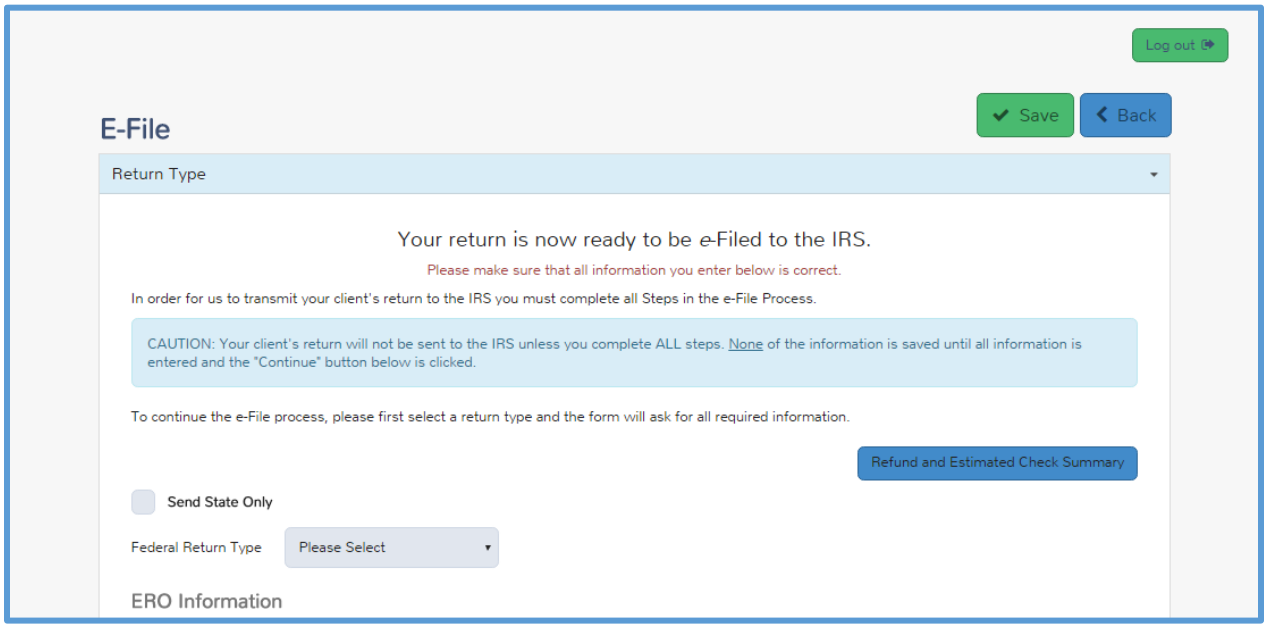
3. From the **Tools** drop-down list, select **Client Status**.

Marking a Return Complete

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

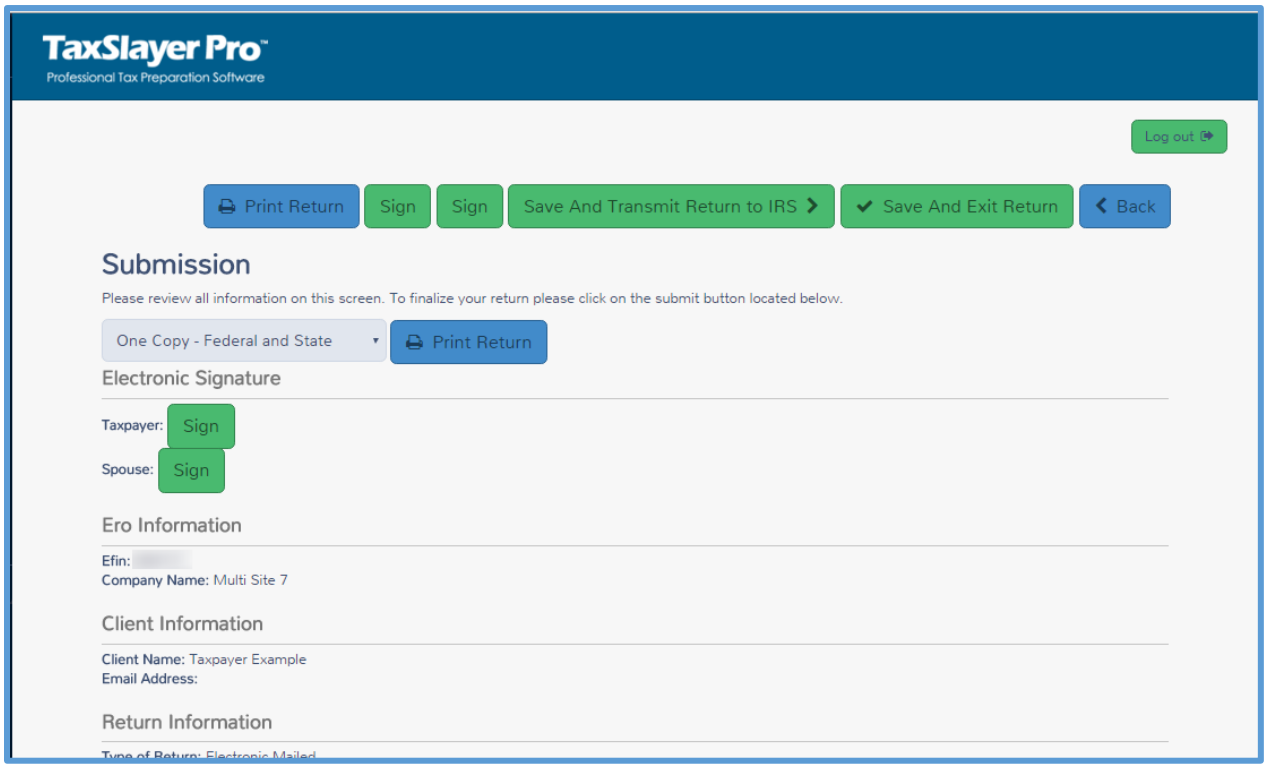
1. From the left navigation bar, click **e-File**.

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



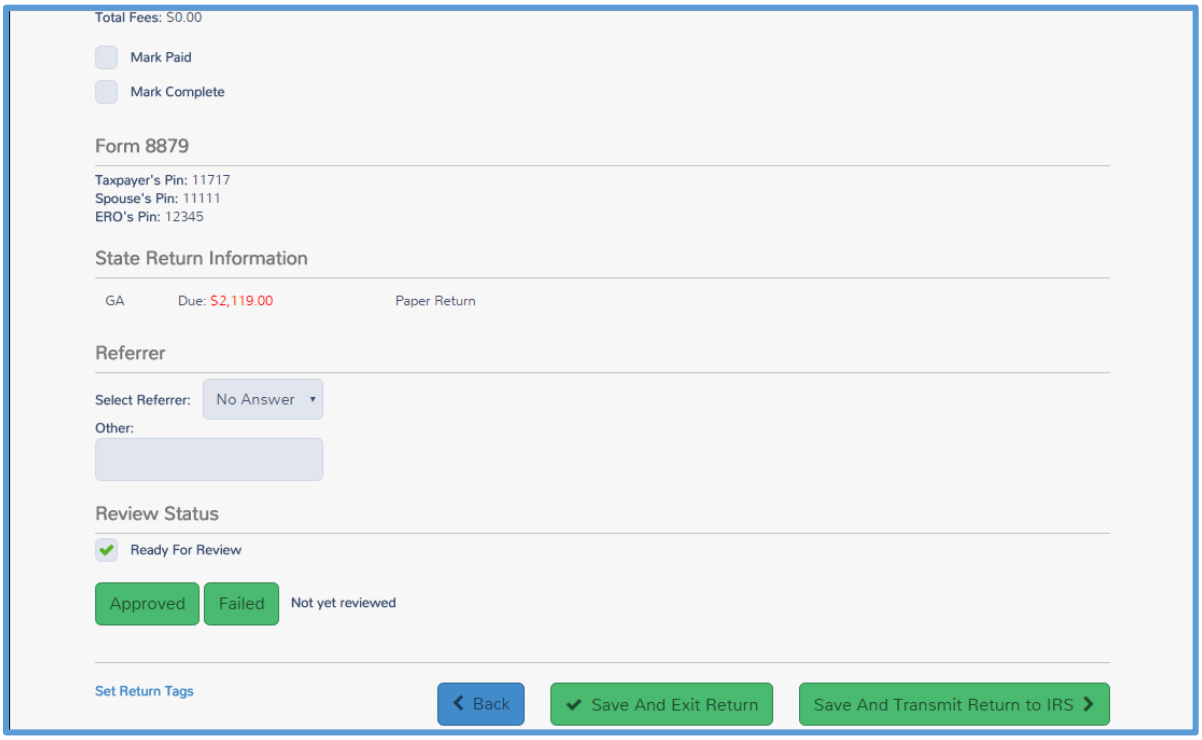
2. Review the information on this page.
3. Click **Save**.

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



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:



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.

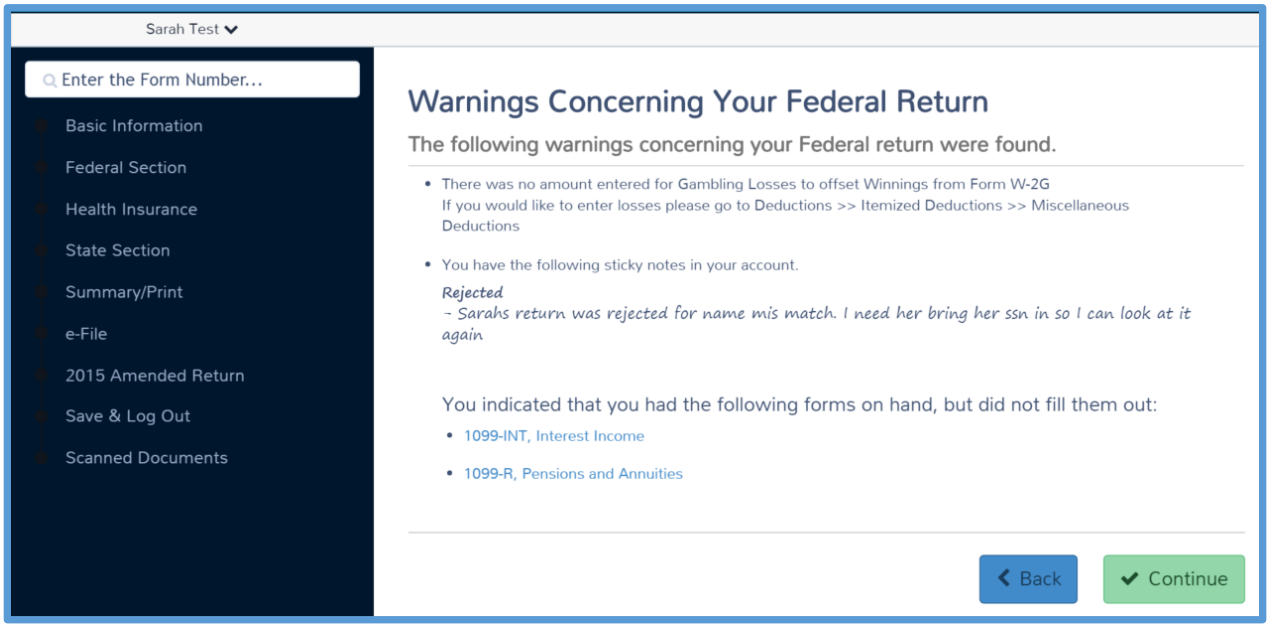
When you complete a return, you need to print a copy for the taxpayer. Depending on how your site handles printing, you can print either from within the return or from the client's status.

Printing from the e-File Page

To print from within the return, use the following steps:

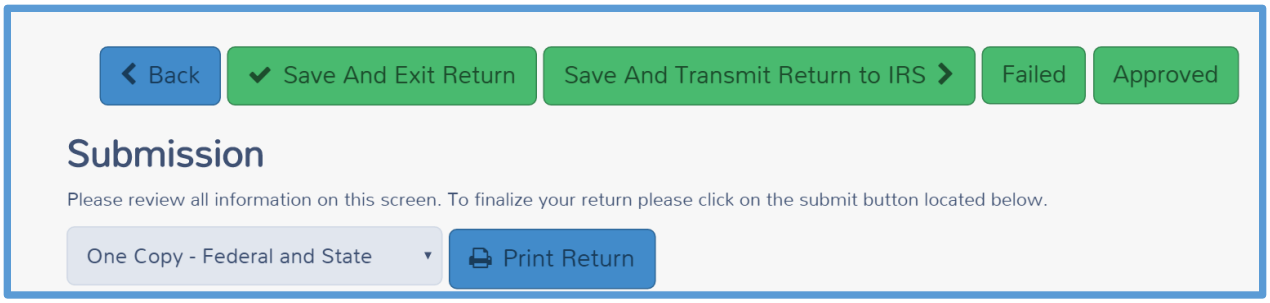
1. While within the tax return, click **e-File** in the left navigation bar.

