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Getting Started with TaxSlayer Pro Online

Login and Passwords
This chapter covers the following actions:

1. Navigate to TaxSlayer Pro Online.
2. List the password requirements.
3. Change your password the first time you log in.
4. Reset your password.
5. Describe and use Multi-Factor Authentication.
6. Describe and use reCAPTCHA.

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

2. Click Pro Online.

Your web browser displays the TaxSlayer Pro Login page:
3. In the appropriate boxes, type one of the following:
   a. The user name and password you received from your site administrator, or
   b. Your user name and password from the previous year.

TIP: Passwords are case-sensitive.

4. Click **LOGIN**.

The first time you log in, 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 of each of the following in your password:
  - 1 upper case letter
  - 1 lower case letter
  - 1 number
  - 1 special character

NOTE: You can only use the following special characters: @ $ ! % * ? &

- Remember that passwords are case-sensitive. 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 **Notification** page:

You have updated your account information, please relog using your updated password.

Back

8. Click **Back**.

TaxSlayer Pro Online displays the login page.

9. Type your user name and **new** password.
10. Click **LOGIN**.

**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 **Username Retrieval** page:

```
Username Retrieval

Enter the email you use for our online Tax Software, and we’ll send you your username.

Email Address

SEND EMAIL

Cancel
```

2. Type the email address used during setup for your Preparer account.
3. Click **SEND EMAIL**.

TaxSlayer Pro Online displays the **Username Retrieval** page:

![Username Retrieval](image)

TaxSlayer sends an email, similar to the following:

![Username Reminder](image)

4. On the **Username Retrieval** page, click **Cancel** to log in.

**Resetting Your Password**

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

![Login](image)
To reset your password, you need your user name. Use the following steps:

1. Click **Forgot Password**.

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

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

TaxSlayer Pro Online displays the **Account Verification** page:

4. Select a delivery option to receive your verification code.

**NOTE**: You can receive a verification code to your email. If you have a cell phone number in your preparer information, you can choose either email or text.

5. Click **SEND CODE**.
6. Retrieve your verification code.
7. Type or paste the verification code in the **Verification Code** box.
8. Click **VERIFY**.

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

![Change Password](image)

9. Type a new password.
10. Type the password again for verification.
11. Click **SUBMIT**.
12. Click **Back** on the **Notification** page to return to the login page.
13. On the TaxSlayer Pro Online **Login** page, log in with your user name and new password.

**Multi-Factor Authentication (MFA)**

TaxSlayer Pro Online utilizes Multi-Factor Authentication (MFA) for your login. MFA is an authentication method that uses something other than what you already know to authenticate yourself.

*When is Multi-Factor Authentication (MFA) Required?*

You must authenticate every fifteen (15) days. In addition, you must authenticate when you do one of the following:

- You log in to a unique device for the first time.
- Your computer is re-imaged.
- You attempt to log in, and fail, three (3) times.
• You click **Forgot Password**.
• You log in with a different browser on the same computer (i.e. log in with Chrome and then open Edge and log in).
• Your browser does not store cookies. In this case, you need to authenticate each time you log in.

**Account Verification**

When an account verification event is triggered, TaxSlayer Pro Online displays the **Account Verification** page:

1. Select a delivery option to receive your verification code.

**NOTE:** You can receive a verification code to your email. If you have a cell phone number in your preparer information, you can choose either email or text.

2. Click **SEND CODE**.
3. Retrieve your verification code from your email or text messages.
4. Type or paste the verification code in the **Verification Code** box.
5. Click **VERIFY**.

**TIP:** You should only click **SEND CODE** one time. TaxSlayer Pro Online generates a new authentication code each time you click **SEND CODE**.

**TIP:** Do not close your browser session until you enter your authentication code. TaxSlayer Pro Online invalidates the verification code if you close the Account Verification page.
reCAPTCHA
TaxSlayer Pro Online utilizes reCAPTCHA during the login process. reCAPTCHA verifies whether the user is a human or computer in order to fight spam and abuse. TaxSlayer Pro Online utilizes reCAPTCHA as an additional security measure to protect taxpayer data.

When is reCAPTCHA Required?
TaxSlayer Pro Online requires reCAPTCHA when the user types the user name and password combination incorrectly twice.

How to Use reCAPTCHA
If you type the user name and password incorrectly twice, TaxSlayer Pro Online displays the reCAPTCHA section:

1. Type the correct information in the Username and Password boxes.
2. Select the I'm not a robot check box.
3. Click LOGIN.
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.
4. Set up EROs for ad hoc/virtual sites.

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:

![Welcome page](image)

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 each year and make changes as needed.

**Note**: If you change your Site Name or SIDN, you must email VITA/TCE support to ensure we have the correct information on file.

   a. Select **Disable Third Party Designee Prefill**.
   b. Select **Offer 8888** if your site will be offering split refunds.
   c. Select **Display Summary using 1040 View** to default to the 1040 view when opening returns.
   d. Select **Hide Preparer Name on 1040 Print**.
You can select the following many other office configuration items. Select any appropriate items.

5. Type the appropriate number in the **Maximum number of clients to display on client list** box to determine when TaxSlayer Pro Online displays the **100 Most Recent Returns** in the Client List.

6. Scroll to the **Office Addresses** and **Office Phones** sections.

TaxSlayer Pro Online displays the **Office Addresses** and **Office Phones** sections:

![Office Addresses and Office Phones sections](image)

**Note**: TaxSlayer imports the information from the order information received from the IRS.

7. Click **Add** or **Edit** to make any necessary changes to the information.

TaxSlayer Pro Online displays a blank address line.

8. Type the street address and Zip Code in the appropriate boxes.
9. When you finish adding the address, click **Continue**.
10. Click **Edit** in the **Office Phones** section if you need to make any changes.
11. Add a phone number the same way you added the address.

**TIP**: If you need to change an existing address or phone number, click **Edit** and type over the existing information.

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:

Note: TaxSlayer automatically displays the ERO name and EFIN sent from the IRS and populates the office identifier automatically. The EFIN and office identifier are the same for “ad hoc” and virtual sites.

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, EFIN, and Office Identifier in the appropriate boxes if the information is blank or if you are setting up an ERO for an “ad hoc” or virtual site.

**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 your SPEC Relationship Manager if the EFIN needs to be changed. TaxSlayer validates return creation based on the EFIN in our system, and TaxSlayer will make necessary changes based on approved change requests.

