TAX SOFTWARE USER GUIDE

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2019.20 Training

Electronically Filing a Return

Creating the e-file

Contents

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:

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:

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**)
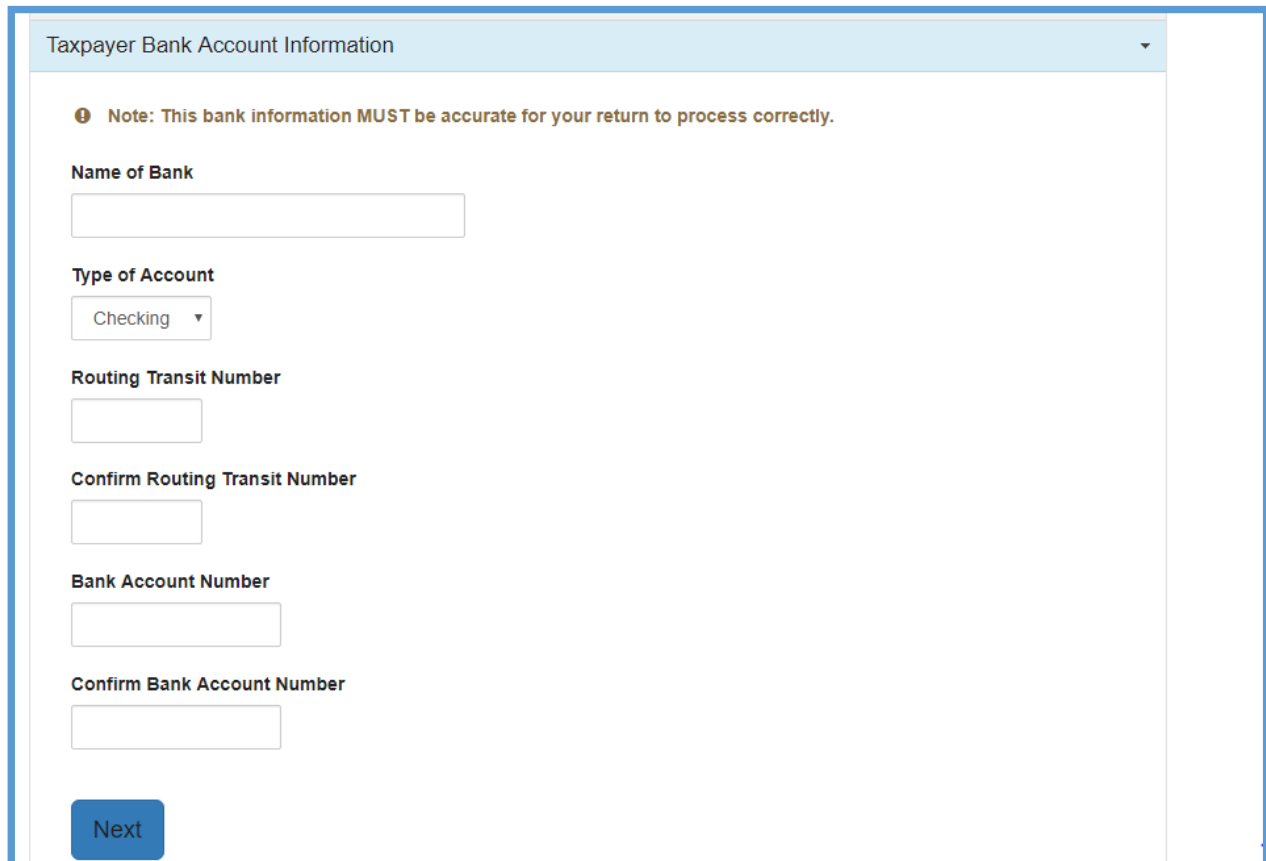   d. Mail the return and receive a direct deposit for the refund (**Paper Return with Direct Deposit**)

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:

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:

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:

> **ERO Information**
>
> **Efin Number**
>
> **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
10102

Spouse 's PIN
18503

ERO's PIN
98765

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**.

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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.

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.

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?	Please Select ▾
2. Are you or your spouse a Veteran from the US Armed Force?	Please Select ▾
3. Do you or any member of your household have a disability?	Please Select ▾
4. Was this return prepared using a Virtual or Drop-Off method?	Please Select ▾

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**.

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VITA/TCE

Completing the Submission Page

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

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:

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	☐
Invoice Paid	☐

Tax Preparation Charges

Total Preparer Fee	$0.00
Electronic Filing Fee	$0.00
Total Fee	$0.00

Return Tag(s)

☐ Add Missing Information   ☐ Contacted Taxpayer   ☐ JAN 11   ☐ JAN 12

Review/Retransmit Status

Ready for Retransmit	☐
Ready For Review	☐

Save And Return   ‹ Back   Save And Exit Return   Save And Transmit Return ›

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 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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