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



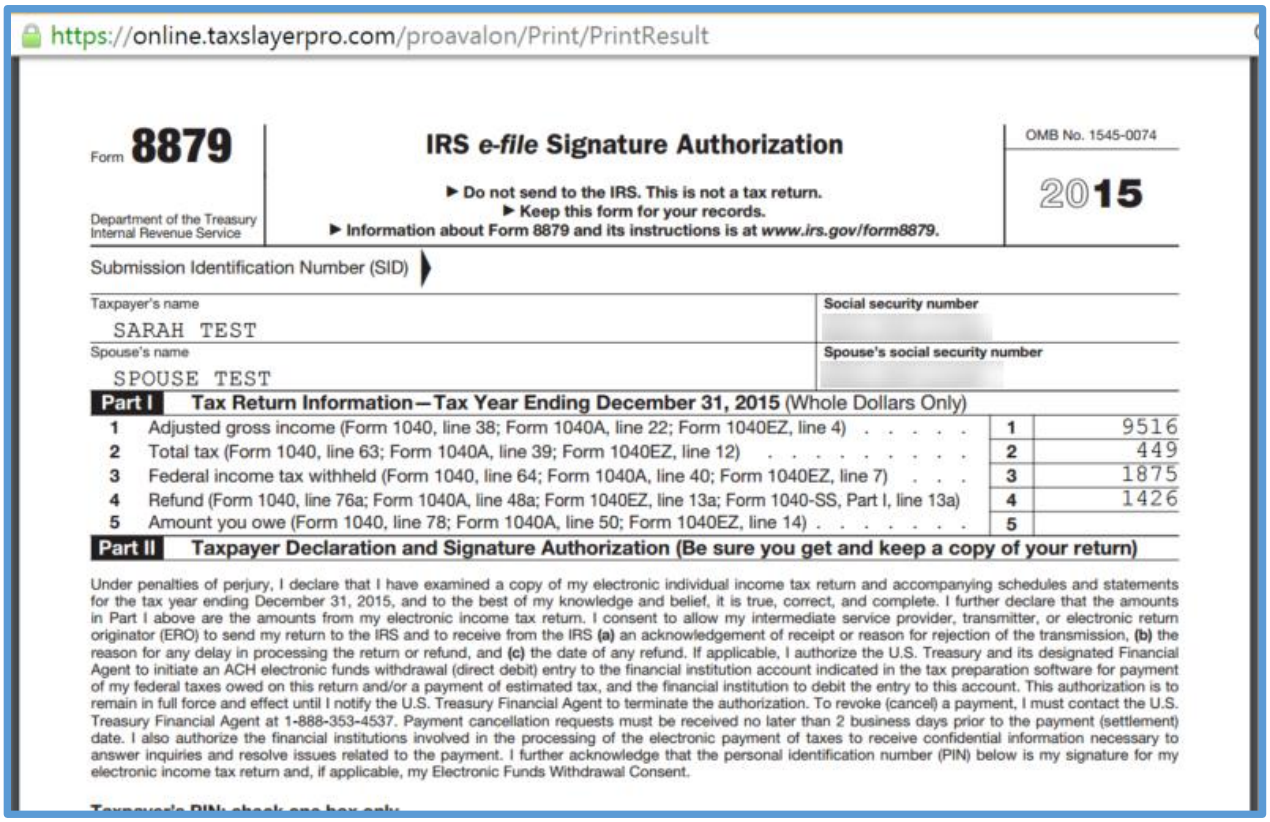
2. Continue through the e-File section as described in *Creating the e-File*.

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:



Form **8879**

Department of the Treasury
Internal Revenue Service

IRS *e-file* Signature Authorization

▶ Do not send to the IRS. This is not a tax return.
▶ Keep this form for your records.
▶ Information about Form 8879 and its instructions is at *www.irs.gov/form8879*.

OMB No. 1545-0074

2015

Submission Identification Number (SID) ▶

Taxpayer's name	Social security number
SARAH TEST	
Spouse's name	**Spouse's social security number**
SPOUSE TEST	

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)	1	9516
2	Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12)	2	449
3	Federal income tax withheld (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7)	3	1875
4	Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a)	4	1426
5	Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14)	5	

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.

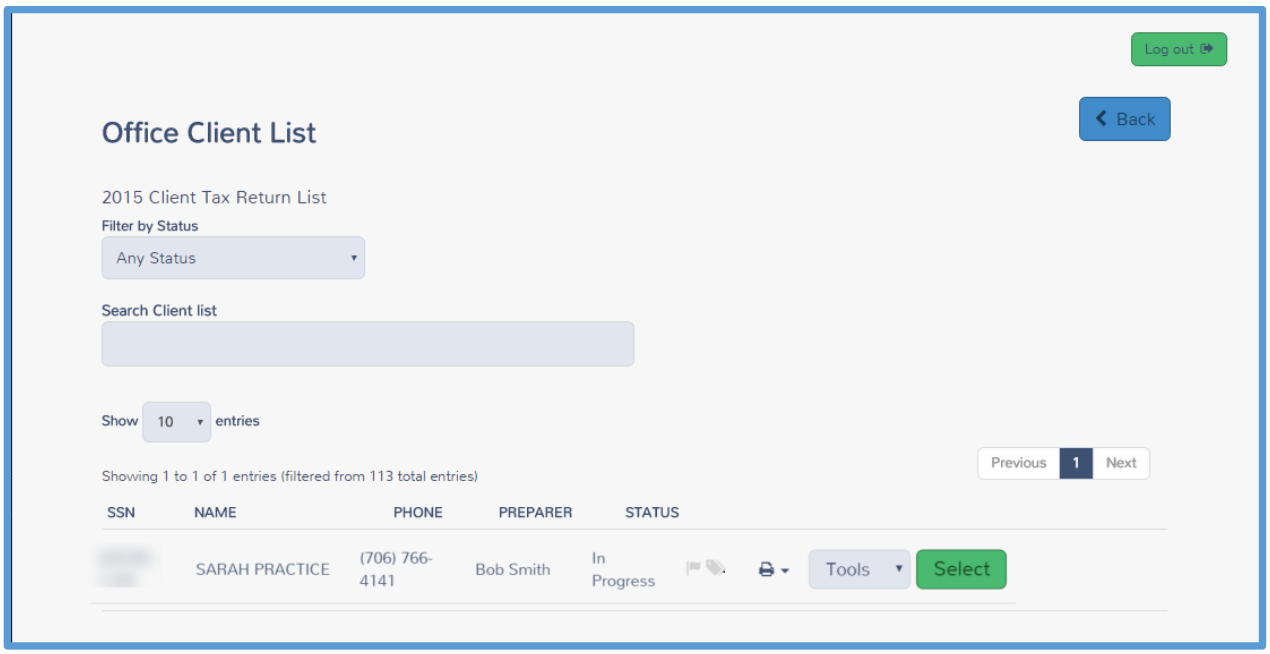
5. Click the **Print** icon in Adobe Reader to print the return.

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:



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.

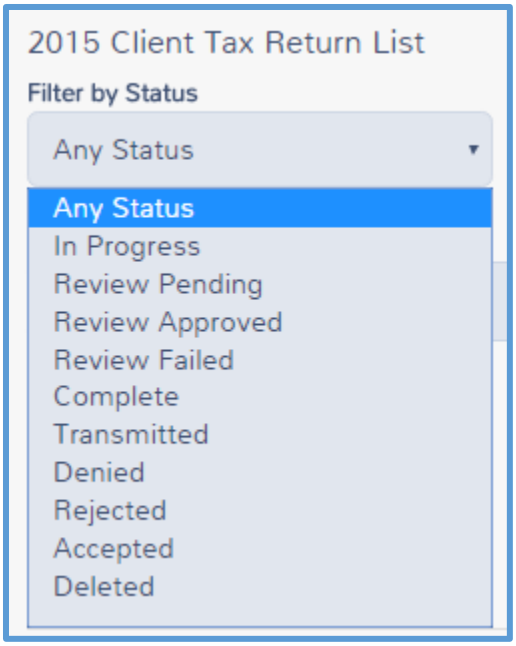
Opening an Existing Return

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.

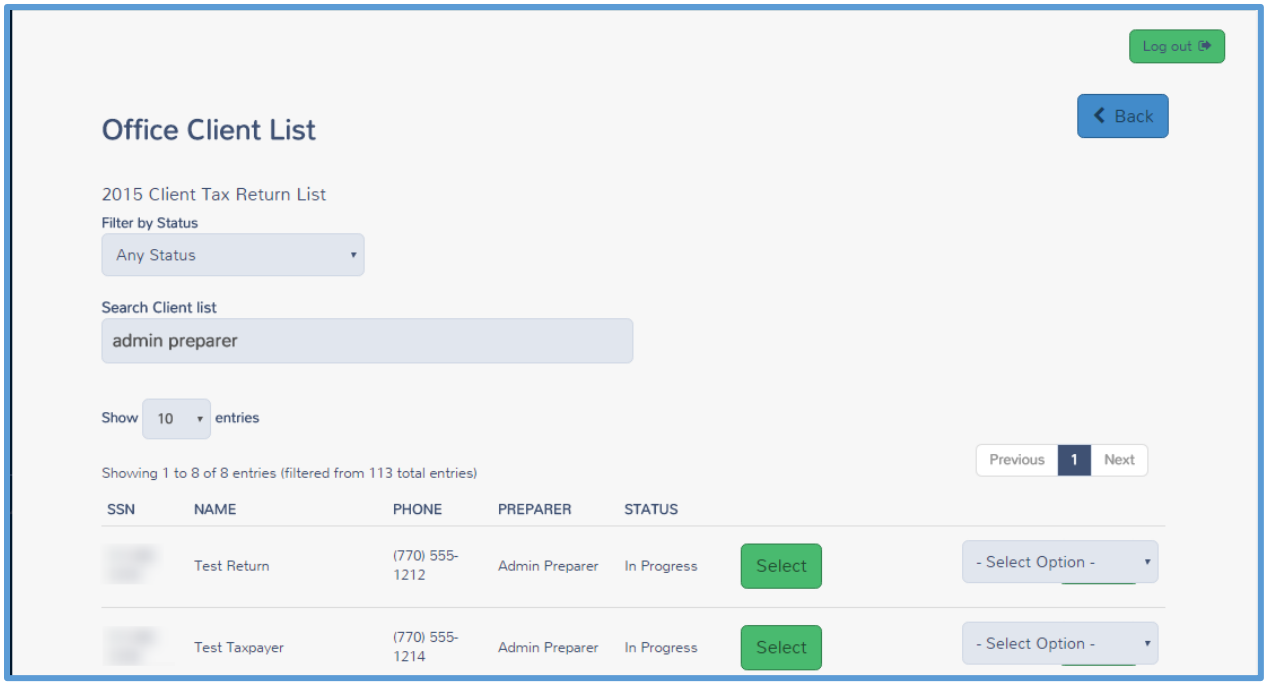
TaxSlayer Pro Online displays the **Office Client List** page:

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



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

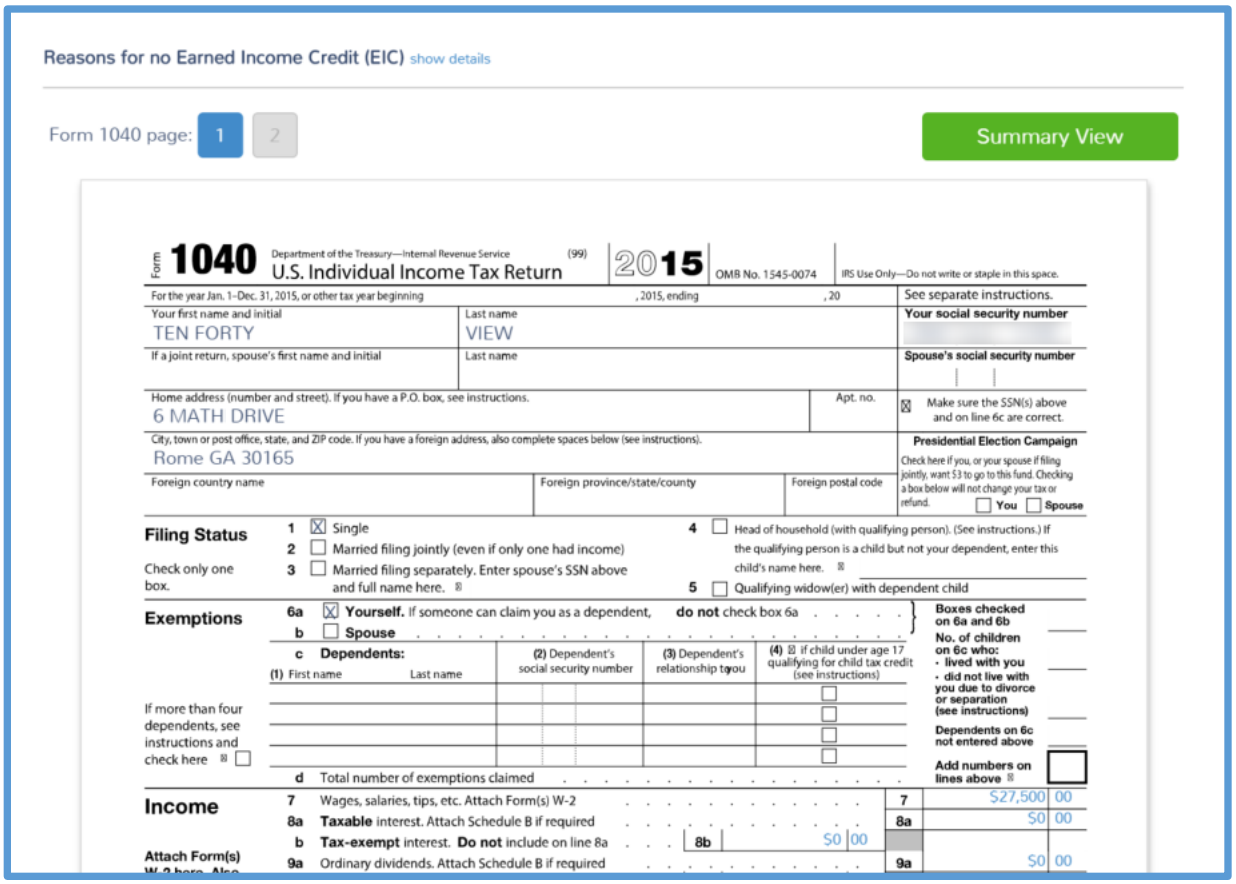
For this example, search using the preparer name, **Admin Preparer**. TaxSlayer Pro Online displays all returns prepared by Admin Preparer:



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.