5. Click **Add** or **Edit** in the **ERO Addresses** section.

TaxSlayer Pro Online displays the **ERO Address Information** 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**.

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

13. When you finish, click **Return**.
Setting up EROs for Ad Hoc/Virtual Sites

To ensure that TaxSlayer Pro Online prints the appropriate ERO name on each Form 8879, set up a separate ERO for each ad hoc/virtual site.

**TIP:** We recommend that you include the ad hoc/virtual site’s SIDN in the ERO name box so it is easier for the return preparer to select the appropriate ERO in the Efile section of the return.

**Note:** The ad hoc/virtual site’s EFIN and Office Identifier should be the same as the main site’s identifier. Make sure you type these correctly to prevent validation errors or IRS rejections.

**TIP:** Search the VITA/TCE Blog for more detailed information on setting up the ERO information for your ad hoc and/or virtual site(s).
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.
6. List and describe each security template permission.

In TaxSlayer Pro Online, use security templates to set the permissions for each preparer. You can use predefined security templates or create and manage your own templates.

Predefined Security Templates

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

**NOTE:** Refer to the TaxSlayer Pro Online Knowledge Base 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 or assigned security templates and will not see them listed in your site’s Security Template menu. 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:

Note: TaxSlayer Pro Online stores previous year’s templates as existing Security Templates.

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 **Configuration Menu** page:

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

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

```
Security Templates

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Created By</th>
<th>Date Created</th>
<th>View Users</th>
<th>Assign</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer Review</td>
<td>VITA/TCE Sample Site</td>
<td>9/27/2016</td>
<td>View Users</td>
<td>Add</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Template with abit</td>
<td>VITA/TCE Sample Site</td>
<td>1/7/2017</td>
<td>View Users</td>
<td>Add</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>New Example</td>
<td>VITA/TCE Sample Site</td>
<td>9/5/2017</td>
<td>View Users</td>
<td>Add</td>
<td>Edit</td>
<td>Delete</td>
</tr>
</tbody>
</table>
```

2. 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 or change the preparer’s existing security template, 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.
**TIP**: Type a name in the **search**… box to quickly find the preparer.

3. Click **Continue**.

**Tip**: Select the **Check/Uncheck All** check box to assign the template to all users. To display both active and inactive users, select the **Show Inactive** check box.
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.
5. View a preparer’s email address.
6. Change the status of one or all preparers.
7. Select a user name to allow for multiple accounts.
8. Mark a user as archived.
9. Set up users for ad hoc/virtual sites.

Creating Users
To add preparers for your site, use the following steps from the Configuration page:

1. Click Select on the Preparer Setup line.

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

2. Click Add.
TaxSlayer Pro Online displays the **Preparer(s) Setup Menu** page:

3. Type the preparer’s name in the appropriate boxes.
4. TaxSlayer Pro Online defaults the PIN to 98765 and carries this PIN to all returns created by this preparer.
5. Scroll to view the remainder of the personal information.

TaxSlayer Pro Online displays the next section of the page:

**NOTE**: VITA/TCE sites do not need a 2848 CAF Number.

**SIDN**

6. From the **PTIN OR SIDN** box, click **Pull from office** to have TaxSlayer Pro Online carry the site’s SIDN to the preparer.
7. Do **not** select the **Office Contact** or **Self-Employed** check boxes.
**TIP:** If you are setting up the preparer for an Ad Hoc site, type the SIDN assigned to the Ad Hoc site. Search the Pro Online Knowledge Base for detailed information on setting up your Ad Hoc site(s).

**Return Access**
8. Select the check box to allow the preparer to view only his or her own returns.
9. Check **Required to use Guide?** if you want to restrict the preparer to using the Guide Me feature for data entry.
10. Select **Prepares NY returns?** and select volunteer tax preparer if you are preparing returns in New York.
11. If you prepare returns in Oregon, select the **Prepares OR returns?** check box and type the preparer’s OR License number.

**Preparer Agent Information (Optional)**
Complete the Preparer Agent Information section if the preparer is a Certified Acceptance Agent who is authorized to assist individuals and other foreign persons who do not qualify for a Social Security number but need to complete or return their ITIN application. TaxSlayer Pro Online prints this information on the Form W-7.

**Login Setup**
12. Scroll to the **Edit Login Account** section.

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

13. Type the preparer’s email address, cell phone number, and a unique user name with at least six (6) characters.
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. To comply with Multi-Factor Authentication standards, all email addresses and cell phone numbers must also be unique unless they are marked to allow for multiple accounts.

Password Requirements

14. Type a password for the preparer.

TIP: When you create a password for the preparer, make sure that you use at least one special character (!@#, etc.). Use at least one uppercase letter, one lowercase letter, and numbers. Also, ensure the password contains at least eight (8) characters. This will be the default password for the preparer/user the first time he or she logs in.

15. 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.

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

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

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

Tip: Press Ctrl + End to navigate directly to the bottom of the page.

Managing Preparers

After you add preparers, you can do the following from the Preparers Menu:

- Easily mark a preparer as active or inactive.
- Mark all preparers as active or inactive.
- View the preparer’s email address.
- Mark a preparer to allow for multiple accounts.
To change the status of the preparer, use the following steps from the **Preparers Menu**:

1. If you need to change the status of all active preparers, select **Active** from the **Status** drop-down list.
2. Click **Flip Active Status**.

TaxSlayer Pro Online changes all active preparers to inactive.

**Note:** TaxSlayer Pro Online displays a warning if you mark all preparers as inactive. Click **OK** to continue or **Cancel** to return to the Preparer(s) Menu page.

3. If you need to change the status of all inactive preparers, select **Inactive** from the **Status** drop-down list.
4. Click **Flip Active Status**.

TaxSlayer Pro Online changes all inactive preparers to active.

5. If you need to change the status of only one preparer, find the preparer in the list, and then select or clear the **Active** check box.

From this page, you can also see the preparer’s email address in the new **Email** column. Use this to ensure that your preparers use unique email addresses and find the preparer’s email address when needed.

**TIP:** Type the preparer’s name or email address in the **Search By** box to easily find preparers.

---

**Marking a User Name to Allow Multiple Accounts (Optional)**

You can select email addresses or cell phone numbers to be used for multiple accounts. This allows you to use the Multi-Factor Authentication (MFA) verification code to authenticate using the same contact information.

