



TAX SOFTWARE USER GUIDE



2019.20 Training

Electronically Filing a Return

Creating the e-file

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Creating the e-file

After completing this topic, you will be able to:

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.
9. Save and exit the return.


Running e-file Validation

When you finish preparing the information in the return, you can prepare the return for e-file. To do so, use the following steps from the open return:

1. Click **e-File** in the left navigation bar.

TaxSlayer Pro Online displays the e-file page, with any errors concerning the return:

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](#)

2. If TaxSlayer Pro Online displays an error on the return, read the error carefully and click **Visit** for that error.
3. Make corrections to the return to eliminate the error.
4. Click **e-File** again.
5. 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:

Warnings Concerning Your Federal Return

 The following warnings concerning your Federal return were found.

- You indicated that you paid taxes to GA on your W-2, but you are not filing a GA state return. To add a state return, select the button below and follow the instructions to add your state return.

[ADD STATE RETURN\(S\)](#)

You have the following sticky notes in your account.

- *Sample Note*
- Notes display in the warning section of the return and can be reviewed by the Quality Review team

6. Review any warnings.
7. 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.
8. Review your notes. If you need to change something in the return, click the appropriate section in the left navigation bar and make changes.
9. 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:

E-File

Return Type

Your return is now ready to be e-Filed to the IRS.

⚠ Please make sure that all information you enter below is correct.

In order for us to transmit your client's return to the IRS you must complete all Steps in the e-File Process.

CAUTION: Your client's return will not be sent to the IRS unless you complete ALL steps. None of the information is saved until all information is entered and the "Continue" button below is clicked.

To continue the e-File process, please first select a return type and the form will ask for all required information.

Refund summary

Federal Return Type

Please Select

First, complete the **Return Type** section. To complete this section, use the following steps:

1. From the **Federal Return Type** drop-down list, select which of the following the taxpayer wants to do:
 - a. Electronically file the return and receive a paper check for the refund (**E-file: Paper Check**)
 - b. Electronically file the return and receive a direct deposit for the refund (**E-file: Direct Deposit**)
 - c. Mail the return and receive a paper check (**Paper Return**)
 - d. Mail the return and receive a direct deposit for the refund (**Paper Return with Direct Deposit**)

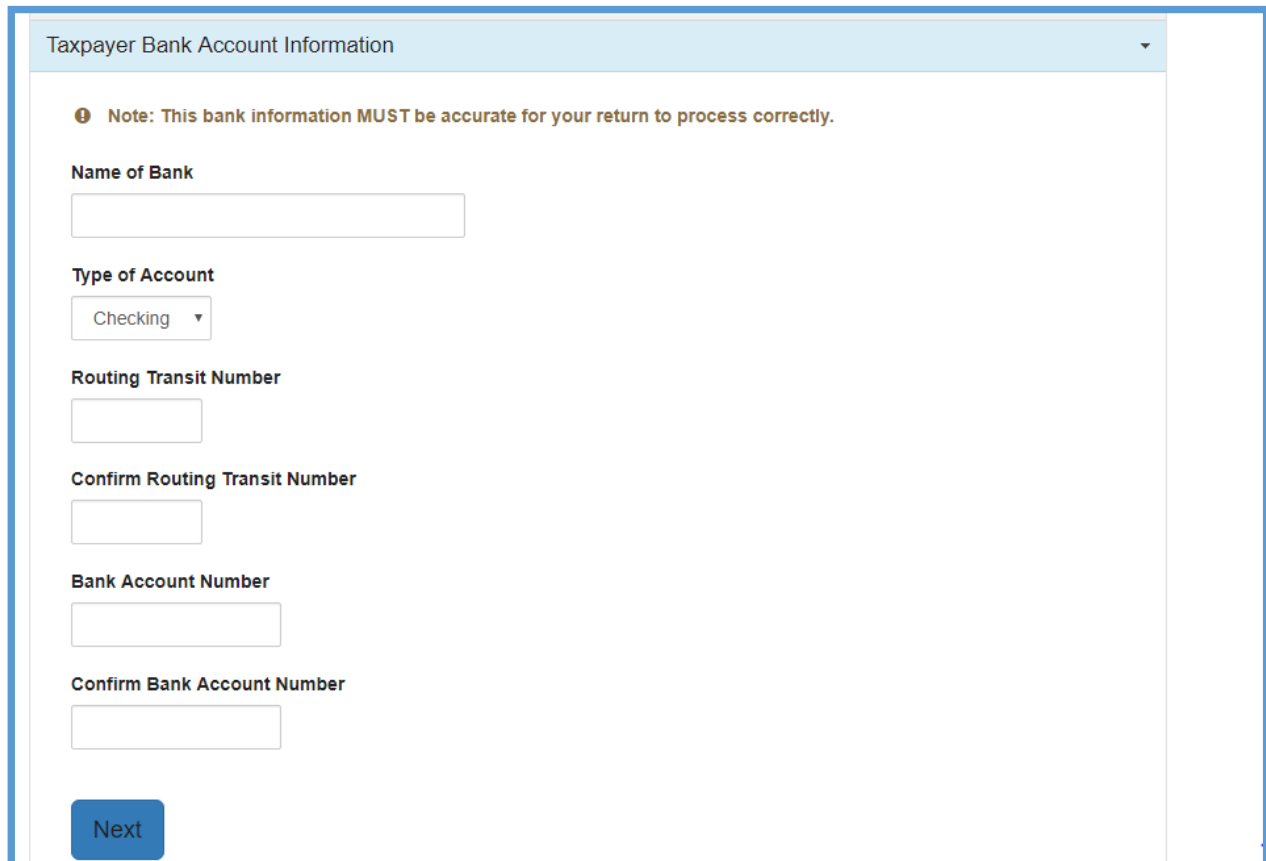
TaxSlayer Pro Online displays additional information depending on your selection.