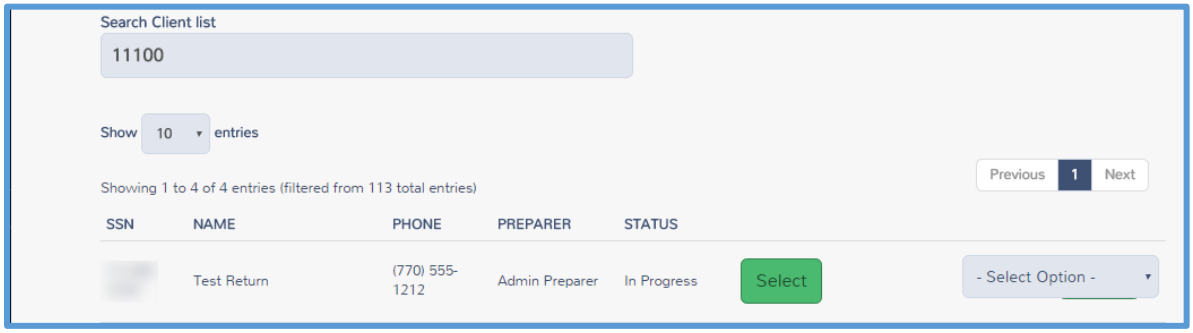
4. Click **Select** on the line for the return you want to open.

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



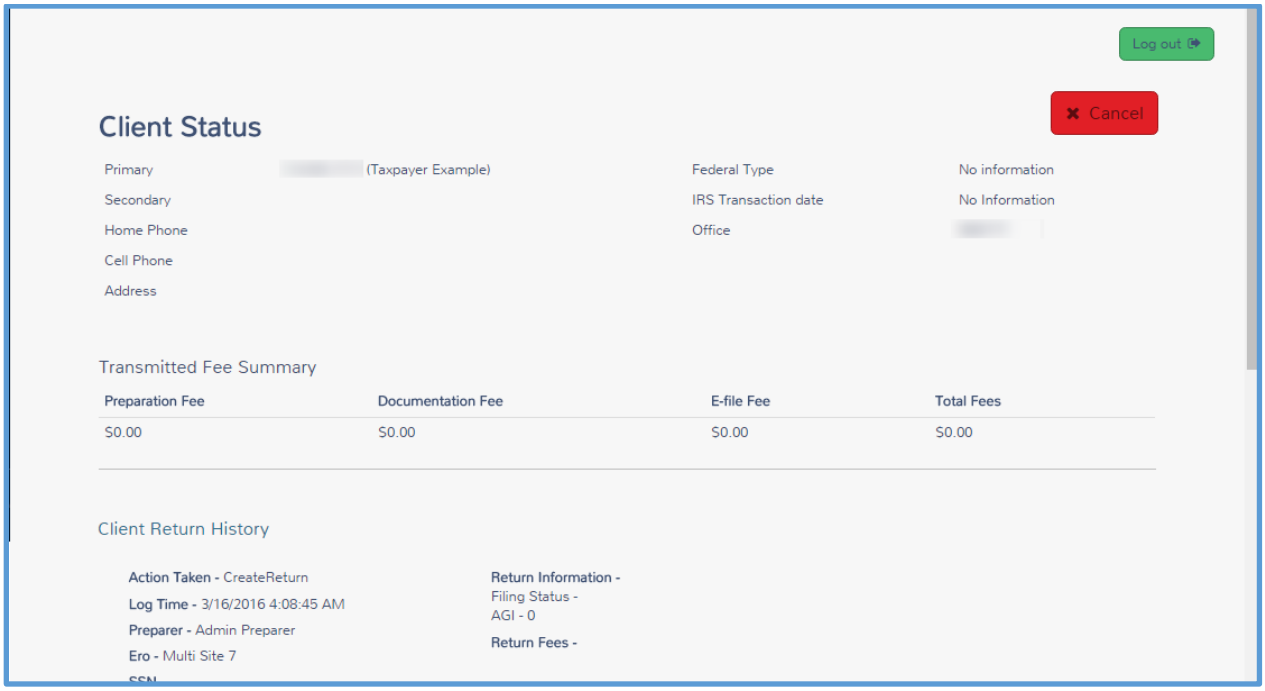
Viewing a Taxpayer's Return History

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



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

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

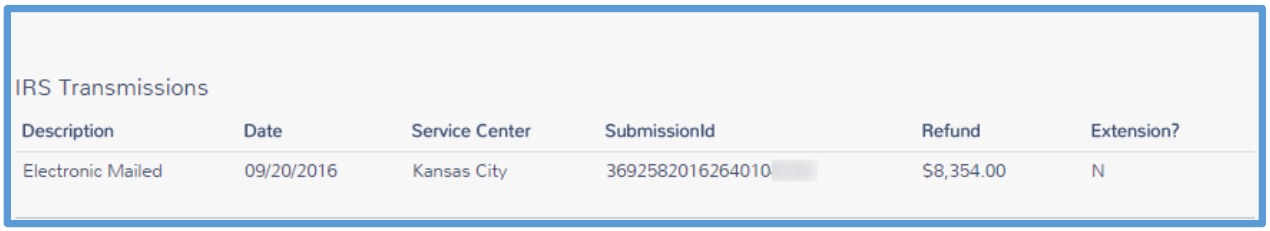


2. Review the return history in the **Client Return History** section.

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

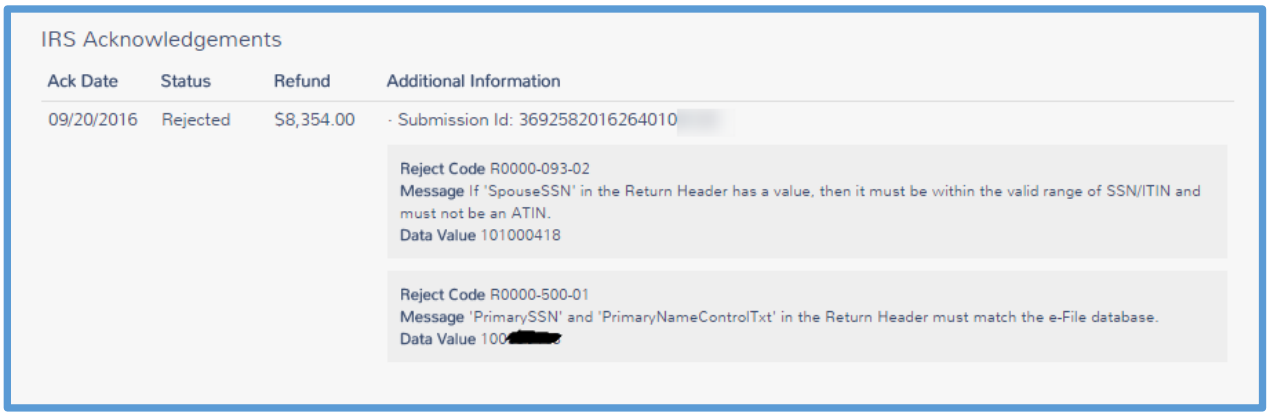
On the taxpayer's **Client Status** page, you can find e-file information at the bottom of the page. In the **IRS Transmissions** section, you can find information on the type of return, date sent, and other information, as shown below:



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 and 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.



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

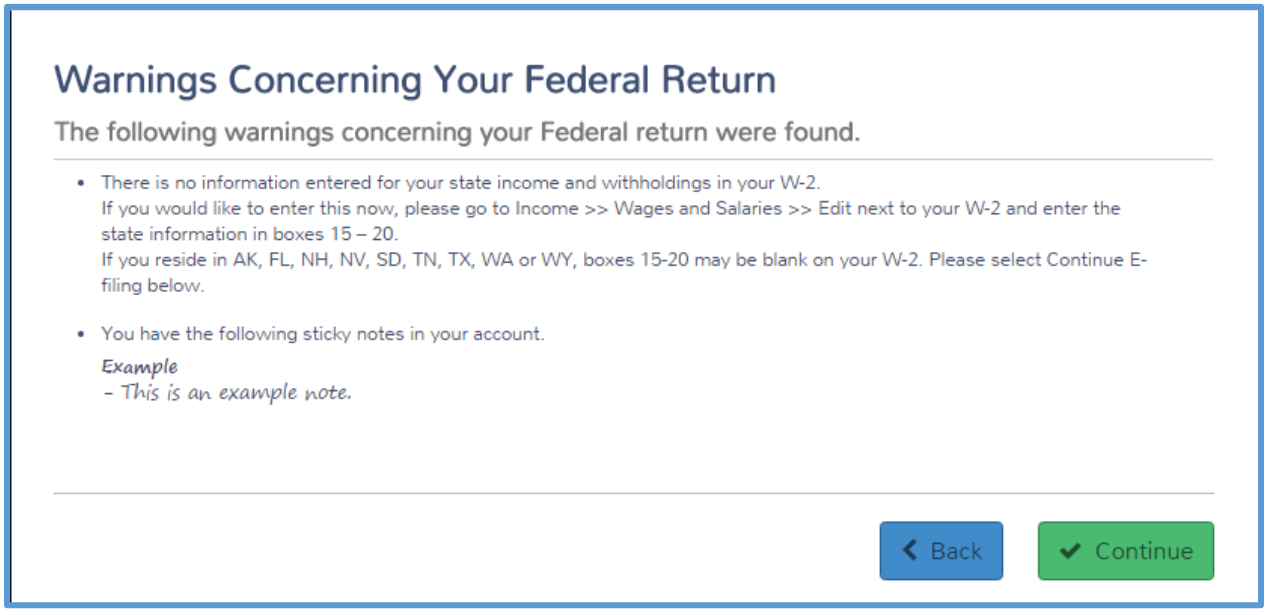
To prepare the return for e-file, use the following steps from the open return:

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:

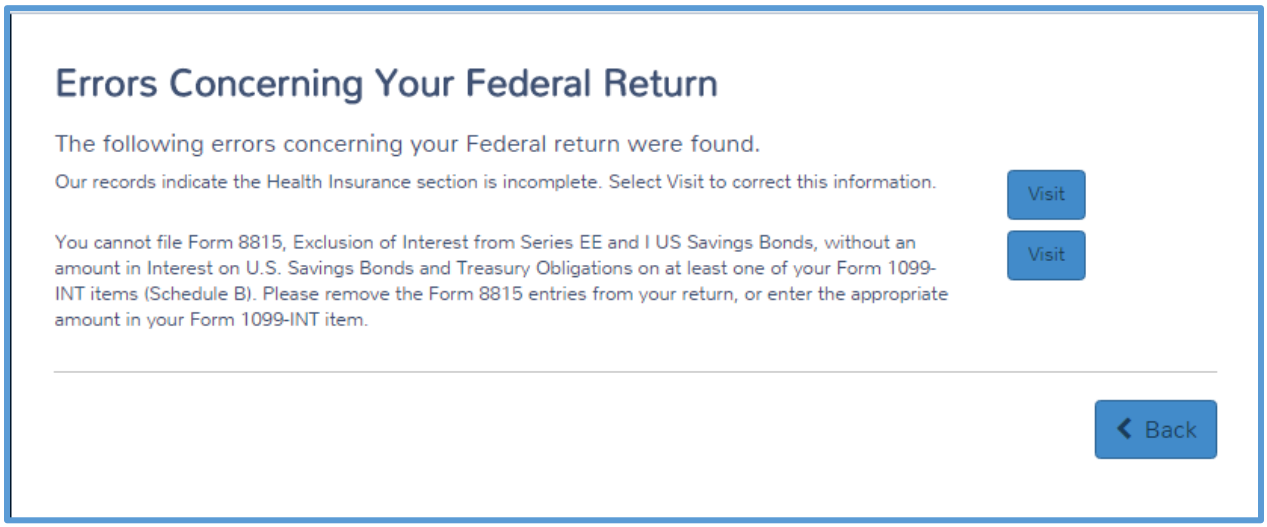


2. Review any warnings.
3. If you need to change any information to eliminate a warning, click **Federal Section** in the left navigation bar and make corrections to that section of the return.
4. Review your notes. If you need to change something in the return, click the appropriate section in the left 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:



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.