**NOTE:** We strongly recommend that you use a unique email address and cell phone number for each user instead of using this feature.

To allow the contact information to be used for multiple users, use the following steps:

1. Find the **Email Address** and **Cell Phone Number** boxes in the **Preparer(s) Setup Menu**:
2. Select the appropriate check box(es) below the Email Address or Cell Phone Number box.

**Note:** You must edit an existing preparer to select these check boxes.

**Marking a User Name Is Archived (Optional)**
In addition to Active and Inactive, users with appropriate permissions can mark preparers who no longer volunteer at your site as Archived. When you use this feature, you can distinguish between users who are inactive because the site is not open and users who will not volunteer again in the future.

To archive users, use the following steps from the Preparer(s) Menu:

1. Select **Edit** for the appropriate preparer.

TaxSlayer Pro Online displays the Preparer(s) Setup Menu for the preparer you selected.

2. At the bottom of the page, clear the Active check box, and then select the Is Archived check box.

3. Click **Continue**.

**TIP:** To view preparers you have archived, click View Archived on the Preparer(s) Menu.

If you later need to reactivate a preparer, select the Active check box on the Preparer(s) Setup Menu for that preparer.

**Setting up Ad Hoc and Virtual Sites**
If a volunteer prepares returns at the main site and one or more ad hoc/virtual sites, create a user name for each site to ensure TaxSlayer uses the correct SIDN in the e-file. In this circumstance, the preparer can use the same email address and/or cell phone number.

**Instructions for Setting up in TaxSlayer Pro Online**

1. Create additional preparers in TaxSlayer Pro Online for the volunteers who work at the ad hoc/virtual site.

2. In Preparer Setup, type the SIDN of the ad hoc/virtual site in the PTIN box.

**NOTE:** TaxSlayer Pro Online carries the SIDN on the Preparer record to the appropriate box in the e-file for reporting purposes.
**Best Practice Tip:** Use a description in the user name to indicate the site where the volunteer will prepare returns.

**TIP:** Search the VITA/TCE Blog for more detailed information on setting up the ERO information for your ad hoc and/or virtual site(s).
Working with Custom Questions
This chapter covers the following actions:

1. Configure custom questions and answers.
2. List reports for custom questions.

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** save the **E-file** page and 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. To change the display order of the answers, drag each answer to the position you want it to appear during return preparation.
10. When you finish adding the question and answer choices, click **Save**.

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

11. To add more questions, click **Add** and follow the same steps.
Assigned Questions

TaxSlayer assigns questions to each site on behalf of the IRS. The Group Master can also assign questions. Sites cannot modify these assigned questions.

<table>
<thead>
<tr>
<th>Question</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Would you say you can carry on a conversation in English, both understanding and speaking?</td>
<td>No</td>
</tr>
<tr>
<td>2. Would you say you can read a newspaper or book in English?</td>
<td>No</td>
</tr>
<tr>
<td>3. Do you or any member of your household have a disability?</td>
<td>No</td>
</tr>
<tr>
<td>4. Are you or your spouse a Veteran from the US Armed Force?</td>
<td>No</td>
</tr>
<tr>
<td>5. Was the taxpayer physically present during the entire return preparation and quality review process?</td>
<td>No</td>
</tr>
</tbody>
</table>

**TIP:** If the **Required** column displays **Yes**, prepares must answer the question before saving the **E-file** page and marking the return for e-file.

Question Reports

TaxSlayer Pro Online contains three reports to analyze question data:

- **Question Statistics:** generates a summary level report for each question
- **Return Questions with Consent Indicator Report:** generates a detailed listing of question data, along with corresponding taxpayer demographic information and assigned/custom consents
- **Return Questions:** generates a detailed listing of question data, along with limited demographic information

**TIP:** You must run all question reports at the site level, even if the site is in your relational group.

Refer to the **Working with Reports** section for detailed instructions for running reports.

**TIP:** You cannot export to CSV if you use punctuation in the custom question or answer.
Working with Taxpayer Profiles
This chapter covers the following actions:

1. Create taxpayer profiles.
2. Add forms to a taxpayer profile.
3. Edit taxpayer profiles.
4. Delete taxpayer profiles.
5. Assign a taxpayer profile to another site as the multi-site administrator.
6. Select a taxpayer profile when starting a new return.
7. 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.

![Taxpayer Profiles Menu](image-url)
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**.

**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 most current tax year from the list.

**TIP**: Tax Slayer Pro Online displays the profile in all years, not just the specified current tax year.

**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 VITA/TCE Blog.

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.

Tax Slayer 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.

Tax Slayer 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:

![Edit Taxpayer Profile](image)

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.

**Assigning a Taxpayer Profile**

If you are a multi-site administrator, you can assign taxpayer profiles you create to sites. After you create taxpayer profiles, use the following steps from the **Group Configuration** page to assign them:
1. Click **Select** on the **Taxpayer Profiles** line.

TaxSlayer Pro Online displays the **Taxpayer Profiles** page:

![Taxpayer Profiles](image)

2. Click **Assign** for the taxpayer profile you want to assign to sites.

TaxSlayer Pro Online displays the **Assign Taxpayer Profile** page.

3. In the **Assign profile to** section, select the site to which you want to assign the profile.

4. Click **Continue**.

**TIP:** If you need to delete a profile, unassign it from applicable offices before deleting.

**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:

1. Add a new consent form.
2. Edit an existing consent form.
3. Delete a consent form.
5. Use the Global Carryforward Consent.

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.
3. Type a name and description for your consent form.
4. Select the Consent Tax Year, either All, the current year, or one of the three prior tax years.
5. Select the Display Disclosure Limitations check box if you need to display the disclosure limitations (optional).
6. Click the Add icon in the Consent Form Terms section.

**NOTE:** Select the Required For Efile check box to prevent the preparer from creating an e-file if the taxpayer denies the consent. Preparers are required to complete all consents created or assigned to the site before creating an e-file.

TaxSlayer Pro Online expands the Consent Form Terms section:

7. Type the term, which is typically 1 year.
8. Type the definition.
Note: Type a description definition so the preparer and taxpayer can see the exact terms of the consent and knowingly accept those terms. Do not select Input Only, as this option requires the preparer to manually type consent form terms on each consent for each taxpayer and must be tracked manually by the site.

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 that was created at your site, 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 way you created a new consent.

TIP: TaxSlayer Pro Online makes changes to consents immediately available in returns. We do not recommend making changes to consents after you start preparing returns.

