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# TAX SOFTWARE USER GUIDE



## **Entering Payments and Estimates**

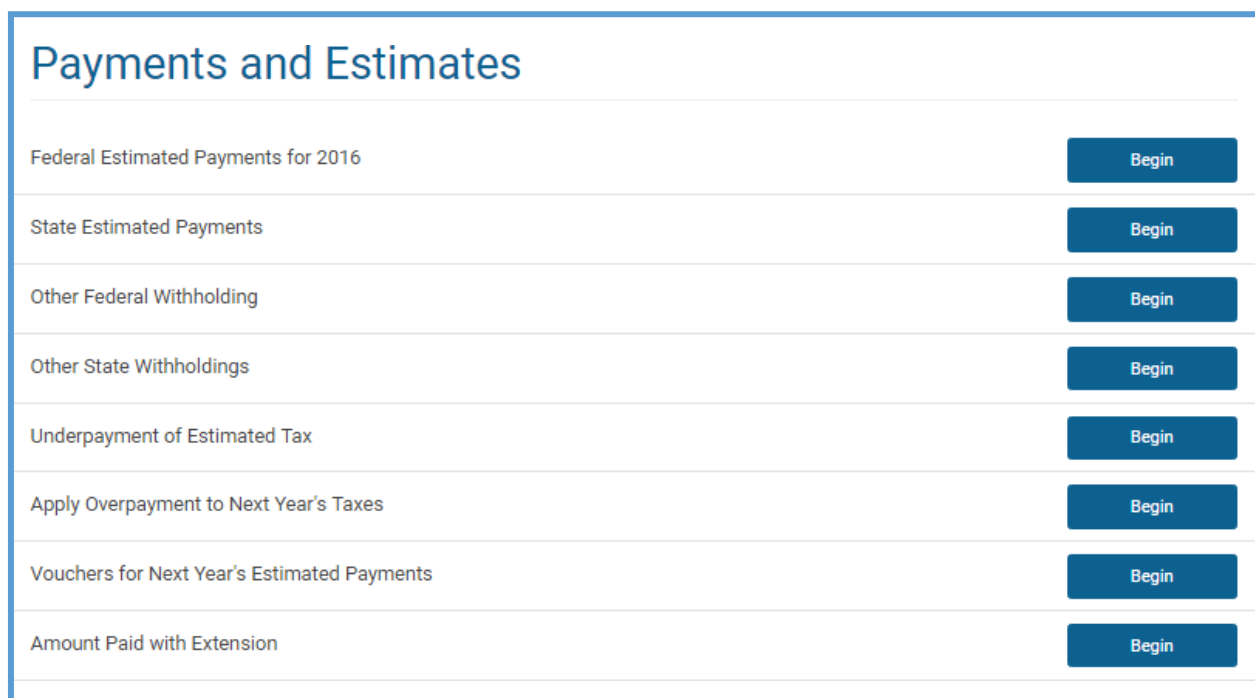
**After completing this topic, you will be able to:**

- ✓ Enter federal estimated tax payments.
- ✓ Enter state estimated tax payments.
- ✓ Enter other federal withholding.
- ✓ Figure an underpayment of estimated tax.
- ✓ Complete estimated tax vouchers.
- ✓ Complete any miscellaneous forms.

## Entering Federal Estimated Tax Payments

Some taxpayers pay Federal estimated tax payments during the year. If the taxpayer did so, you can add those to the return so the taxpayer gets credit for paying the estimated payments. To add these payments, use the following steps:

1. Find the **Payments and Estimates** page, as shown below:



Payments and Estimates	
Federal Estimated Payments for 2016	Begin
State Estimated Payments	Begin
Other Federal Withholding	Begin
Other State Withholdings	Begin
Underpayment of Estimated Tax	Begin
Apply Overpayment to Next Year's Taxes	Begin
Vouchers for Next Year's Estimated Payments	Begin
Amount Paid with Extension	Begin

2. Click **BEGIN** on the **Federal Estimated Payments** line.

**1040 View:** Click Line 65 to link to the **Payments – Estimated Payments** page.

TaxSlayer Pro Online displays the **Payments – Estimated Payments** page:

## Payments - Estimated Payments

Amount Applied from Prior Year Refund

\$|

Estimated Federal Tax Paid(4/15/2016)

\$

Estimated Federal Tax Paid(6/15/2016)

\$

Estimated Federal Tax Paid(9/15/2016)

\$



Estimated Federal Tax Paid(1/15/2017)

\$

3. Type the amount of any payments the taxpayer applied to estimated taxes from the previous year's refund in the first box.
4. In the remaining boxes, type the amount of any estimated tax payment in the appropriate box based on the payment date.
5. Click **Continue**.