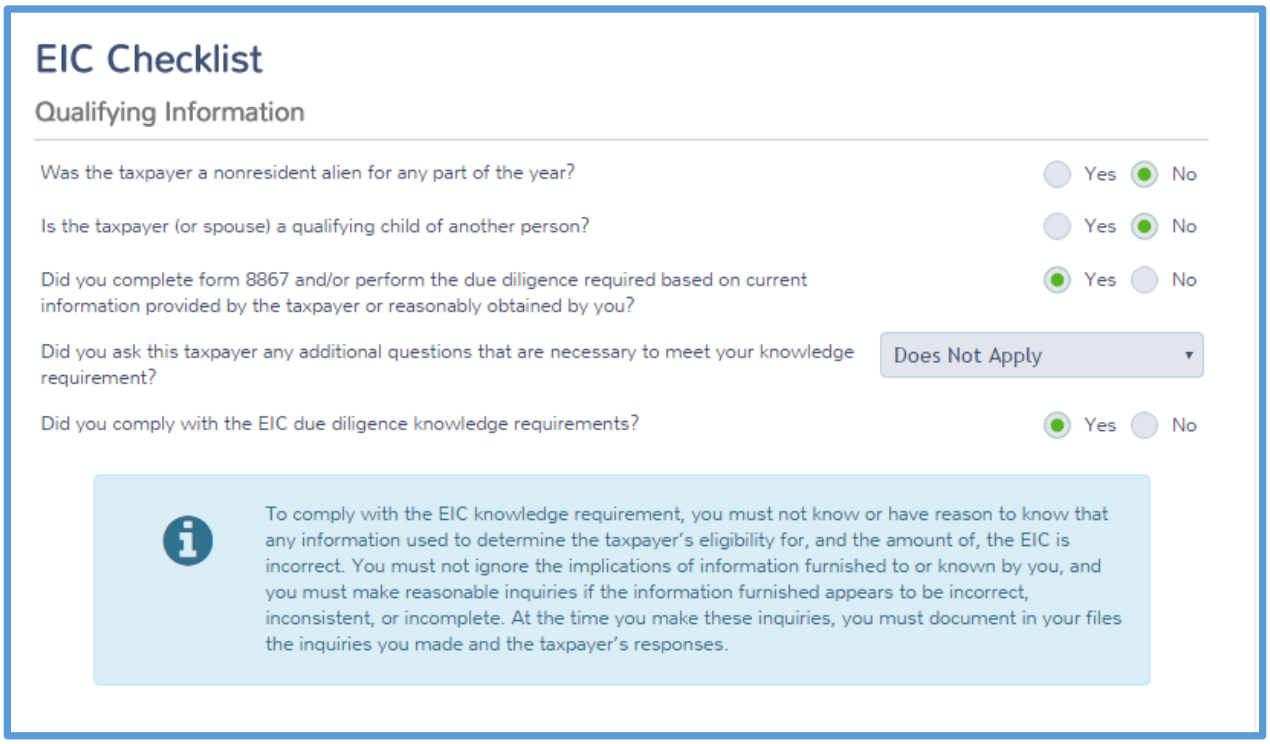
Completing the Earned Income Credit Checklist

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.

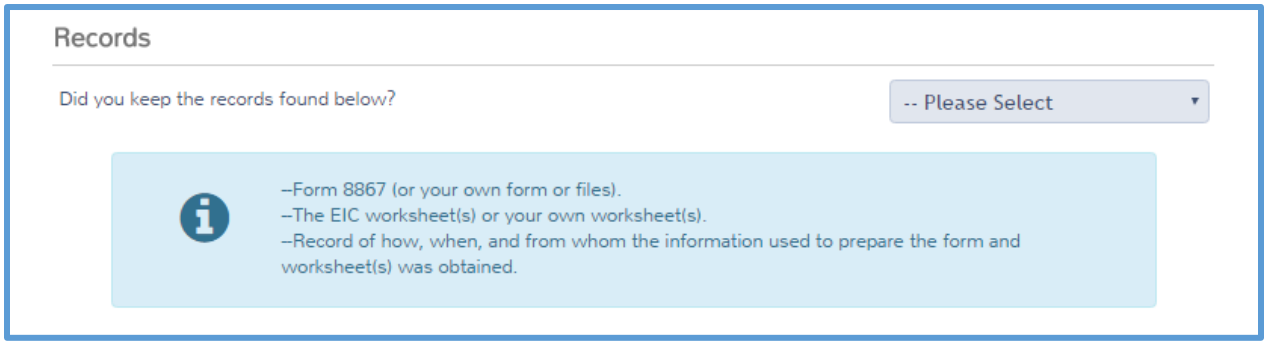
To complete the additional EIC information, use the following steps:

1. Click **e-File**.

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

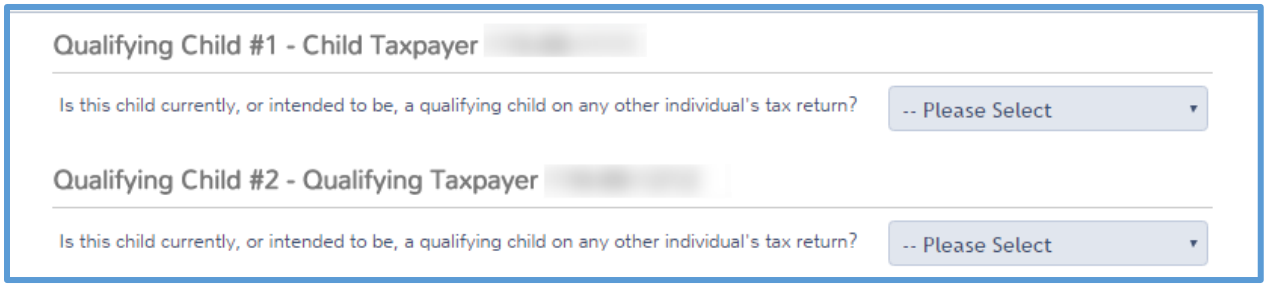


2. Carefully read and answer the questions in the **Qualifying Information** section. These questions confirm the taxpayer and spouse's eligibility for earned income credit, including questions about the taxpayer's residency status, whether the taxpayer or spouse is a qualifying child of another person,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



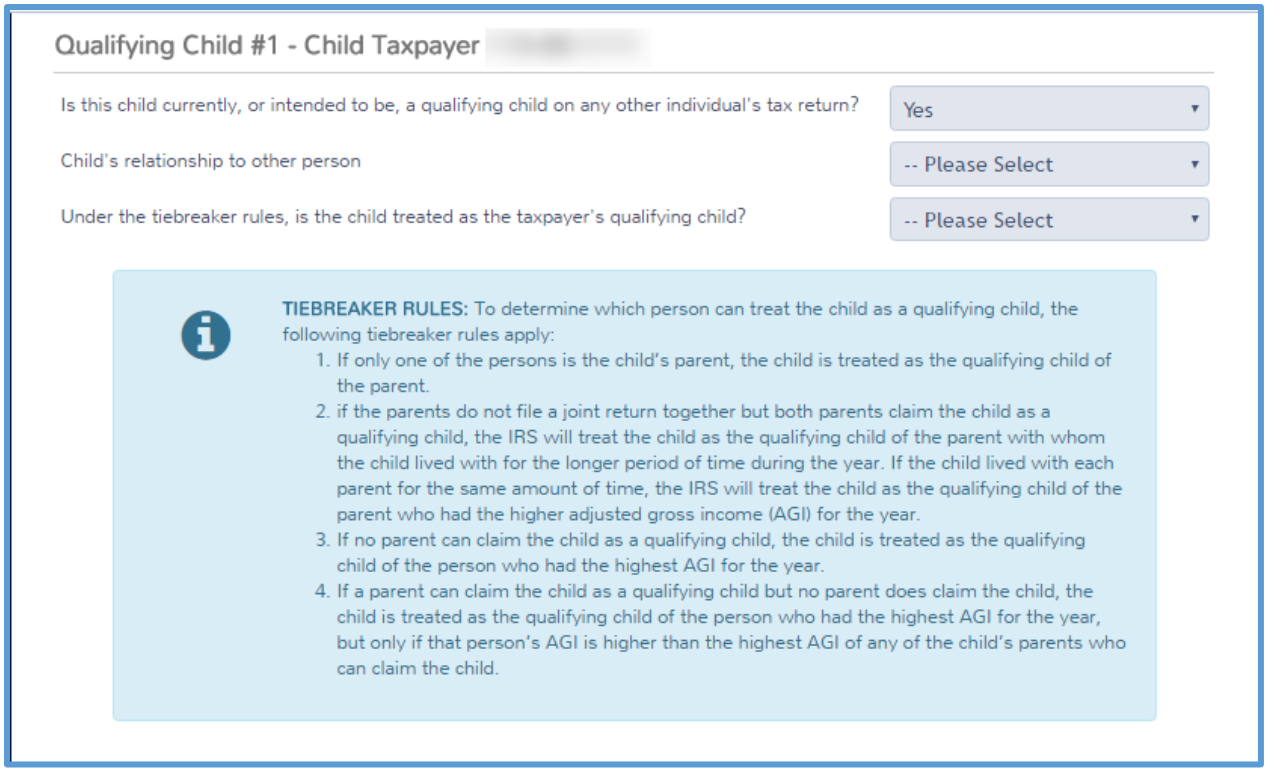
4. In the **Records** section, carefully read and answer questions about the taxpayer's records. Even though you are not required to maintain the records, verifying the information leads to a more accurate tax return.

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



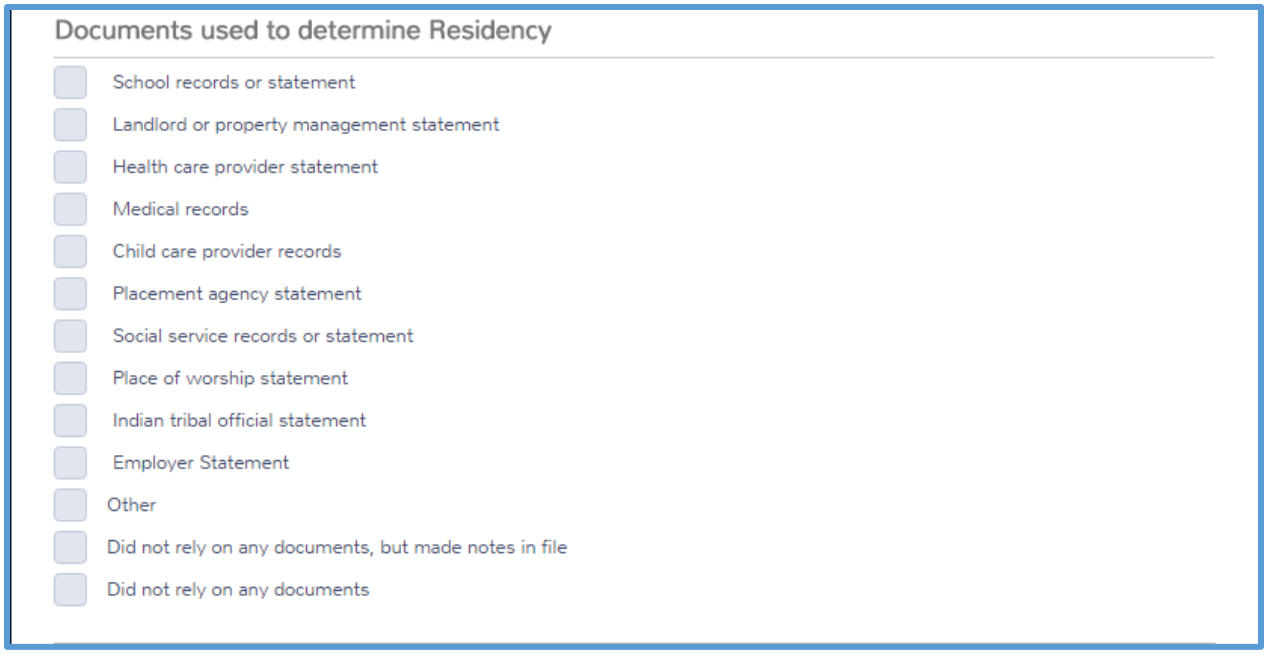
6. Answer the question concerning whether the child could be considered a qualifying child for another individual.