Deleting a Consent
If you later need to delete a consent form that was created at your site, 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.

**TIP**: If you assign a consent to a group, unassign the consent from the group before you delete it. You cannot unassign a deleted consent from a site.

**Global Carryforward Consent**

Taxpayers must affirmatively consent during the return preparation process to allow their information to be available for global carryforward in the subsequent tax year. Based on the agreement with SPEC, TaxSlayer assigns the electronic version of the Global consent to all VITA/TCE Pro Online sites. You cannot edit or delete this consent.

If the taxpayer granted Global Consent in the prior year and visits a different volunteer site in the current filing season, TaxSlayer alerts the preparer that carryforward data exists for use in the current year’s tax return.

**Note**: If the taxpayer denied the Global Consent in the prior year, there is no impact on the same-site carryforward option.
Consent Report
Each site can run a report that indicates which consents a taxpayer granted or denied. Locate the **Custom Consents** report in the **Custom Configuration Items** on the **Office Reporting** page.

![Consent Report Image](image)

TaxSlayer Pro Online includes the following columns in the Custom Consents report:

- SIDN
- EFIN
- Last 4 digits of the SSN
- First Name
- Last Name
- Email
- City
- State
- Zip
- Phone
- Office (Site) Name
- Column for each consent with a Yes/No indicator

Refer to the **Working with Reports** topic for information on running reports.
Configuring Printing
This chapter covers the following actions:

1. List the predefined assigned 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 print sets assigned by TaxSlayer. TaxSlayer Pro designed these print sets based on collaboration with the IRS.

**TIP:** All print sets are available from the Submission, but those available from the Client List are limited.

View Assigned Print Sets
To view the contents of the assigned print sets, use the following steps from the Configuration Menu:

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

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

```
<table>
<thead>
<tr>
<th>Print Type</th>
<th>Client</th>
<th>Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PY TAXPAYER COPY PRINT</td>
<td>VITA/TCE Main</td>
<td>9/30/2016</td>
<td>Set As Default, View</td>
</tr>
<tr>
<td>2018 PAPER FILE COPY</td>
<td>VITA/TCE Main</td>
<td>1/4/2019</td>
<td>Set As Default, View</td>
</tr>
<tr>
<td>2018 TAXPAYER COPY PRINT</td>
<td>VITA/TCE Main</td>
<td>4/20/2016</td>
<td>Set As Default, View</td>
</tr>
<tr>
<td>QUALITY REVIEW</td>
<td>VITA/TCE Main</td>
<td>5/13/2016</td>
<td>Set As Default, View</td>
</tr>
</tbody>
</table>
```

2. To view the assigned print set, click **View**. You cannot edit these print sets.

Create a Custom Print Set
To create a custom print set, use the following steps from the **Print Sets** landing page:

1. Click **Add**.
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. To set a print set as the default set for all returns printed from the Client List and/or Submission page, click **Set As Default** on the line for that print set.

11. If you need to edit or delete a print set you created, click **Edit** or **Delete** to do so.

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

### Setting the Default Print Set from the Group Level

A group level administrator can set the default print set to any print set they create and assign. To set the default print set from the group level, use the following steps from the **Configuration Menu** after logging in with your Group Level login:

1. Click **Select** on the **Print Set Templates** line.

TaxSlayer Pro Online displays the **Print Set Templates** page:

![Print Set Templates](image)

2. Click **Assign** for the appropriate print set.
TaxSlayer Pro Online displays the **Assign Print Set Template** page:

3. Select the **Set Assigned as Default Print Set** check box.
4. Select the offices in the **Offices** section.
Managing Returns
This chapter covers the following actions:

1. Set up return tags.
2. Filter returns by return tags.
3. Deactivate returns.
4. Restore returns.
5. Add taxpayer notes.
6. Send messages.
7. Change the language in a return.

Working with Return Tags
You can create a customized list of return tags to manage the status of the returns at your site or track the returns by Quality Reviewer.

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:

1. Click Add.
2. Type a tag name in the Add new tag box.

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

3. Repeat the steps until you add all the return tags you want.
4. To change the tag display order, drag each tag to the correct position.
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*.

Making Return Tags Required

As a site administrator, you can require preparers to use tags to track specific items from the **Submission** page, such as the Quality Reviewer. To do this from the **Configuration Menu**, use the following steps:

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

TaxSlayer Pro Online displays the **Office Setup** page. Scroll to the **Office Configuration** section.

2. Select the **Require Return Tag(s) for Saving Returns** check box.

3. Click **Continue**.

**NOTE**: For quality review reports on return tags, creates **Pending Review** and **Not Reviewed** return tags.

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 **Office Client List** page:

1. 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.
**Tip:** You can also select **No Tag** to filter those returns or sort by quality reviewer.

**Using the Return Tag Report**
The site administrator can use the Return Tag report to easily manage returns. Locate the Return Tag report in the **Custom Configuration Items** category on the **Office Reporting** page.

TaxSlayer Pro Online includes the following information in this report:

- Last four digits of Social Security number
- Taxpayer First Name
- Taxpayer Last Name
- Phone number
- Return Status
- Return Tags (will list multiple if more than one tag is assigned)

Refer to the [Working with Reports](#) section for detailed instructions on sorting the report and exporting the data for further analysis.

**Deactivating Returns**
In rare events, you may need to deactivate a return. You can do this in the **Office Client List** if the return status is **In Progress** or **Review Failed**.

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

1. Find the return you want to deactivate.
2. From the **Tools** drop-down list, click **Deactivate**.
TaxSlayer Pro Online displays the **Deactivate Return** page:

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

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

Tip: Select **Do Not Show Deactivated Returns** on the **Office Client List** to hide deactivated returns from view.

**Reactivating a Return**

If you later need to reactivate a return your site deactivated, 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 Notes**

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

**Note**: TaxSlayer Pro Online does not transmit notes to the IRS, but prints them in **Preparer Notes** in the **Quality Review** print set and carries them forward to the next tax year.

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

1. Click the **Tools** drop-down list.
2. Click **Notes**.

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

![Add a new note window](image)

3. Click **Add**.
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:

![Found notes window](image)

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** or **Review Returns**:

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

![Office Client List](image)

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

![Notes window](image)

3. Click existing notes (listed at the upper right) to review them.
4. To add a new note, type the title and description in the appropriate boxes.
5. Click Save.
6. Click Add New and use the same steps to add a 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.

