This page intentionally left blank.
Contents

Installing TaxSlayer Pro Desktop ........................................................................................................5
Installation and Network Configuration ..........................................................................................5
  Installation ................................................................................................................................5
  Network Configuration ..............................................................................................................9
Setting up Site Information .............................................................................................................15
  Office/Site Setup ...................................................................................................................15
Setting up Security Templates .......................................................................................................28
  Predefined Security Templates .............................................................................................28
  Creating Security Templates .................................................................................................28
  Editing Security Templates ..................................................................................................33
Adding Preparers ..........................................................................................................................35
  Adding Preparers ...................................................................................................................35
Working with Custom Questions ..................................................................................................40
  Adding Custom Questions .......................................................................................................40
Configuring Printing .....................................................................................................................43
  Setting up the Printer ............................................................................................................43
  Print Sets ................................................................................................................................45
Managing Returns ........................................................................................................................49
  Working with Return Tags .......................................................................................................49
Deleting Returns ..........................................................................................................................53
Recalling Returns ........................................................................................................................55
Backing up and Recalling Returns on Non-Networked Computers ............................................56
Updating and Transferring ...........................................................................................................60
  Managing Updates ................................................................................................................60
Transferring to Non-Networked Computers ..................................................................................63
  Transferring Configuration to Non-Networked Computers .................................................63
  Transferring Updates to Non-Networked Computers ............................................................67
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with Reports</td>
<td>70</td>
</tr>
<tr>
<td>Exporting a Report</td>
<td>75</td>
</tr>
<tr>
<td>Preparing a Return</td>
<td>78</td>
</tr>
<tr>
<td>Starting a Tax Return</td>
<td>78</td>
</tr>
<tr>
<td>Starting a New Return</td>
<td>78</td>
</tr>
<tr>
<td>Selecting the Filing Status</td>
<td>79</td>
</tr>
<tr>
<td>Entering Personal and Spouse Information</td>
<td>80</td>
</tr>
<tr>
<td>Adding Dependents</td>
<td>82</td>
</tr>
<tr>
<td>Working with Health Insurance</td>
<td>87</td>
</tr>
<tr>
<td>Completing the Health Insurance Questionnaire</td>
<td>87</td>
</tr>
<tr>
<td>Entering Income, Deductions, etc.</td>
<td>88</td>
</tr>
<tr>
<td>Using the Wizard</td>
<td>88</td>
</tr>
<tr>
<td>Working in the Return</td>
<td>92</td>
</tr>
<tr>
<td>Completing a State Return</td>
<td>96</td>
</tr>
<tr>
<td>Adding a State</td>
<td>96</td>
</tr>
<tr>
<td>Marking the State for Electronic Filing</td>
<td>99</td>
</tr>
<tr>
<td>Deleting a State Return</td>
<td>100</td>
</tr>
<tr>
<td>Finishing the Return</td>
<td>102</td>
</tr>
<tr>
<td>Marking the Return for e-file</td>
<td>102</td>
</tr>
<tr>
<td>Adding a Return Tag</td>
<td>104</td>
</tr>
<tr>
<td>Creating the e-file</td>
<td>105</td>
</tr>
<tr>
<td>Transmitting Electronic Returns</td>
<td>106</td>
</tr>
<tr>
<td>Receiving Acknowledgements</td>
<td>109</td>
</tr>
<tr>
<td>Printing the Return</td>
<td>111</td>
</tr>
<tr>
<td>Index</td>
<td>116</td>
</tr>
<tr>
<td>Glossary</td>
<td>120</td>
</tr>
</tbody>
</table>
Installing TaxSlayer Pro Desktop

Installation and Network Configuration

This chapter covers the following actions:

1. Install TaxSlayer Pro.
2. Configure a network computer as the file server.
3. Configure workstations.

Installation

*Note*: If you intend to install TaxSlayer Pro on a network, designate one computer as your transmitting computer and install on that computer first.

To install TaxSlayer Pro, use the following steps:

1. Insert your TaxSlayer Pro CD in the CD drive.

Windows displays the InstallShield Wizard for TaxSlayer Pro:

![InstallShield Wizard](image)

*Note*: If you have auto-run disabled on your computer, navigate to the CD drive in *My Computer* or *File Explorer* and double-click *Setup.MSI*.
2. Click **Next**.

   InstallShield Wizard displays the license agreement:

   ![License Agreement Dialog Box]

3. Read the license agreement and select **I accept the terms in the license agreement**.

4. Click **Next**.
InstallShield Wizard displays the **Select the Installation Drive** page, displaying all available drives.

5. Leave the setting at default, which is your C drive, or change the drive using the drop-down list.

6. Click **Next**.

InstallShield Wizard displays the **Ready to Install the Program** page:

7. Click **Install** to begin installation.
InstallShield Wizard displays the **Installing TaxSlayer Pro** page with a progress bar showing your installation status.

InstallShield Wizard may take several minutes to install the program.

When finished, InstallShield Wizard displays a message to let you know installation is complete:

8. Click **Finish**.

Windows closes InstallShield Wizard and the TaxSlayer Pro icon should appear on your desktop:
Network Configuration
The first time you open TaxSlayer Pro after your install, TaxSlayer prompts you to complete first-time configuration.

Transmitting Computer
Before you begin setting up TaxSlayer Pro on your network, do the following:

- Verify that your network is set up properly.
- Set the TaxSlayer Pro folder to allow everyone on the network at least Modify privileges.
- Enable file and printer sharing in your operating system and in your antivirus software.

If you need assistance with the settings above, contact your network/technology specialist.

To configure TaxSlayer Pro on a network, use the following steps:

1. Double-click the TaxSlayer Pro icon on your desktop.

TaxSlayer Pro displays the **Thank you for choosing TaxSlayer Pro** window:

![TaxSlayer Pro window](image)

2. Click **Ok**.
TaxSlayer Pro displays the **Network** question:

![Image of TaxSlayer Pro Question](image)

Do one of the following:

3. Click **Yes** if you intend to use TaxSlayer Pro on a network

**NOTE**: Click **No** if you are setting up a stand-alone computer, discussed later in this guide.

If yes, TaxSlayer Pro displays the next configuration question:

![Image of TaxSlayer Pro Question](image)

a. Click **Yes** to show that this computer is the file server.

**Note**: Remember to install and set up the transmitting computer first. For instructions on setting up computers other than the file server, see the next section in this lesson.

TaxSlayer Pro displays a note concerning the following questions.

b. Read the note and click **Ok**.

TaxSlayer Pro displays a question to determine if this is the transmitting computer.

c. Click **Yes** to show that this is the transmitting computer.
TaxSlayer Pro displays the **System/Network Configuration Menu**:

![System/Network Configuration Menu]

**Tip:** TaxSlayer Pro uses these menus throughout the program after you answer questions to give you a chance to review your answers.

d. Review the answers to the questions. If you need to change an answer, click it to toggle the answer to **NO**.

e. Verify the name of the computer.

f. Click or type **0** to exit network setup.

**Workstations**

To configure TaxSlayer Pro on workstations, finish configuring the transmitting computer, and then use the following steps:

1. Install TaxSlayer Pro on the workstation using the steps discussed earlier in this lesson.
2. Double-click the TaxSlayer Pro icon on your desktop.
3. Answer questions as discussed before until TaxSlayer Pro displays the **File Server** question.
4. Click **No** to show that this computer is not the file server.

TaxSlayer Pro displays a note concerning the following questions.

5. Read the note, and then click **Ok**.
TaxSlayer Pro displays the **Please Select Your Network Drive** box:

If this is the TRANSMITTING COMPUTER, choose the drive letter the tax program is installed on. In most cases, this will be Option 1 above (Local Drive C:\). If this is a WORKSTATION COMPUTER, choose the drive letter used to network your Workstation Computer to your Transmitting Computer. Note - you should see the name of your Transmitting Computer in the list. If so, select the Computer Name and click OK. If you do not see your Transmitting Computer in the list, select Enter UNC Shared Path and enter the network path or check the sharing settings and permissions on your transmitting computer.

6. Read the instructions at the top of the window carefully and select the transmitting computer.
7. Click **Ok**.

TaxSlayer Pro displays the **Network** question:

8. Click **Yes**.
TaxSlayer Pro displays a question to determine whether this is the file server:

9. Click **No** to show that this computer is not the file server.

TaxSlayer Pro displays a question to determine whether this is the transmitting computer:

10. Click **No** to show that this is a non-transmitting workstation.
TaxSlayer Pro displays the **System/Network Configuration Menu**:

![System/Network Configuration Menu](image)

11. Review the answers to the questions and toggle answers if necessary.
12. Click **Exit** or type the corresponding number to exit network configuration.
13. Repeat these steps for each workstation.