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:



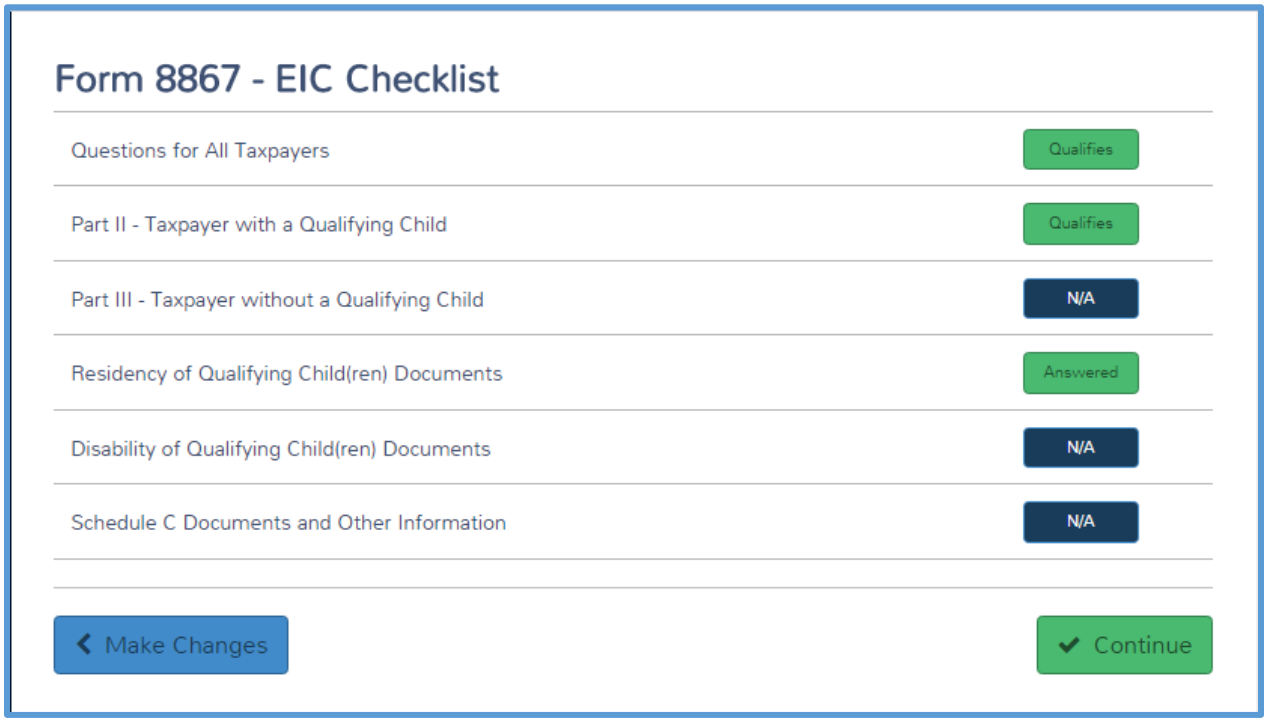
7. Answer the questions about the child's relationship to the other - question and the tiebreaker rules.

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



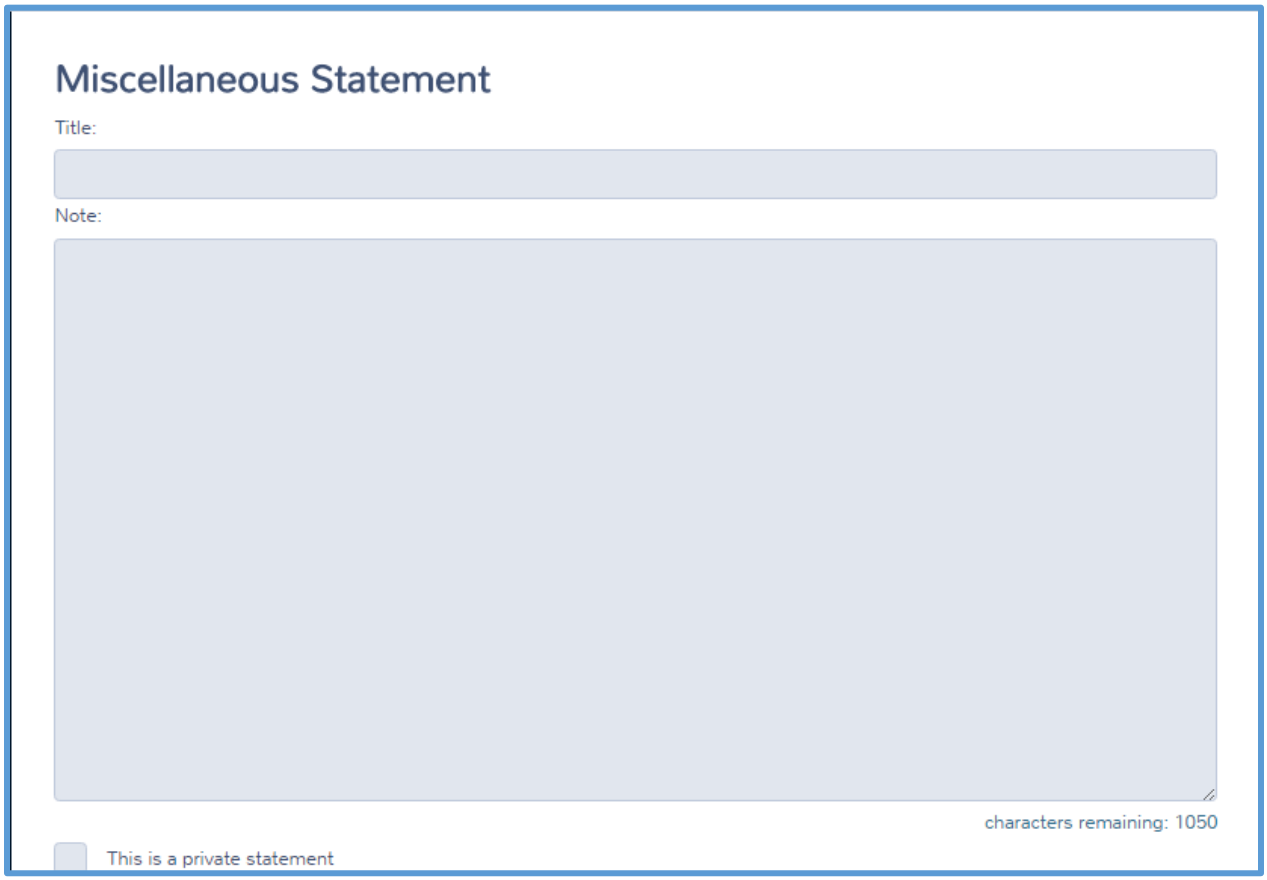
9. Select the appropriate check box(es) to show what documents you used. Since you are not required to maintain documents as an IRS volunteer, you can select the **Did not rely on any documents** checkbox***.***
10. Click **Continue**.

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:



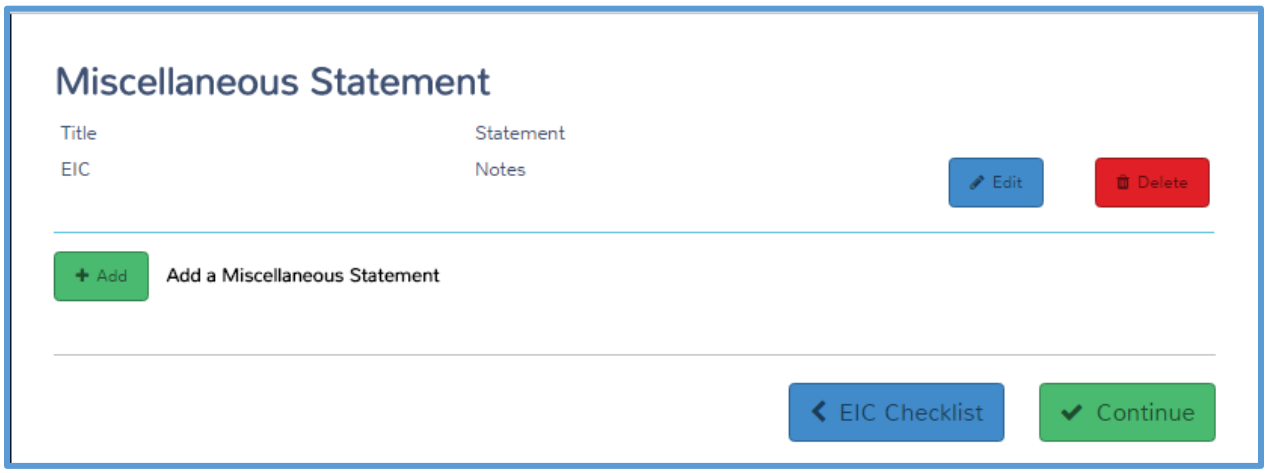
11. Review the information on the checklist.
12. Click **Continue**.

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



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:

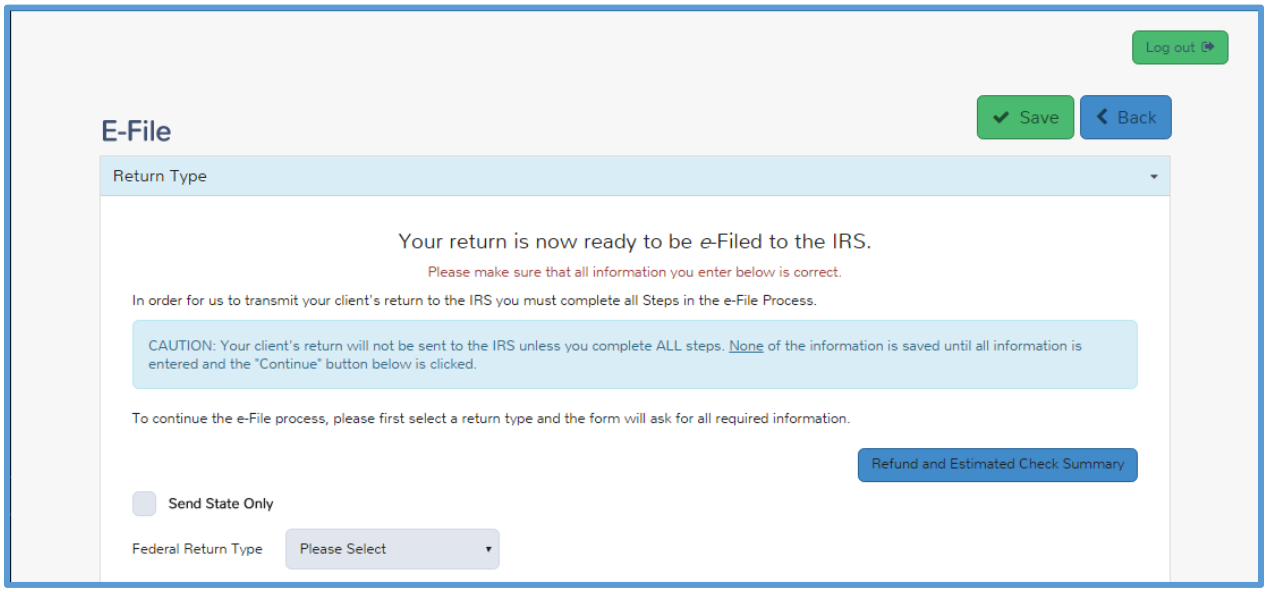


16. Click **Continue**.

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.

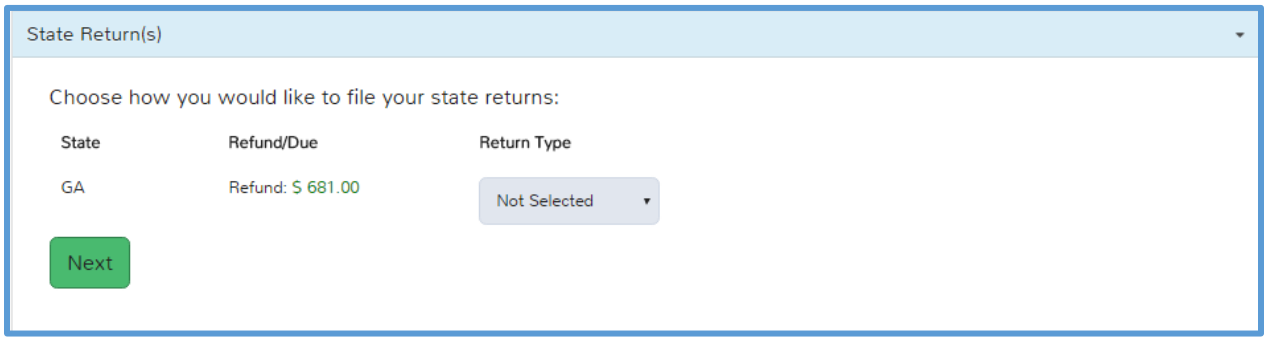
TIP: TaxSlayer Pro Online defaults to electronically filing the return. You must select **Paper Return** if you want the taxpayer to mail the return to the IRS.