Tip: From the client list, you can see who created the note and the date/time it was created. You can also view notes in Warnings Concerning Your Federal Return.

Tip: When carrying forward returns, clear check boxes to remove year-specific notes you do not need in the current return.

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**.

**Changing the Language in a Return**

TaxSlayer Pro Online defaults to displaying and printing returns in English unless you select **Default Tax Returns to Spanish** during office configuration. To change the language to Spanish while in a tax return, use the following steps:

1. From the **Tools** drop-down list, click **¿Sí hablas Español?**

TaxSlayer Pro Online displays the **Select Language** window:

2. Click **Español**.

TaxSlayer Pro Online now displays certain items in Spanish and prints IRS approved forms in Spanish until you exit the return.
Working with Reports
This chapter covers the following actions:

1. Run reports.
2. Filter reports.
3. Export reports.
4. Run Management reports (web reports)
5. Customize 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 Reporting page:

2. Click the appropriate report category to expand it. For purposes of this topic, expand the Custom Configuration Items category.
3. 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:

![Return Questions page](image)

4. Review the information on the report.

**Tip**: If the report has many columns, you may need to scroll to the right to see all of the report data.

**Searching and Sorting**

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

**Printing**

7. 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

8. 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.

**TIP**: Follow all security, privacy, and confidentiality rules for taxpayer data.

**TIP**: Search the Pro Online Knowledge Base for detailed information on all TaxSlayer Pro Online reports. Type the key words *Report Descriptions*, and then click **Find Matches**.

Management Reports

TaxSlayer Pro Online offers a library of web-based reports to assist sites with managing returns and running the reports needed for grant purposes.

To run web-based management reports, use the following steps from the **Office Reports** page:

1. Click the **Other Data Reports** section to expand it.
2. Click **Select** on the **Management Reports** line.

TaxSlayer Pro Online launches a separate window displaying the **Web Reports** page:
**NOTE**: Because TaxSlayer Pro Online launches a separate window for management reports, you must enable pop-up blockers.

3. Click the report title for the report you want to run. For purposes of this topic, run the **Site Production Detail Report - Electronic** report, but you should use the same steps for other reports.

TaxSlayer Pro Online displays the **Report Setup: Site Production Detail Report – Electronic** page:

4. Select the Tax Year, Start Date, and End Date.

**NOTE**: The filters discussed in this topic are not applicable to all reports. Select the appropriate filters for the report you need to run.

5. Click **EFIN Selection**.

TaxSlayer Pro Online displays the **EFIN Selection** section:

6. Select the check box for the EFIN(s) for which you want to run the report (even if running the report at the site level for a single EFIN).

**NOTE**: Use the **EFIN Filter** box to search for a specific EFIN in the list.
7. Do one of the following. For this exercise, select **Run Report to Export**.
   a. Click **Run Report** to display the report on the screen.
   b. Click **Run Report to Export** to enable an export and display the first ten (10) rows of the report on the screen.

TaxSlayer Pro Online displays the **Report: Site Production Detail Report – Electronic** page displaying the first ten rows:

8. Review the report on the screen.
9. Click **Export Full Report**.

TaxSlayer Pro Online generates a CSV file and downloads it to your Downloads folder.

10. Click the **X** in the upper right corner of the page to close web reports.

**TIP**: Search the Pro Online User Guide on the VITA/TCE Springboard for detailed information on all TaxSlayer Pro Online reports.

**Report Customization**

You can customize the reporting display under Reports. You can limit the report list to the ones used at your site and manage the display order to fit your site’s workflow.

To customize reports, use the following steps from the **Configuration Menu** page:

1. Click **Select** on the **Report Customization** line.
TaxSlayer Pro Online displays the **Report Customization** page:

2. Do one of the following to find the report you want to customize:
   a. Type the name of the report in the **Report Type (Lookup)** box.
   b. In the **Report Type (Lookup)** box, press the Down arrow to display a list of all reports.
3. Select the report(s) you want to display.

TaxSlayer Pro Online displays the selected reports in **Selected Report Type(s)** section.

4. Drag the reports to display in the order you want.

**TIP:** Click and hold the report name to drag the box.

5. Click **Save**.
6. From the **Welcome** page, click **Select** on the **Reports** line.

TaxSlayer Pro Online displays the reports in the order you selected within the appropriate reporting category.

**TIP:** If you later want to display all reports, return to **Report Customization** and remove the reports you have listed. Then, press the Down arrow and click each report in order to display all.
Managing Multiple Sites

This chapter covers the following actions:

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

If you manage multiple sites, your group 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 and password.

**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:

![Welcome page](image)

**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

g) Custom Credits

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

**NOTE:** ALL multi-site (MSA) group administrators can access this feature.

![Assign Questions](image)

**Note:** The site cannot modify or delete items assigned by the group.

- TaxSlayer makes any modifications to an item immediately available to the assigned site.
- You must unassign items from any applicable site before you delete it at the group level. Once you delete an item, you cannot unassign it.

**Searching by Office (Relational EFIN required)**

In many features, you can search by office if you are using a Relational EFIN and your user name is assigned an appropriate security template. This way, you can run reports or search for clients in one of the sites you manage.
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 and your user name is assigned an appropriate security template. 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 **Access** for the office you want to access.

**Note**: Click **Edit** to display the Office Setup page for that site.

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 Custom Credits

This chapter covers the following actions:

1. Set up custom credits.
2. Add a custom credit in the return.

Custom credits allow the preparer to capture items that are not contained in other reports. You can use custom credits to capture state credits and other items that your site needs for grant purposes. You can add an unlimited number of custom credits, and the Custom Credit Report displays the following information:

- EFIN
- Last four digits of primary Social Security number
- Last name
- Credit description
- Credit value

You can mark the Custom Credit box as required, but you cannot create an answer bank. All answers must be numeric with a maximum of 9 numbers.

Setting up Custom Credits

To set up Custom Credits, use the following steps as an administrator from the Configuration Menu:

1. Click Select on the Custom Credit line.

TaxSlayer Pro Online displays the Custom Credit page:
2. Click **Add**.