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:



The screenshot shows a web form titled "Taxpayer Bank Account Information". At the top, there is a note: "Note: This bank information MUST be accurate for your return to process correctly." Below the note are several input fields: "Name of Bank" (text box), "Type of Account" (dropdown menu with "Checking" selected), "Routing Transit Number" (text box), "Confirm Routing Transit Number" (text box), "Bank Account Number" (text box), and "Confirm Bank Account Number" (text box). At the bottom left of the form is a blue "Next" button.

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:

You may split your refund in up to 3 accounts, paper check and purchase up to 3 savings bonds. The total deposits and savings bond purchases must equal your total refund of \$2,772.00

Bank Accounts

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

Bank Account 1

Account Type Checking ▾	Bank Name <input type="text"/>	Deposit Amount \$ 0.00	Pull Refund
Routing Number <input type="text"/>	Account Number <input type="text"/>		
Confirm Rtn Number <input type="text"/>	Confirm Account Number <input type="text"/>		

Bank Account 2

Account Type Checking ▾	Bank Name <input type="text"/>	Deposit Amount \$ 0.00
----------------------------	-----------------------------------	---------------------------

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

Purchase Savings Bonds

You can purchase up to 3 savings bonds with the remainder of your refund.

Bond amounts must be in \$ 50 increments

Purchase A Bond I do not want to purchase this bond

Amount to be used for bond purchase for yourself

Purchase another bond for yourself or someone else I do not want to purchase this bond

Bond Amount

Enter the owner's name (First then Last) for the bond registration

If you would like to add a co-owner or beneficiary, enter the name here (First then Last)

Is Beneficiary?

Purchase another bond for yourself or someone else I do not want to purchase this bond

Bond Amount

Enter the owner's name (First then Last) for the bond registration

If you would like to add a co-owner or beneficiary, enter the name here (First then Last)

Is Beneficiary?

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:

ERO Information

Efin Number
000000

ERO Name
MAIN SITE

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

Confirming Form 8879 Information

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

Client Email

Taxpayer's PIN

Spouse 's PIN

ERO's PIN

Next

3. In the **Pin Numbers** section, review the taxpayer, spouse, and ERO PINs.
 - a. TaxSlayer Pro Online automatically defaults the ERO PIN to 98765, as discussed in the *Configuring TaxSlayer Pro Online* lessons.
4. Complete any necessary information in the **State Return(s)** section. See the *Electronically Filing States* lesson in this section for information on completing this section.
5. Click **Next**.