If this is not a network configuration, click **No** on this question as shown below:

![TaxSlayer Pro Question](image)

4. Answering **No** indicates this will be a stand-alone computer setup for using TaxSlayer Pro.
   a. See the next section, *Setting up Site Information*, for instructions on configuring TaxSlayer Pro.
Setting up Site Information
This chapter covers the following actions:

1. Configure your office/site in TaxSlayer Pro.
2. Set up EROs in TaxSlayer Pro.

Office/Site Setup
Before you begin using TaxSlayer Pro, you need to configure settings and establish an ADMIN password. You can set up your site and edit or delete information for the ERO and preparers. Several items in configuration carryover to tax return so that you only have to type this information once. This includes items such as the firm/site name information.

To configure TaxSlayer Pro, use the following steps:

1. Double-click the TaxSlayer Pro icon on your desktop.
2. Set up the network or standalone computer as discussed in the Network Configuration section.

TaxSlayer Pro displays a reminder that you should fill in all information pertaining to your Firm/Site, as seen in the screenshot below.

3. Click Ok.
Completing Firm Information

TaxSlayer Pro displays the **Firm Information Menu**:

4. Type your site’s SIDN twice for verification.

**NOTE**: If the SIDN does not match, TaxSlayer Pro prompts you to rekey the SIDN before you can continue.

5. Type your site’s other information. Use the following tips for entering this information:
   a. Do not type any special characters in the name or address boxes. When you click **Ok**, TaxSlayer Pro displays an error message with any characters the IRS does not allow.
   b. When you type your Zip Code, TaxSlayer Pro completes the city and state boxes.
   c. If your site is in another country, select the **Check for Foreign Address** check box to select the country.
d. Do not type your Social Security number in the Firm EIN box. This box pertains to paid preparers, so leave this box blank.
e. Type your EFIN validation code, or vendor control number, in the Efin Validation Code box.

TIP: Log in to your My Account/Account Hub page and navigate to Account History to locate your EFIN Validation Code.

6. When you finish typing your site’s information, click Ok.

TaxSlayer Pro displays the Firm Information Setup Menu:

![Firm Information Setup Menu]

7. Review the answers to the questions. If you need to change an answer, click it to change the answer. Leave Group Code blank.
8. Click Exit or type the corresponding number.
Adding an Administrator Password

TaxSlayer Pro displays the **New Password** window:

1. Read this page carefully. It contains information on setting a strong password.
2. Type your new password.

**TIP:** The password must contain at least 8 characters, at least 1 upper case letter, at least 1 lower case letter, at least 1 number and at least 1 special character.

3. Press Enter.

TaxSlayer Pro displays the **Confirm New Password** window:

4. Type the new password again for verification.
5. Press Enter.
TaxSlayer Pro displays the **Security Question** window:

6. Select a security question from the list.
7. Type the answer to the security question.

**TIP**: Choose a security question for which you can easily remember the answer. If you forget your password, you will use this information to reset it.

8. Click **Ok**.

TaxSlayer Pro displays the **Enter/Edit Preparers** window:

9. Click **Exit**. See the **Adding Preparers** section for information on adding preparers.
TaxSlayer Pro connects to the Internet to process any updates to the program. This may take a few minutes:

TaxSlayer Pro asks you to confirm the system date on your computer:

10. TaxSlayer Pro Online exits the program to apply the new settings.

After you complete the main configuration settings and set a password, you still need to set up paths and some other information. To do this, use the following steps:

1. Double-click the TaxSlayer Pro icon on your desktop.
TaxSlayer Pro displays the **TaxSlayer Pro Login** box:

11. Type the user name and password you created in Configuration.
12. Click **Ok**.

TaxSlayer Pro displays the **Main window** where you can navigate to any additional configuration items.

*Changing Configuration Settings*

If you need to change your site configuration later, you can do so from the main window. To change configuration, use the following steps from the TaxSlayer Pro main window:

1. Click **Configuration** or type the corresponding number.
TaxSlayer Pro displays the **Configuration Main Menu**:

![Configuration Main Menu]

2. Click or type the number for which you want to change settings.
3. Follow the screen prompts to type the corrected or updated information.
4. Press Enter to save the information.
5. Click **Exit** or type the corresponding number.

TaxSlayer Pro configuration that you may want to edit includes setting a backup path and configuring macros.

*Setting up a Backup Path*

1. On the **Configuration Main Menu**, click **Path Menu** or type the corresponding number.
TaxSlayer Pro displays the **Path Menu**:

```
* 1. Installation Path..............: C:\TaxSlayer\20 Net\n 2. Prior Path......................:
 3. Secondary Backup Path.........:
 0. Exit
```

2. Leave the installation and prior path as displayed.
3. To back up returns to a second location, click **Secondary Backup Path** or click the corresponding number. This will allow deleted returns to be restored and maintain an automated backup of the returns being prepared.

**Note:** Connect your secondary backup media (USB drive, external hard drive, etc.) before beginning this step.

TaxSlayer Pro displays the **Select Backup Path** window with any external storage locations listed:

4. Click or type the number for the drive you want to use for the secondary backup.

**NOTE:** You cannot use a CD/DVD drive for your secondary backup drive.
5. Click **Ok**.

TaxSlayer Pro displays the **Path Menu**:

```
* 1. Installation Path: C:\TaxSlayer\20 Net\ 
  2. Prior Path: 
  3. Secondary Backup Path: D:\TaxSlayer\20 NET\DATA 
  0. Exit
```

6. Review the information for accuracy.

*Setting up Macros*

**Tip:** TaxSlayer Pro allows you to set up macros, or automatic entries, to reduce your time and keystrokes when entering data for employers, day care providers, etc., in your area.

To set up macros, use the following steps from the **Configuration Main Menu**:

1. Click **Advanced Configuration (Macros)** or type the corresponding number.
TaxSlayer Pro displays the Advanced Configuration Menu:

2. Click **MACRO (Most Common) Setup**.
TaxSlayer Pro displays the **Keystroke (Macro) Saver Setup Window**:

3. Click the type of macro you want to change. For this example, click **W2 Employers/1099R Payers**.
TaxSlayer Pro displays the **Most Common Employers** window:

4. Click **New** and complete the information for each employer.
5. Click **Exit**.
6. Complete the information for any of the following using the same basic steps:
   a. Interest and dividend payers
   b. K-1 entities
   c. Child care providers
   d. Charitable organizations
   e. Banks
Setting up Security Templates

This chapter covers the following actions:

1. List the security templates delivered with TaxSlayer Pro Desktop.
2. Determine which security template to use based on the allowed actions.
3. Create a new security template.
4. Edit an existing security template.

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

Predefined Security Templates
In most cases, you need to use the security templates that TaxSlayer Pro predefines with your software. You can choose from the predefined security templates for each user. For a list of predefined security templates, see the TaxSlayer knowledge base.

When you set up users/preparers, you can select the security template during setup. See the next topic in this section, Adding Preparers, for information on selecting security templates for users.

**TaxSlayer Pro Tip:** You cannot add the predefined Administrator role to users, and you cannot edit that role.

Creating Security Templates
You can create as many new security templates as you need at your site. To do this, use the following steps from the Configuration main menu:

1. Click Firm/ERO/Preparer Setup or type the corresponding number.
TaxSlayer Pro displays the **Company Setup Menu**:

![Company Setup Menu](image)

2. Click **Role(s) Menu** or type the corresponding number.

TaxSlayer Pro displays the **Security Roles** dialog box with the predefined roles:

![Security Roles](image)

3. To add a new role, click **New**.
TaxSlayer Pro displays the **Role Name** dialog box:

![Role Name dialog box]

4. Type the name of the role you want to create.
5. Press Enter.

TaxSlayer Pro displays the **Preparer Security Menu**:

![Preparer Security Menu]

6. Click the permission or type the corresponding number to change that permission for this security template role.

When you click each option, TaxSlayer Pro displays a dialog box similar to the following:

![Permission selection dialog box]

0. Exit
1. Preparer has Access
2. Preparer does not have Access
7. Click the correct number to adjust the access for the preparer.
8. Click **Ok** when finished.
9. If you want to change the options the user can access on the TaxSlayer Pro main window, click **Main Menu Options** or type the corresponding number.

TaxSlayer Pro displays the **Main Menu Options** menu:

![Main Menu Options menu](image)

10. Click the options you want to toggle to **NO** so that users in this role cannot access the option on the TaxSlayer Pro main window.

**TaxSlayer Pro Tip:** When users click an option to which they do not have access, TaxSlayer Pro displays the following dialog box:

![Dialog box](image)

11. Click **Exit** or type the corresponding option.
12. Do **not** adjust the following permissions. VITA/TCE sites do not use these:
   a. Quick Calc
   b. Client Retention
   c. Default Retention Password
   d. Appointments
   e. Papercut Security
   f. Print Checks
   g. Fees Configuration (If your site does not track fees saved)

13. You can determine whether the user can access all tax returns or only returns he or she created. To do so, click **Tax Returns Access** or type the corresponding number.