TaxSlayer Pro Online displays the **Add Custom Credit** page:

![Add Custom Credit](image)

3. Type a name for the custom credit.
4. If you want preparers to be required to add the custom credit, select the **Required** check box.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Custom Credit** list with the new credit:

![Custom Credit](image)

6. If you are a multi-site administrator, you can also click **Assign** to assign the custom credit to other sites, as shown below:

![Custom Credit](image)

**Adding the Custom Credit in a Return**

When you finish a tax return, you can enter the custom credit. To do so, use the following steps from the **E-File** page:

1. Work through the sections of the **E-File** page until you reach the **Custom Credit(s)** section.
TaxSlayer Pro Online displays the **Custom Credit(s)** section:

2. Type the appropriate amount in the box.

**NOTE**: Remember that if the administrator marks a custom credit as required, you cannot e-file until you type an amount in the required box, even if the amount is zero.
Adding an Office IP Whitelist

This chapter covers the following actions:

1. Discuss the purpose of an Office IP Whitelist.
2. Add IP Addresses to the Office IP Whitelist.
3. Configure TaxSlayer Pro Online to verify IP addresses.
4. Delete IP addresses from the Office IP Whitelist.

For added security measures, you can restrict access to TaxSlayer Pro Online only to IP addresses associated with your site. If you do this, you and other site users can only log in to TaxSlayer Pro Online from the IP addresses you specify.

**NOTE:** If you use this feature, add the office’s IP addresses before you enable the feature. If you do not have any IP addresses whitelisted, no one will have access to the program.

**Adding IP Addresses**

First, add any IP addresses associated with your site. To do this, use the following steps from the Configuration Menu:

1. Click **Select** on the Office IP Whitelist line.

TaxSlayer Pro Online displays the **Edit Office IP Whitelist** page:

2. Type the allowed IP address in the **IP Address** box.
3. Click **Add**.
TaxSlayer Pro Online displays the allowed IP address in the **Whitelisted IP Addresses** section.

4. Repeat the last two steps for all allowed IP addresses.

**Allow Only Whitelisted IP Addresses**

After you add the IP addresses you want to allow, you need to configure TaxSlayer Pro to restrict access to only those. To do this, use the following steps from the **Configuration Menu**:

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

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

![Office Setup](image1)

2. Scroll to the **Office Configuration** section.

TaxSlayer Pro Online displays the **Office Configuration** check boxes:

![Office Configuration](image2)
3. Select the **Force Verification of IP Addresses** check box.

Now, when a user attempts to log in using an IP address that is not in the whitelist, TaxSlayer Pro Online prevents the login and displays a message that you cannot log in from this location.

If you would like to allow the user to log in using that IP address, add it to the whitelist. Otherwise, discuss secure locations with that user.

**Deleting IP Addresses**

If you no longer want to allow access to an IP address, use the following steps from the **Edit Office IP Whitelist** page:

1. Find the applicable IP address in the **Whitelisted IP Addresses** section.
2. Click **Delete** on the line for that IP address.

TaxSlayer Pro Online deletes the IP address.
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 or the site’s Internet service becomes unavailable for an extended period. 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.

Site Administrators can download the desktop application. To do so, use the following steps:

1. Log in to My Account/Account Hub from the VITA/TCE Springboard.
2. Select the appropriate year to download, located as shown below:

   ![Software Options](image)

   TaxSlayer Pro Online begins downloading the setup file:

   ![Setup File](image)
3. When TaxSlayerPro.com completes the download, click the file. Windows displays the InstallShield Wizard for TaxSlayer Pro:

![InstallShield Wizard](image)

4. Complete installation and setup as described in the Installing TaxSlayer Pro Desktop section.

**Tip:** For a complete listing of contingency options, refer to IRS Publication 4396-A, *Partner Resource Guide*. You can download this publication from the Contingency Plan lesson on the Practice Lab.

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 or local Internet 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:

![Welcome to VITA/TCE Practice Lab](image)

To start a new return, use the following steps:

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

TaxSlayer Pro Online displays the **Available Taxpayer Profiles** page:
1. Select a taxpayer profile, or select **Basic (No Profile)** to prepare the return without a taxpayer profile.

2. Click **Enter Social Security Number**.

   Taxslayer Pro Online displays the **Enter Social Security Number** section:

   ![Enter Social Security Number Section](image)

3. Type the taxpayer’s Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN).

4. 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.

5. 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:

**TIP:** If you select *Nonresident Alien* as the filing status, you cannot change back to a resident filing status (i.e. Single, etc.) on the tax return. You will need to deactivate the return and then reactivate using new return data.

**Working in the Return**

*Layout and Links*

Use the left navigation panel to determine your current section of the tax return. The submenu links in the left navigation panel 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, TaxSlayer Pro Online logs you out and displays the Office Client List. 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 for that page.

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 either at the top of the page or on the box:

Click the warning to go to the error and correct it.
Federal AGI and Refund Amount
As you work through the return, TaxSlayer Pro displays the federal and state refund amount:

NOTE: If you have not added a state, TaxSlayer Pro Online displays N/A for the state refund amount. If you have multiple states in the return, TaxSlayer Pro Online rotates the state section between the applicable states, displaying the appropriate refund/balance due information.

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 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, state, and resident 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.

**TIP**: If you selected the Married Filing Separate filing status and the taxpayer does not know the spouse’s Social Security number, type 111-00-1111 to continue to the next page. The taxpayer needs to paper file the return.

**Entering State Information**

When you enter the address, TaxSlayer Pro Online automatically selects the taxpayer’s state from the **Resident State Return** drop-down list and completes the basic state return as you add information to the return.

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 or state 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:

![Basic Information](image)

**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** in the left navigation bar, as shown below:

![Navigation Bar](image)
2. Click **BEGIN** on the **IRS Identification PIN** line.

TaxSlayer Pro Online displays the **IRS Identity Protection Pin** page:

![IRS Identity Protection Pin](image)

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
- 1040 View
- 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*.

**1040 View**

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:

![Image of a tax form]

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:

![Let's look at the money you earned](image)

6. Click **Guide Me**.

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

![Income Guide](image)

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** or select **Income** from the left navigation panel.

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

![Income Page](image)

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 **Taxpayer** menu, 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.
Forms Completed
Forms Completed allows you to quickly navigate through the Federal entry pages you already completed in the return. TaxSlayer Pro Online expands the left navigation panel sections to show the completed entry pages:
Working with Health Insurance Credits
This chapter covers the following actions:

1. Complete the health insurance questionnaire.

With health insurance from the Marketplace or State Exchange, taxpayers must include certain information with the tax return to figure any credit or repayment related to health insurance.