Third Party Designee Information

TaxSlayer Pro Online does not populate the third party designee information when you have the **Disable Third Party Designee Prefill** 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.

Third Party Designee Info

This information is optional

First Name

Designee Last Name

Designee Phone
() -

Designee Pin

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:

Examples of Taxpayer Information: - your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address and sources of income, deductions and credits claimed on the tax return.

Dependent Information includes, but not limited to: - The name, SSN, date of birth, and relationship of any dependent claimed on the tax return.

Limitation of the Duration of Consent: - I, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above. If I wish to limit the duration to an earlier date, I will deny consent.

Limitation of the Scope of Disclosure: - I, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I wish to limit the scope of the disclosure of tax return information further, I will deny consent.

Explanation of Denial - Taxpayer does not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA/TCE Site next year.

Consent Status

I / we, the Taxpayer have read the above information. By typing in my / our taxpayer PIN(s) and checking this input, I / we hereby **GRANT** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites" as stated above.

I / we, the Taxpayer have read the above information. By checking this input, I / we hereby **DENY** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites" as stated above.

Primary PIN (enter 5 numbers)

Primary PIN Date

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.

NOTE: TaxSlayer Pro Online prints the Consent forms with taxpayer and spouse signature lines.

Answering Custom Questions

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

Questions

1. Other than English what language is spoken in your home?
2. Are you or your spouse a Veteran from the US Armed Force?
3. Do you or any member of your household have a disability?
4. Was this return prepared using a Virtual or Drop-Off method?

Note: TaxSlayer will assign five questions to all sites for Tax Year 2018.

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

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

7. Click **Next** or **Save**.

Completing the Submission Page

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

Submission

Please review all information on this screen. To finalize your return please click on the submit button located below.

MASTER PRINT ▾

Print Return

ERO Information

EFIN	██████████
Company Name	MAIN SITE

Client Information

Client Name	████████████████████
Primary Email Address	

Print

If you want to print the return now, use the following steps:

1. Select the print set you want from the drop-down list.
2. Click **Print Return**.

TaxSlayer Pro Online displays the return in a separate window as a PDF:

The screenshot shows a web browser window with the URL <https://vita.taxslayerpro.com/ProAvalon/Print/PrintResult>. The form is for the 2016 tax year. The filer's name is NAVIGATING CHECKLIST, and the last name is DECEASED. The date of death is 02/17/2016. The address is 3205 GARDEN LAKES BLVD, ROME, GA 30165-3016. The filing status is Married filing jointly. Exemptions include the filer and a spouse. Income reported includes wages of 58000, taxable interest of 1999, and tax-exempt interest of 1999.

3. Click the **Print** icon at the top left to print the return.

Reviewing Information

Review the following sections on this page:

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

Next Steps

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

1. Scroll to the bottom of the page.

TaxSlayer Pro Online displays the sections of the page:

Type of Return	E-file: Paper Check
Federal Refund	\$2,772.00
Is Complete	<input type="checkbox"/>
Invoice Paid	<input type="checkbox"/>
Tax Preparation Charges	
<hr/>	
Total Preparer Fee	\$0.00
Electronic Filing Fee	\$0.00
<hr/>	
Total Fee	\$0.00
Return Tag(s)	
<hr/>	
<input type="checkbox"/> Add Missing Information	<input type="checkbox"/> Contacted Taxpayer
<input type="checkbox"/> JAN 11	<input type="checkbox"/> JAN 12
Review/Retransmit Status	
<hr/>	
Ready for Retransmit	<input type="checkbox"/>
Ready For Review	<input type="checkbox"/>
<hr/>	
<input type="button" value="Save And Return"/> <input type="button" value="← Back"/> <input type="button" value="Save And Exit Return"/> <input type="button" value="Save And Transmit Return >"/>	

2. Do one of the following:

- If the return is complete and ready to be e-filed, select the **Mark Complete** check box in the **Return Information** section.
- If another person needs to review the return before it can be marked complete, select the **Ready for Review** check box at the bottom of the page.

3. Click **Save and Exit Return**.

TIP: Click **Save and Return** to return to the **Summary/Print** page.

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