   TaxSlayer Pro displays the following menu:

   ![Permission Menu]

14. Select the correct option.
15. Click **Ok**.
16. When you finish setting up permissions for the security template, click **Exit Menu**.
TaxSlayer Pro displays the **Security Roles** menu with the new role added:

```
<table>
<thead>
<tr>
<th>Description</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. E-FILE MANAGER</td>
<td>*</td>
</tr>
<tr>
<td>2. INTERVIEWER</td>
<td>*</td>
</tr>
<tr>
<td>3. RETURN PREPARER</td>
<td>*</td>
</tr>
<tr>
<td>4. REVIEWER</td>
<td>*</td>
</tr>
<tr>
<td>5. SAMPLE</td>
<td></td>
</tr>
<tr>
<td>6. SUPER USER</td>
<td>*</td>
</tr>
<tr>
<td>7. TEMPLATE MANAGER</td>
<td>*</td>
</tr>
</tbody>
</table>
```

17. Add new roles as needed.
18. Click **Exit** when you finish adding roles.

**Editing Security Templates**
You can edit predefined or new security roles before or during tax season. If you want changed permissions to automatically update for the preparer, make sure that you select this correctly in the preparer set up (see the \[Adding Preparers\] topic, next).

**TaxSlayer Pro Tip:** You cannot edit the predefined Administrator role.

To edit roles later, use the following steps from the TaxSlayer Pro main window:

1. Navigate to the **Role(s) Menu** as discussed previously.
TaxSlayer Pro displays the **Security Roles** dialog box:

![Security Roles dialog box](image)

2. Click the name of the role you want to change.
3. Click **Edit**.

TaxSlayer Pro displays the **Preparer Security Menu**:

![Preparer Security Menu](image)

4. Use the same steps you used to set up security roles to change items.
5. When you finish changing permissions, click **Exit Menu**.
Adding Preparers
This chapter covers the following actions:

1. Add a preparer.
2. Assign a security template for preparers.
3. Control return access.

Adding Preparers
After you configure the information for the office and set up security templates, you need to add preparers. Add each preparer in your office.

TaxSlayer Pro Tip: TaxSlayer Pro prompts the ADMIN user to change the password during the setup process.

To add a preparer, use the following steps from the Company Setup Menu:

1. Click Preparer(s) Menu or type the corresponding number.

TaxSlayer Pro displays the Enter/Edit Preparers window:
2. To add a new preparer, click **New**.

3. Type a preparer code. You can use any number from 1-999. Use a unique code for each preparer.

4. **Do not type** a Social Security number.

5. TaxSlayer Pro carries the SIDN from the number you typed in site configuration to the **PTIN** box.

6. Type the preparer’s name in the appropriate boxes.

7. Click **Ok**.
TaxSlayer Pro displays the **Preparer Edit Menu**:

8. Verify the information for the preparer.

**TaxSlayer Pro Tip**: TaxSlayer Pro generates the practitioner PIN to 98765.

9. Click **Preparer Security** or type the corresponding number.
TaxSlayer Pro displays the **Preparer Security Menu** with the new user name:

![Preparer Security Menu](image)

**Assigning Security Templates**

For each preparer, you should assign the correct security template. For information on the default security templates and creating new security templates, see [Setting up Security Templates](#).

To assign a security template for a preparer from the **Preparer Security Menu**, use the following steps:

1. Click **Role** or type the corresponding number.
TaxSlayer Pro displays the **Security Roles** menu:

![Security Roles Menu](image)

2. Click the security role you want to use for this preparer or type the corresponding number.

TaxSlayer Pro displays the **Preparer Security Menu** with the new role name listed.

**TaxSlayer Pro Tip**: If you need to make a security change specific to the user, click the appropriate option.
Working with Custom Questions

This chapter covers the following actions:

1. Configure questions and answers.
2. List the number of possible answer choices you can add.

TaxSlayer Pro allows you to set up custom questions that preparers should answer while interviewing a taxpayer. You can use only the predefined questions or add more questions.

Adding Custom Questions

To access custom questions from the TaxSlayer Pro main window, use the following steps from the Configuration menu:

1. Click Custom Questions or type the corresponding number.

TaxSlayer Pro displays the Custom Questions menu:

<table>
<thead>
<tr>
<th>New</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TaxSlayer Pro Tip:** TaxSlayer Pro provides predefined questions in the tax returns. You cannot review or edit these questions from the Custom Questions configuration menus.

2. To add a new question, click New.
TaxSlayer Pro displays the **Question** box:

3. Type the question.
4. Press Enter.

TaxSlayer Pro displays the **Edit…** menu:

5. If you want to require preparers to answer this question, select the **Require Answer for E-File?** check box.

**TaxSlayer Pro Tip:** If you require the answer to a question, you **cannot** mark the return for e-file unless you answer the question.

6. Type the first answer choice in the **Answer Text** box.
7. Click **Add New Answer**.
TaxSlayer Pro displays the new answer choice:

8. Repeat the steps to add answer choices.
9. If you want to delete an answer choice, click Remove for that answer.
10. When you finish adding answer choices, click Exit.
Configuring Printing
This chapter covers the following actions:

1. List the predefined print sets.
2. Determine which print set to use for the taxpayer.
3. Change the number of copies to print.

Setting up the Printer
Next, you need to set up printing. To set up a default printer from the Configuration main menu, use the following steps:

1. Click Printer/Copies Setup or type the corresponding number.

TaxSlayer Pro displays the Print/Copies Setup Menu:

2. Click Printer Setup or type the corresponding number.
TaxSlayer Pro displays the **Printer Setup Menu**, listing the printer you have set up as your computer's default printer as the default TaxSlayer Pro printer:

3. Verify that the listed printer is the one you want to use for TaxSlayer Pro. If you want to change the printer, click **Default Tax Printer**.

TaxSlayer Pro displays the **Default Tax Printer** menu:

4. Click the printer you want to use as your TaxSlayer Pro default printer.
5. Click **Ok**.
TaxSlayer Pro displays the **Printer Setup Menu** with the printer you selected:

![Printer Setup Menu](image)

6. Click **Exit** or type the corresponding number.

**Print Sets**

After you select the printer you want to use, review the predefined print sets and make any necessary changes for your site’s print sets. To do this from the **Print/Copies Setup Menu**, use the following steps:

1. Click **Edit Individual Print Options** or type the corresponding number.
TaxSlayer Pro displays the **Copy Menu**:

![Copy Menu](image)

<table>
<thead>
<tr>
<th>No.</th>
<th>Fed/St</th>
<th>Form/Schedule Name</th>
<th>Num. Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FD</td>
<td>Cover Page</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>FD</td>
<td>Client Letter</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>FD</td>
<td>Privacy Letter</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>FD</td>
<td>Client Invoice</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>FD</td>
<td>Form 1040</td>
<td>1</td>
</tr>
<tr>
<td>6</td>
<td>FD</td>
<td>Form 1040 A</td>
<td>1</td>
</tr>
<tr>
<td>7</td>
<td>FD</td>
<td>Form 1040 EZ</td>
<td>1</td>
</tr>
<tr>
<td>8</td>
<td>FD</td>
<td>Form 1040 NR (Nonresident Alien)</td>
<td>1</td>
</tr>
<tr>
<td>9</td>
<td>FD</td>
<td>Form 1040 NR-EZ (Nonresident Alien)</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>FD</td>
<td>Form 1040 PR (SE Tax for PR)</td>
<td>1</td>
</tr>
<tr>
<td>11</td>
<td>FD</td>
<td>Form 1040 SS (SE Tax for PR)</td>
<td>1</td>
</tr>
<tr>
<td>12</td>
<td>FD</td>
<td>Form 1040 X</td>
<td>1</td>
</tr>
<tr>
<td>13</td>
<td>FD</td>
<td>Form 1040 V</td>
<td>1</td>
</tr>
<tr>
<td>14</td>
<td>FD</td>
<td>Form 1040 Estimates</td>
<td>1</td>
</tr>
<tr>
<td>15</td>
<td>FD</td>
<td>Form 1040 NR Estimates</td>
<td>1</td>
</tr>
<tr>
<td>16</td>
<td>FD</td>
<td>Form 1045 (Tentative Refund Application)</td>
<td>1</td>
</tr>
<tr>
<td>17</td>
<td>FD</td>
<td>Dependent Standard Deduction Wks</td>
<td>1</td>
</tr>
<tr>
<td>18</td>
<td>FD</td>
<td>Schedule A (Itemized Deductions)</td>
<td>1</td>
</tr>
<tr>
<td>19</td>
<td>FD</td>
<td>Overflow Schedule A</td>
<td>1</td>
</tr>
<tr>
<td>20</td>
<td>FD</td>
<td>Schedule A Medical Breakdown</td>
<td>1</td>
</tr>
<tr>
<td>21</td>
<td>FD</td>
<td>Schedule A Mortgage Interest Wks</td>
<td>1</td>
</tr>
<tr>
<td>22</td>
<td>FD</td>
<td>Schedule A Mortgage Insurance Wks</td>
<td>1</td>
</tr>
</tbody>
</table>
2. Review the predefined print sets so you know what forms and how many copies of each form are printed with each print set. In most cases, you should use one of the print sets designated as VITA. TaxSlayer Pro designed these print sets to follow the IRS guidelines.