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.
4. Print the state return.

If you did not select a resident state in Basic Information, 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** menu:

![Georgia Return](image)

6. Click **BEGIN** on the line for which you need to add information.
7. Follow the instructions for each line on the page.
8. Continue adding information to the state return as needed based on the taxpayer’s circumstances.

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

**Caution**: Many states have exclusions to vested retirement income. This means a portion or all government (Federal, state, local, or military) retirement income is not taxable. If so, select the Retirement Exclusion Worksheet (in Subtractions) to allocate the nontaxable income based on your state laws.

**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** summary page:

![State Return summary 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:

![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.
Printing the State
TaxSlayer Pro Online displays a printer icon once you exit the state return:

To generate a PDF to review the state portion of the return based on any additional data you entered and TaxSlayer calculations, use the following steps:

1. Click the Printer icon.

TaxSlayer Pro Online generates a PDF of the state portion of the return in a new window:
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.
5. Mark a return as ready to e-file.

**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.

**Note:** Work down the Summary/Print page to review the return using your Quality Review procedures. When you click a line and then return, TaxSlayer Pro Online brings you back to the Summary/Print page.

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**.

**Forms Complete to Review Returns**

After you identify the returns you need to review, you can use the Forms Complete feature to easily review the completed entry forms in that return. To do this, use the following steps:

1. Click **Select** on the line for that return.
TaxSlayer Pro Online displays the return.

2. Click **Federal Section** in the left navigation panel.

3. Click each entry item to review the information.

**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.
Marking a Return for e-file

If you do not have permission to e-file returns, or you do not want to e-file a return now, you can tag the return with Return Tags as a reminder to e-file it later. Use the following steps from the Submission page:

1. Find the **Return Tag(s)** section located above the **Review/Transmit Status** section.

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

2. Select the check box for the **Ready to Transmit** return tag (or other applicable return tag your site uses to designate returns as ready to e-file).

3. Click **Save and Exit Return**.
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.
3. Print a copy of the return at time of IRS acceptance.
4. Print a copy of the state return.
5. Print a single form.

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.

![](image)

3. Select a **Print Set** from the drop-down list.
4. Click **Print Return**.

TaxSlayer Pro Online displays the **Print Results** page with a PDF of the return.

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 **Office Client List** page:

1. Find the client in the list.
2. Click the **Printer** icon.
3. Select a print set from the drop down list.

**Note**: You can select a default print set in Configuration that always displays at the top of the drop-down list.

4. Click **Print Return**.

**Print a Copy of an IRS Accepted Return**

Sometimes, you need to print a return after it is accepted by the IRS, but the return may have been amended since the acceptance. If you need to print a return as it was sent to the IRS and accepted, use the following steps from the **Office Client List** page:

1. Find the client in the list.
2. From the **Tools** drop-down list, select **Client Status**.
TaxSlayer Pro Online displays the information for the return:

3. Select the **Print** icon next to the Federal or State accepted return.

**NOTE:** If an adjustment was made to a return after the site submitted it to the IRS, the preparer or quality reviewer can use this feature to view a PDF of the accepted tax return.

**Print a Copy of the State Return**

After you complete a state return during return preparation, TaxSlayer Pro Online displays a printer icon on the state return grid. You can use this feature to print a copy of the state return. To print the state return, complete the return and then use the following steps:

1. Click the Printer icon next to the state return.
Printing a Single Form
In 2017 and later returns, you can print the following forms as a single form:

- Schedule A
- Schedule B
- Schedule C
- Schedule D
- Schedule R
- Form W-4
- Form 1116
- Form 2441
- Form 5329
- Form 5405
- Form 8606
- Form 8863
- Form 8880
- Form 8962 (Health Care section)
- Form 8965 (Health Care section)

To do so, use the following steps:

1. Navigate to the Income menu.

2. On the line for the form, click Print.

3. Follow the on-screen instructions to view the form in PDF and print if needed.
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:

![Filter by Status](image)

3. Type client information in the **Search Client List** box. You can search the client list using one of the following:
   a. Last 4 digits of Social Security number
   b. Full Social Security number
   c. First or Last Name
   d. Phone number
   e. Preparer
   f. Status

**Note:** TaxSlayer Pro Online only enables the auto-find feature when the site has either:

- Fewer than 1,000 returns, or
- Fewer returns than designated in Office Setup.

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

![TaxSlayer Pro Online User Guide](image)

**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 **MeF Status 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:

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. Review notes entered by the preparer.
4. Review warning messages.
5. Select a federal return type.
6. Enter direct deposit information or split a refund.
7. Confirm ERO information.
8. Verify Form 8879 information.
10. File a Credit Only state return.
11. 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.

Correcting e-file Errors

TaxSlayer Pro Online displays the e-file page, with any errors concerning the return that were not corrected during return preparation:

```
Errors Concerning Your Federal Return

The following errors concerning your Federal return were found.

Our records indicate the Health Insurance section is incomplete. Select Visit to correct this information.

VISIT
```

1. If TaxSlayer Pro Online displays an error on the return, read the error carefully and click Visit for that error.
2. Make corrections to the return to eliminate the error.
3. Click e-File again.
4. 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.

**Reviewing Warnings and Notes**

TaxSlayer Pro Online displays the following:

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

5. Review any warnings.

6. 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.

7. Review your notes. If you need to change something in the return, click the appropriate section in the left navigation bar and make changes.

8. 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.
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 how the taxpayer wants to file the return.

TaxSlayer Pro Online displays additional information depending on your selection.

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

**Entering Direct Deposit Information**
If the taxpayer wants his or her refund directly deposited into a bank account, use the following steps from the **E-File** page:

1. Select **E-file: 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. Type the name of the bank (Optional).
4. Select whether the account is a checking account or savings account.
5. Type the routing transit and bank account numbers in the appropriate boxes. TaxSlayer Pro Online requires that you type these numbers twice for accuracy.
6. Click Next.

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

**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:

![Bank Account Information](image)

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.
5. Type both the routing transit and bank account numbers again. TaxSlayer Pro Online requires that you verify the numbers for accuracy by retyping them.
6. For each account, type the amount the taxpayer wants deposited to that account. If the taxpayer wants part of the refund issued as a paper check, type the appropriate amount in the **Paper Check Allocation** box.

**TIP:** If you only want to deposit the refund into one account, click **Pull Refund**.

**NOTE:** State refunds will be deposited to the account listed on the first line.
7. Scroll down to enter information to purchase savings bonds.