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.

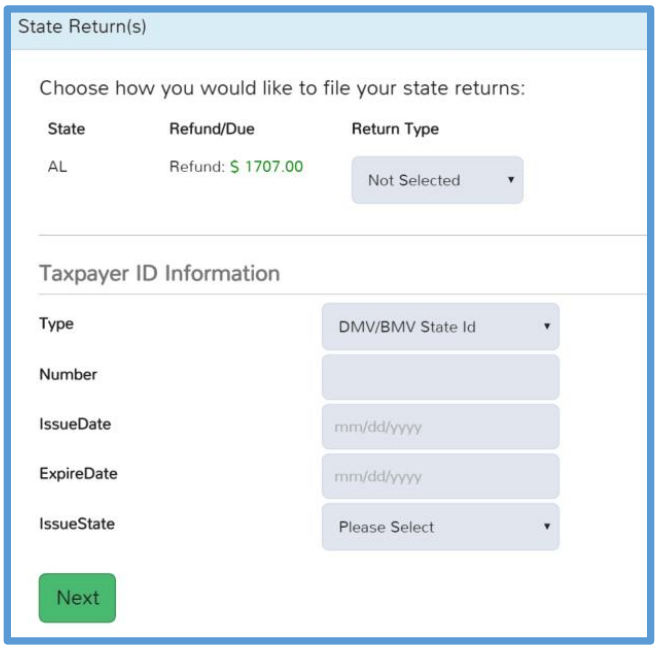
TaxSlayer Pro Online displays the **State Return(s)** section:



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:

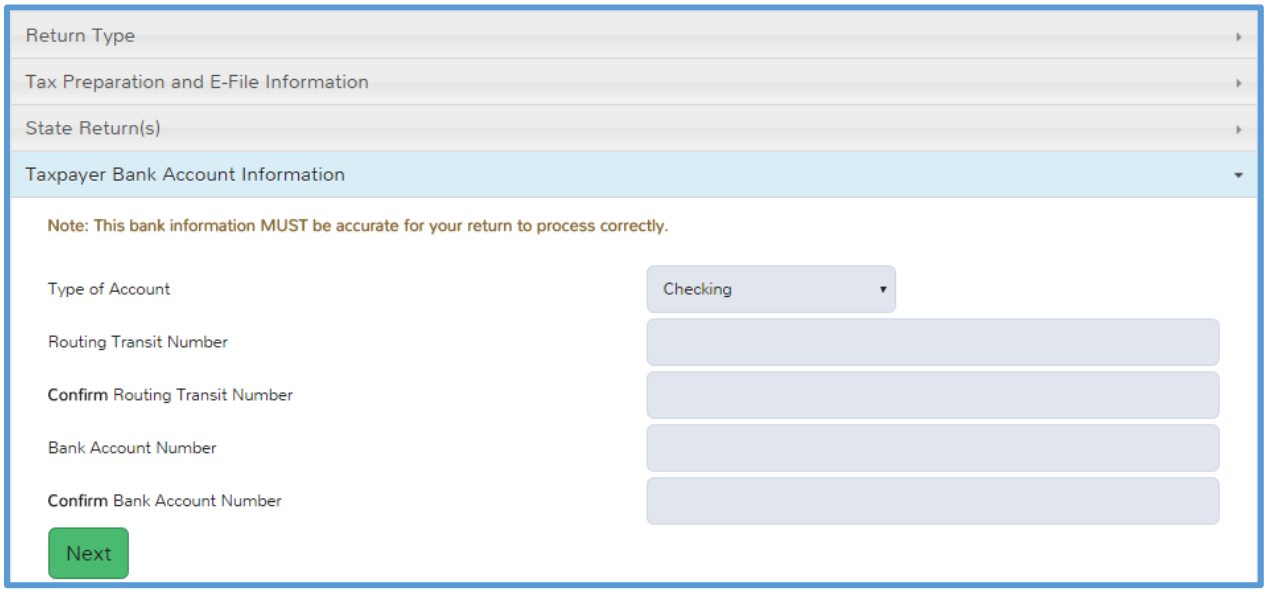


Entering Direct Deposit Information when Form 8888 is not selected

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:



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.

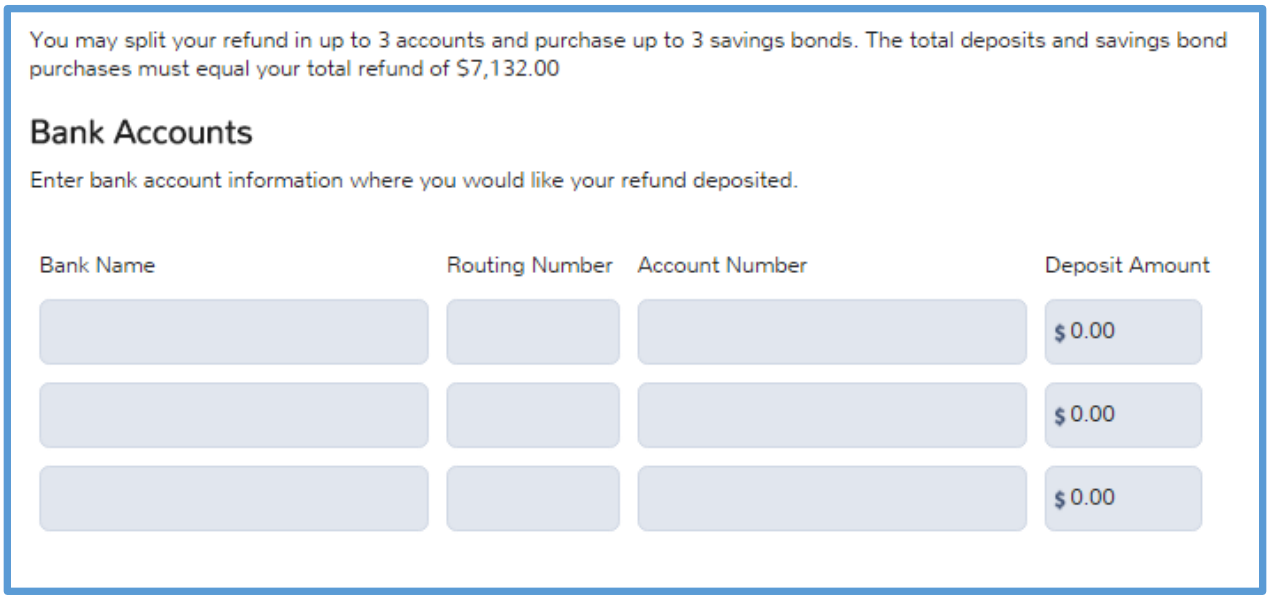
Splitting the Refund

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:

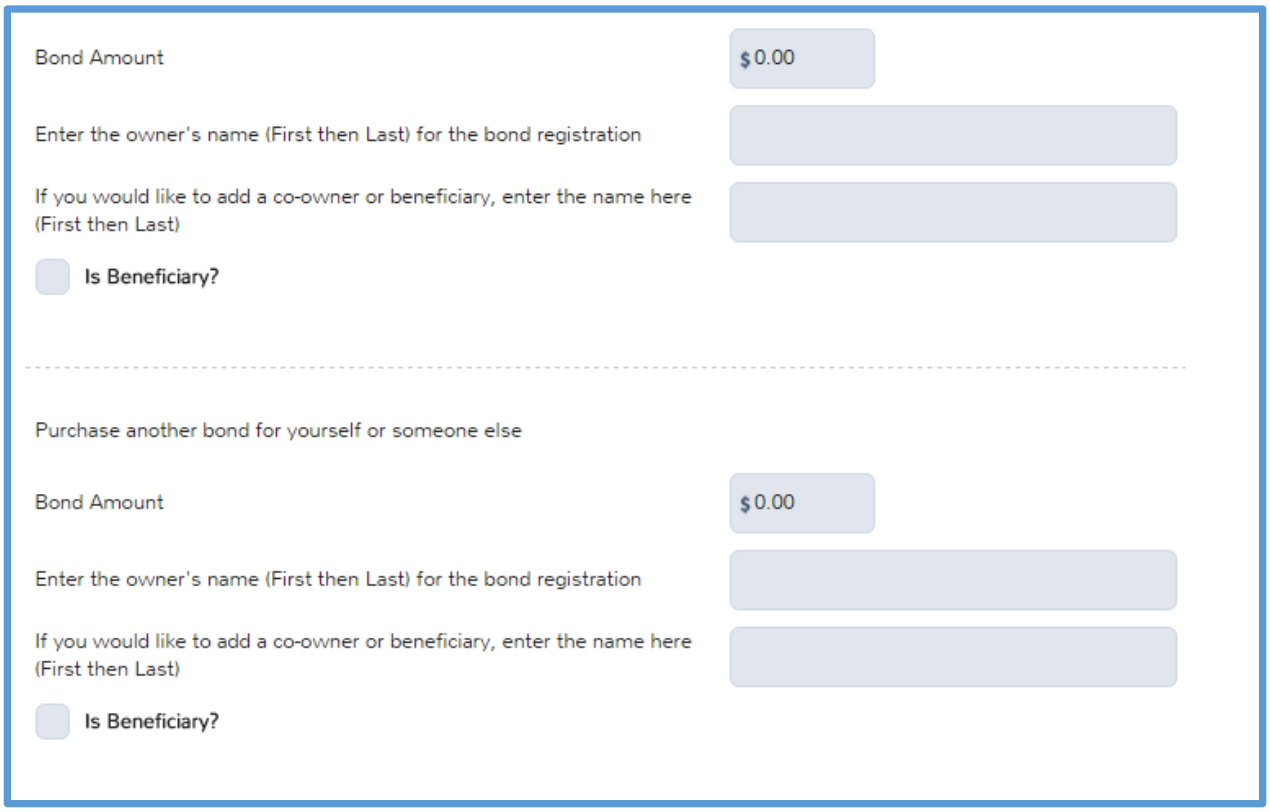


3. Select whether the account is a checking account or savings account.
4. Type the routing transit and bank account numbers in the appropriate boxes.

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.

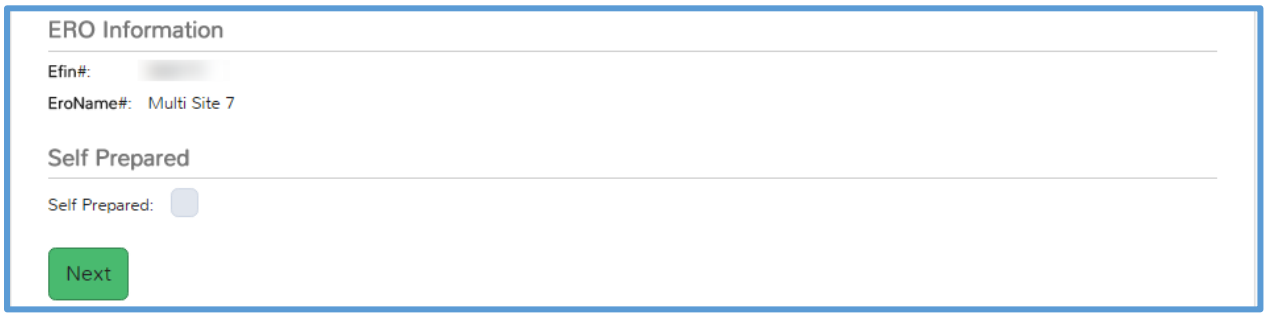


6. Click **Next**.

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:

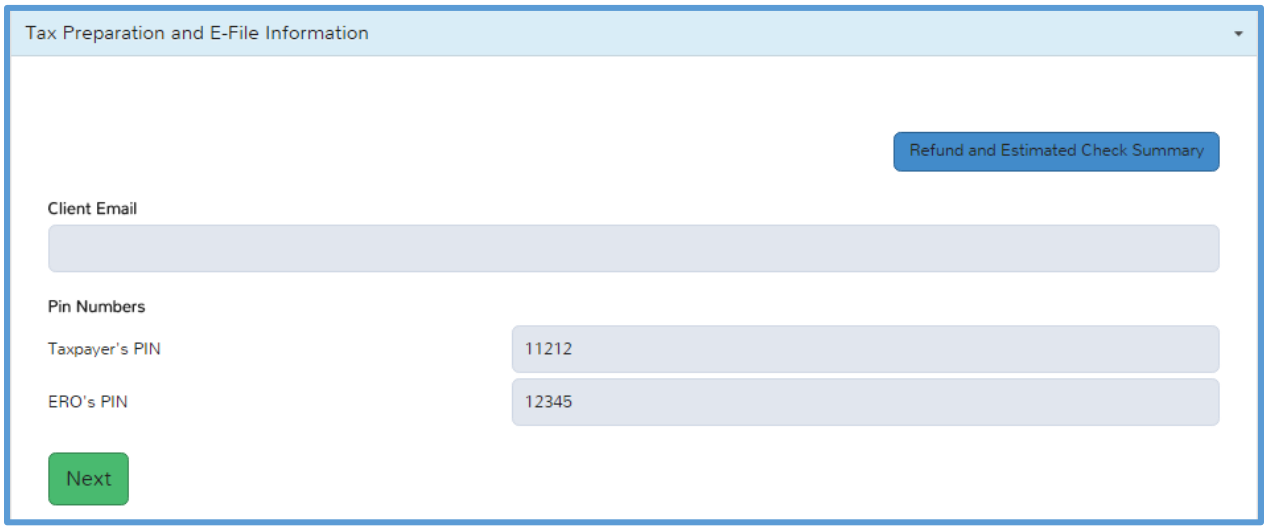


1. Review the ERO information for accuracy.
2. Click **Next**.

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:

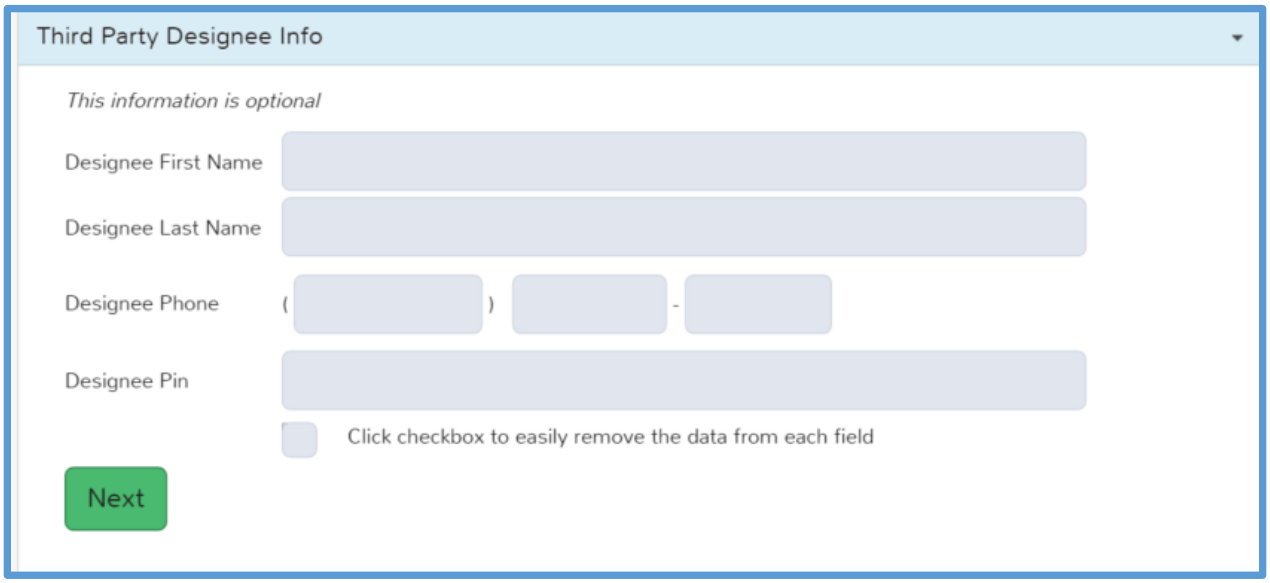


3. In the **Pin Numbers** section, review the taxpayer, spouse, and ERO PINs.
    a. TaxSlayer Pro Online automatically defaults the ERO PIN to 98765, as discussed in the *Setting Up Site Information chapter.*
4. Click **Next**.

Third Party Designee Information

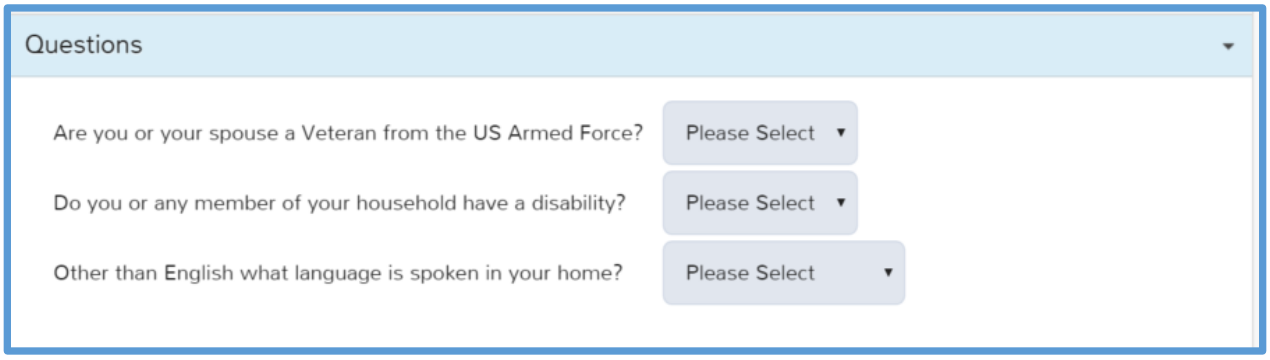
TaxSlayer Pro Online does not populate the third party designee information. If you need to enter another taxpayer as the third party designee, click **Third Party Designee Info** and complete the appropriate information.

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



Answering Custom Questions

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



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

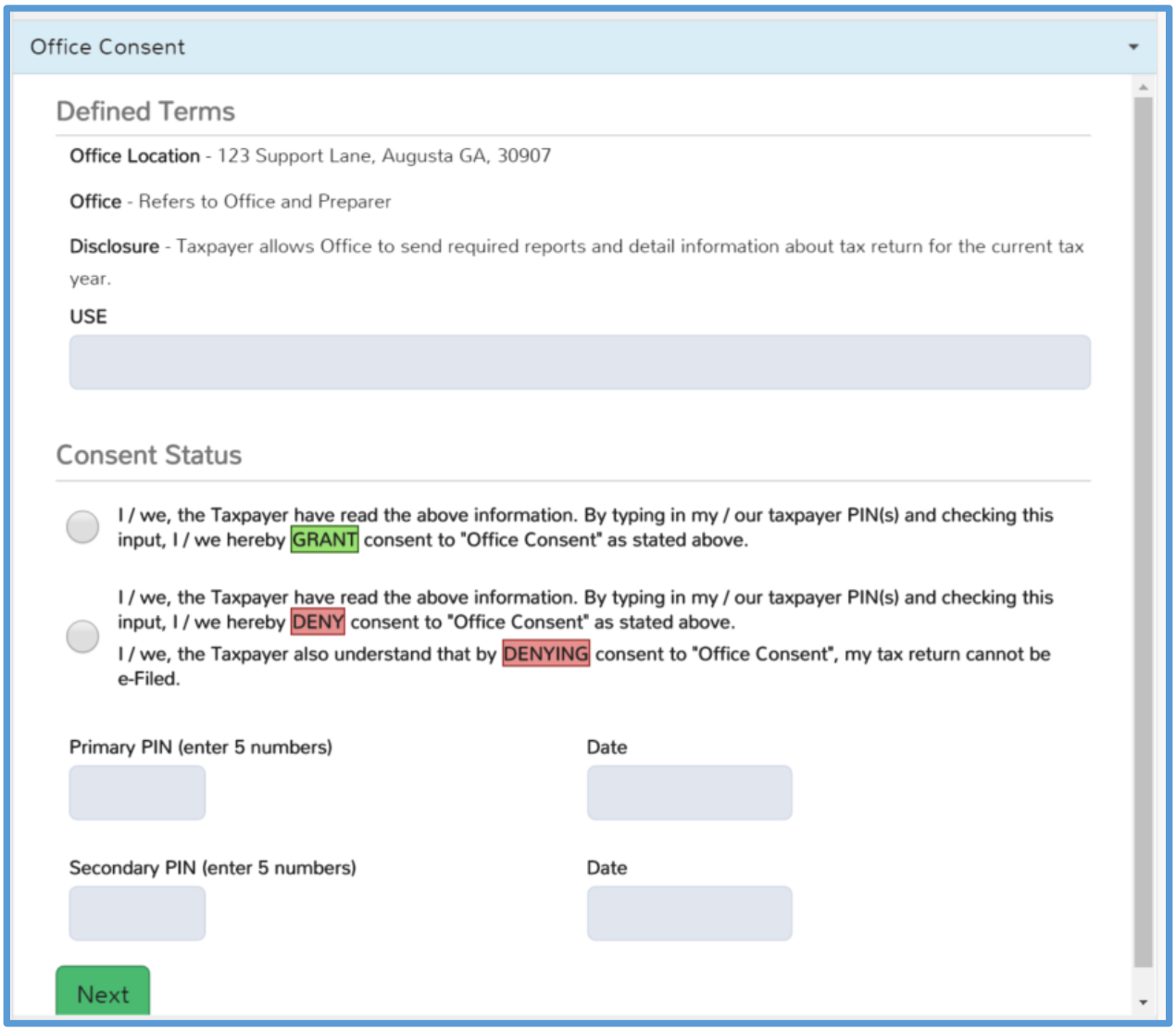
TIP: If your site administrator marked a question as **Required**, you must answer the question to continue.

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:



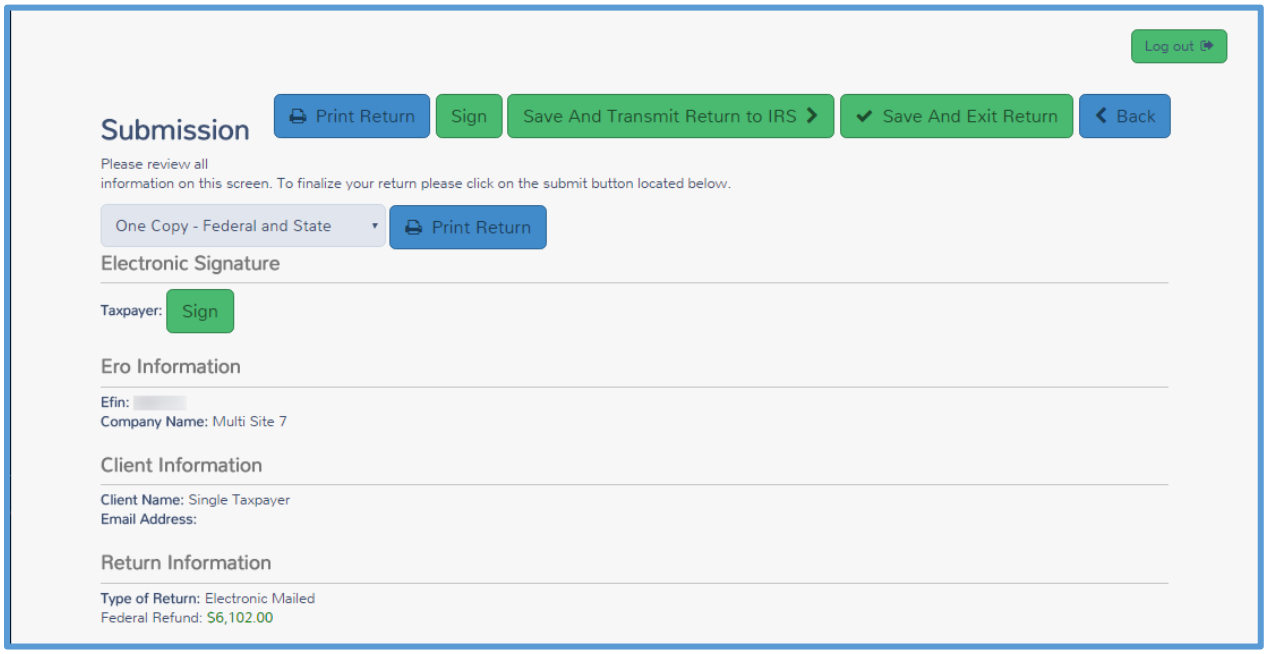
Follow your site procedures when completing the Consent pages.