![Copy Menu](image)

**Changing the Number of Copies**

To change the number of copies for an individual form, use the following steps:

1. Click the **Num. Copies** column for the form.

![Num. Copies](image)

2. Type the number of copies you want to print.
3. Press Enter.
To change the number of copies for a range of forms in the print set, use the following steps:

1. Click **Set Range**.

TaxSlayer Pro displays the range window:

```
<table>
<thead>
<tr>
<th>Form Type</th>
<th>Beginning Range</th>
<th>Ending Range</th>
<th>Number of Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Letter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Privacy Letter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client Inv</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Form 104</td>
<td></td>
<td>1122</td>
<td></td>
</tr>
<tr>
<td>Form 104</td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Form 1040 EZ</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form 1040 NR (Nonresident Alien)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form 1040 NR-EZ (Nonresident Alien)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

2. Verify the **Beginning Range** and **Ending Range** boxes. The numbers here correspond to the number of the form, as listed in the print set. If you want to change the number of copies in all forms for this print set, leave the range as it is.
3. Type the correct number in the **Number of Copies** box.
4. Press Enter.
5. When you finish making changes to the print sets, click **Done**.
Managing Returns
This chapter covers the following actions:

1. Set up Return Tags.
2. Filter returns by Return Tags.
3. Delete returns.
4. Recall returns.
5. Back up returns from non-networked computers.
6. Recall returns from non-networked computers.

Working with Return Tags
TaxSlayer Pro allows you to set up return tags to manage your returns. With return tags, you can designate a customized status.

Setting up Return Tags
TaxSlayer Pro does not have default return tags. You can create these while configuring macros. To add return tags in TaxSlayer Pro, use these steps from the Configuration main menu:

1. Click Advanced Configuration (Macros) or type the corresponding number.

TaxSlayer Pro displays the Advanced Configuration Menu:

2. Click MACRO (Most Common) Setup or type the corresponding number.

TaxSlayer Pro displays the Keystroke (Macro) Saver Setup Menu:

3. Click Return Status Tags or type the corresponding number.
TaxSlayer Pro displays the **Return Status Tags** menu:

4. To add a new return tag, click **New**.

TaxSlayer Pro displays the **Return Status Tag** box:

5. Type the name of the return tag you want to use.
6. Press Enter.

TaxSlayer Pro displays the **Return Status Tags** menu with the new return tag listed:

7. Repeat the steps until you add all the return tags you need.
8. Click **Exit**.
When a preparer exits a return, he or she can designate a return tag in the Receipt Menu:

![Receipt Menu](image)

Filtering Returns by 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 TaxSlayer Pro main window:

1. Click **Tax Returns** or type the corresponding number.
TaxSlayer Pro displays the **Create a Return or Select a Client to Edit** window:

<table>
<thead>
<tr>
<th>SSN</th>
<th>First Name</th>
<th>Last Name</th>
<th>Spouse SSN</th>
<th>Spouse First Name</th>
<th>Telephone</th>
<th>Type</th>
<th>Preparer</th>
<th>Complete</th>
<th>Refu</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NAME</td>
<td>LAST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>JANE</td>
<td>DOE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2002</td>
</tr>
<tr>
<td>1</td>
<td>TAXPAYER</td>
<td>EXAMPLE</td>
<td></td>
<td></td>
<td>(770) 555-1414</td>
<td>Gift Mail</td>
<td>1</td>
<td></td>
<td>252</td>
</tr>
</tbody>
</table>

2. Scroll to the far right of the list.

TaxSlayer Pro displays the **Return Tags** column:

<table>
<thead>
<tr>
<th>Dated</th>
<th>Fees Paid</th>
<th>Receipt N</th>
<th>Return Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>0.00</td>
<td>1</td>
<td>MISSING INFORMATION</td>
</tr>
<tr>
<td>0.00</td>
<td>0</td>
<td></td>
<td>OUT OF SCOPE</td>
</tr>
</tbody>
</table>

3. To sort the list by return tags, click the column heading.
4. To filter the list using return tags, click the **filter** icon in the column heading (🗂).
TaxSlayer Pro displays the return tag filter:

5. Select the check boxes for any return tags you want to include in the list.
6. Clear the check boxes for any return tags you do not want to include in the list.
7. Click OK.

TaxSlayer Pro displays the list of returns, including only those with the selected return tags.

Deleting Returns
In rare events, you may need to delete a return. You can do this with the utilities in TaxSlayer Pro.

TaxSlayer Pro Tip: Use this feature with caution. Do not delete a return that you may need later.

To delete a tax return, use the following steps from the TaxSlayer Pro main window:

1. Click Utilities or type the corresponding number.
TaxSlayer Pro displays the **Utilities Menu**:

1. Backup Returns
2. Recall Returns
3. Log in to ScreenConnect
4. Quick MFJ vs MFS Comparison
5. Program Backup Utility
6. Send Corrupt Return to TaxSlayer Pro
7. Repair Tax Return Pick List
8. Repair Backup Pick List
9. Remove an Individual Client
10. Upload Conversion Data
11. Additional Utilities
0. Exit

2. Click **Remove an Individual Client** or type the corresponding number.

TaxSlayer Pro displays the **Remove Client** menu:
3. Select the check box for the client(s) you want to delete.
4. Click **Ok**.

TaxSlayer Pro displays the **Question** confirmation box:

![Question confirmation box](image)

5. Click **Yes**.

**Recalling Returns**
If you selected a secondary backup drive to automatically back up your returns, you can use this backup drive to recall that version of a return later. To recall returns, use the following steps from the **Utilities** menu:

**NOTE:** Refer to the Pro Desktop knowledge base for setting up a secondary drive location.

1. Click **Recall Returns** or type the corresponding number.

TaxSlayer Pro displays the **Select the Directory to Recall Returns From** window with all available backups listed:

![Select the Directory to Recall Returns From window](image)

2. Click the correct backup location.
3. Click **Ok**.
TaxSlayer Pro displays the **Select Clients To Recall** window:

![Select Clients To Recall](image)

4. Select the check boxes for the return(s) you want to recall. If you want to recall all returns, click **Check All**.
5. If you want TaxSlayer Pro to overwrite the return with the data from the backup, select the **Overwrite Existing Returns** check box.
6. Click **Ok**.

TaxSlayer Pro recalls the returns.

**Backing up and Recalling Returns on Non-Networked Computers**

If you have returns that are not networked, you still need to back them up. You may also need to transfer returns from a non-networked computer to the specified transmitting computer for e-filing.

**Backing up Returns**

When you are ready to back up returns on a non-networked computer, first make sure that your USB drive or other external storage device is connected to the computer.

**TaxSlayer Pro Tip**: You can back up and recall returns for non-transmitting sites without needing to use a transmission code. Simply back up the returns at the non-transmitting site, recall the returns at a transmitting site, complete the applicable information in the return, and e-file as normal.

To back up the returns, use the following steps from the **Utilities** menu:

1. Click **Backup Returns** or type the corresponding number.
TaxSlayer Pro displays the **Select the Drive to Use for Backup** window:

2. Click the drive to which you want to back up returns.
3. Click **Ok**.

TaxSlayer Pro displays the **Select Clients to Backup** window:

4. Select the check box for the client(s) you want to back up. If you want to select all clients, click **Check All**.
5. Click **Ok**.

TaxSlayer Pro backs up the client files to the selected location.
Recalling Returns

When you finish backing up the returns, you can move the external storage device to another computer to recall the returns.

To recall the returns on the transmitting computer, use the following steps from the Utilities menu:

1. Click **Recall Returns** or type the corresponding number.

TaxSlayer Pro displays the **Select the Directory to Recall Returns From** window:

2. Click the name of the directory to which you backed up the returns. Remember that you may have multiple directories if you set up a secondary backup location. Choose the correct one.

3. Click **Ok**.

TaxSlayer Pro displays the **Select Clients To Recall** window:
4. Select the check boxes for the return(s) you want to recall. If you want to recall all returns, click **Check All**.
5. If you want TaxSlayer Pro to overwrite the return with the data from the backup, select the **Overwrite Existing Returns** check box.
6. Click **Ok**.

TaxSlayer Pro recalls the returns.
Updating and Transferring

This chapter covers the following actions:

1. Configure automatic updates in TaxSlayer Pro.
3. Transfer updates to non-networked computers.
4. Transfer configuration to non-networked computers.

Managing Updates

Configuring Updates

TaxSlayer Pro automatically downloads and installs updates the first time you open the program each day. For states, you can configure which updates TaxSlayer Pro automatically downloads. To do this, use the following steps from the TaxSlayer Pro main window:

1. Click **Updates** or type the corresponding number.

TaxSlayer Pro displays the **Internet Update Utility Main Menu**:

2. Click **Configure Updates** or type the corresponding number.
TaxSlayer Pro displays the **Update Manager**:

3. Select the check boxes for the states you want TaxSlayer Pro to automatically download.

**TaxSlayer Pro Tip**: We recommend that you limit the number of states for automatic download to those you use most commonly at your office.

4. Click **Exit**.

**Downloading Updates**

If you need to prepare a state return other than those you selected for automatic download, you need to update the state. To do this, use the following steps from the **Internet Update Utility Main Menu**:

1. Click **Download/Install Updates** or type the corresponding number.