8. Clear the I do not want to purchase this bond check box.
9. Type the amount the taxpayer wants to use to purchase savings bonds. Always use $50 increments.
10. If the taxpayer is not purchasing the bond for himself/herself, type the owner’s name.
11. If necessary, type the name of a co-owner or beneficiary. If a beneficiary, select the Is Beneficiary? check box.
12. 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**.

**TIP:** If you set up multiple EROs to accommodate ad hoc/virtual sites, TaxSlayer Pro Online displays a **Select ERO to Use** drop-down box and defaults to the main location.

Confirming Form 8879 Information
TaxSlayer Pro Online displays the **Tax Preparation and E-File Information** section:

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

2. Click Next.

**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 Knowledge Base 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:
Third Party Designee Information
TaxSlayer Pro Online does not populate the third party designee information when you have the Disable Third Party Designee check box selected in Office Setup. 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.
Consent to Use/Consent to Disclose
TaxSlayer Pro Online displays the Consent to Use and Consent to Disclose pages next. TaxSlayer assigns all sites the Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites for the purposes of taxpayer participation in the Global Carryforward feature.

The following is a sample consent page:

Follow your site procedures when completing the Consent pages. If the taxpayer denies consent, leave the PIN and date blank.

**TIP:** If your site has set up Consents, you must answer them before creating the e-file. If the Consent is marked as Required, and the taxpayer denies the consent, you must paper file the return.

**TIP:** If the filing status is married filing jointly, you are not required to complete the spouse PIN and date information.

**NOTE:** TaxSlayer Pro Online prints the consent forms with taxpayer and spouse signature lines.
Answering Custom Questions
TaxSlayer Pro Online displays the Questions section:

NOTE: For Tax Year 2019, TaxSlayer will assign nine questions to all sites on behalf of the IRS.

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

TIP: If your site or group administrator marked a question as Required, you must answer the question to continue. If you select BACK before you answer the required questions, TaxSlayer Pro Online does NOT save any of the data entered on this page.

2. Click Next or Save.

State ID
Some states require the taxpayer/spouse state ID for electronic filing. The state typically uses this information as part of their identity protection programs. If the state ID is required, complete the information in this section before you click Save.
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 section, 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 in the **Return Information** 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.

   **TIP:** You cannot select both **Is Complete** and **Ready for Review**.

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:

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 an **E-file option** from the **Federal Return Type**. You must select from this drop-down list even if you are not electronically filing the federal return.
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:

- Select the check box(es) for the returns you want to transmit.

Note: To sort columns within the Transmissions menu, click the column header.

TIP: Review the state columns for the filing status of the state return. In this view, TaxSlayer Pro Online displays the first state listed in the return. If the preparer marked the state for paper filing, TaxSlayer Pro Online displays the No Electronic State status.

3. If you want to select all returns, click Check All.
4. If you have rejected returns that you did not mark **Ready to Retransmit** on the **Submission** page 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.

**TIP:** To automatically add returns that have been corrected and are ready to retransmit, select the **Ready for Retransmit** check box on the return’s **Submission** page.

6. Click **Add Returns**.
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:

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 validation error.

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 Office Reporting page:

1. Click Transmission Reports to expand the list.
2. Click either Federal or State to expand the category.
3. Click Select on either the IRS Acknowledgements or State Acknowledgements line.

TaxSlayer Pro Online displays the IRS Acknowledgements page, listing all acknowledged returns that have not previously been viewed:
4. 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.

5. Print your acknowledgement report. Click **Print PDF**.

6. 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.

7. 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 Reporting** page:

1. Click **Transmission Reports** to expand the category.
2. Click **Federal** to expand the category.
3. Click **Select** on the **Validation Errors** line.

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

4. 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.

**Using Rejected Clients**

To quickly review all outstanding IRS rejected returns, state rejected returns, and validation errors, use the following steps from the Welcome page:

1. Click the Rejected Clients button.

TaxSlayer Pro Online displays the Rejects and Validation Errors page:

2. Select the year from the drop-down list.
   
   **TIP:** TaxSlayer Pro Online defaults to the current year.

3. Select Rejects or Validation errors from the drop-down list.
   
   **TIP:** TaxSlayer Pro Online defaults to search for rejected returns.
TaxSlayer Pro Online displays any outstanding IRS and state rejections or outstanding validation errors, depending on your selection:

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

1040 View – Entry method that allows the preparer to click the dollar amount associated with a specific line item to access the associated entry form

Assigned Questions – Custom questions and answer banks assigned to a site by TaxSlayer or multi-site administrator; they cannot be modified or deleted

Assigned Security Templates – Security templates assigned to a site by TaxSlayer or a multi-site administrator; they cannot be modified or deleted

Assigned Taxpayer Profiles – Taxpayer profiles assigned to a site by TaxSlayer or a multi-site administrator; they cannot be modified or deleted

Cancel Button – This button takes the preparer to the previous screen

Change Preparer – Assign a return to a different preparer than the one who initially created the return; the site administrator enables privacy settings through Security Templates

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

Client Return History – A list of specific actions taken when the preparer saves and exits the return through the e-file section, including: user name, log time, preparer, ERO, taxpayer’s Social Security number, state return, RTN and other return information

Client Search – Search for returns at your site through various filtering options

Client Status – Displays the taxpayer’s Social Security number, phone numbers, address, Federal return type, IRS Transaction date, and Reject information

Complete – An option selected in the e-file section when the return passes review and is ready to be e-filed; Complete returns are available for transmission to the Processing Center
**Configuration** – A TaxSlayer menu including Office Setup, ERO setup, Preparer Setup, Security Templates, Question Templates, Taxpayer Profiles, Print Sets, and Return Tags

**Contingency Plan** – TaxSlayer Pro, also referred to as *Desktop*, to be utilized in the rare occasion that TaxSlayer Pro Online is unavailable or the site loses internet for an extended period of time

**Continue button** – In the Federal section, this button saves information and allows the preparer to proceed to the next screen

**Consent** – A form the taxpayer (and spouse, if applicable) signs giving the preparer permission to use or disclose tax information for a specific purpose

**Custom Credits** – Credits you can add to the E-File page of a tax return to be tracked in reports

**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.

**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 IP Whitelist – A custom list of IP addresses that are allowed to access TaxSlayer Online for your site

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.