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:



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:

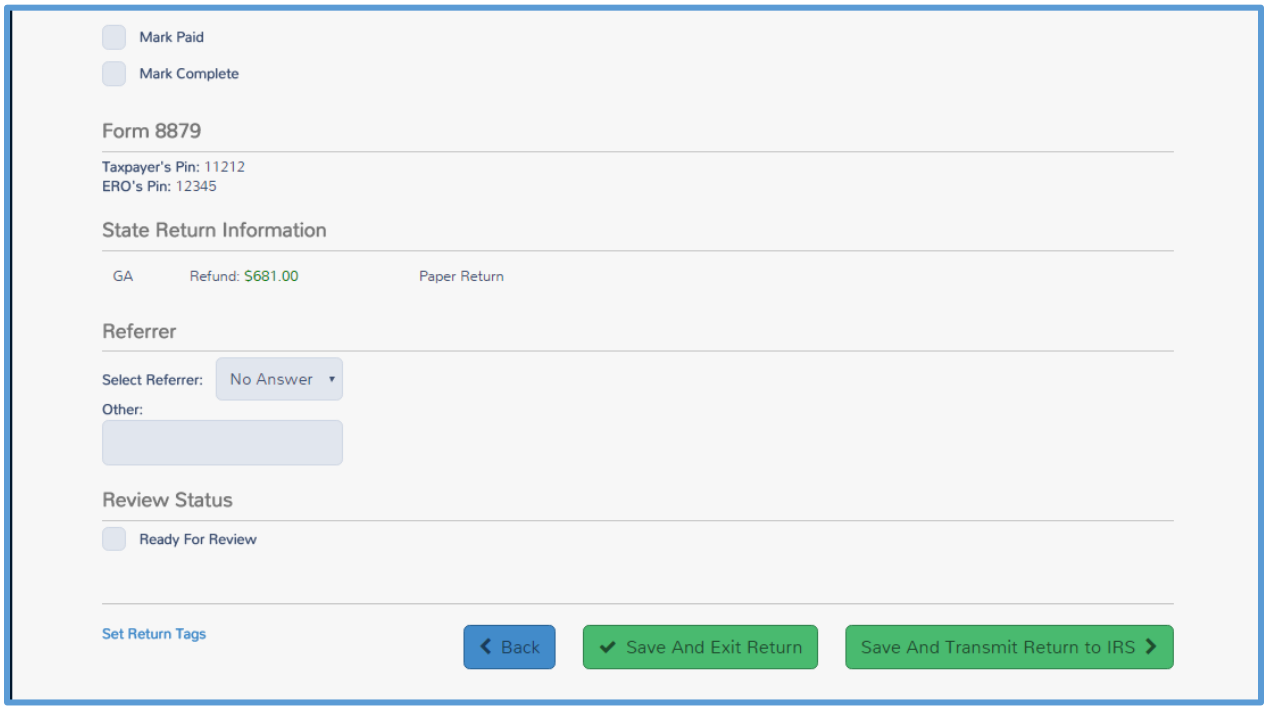
1. ERO Information
2. Client Information
3. Return Information
4. Form 8879
5. State Return Information

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:



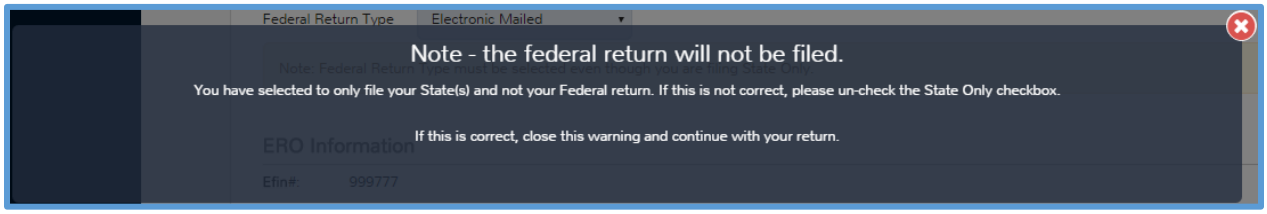
2. Do one of the following:
   a. If the return is complete and ready to be e-filed, select the **Mark Complete** check box above the **Form 8879** section.
   b. If another person needs to review the return and you are using the built-in review process before it can be marked complete, select the **Ready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

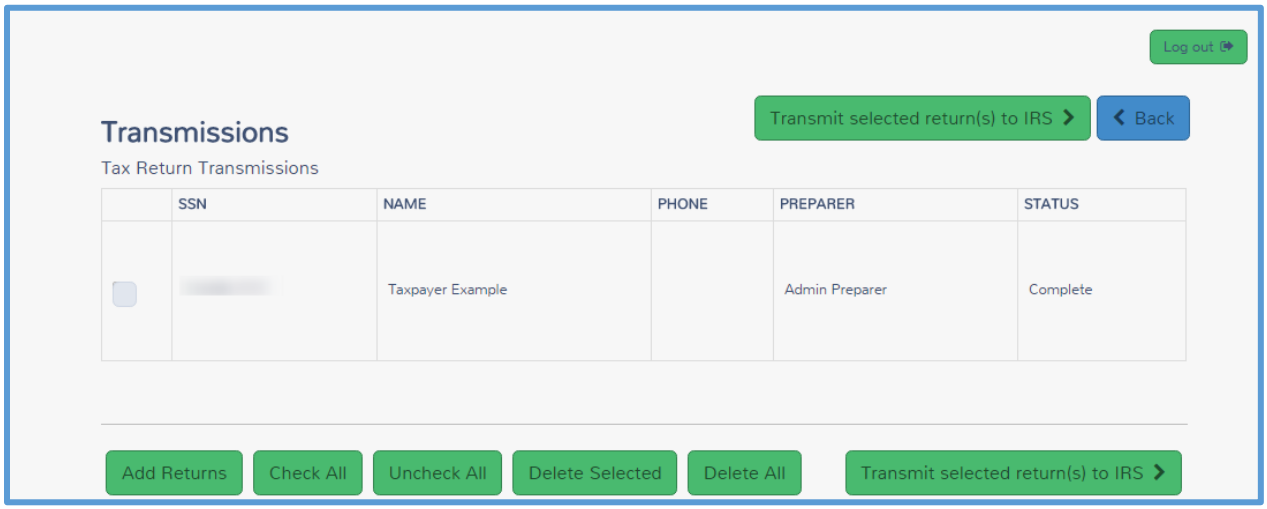
1. Select e-files to submit.
2. Add corrected rejects to submit.

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:

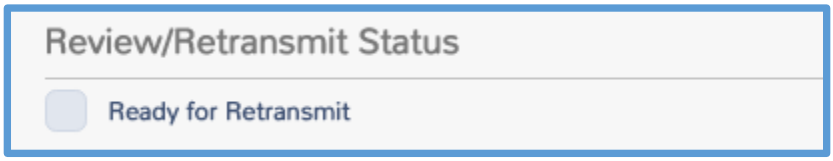


2. Select the check box(es) for the returns you want to transmit.
3. If you want to select all returns, click **Check All**.
4. If you have rejected returns and need to resubmit them, click **Add Returns**.

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

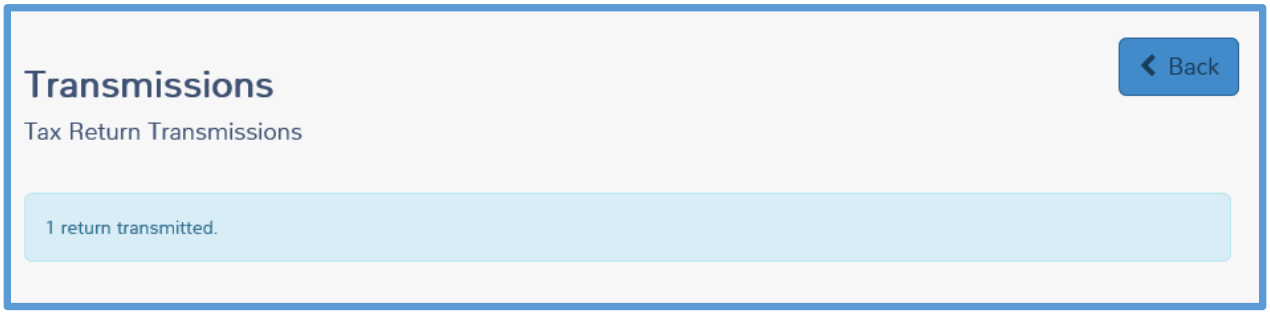
5. Select the return(s) you want to add to the transmission list.
6. Click **Add Returns**.

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



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:



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

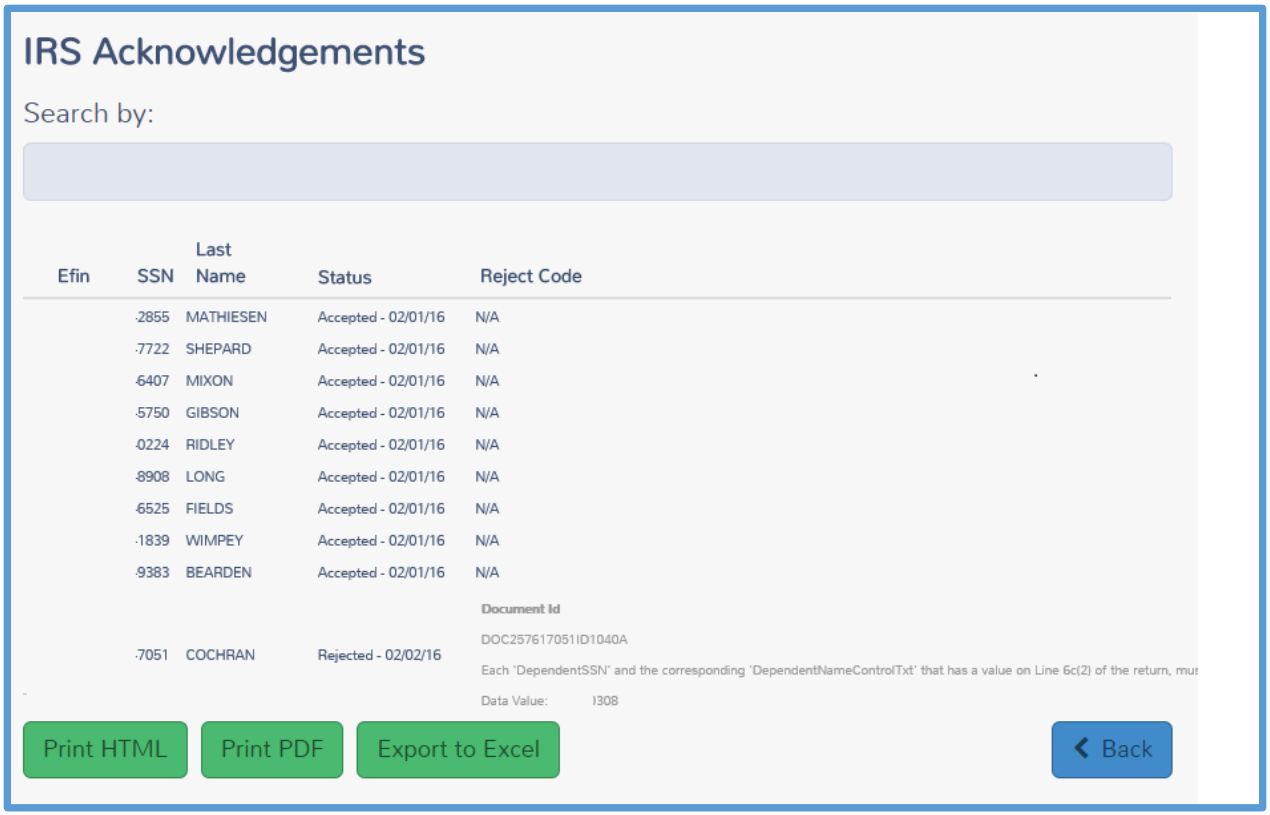
When you transmit returns, you usually receive an acknowledgement within one hour for federal returns and 24-48 hours for state returns. We recommend that you check for acknowledgements several times a day. To check for acknowledgements, use the following steps from the **Welcome** page:

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:



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.

TaxSlayer Pro Online displays the acknowledgement report as a PDF.

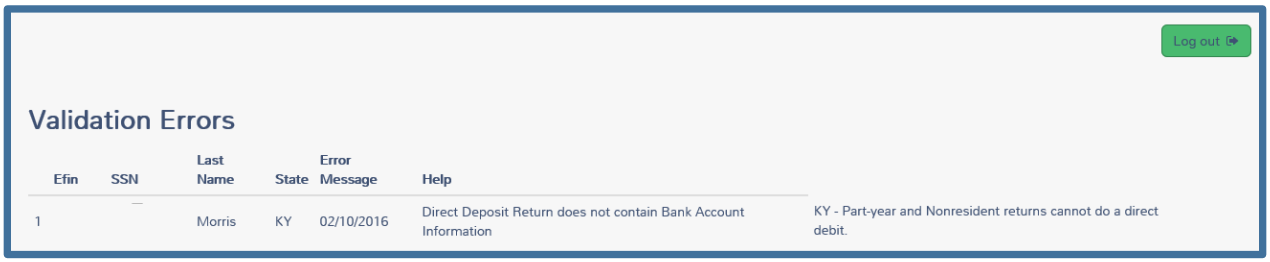
6. When you finish reviewing acknowledgements and printing the report, click **Back**.

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:



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**.

Index

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