TaxSlayer Pro displays the **Update** window with all states that are not up to date in red:

2. Click the state(s) you need to update.
3. Click **Download**.
TaxSlayer Pro displays the **Transfer** tab with the progress of the download and installation:

4. Click **Exit**.

**Transferring to Non-Networked Computers**

**Transferring Configuration to Non-Networked Computers**

If you do not have a network for the computers at your site, you can transfer configuration to the non-networked computers. Use a USB flash drive or other external media.
Backing up Configuration

To back up configuration to external media, use the following steps from the Configuration main menu:

1. Click Configuration Utilities or type the corresponding number.

TaxSlayer Pro displays the Configuration Utilities Menu:

- 1. Copy Configuration to Disk
- 2. Restore Configuration from Disk
- 3. Register DLL Files
- 4. Clear Configuration
- 0. Exit

2. Click Copy Configuration to Disk or type the corresponding number.

TaxSlayer Pro displays the Select the Drive to Use for Backup menu:

- Drive Letter
  - 0. Exit
  - 1. C:\ Drive
  - 2. D:\ Drive

3. Click the drive to which you want to back up configuration.
4. Click Ok.

TaxSlayer Pro saves the configuration backup.
Configuring the Non-Networked Computer

After you save the configuration backup to the appropriate media, you need to move the file to the non-networked computer and restore it. To do this, use the following steps:

1. Attach the media device containing the update package to the non-networked computer.
2. Navigate to the **Configuration** main menu.
3. Click **Configuration Utilities** or type the corresponding number.

TaxSlayer Pro displays the **Configuration Utilities Menu**:

![Configuration Utilities Menu]

5. Click **Restore Configuration from Disk** or type the corresponding number.

TaxSlayer Pro displays the **Select the Drive to Use for Restore** menu:

![Select the Drive to Use for Backup]

6. Click the drive to which you want to back up configuration.
7. Click **Ok**.
TaxSlayer Pro displays the **Question** box:

8. If you are restoring configuration to your transmitting computer, click **Yes**. Otherwise, click **No**.

TaxSlayer Pro displays the **Select Prior Year Path** menu:

9. Determine how you want to select the prior year path and click the appropriate option of the following:
   - Click **Exit** if you do not have the prior year’s software.
   - **Select Paths from Drive**
   - **Enter Prior Year Path**

10. Click **Ok**.

TaxSlayer Pro confirms restoration:
11. Click **Ok**.

   TaxSlayer Pro closes the program to apply configuration changes.

**Transferring Updates to Non-Networked Computers**
If you do not have a network for the computers at your site, you still need to update TaxSlayer Pro on each workstation. You can do this using a USB flash drive or other external media.

**Save Updates**
To save updates to external media, use the following steps from the **Internet Update Utility** main menu:

1. Click **Backup Updates** or type the corresponding number.

   TaxSlayer Pro displays the **Save As** window:

   ![Save As window](image)

2. Navigate to the location to which you want to save the update package. If you are moving this to another computer, remember to save to the correct drive (USB flash drive or external hard drive).

3. Click **Save**.

   TaxSlayer Pro saves the update package with the file name .upd.
Updating the Non-Networked Computer

After you save the update package to the appropriate media, you need to move the file to the non-networked computer and install the updates. To do this, use the following steps:

1. Attach the media device containing the update package to the non-networked computer.
2. Open TaxSlayer Pro.
3. Navigate to the **Internet Update Utility** main menu.
4. Click **Recall Updates** or type the corresponding number.

TaxSlayer Pro displays the **Open** window:

5. Navigate to the location to which you saved the update package.
6. Click **Open**.
TaxSlayer Pro displays the **Update** window:

7. Install the updates as normal.
Working with Reports
This chapter covers the following topics:

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

TaxSlayer Pro provides several reports that you can run to help manage returns. To run a report, use the following steps from the TaxSlayer Pro main window:

1. Click **Reports** or type the corresponding number.

TaxSlayer Pro displays the **Reports Menu**:

![Reports Menu]

**TaxSlayer Pro Note**: TaxSlayer will deliver additional reports to help the management process of the sites.
2. Review the available reports. Click the report type you want to run or type the corresponding number. For this topic, we will run **Client Reports**.

TaxSlayer Pro displays the **Client Reports** window:

![Client Reports Window]

3. Scroll through the list of available information and select the check box(es) for any data on which you want to run the report. For this example, we will use the **Income: Wages, Salaries, Tips, Etc.** data.

TaxSlayer Pro displays a box requesting the starting point for the data you want to report:

![From Income: Wages, Salaries, Tips, Etc.]

4. Type the starting dollar amount.
5. Press Enter.
TaxSlayer Pro displays a box requesting the ending point for the data you want to report:

6. Type the ending dollar amount.
7. Press Enter.

TaxSlayer Pro displays the **Client Reports** window with the data you typed in the **Input** column:

**TaxSlayer Pro Tip**: If you want to save this information to run the same report later, click **Save Report**, type a name for your report, and press Enter.

8. Click **View**.
TaxSlayer Pro displays a **Question** confirmation box:

![Question confirmation box]

**You have Selected to Print a Report Containing 2 Clients.**

**Would You Like to Continue?**

- Yes
- No

9. Click **Yes**.

TaxSlayer Pro displays the **Select Fields to Report** window:

![Select Fields to Report window]

10. Select the check boxes for the data you want to include in the report.
11. Click **Ok**.

TaxSlayer Pro displays the **Sort By** menu:

![Sort By Menu]

12. Click the column description by which you want to sort the report.
13. Click **Ok**.

TaxSlayer Pro displays the report as a PDF:
Exporting a Report
You can also export a report to Microsoft Excel instead of displaying it as a PDF. To export a report, use the following steps:

1. Navigate to reports and select the input data as discussed previously. TaxSlayer Pro displays the Client Reports window:

2. From the Generate Report Type drop-down list, select Export to Microsoft Excel File.

3. Click View.
TaxSlayer Pro displays a **Question** confirmation box:

4. Click **Yes**.

TaxSlayer Pro displays the **Select Fields to Report** window:

5. Select the check boxes for the data you want to include in the report.
6. Click **Ok**.

TaxSlayer Pro displays the **Save As** window:

![Save As window](image)

7. Navigate to the location to which you want to save the report.
8. Click **Save**.

TaxSlayer Pro saves the report as a .csv in the location you chose:
Preparing a Return

Starting a Tax Return
This chapter covers the following actions:

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
To start a tax return in TaxSlayer Pro Desktop, use the following steps from the main window:

1. Click Tax Returns or type the corresponding number.

TaxSlayer Pro Desktop displays the Create a Return or Select list of Clients window:

![Create a Return or Select list of Clients window]

2. In the Start/Edit 1040 Tax Return box, type the taxpayer’s Social Security number.
3. Press Enter.

TaxSlayer Pro displays the Question dialog box:

![Question dialog box]

4. Click Yes to create the return.
Selecting the Filing Status

TaxSlayer Pro displays the Select the Correct Filing Status menu:

5. Determine the correct filing status and click the status or type the corresponding number.

**Note:** If the taxpayer’s filing status is Married Filing Separate, TaxSlayer Pro displays questions concerning residency and whether the spouse itemizes deductions. If the taxpayer’s filing status is Qualifying Widow(er), TaxSlayer Pro displays a question concerning the year the spouse passed away.
Entering Personal and Spouse Information

TaxSlayer Pro displays the **Personal Information Entry** menu:

6. Read each line and type the information as given to you by the taxpayer.
   a. You must type the taxpayer’s Social Security number again for verification.
   b. TaxSlayer Pro displays additional boxes on this menu depending on the filing status. For example, if the taxpayer is married, TaxSlayer Pro displays the **Spouse’s Information** section.
   c. If the spouse’s last name is the same as the taxpayer’s, TaxSlayer Pro automatically fills that box with the taxpayer’s last name.
   d. When you type the Zip code, TaxSlayer Pro automatically populates the city and state.

7. Click **Ok**.
TaxSlayer Pro displays the **Personal Information – Name & Address Menu**:

8. Review the information on this menu. Click the line or type the corresponding number to change any entries.
9. When you finish, click **Exit** or type the corresponding number.
TaxSlayer Pro displays the **Question** dialog box:

10. Do one of the following:
   a. Click **Yes** if the taxpayer has dependents.
   b. Click **No** if the taxpayer does not have dependents. In this guide, skip to the next section.

**Adding Dependents**

TaxSlayer Pro displays the **Edit Dependent Information** menu:

11. Click **New** to add a dependent.
TaxSlayer Pro displays the **Dependent Information Entry Screen**:

![Dependent Information Entry Screen](image)

12. Read each line and type the information as given to you by the taxpayer.
   
   a. If the dependent’s last name is the same as the taxpayer’s, leave the box blank. TaxSlayer Pro automatically populates the box with the taxpayer’s last name.
   
   b. If the dependent does not have a Social Security number, select an option from the drop-down list.

13. When you finish adding the dependent’s information, click **Ok**.

TaxSlayer Pro displays the **Qualifying Dependent Care Expenses** box:

![Qualifying Dependent Care Expenses](image)

14. Type the amount of qualifying dependent care expenses the taxpayer paid during the year for this dependent. If none, leave this box as $0.

15. Press Enter.
TaxSlayer Pro displays the **Dependent Information Menu**:

```
Dependent Information Menu

1. Dependent Name: CHILD RETURN
2. Birth Date: 04/12/2014  Age: 2
3. SSN: [Redacted]
4. Relationship: DAUGHTER
5. Months: 12
6. Qualifies for Child Tax Credit: YES
7. Full-Time Student: NO
8. Disabled: NO
9. Remove from EIC/SSN not Valid for EIC: NO
10. Paid Dependent Care Expenses: 1000
11. Qualifying Child Not a Dependent: NO
12. Dependent Due Diligence Notes:
13. Is This Person Married: NO
14. If Married, Filing MFJ return only for Claim of Refund: N/A
15. Identity Protection PIN:
16. Exit
```

16. Review the information shown on the menu.

**Identity Protection PIN**

If the **dependent** has an Identity Protection PIN issued by the IRS, click **Identity Protection PIN** and type the PIN in the box.

17. When you finish reviewing the dependent’s information, click **Exit**.
18. Add as many dependents as needed, and then click **Exit**.
19. TaxSlayer Pro displays additional questions and menus. Read each menu carefully and type the information as presented to you by the taxpayer.
If the taxpayer has an Identity Protection PIN issued by the IRS, use the following steps:

1. Continue through the questions until you reach the **Personal Information Menu**, after questions about health insurance, as shown below:

   ![Personal Information Menu](image)

   - 1. Name & Address
   - 2. Dependents & Qualifying Children
   - 3. Filing Status: [1]
   - 4. Preparer Code: [1]
   - 5. Other Categories
   - 6. Full-year minimum essential health care coverage? [YES]
   - 7. Health Insurance through the Marketplace/Exchange? [NO]
   - 0. Exit

2. Click **Other Categories** or type the corresponding number.

   TaxSlayer Pro displays the **Other Categories Menu**:

   ![Other Categories Menu](image)

   - 1. Allow Another Person to Discuss Return With IRS...: No
   - 2. Third Party Designee Name: 
   - 3. Third Party Designee Phone: 
   - 4. Third Party Designee PIN: 
   - 5. Disaster Designation: 
   - 6. Military Processing: 
   - 7. Attach PDF Document: 
   - 8. Print Data: 
   - 9. Force Itemized Deductions or Dual-Status Alien: 
   - 10. Print English or Spanish Forms: English
   - 11. Are you a non-paid preparer? [YES - IRS-PREPARED]
   - 12. Print organizer for client next year: No
   - 13. Taxpayer's Identity Protection PIN: 
   - 14. Driver's License Information: 
   - 0. Exit
3. Click **Taxpayer’s Identity Protection PIN** or **Spouse’s Identity Protection PIN**, as necessary.

TaxSlayer Pro displays the **Taxpayer’s Identity Protection PIN** box:

![Taxpayer's Identity Protection PIN box]

4. Type the identity protection PIN issued by the IRS.
5. Press Enter.
Working with Health Insurance

This chapter covers the following actions:

1. Complete the health insurance questionnaire.

Taxpayers must include certain information with the tax return to figure any credit or repayment for health insurance if they had coverage through the Marketplace or state exchange. To begin working with the health insurance information, use the following steps:

1. Continue answering questions in TaxSlayer Pro’s questionnaire until you reach the health care coverage question.

TaxSlayer Pro displays the Question screen:

Completing the Health Insurance Questionnaire

TaxSlayer Pro 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 automatically determines questions you need to answer based on the answers to other questions. Complete the dynamic questionnaire using the taxpayer’s information.
Entering Income, Deductions, etc.

This chapter covers the following actions:

1. Use the wizards to prepare the return.
2. Add Form W-2 using the wizard.
3. List the methods of entering income.
4. Use menus to enter information in the return.
5. Use 1040 View to enter information in the return.
6. Use the Form Finder.

Using the Wizard

After you complete the taxpayer, spouse, and dependent information, as well as health insurance information, TaxSlayer Pro displays questions concerning income:

![Question dialog box](image)
To add a Form W-2, use the following steps:

1. Click Yes.

TaxSlayer Pro displays the Form W-2 screen:

2. Click New to add a new Form W-2.

TaxSlayer Pro displays the Select the Payee on the W-2 screen:

3. Click whether the Form W-2 belongs to the taxpayer or spouse or type the corresponding number.

4. Click Ok.
5. Type the information on the Form W-2 entry screen just as it appears on the Form W-2 the taxpayer received from the employer.
   a. If the employer is listed in the employer database, TaxSlayer Pro auto-populates the employer’s name and address when you type the EIN.

**Note:** Type only whole numbers in all boxes in TaxSlayer Pro. If you type cents, TaxSlayer Pro rounds to the nearest dollar.

6. When you finish typing information in Form W-2, type 0 to exit.

**Note:** If you want to exit Form W-2 without saving the information, press Ctrl + E.
TaxSlayer Pro displays the **Income Menu**:

```
<<1. Wages, Salaries, Tips (W-2).........................[  45001 ]
  2. Interest or Dividends (Sch B, 8815)..............[  0 ]
  3. Interest or Dividends (Less than $1500)........[  0 ]
  4. State & Local Refunds (1099-G Box 2)............[  0 ]
  5. Alimony Received....................................[  0 ]
  6. Business Income/Loss (Sch C, C-EZ, 1099MISC).....[  0 ]
  7. Capital Gain/Loss( Sch D)..........................[  0 ]
  8. Installment Sale (6252)
  9. Other Gains/Loss (4797, 8824)......................[  0 ]
 10. IRA/Pension Distributions (1099R,RRB-1099-R).....[  0 ]
 11. Rents, Royalties, Entities (Sch B,K-1,1065,9502)....[  0 ]
 12. Farm Income (Sch F)................................[  0 ]
 13. Unemployment Compensation (1099-G Box 1)........[  0 ]
 14. Social Security Benefits (1099-SSA, RRB-1099).....[  0 ]
 15. Other Income (W-2G, 2555)..........................[  0 ]
  * 16. Total Income......................................[  45001 ]
 17. Form 1099-MISC
  0. Exit
```

7. Review the income menu and click or type the corresponding number for any income you need to add to the tax return.
8. To add the other types of income, use the same basis steps we used to add Form W-2.
9. When you finish adding income, click **Exit** or type the corresponding number.
TaxSlayer Pro displays the main return window:

Working in the Return
TaxSlayer Pro provides three ways to add income, deductions, and other information to the tax return. You can use the menus on the left of the page, use Form 1040 View, or search for forms.

Using Menus
To use the menus, use the following steps:

1. Find the menu you need to access in the left navigation bar.
2. Click the name of the menu or type the corresponding number.
3. Click the name of the entry screen you need or type the corresponding number.
4. Use the same basic steps we covered for adding Forms W-2 to add information to the return.
Using 1040 View
To use 1040 View, use the following steps:

1. Find and click the line on Form 1040 for which you need to add amounts.

TaxSlayer Pro displays the entry screen for that line:

2. Complete the information.

Using Form Finder
To use Form Finder to add information to the return, use the following steps:

1. Do one of the following:
   a. Type the form number in the Search for Keyword box, and then press Enter.
   b. If you have already added information for a form, click Forms Completed in the Form Finder section.

TaxSlayer Pro displays a list of forms in the return:

2. Click the name of the form.
TaxSlayer Pro displays the information menu for that form:

| 1. Amount Paid to Child Care Providers | 1000 |
| 2. Number of Qualifying Persons | 1 |
| 3. 2016 Qualified Expense You Incurred/Paid | 1000 |
| 4. Taxpayer's Earned Income | 45001 |
| 5. Spouse's Earned Income | 0 |
| 6. Employer-paid Dependent Care Benefits | 0 |
| 7. Carryover Amount, if Any | 0 |
| 8. Forfeited Amount, if Any | 0 |
| 9. Include Combat Pay for Earned Income for | |
| 10. Remove Form 2441 | |

CAUTION: Credit is being Reduced Based on Spouse's Earned Income.
If Spouse was a Full-Time Student, Income may be Increased.

0. Exit
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.

Adding a State
When you finish all the information for the federal return, you can add a state.

Note: Do not add a state to the return until you have completed all of the federal information. If you make changes to the federal return, you must remove and re-add the state for any changes to take effect in the state return.

When you are ready to add information to the state return, use the following steps:

1. Click State Return in the left navigation bar, or type the corresponding number.

TaxSlayer Pro displays the IRS Regulation screen:

![IRS Regulation Screen]

2. Read the information on the screen carefully, and then click Ok.
TaxSlayer Pro displays the state list:

3. Click the name of the state or type the corresponding number.
4. Click Ok.

TaxSlayer Pro displays the **State Tax Program** menu:
5. Determine the taxpayer’s state residency and click the appropriate line.

TaxSlayer Pro displays the menu for the state return, including any information carried from the federal return to the state:

6. Click the appropriate menu item or type the corresponding number to enter additions or subtractions from income.

7. Review the information in the state return to ensure you include everything required for the state.
Marking the State for Electronic Filing

To mark the state return to be electronically filed, use the following steps:

1. Click **Electronic Information Menu** or type the corresponding number.

TaxSlayer Pro displays the Question screen:

2. Click **Yes** to mark this state return for e-filing.

TaxSlayer Pro displays the **State Electronic Menu**:

3. Read the information on this menu carefully, as the menu items may show differently depending on whether the taxpayer will receive a refund or owe a balance due. On each menu item, click to add or change information.
4. When you finish, click **Exit** or type the corresponding number.

TaxSlayer Pro displays the **Question** screen:

5. If you want to print the state electronic filing authorization form, click **Yes**. If you want to print this form later, click **No**.

When you finish adding information to the state return and click **Exit**, TaxSlayer Pro displays the following question if the taxpayer owes a balance due:

6. Because an underpayment of estimated tax is out of scope for volunteers, click **No**.

**Deleting a State Return**

If you need to delete a state from the return, you can do so. Do this with caution, as you cannot retrieve the state information later.

To delete a state, use the following steps from the State list:

1. Select **Delete State(s) Return** or type the corresponding number.
2. Click **Ok**.
TaxSlayer Pro displays the **Select the State(s) to Delete** menu:

3. Select the check box for the state you want to delete.
4. Click **Ok**.

TaxSlayer Pro deletes the state and displays the state list.
Finishing the Return
This chapter covers the following actions:

1. Enter electronic filing information.
2. Mark a return complete.
3. Print the return while in the return, during e-file creation, and while the return is closed.

Marking the Return for e-file
When you finish adding all the information in the return, you can prepare to send the return for review. Use the following steps to complete the return:

1. Review any warnings in the Diagnostic Warnings section at the bottom of the screen. If you do not see this section, click Diagnostic Warnings in the left navigation bar.
2. For each electronic filing error (in red), navigate to the entry page and correct the error.
3. For each warning, review the information for accuracy. Navigate to the entry page to correct any inconsistencies.
4. Click Mark Return Electronic in the left navigation bar.

TaxSlayer Pro displays the E-File Menu:

Note: TaxSlayer Pro defaults all returns created to electronic returns. You can change this, but will need to complete the necessary forms to elect paper filing.
5. If the taxpayer wants the refund or balance due done electronically, click **Return Type** or type the corresponding number. In this example, the taxpayer has a refund.

TaxSlayer Pro displays the **Select the E-File Type** menu:

6. To select direct deposit, click **Direct Deposit** or type the corresponding number.
7. Click **Ok**.

TaxSlayer Pro displays the **Client Bank Deposit Account Information** menu:

8. Type the taxpayer’s routing and account numbers twice for verification. Read each number from the taxpayer’s check to ensure that you type the number correctly.
9. Select the account type from the drop-down list.
10. Click **Ok**.
11. Click **Signature Authorization** and **Other E-File Information** and review all of the information on these menus. Make changes as needed.

12. When you finish, click **Exit** or type the corresponding number.

If you did not mark the state return for electronic filing when adding state information, see *Marking the State for Electronically Filing*.

**Adding a Return Tag**

When you finish the return and are ready to close it, use the following steps:

1. Click **Exit** in the left navigation bar.

TaxSlayer Pro displays the **Receipt Menu**:

![Receipt Menu](image)

Enter Option: [ ]
2. To add a return tag, click **Return Status Tags** or type the corresponding number.

![Return Status Tags](image)

3. Select the check box for the return status tag(s) you want to add.
4. Click **Ok**.
5. Review other information on the **Receipt** menu, and then click **Exit** or type the corresponding number.

**Creating the e-file**
TaxSlayer Pro displays the **Question** dialog box:

![Question](image)

6. If you are ready to create the e-file, click **Yes**. If the return is not complete, click **No**.

**Note:** If you are not responsible for creating e-files, and another person needs to review the return and create the e-file, click **No**.
TaxSlayer Pro displays the **Question** dialog box:

![Question dialog box]

7. Review the instructions in the *Printing a Return* section of this chapter.

**Transmitting Electronic Returns**

To transmit the returns, first make sure you are on the transmitting computer, and then use the following steps from the TaxSlayer Pro main window:

1. Click **E-File**.

TaxSlayer Pro displays the **E-File Main Menu**:

![E-File Main Menu]

2. Click **Transmit Electronic Return(s)** or type the corresponding number.
If you have a high priority message that you have not read, TaxSlayer Pro displays the **Question** dialog box:

3. Click **Yes**.

TaxSlayer Pro displays the **Message Center** window.

4. Read any unread messages and perform any necessary actions before transmitting returns.

**Note:** You cannot transmit returns until you have read all high priority messages in the Message Center.

TaxSlayer Pro displays the **TaxSlayer Pro Transmission Table:**

5. Review the client information.

6. If you need to remove a client from the transmission list, select the client, and then click **Remove Client**.

7. When you finish reviewing the transmission table, click **Transmit**.
TaxSlayer Pro displays a Question box:

8. Click Yes to print the list.

**Note:** TaxSlayer recommends that you always print the list for recordkeeping purposes. Remember, however, that this is only a list of clients for which you have created an e-file; it is not a report of returns that have actually been transmitted.

TaxSlayer Pro displays the **Transmit/Receive** dialog box:

9. Click **Connect**.
TaxSlayer Pro transmits all selected returns to the processing center.

10. When the transmission is complete, click **Exit**.

TaxSlayer Pro displays the **You have reports to print** message.

11. Navigate to the **E-File Main Menu**.

12. Click **Print Reports**.

TaxSlayer Pro displays the **E-File Print Menu**:

```
  * 1. Transmission Confirmation
  » 2. IRS Acknowledgements
  » 3. State Acknowledgements
  * 4. Invalid Returns
  * 5. Bank Receipts
  * 6. Bank Disbursements
  * 7. Bank Fee Deposits
  * 8. Bank Funding
  * 9. Bank Rejects
  * 10. Bank Check Prints
  11. Message Center
  12. Additional/Old Reports
  0. Exit
```

13. Print each report designated by an arrow.

**Receiving Acknowledgements**

After you transmit returns, TaxSlayer sends those returns to the IRS and/or state for processing. Federal returns are usually acknowledged within 24 hours. You do need to receive your acknowledgements several times a
day. To do so, log in to the transmitting computer and use the following steps from E-File Main Menu:

1. Click Receive Acknowledgements Only or type the corresponding number.

TaxSlayer Pro displays the TaxSlayer Pro Communications screen:

2. Click Connect.

TaxSlayer Pro connects with the processing center and retrieves any available acknowledgements.

3. When communication is complete, click Exit.

TaxSlayer Pro displays the You have reports to print message.

4. Click Ok.
5. From the E-File Main Menu, click Print Reports or type the corresponding number.
6. From the E-File Print Menu, click IRS Acknowledgements or type the corresponding number.

TaxSlayer Pro displays the IRS Acknowledgements report.
7. Review the acknowledgement report.
8. For any rejected return, read the rejection code and explanation, and then open the return to make corrections.
9. When you correct the return, create the e-file and transmit it again.
10. Print the acknowledgement report for your records.

Printing the Return
You can print a return while you are in the return, when you create the e-file, or when you are not in a return.

Printing in the Return
To print the return, use the following steps from the main window of the return:

1. Click **View Results** in the left navigation bar.

TaxSlayer Pro displays the **Select Form/Schedule to View** menu:

```
Select Form/Schedule to View

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0. Exit</td>
</tr>
<tr>
<td>1. Quick Summary</td>
</tr>
<tr>
<td>2. Print Return</td>
</tr>
<tr>
<td>3. Print Selected Forms/States</td>
</tr>
<tr>
<td>4. State Forms</td>
</tr>
<tr>
<td>5. Prior Years Comparison</td>
</tr>
<tr>
<td>6. Form 1040</td>
</tr>
<tr>
<td>7. Form 1040EZ</td>
</tr>
<tr>
<td>8. Why No EIC Calculated</td>
</tr>
<tr>
<td>9. Form 8879</td>
</tr>
<tr>
<td>10. Form W-2</td>
</tr>
<tr>
<td>11. Cover Page</td>
</tr>
<tr>
<td>12. Client Invoice</td>
</tr>
<tr>
<td>13. Client Letter</td>
</tr>
<tr>
<td>14. Privacy Letter</td>
</tr>
<tr>
<td>15. Client Form Listing Summary</td>
</tr>
</tbody>
</table>

```

2. Click **Print Return** or type the corresponding number.
3. Click **Ok**.
TaxSlayer Pro displays the **Select Print Option** menu:

4. Click the print option you want to use or type the corresponding number.
5. Click **Ok**.

TaxSlayer Pro displays a question:

6. Click **Yes**.

TaxSlayer Pro displays the **Printer** dialog box showing the default printer:
7. If you do not want to use the default printer selected during configuration, select the printer you want to use from the drop-down list.
8. Click **Ok**.

TaxSlayer Pro prints the tax return.

*Printing While Creating e-file*

If you want to print the return while creating the e-file, follow the steps in the *Creating the e-file* section.

*Printing Outside the Return*

If you are not in the return, and want to print, use the following steps from the TaxSlayer Pro Main Window:

1. Click **Print**.

TaxSlayer Pro displays the **Print Menu**:

![Print Menu](image)

2. Click **Print Individual Returns** or type the corresponding number.
TaxSlayer Pro displays the **Select Clients to Print** menu:

![Select Clients To Print menu](image)

3. Select the check box for any return(s) you want to print.

When you select each check box, TaxSlayer Pro displays the **Select Print Option** menu:

![Select Print Option menu](image)
4. Select the print set you want to print for that client.
5. Click Ok.
6. When you finish selecting clients, click Print Selected.

TaxSlayer Pro displays the Printer dialog box showing the default printer:

1. If you do not want to use the default printer selected during configuration, select the printer you want to use from the drop-down list.
2. Click Ok.

TaxSlayer Pro prints the tax return.
Index

1040 View, 88, 92, 94, 120
Acknowledgements, 109, 110
Address, 16, 81, 90, 120, 121, 122
Administrator (ADMIN), 15, 18, 28, 33, 35, 120
Appointments, 32
Back up, 22, 23, 49, 55, 56, 57, 64, 65, 67
Balance due, 99, 100, 103, 121
Characters, 16, 18
Child Care Provider, 27
Client Retention, 32
Client Search, 120
Client Status, 120
Company Setup, 29, 35
Configuration, 5, 9, 10, 11, 14, 15, 20, 21, 22, 24, 25, 28, 32, 36, 40, 43, 49, 60, 63, 64, 65, 66, 67, 113, 115
Configuration Menu, 11, 14, 25, 49
Configure, 9, 11, 15, 35, 60
Configuring printing, 43
Consent to Use, 122
Contingency plan, 5, 15, 40, 60, 120
Control number, 17
Custom questions, 40, 120
Customize, 122
Deactivate, 120
Deactivate return, 120
Deactivate Return, 120
Default printer, 43, 44, 112, 113, 115
Default Retention Password, 32
Delete, 15, 42, 49, 53, 55, 96, 100, 101, 120
Dependent, 78, 82, 83, 84, 88
Dividends, 27
Drive, 5, 7, 12, 23, 55, 57, 63, 64, 65, 66, 67
Edit, 15, 19, 22, 28, 33, 34, 35, 37, 40, 41, 45, 52, 78, 82
e-file, 41, 56, 102, 103, 104, 105, 106, 108, 109, 110, 111, 113, 120, 121
EFIN (Electronic Filer Identification Number), 17, 120, 121
EIN, 17, 90, 120
Employer, 27, 90, 120
ERO (Electronic Return Originator), 15, 28, 120, 121
ERO Setup, 121
Error, 16, 102
External hard drive, 23, 67
Fees, 32, 121
File server, 5, 10, 11, 13
Filing status, 78, 79, 80
Filter Returns, 49, 51
Firm, 15, 16, 17, 28
Form 1040, 78, 88, 92, 94, 120
Form 1099-R, 120
Form 2441, 120
Form W-2, 88, 89, 90, 91, 93, 120
Group Code, 17
Health insurance, 85, 87, 88
Health insurance credits, 87
Health insurance questionnaire, 87
In Progress, 120
Install, 5, 7, 8, 9, 10, 11, 61, 68, 69
Interest, 27
IRS (Internal Revenue Service), 16, 47, 78, 84, 85, 86, 96, 109, 110, 120
IRS guidelines, 47
IRS Identity protection PIN, 78
Last name, 80, 83
Left navigation bar, 92, 96, 102, 104, 111
License agreement, 6
Login, 17, 21, 110, 121
Macros, 22, 24, 49
Married, 79, 80
Message Center, 107, 122
Messages, 107, 122
Microsoft Excel, 75
Multi-site/group administrator, 120, 122
Network, 5, 9, 10, 11, 12, 14, 15, 63, 67
Non-networked, 49, 56, 60, 63, 65, 68
Notes, 122
Office Setup, 121
Password, 15, 18, 19, 20, 21, 35
PDF, 74, 75
Permissions, 28, 30, 32, 33, 34
Phone number, 120, 121
PIN (Personal Identification Number), 84, 85, 86
Practitioner PIN, 37
Predefined, 28, 29, 33, 40, 43, 45, 47
Predefined print sets, 43, 45, 47
Preparer, 15, 17, 19, 28, 30, 31, 33, 34, 35, 36, 37, 38, 39, 40, 41, 51, 120, 121, 122
Preparer code, 36
Preparer Security, 30, 34, 37, 38, 39
Preparer Setup, 28
Print, 32, 43, 45, 47, 48, 100, 102, 108, 109, 110, 111, 112, 113, 114, 115, 121, 122
Print Checks, 32
Print sets, 43, 45, 47, 48, 115, 121, 122
PTIN, 36
Quick Calc, 32
Range, 48
Recall, 49, 55, 56, 58, 59, 68, 122
Refund, 99, 103, 121
Reject, 120
Rejected, 111
Rejects, 122
Relational EFIN, 122
Reports, 70, 71, 72, 73, 74, 75, 76, 77, 108, 109, 110, 111, 121, 122
Required, 98, 121
Reset, 19
Restore, 65, 122
Return access, 35
Return Status, 49, 50, 105
Return tags, 49, 50, 51, 52, 53, 104, 105, 122
Review, 11, 14, 17, 24, 40, 45, 47, 71, 81, 84, 91, 98, 102, 104, 105, 106, 107, 111, 120, 122
Review Failed, 120, 122
Run reports, 70
Secondary Backup Path, 23
Security, 19, 28, 29, 30, 32, 33, 34, 35, 38, 39, 120, 121, 122
Security code, 121
Security Question, 19
Security role, 29, 33, 34, 39, 122
Security template, 28, 30, 32, 33, 35, 38, 120, 122
Set Range, 48
SIDN, 16, 36, 121, 122
Site name, 15, 121
Social Security number, 17, 36, 78, 80, 83, 120, 122
Social Security number (SSN), 17, 36, 78, 80, 83, 120, 122
Special character, 16, 18
Spouse, 78, 79, 80, 86, 88, 89
State, 16, 60, 61, 62, 80, 96, 97, 98, 99, 100, 101, 104, 109, 122
Tax Returns Access, 32
Tax year, 122
Taxpayer Notes, 122
Text, 41
Transfer, 56, 60, 63
Transmitting computer, 5, 9, 10, 11, 12, 13, 56, 58, 66, 106, 110
Update, 33, 60, 61, 62, 65, 67, 68, 69
USB drive, 23, 56
User, 1, 21, 28, 31, 32, 35, 38, 39, 120
User name, 21, 38
Validation, 17, 122
Wages, 71
Warnings, 102
ZIP code, 16, 80, 122
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 Security Templates – Security templates assigned to a site by TaxSlayer or a multi-site administrator; they cannot be modified or deleted

Client List – A list of all created returns at the site that the user is allowed to access

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

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

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.

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

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

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

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

Print Sets (Assigned) – A print set assigned by TaxSlayer
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

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

Recall Return – A feature that allows you to restore a deactivated return when you begin a new return with that Social Security number

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

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; Tax Slayer 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; Tax Slayer sends a failed message to the preparer via the Message Center

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.

Security Templates/Roles – 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

SIDN – Site Identification Number

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

Zip Code Lookup – A feature that auto-populates the city and state in an address when you type the ZIP code