TaxSlayer Pro Online displays the **Payments and Estimates** page listing the estimated tax payments you entered:

Payments and Estimates	
Total Payments	Prior Year
\$400.00	\$0.00

6. Click **Continue**.

## Entering State Estimated Tax Payments

Some taxpayers pay state estimated tax payments during the year. To add state estimated tax payments, use the following steps from the **Payments and Estimates** page:

1. Click **BEGIN** on the **State Estimated Payments** line.

TaxSlayer Pro Online displays the **Payments – State Estimated Payments** page:

## Payments - State Estimated Payments

Amount Applied from Prior Year Refund

Estimated State Tax Paid on(4/15/2016)

Estimated State Tax Paid on(6/15/2016)

Estimated State Tax Paid on(9/15/2016)



Estimated State Tax Paid ON or BEFORE(12/31/2016)

Estimated State Tax Paid AFTER(12/31/2016)

State Name \*

2. Type the amount of any payments the taxpayer applied to estimated taxes from the previous year's refund in the first box.
3. In the remaining boxes, type the amount of any estimated tax payment in the appropriate box based on the payment date.
4. Select the state to which the taxpayer paid these payments from the **State Name** drop-down list.
5. Click **Continue**.

TaxSlayer Pro Online displays the **State Estimated Payment** page listing the estimated tax payments you entered:

State	Total Payments	Prior Year	
GA	\$400.00	\$0.00	 

6. If the taxpayer made estimated tax payments to more than one state, click **Add** for each state and use the same steps to add estimated tax payments for that state.
7. Click **Continue**.

## Entering Other Federal Withholdings

Some taxpayers pay other withholdings to the IRS during the year. If the taxpayer did so, you can add those to the return so the taxpayer gets credit for paying that tax. To add federal withholdings not listed elsewhere on the return, use the following steps from the **Payments and Estimates** page:

1. Click **BEGIN** on the **Other Federal Withholding** line.

TaxSlayer Pro Online displays the **Other Federal Withholdings** page:

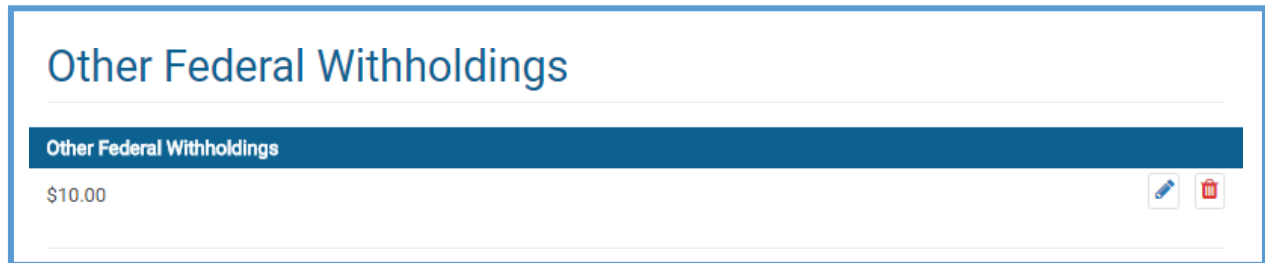
Note: Do not enter amount from W-2, W-2G, 1099-R, or 1099-G (unemployment)

Amount of other federal withholding \*

Check here if this withholding is from a 1099

2. Type the amount of federal withholdings you have not previously entered in the tax return.
3. If the withholding is from a Form 1099, select the check box.
4. Click **Continue**.

TaxSlayer Pro Online displays the **Other Federal Withholdings** page with the withholding listed:



Other Federal Withholdings

Other Federal Withholdings

\$10.00

5. Click **Continue**.

## Calculating an Underpayment of Estimated Tax

If the taxpayer did not pay enough tax during the year, either through withholdings or estimated tax payments, TaxSlayer Pro Online displays a warning during the e-file process.

**NOTE:** Continue through the warning **without** adding Form 2210. Calculating the underpayment of estimated tax penalty is out of scope.

## Creating Estimated Payment Vouchers

Some taxpayers need to pay estimated tax payments each year, and want you to create the vouchers they need to use to make those payments. To create estimated tax payment vouchers, use the following steps from the **Payments and Estimates** page:

1. Click **BEGIN** on the **Vouchers for Next Year's Estimated Payments** line.

TaxSlayer Pro Online displays the **Estimated Payments for Next Year** page:

### Estimated Payments for Next Year

First Quarter(April 15, 2017)  
\$

Second Quarter(June 15, 2017)  
\$

Third Quarter(September 15, 2017)  
\$

Fourth Quarter(January 15, 2018)  
\$



2. Type the amount of estimated payment for each quarter in the appropriate box.

**TIP:** Use the IRS instructions for Form 1040-ES to figure the amount of estimated tax the taxpayer needs to pay for each quarter. You can use their total tax minus payments on this year's return as a guide.

3. Click **Continue**.

TaxSlayer Pro Online displays the **Set of Estimated Payment Vouchers for Next Year** page:

### Set of Estimated Payment Vouchers for Next Year

First Quarter	Second Quarter	Third Quarter	Fourth Quarter	
\$25.00	\$25.00	\$25.00	\$25.00	 

4. Click **Continue**.

# Adding Miscellaneous Forms

In some cases, you need to complete other forms for a taxpayer. This can include an application for an extension, application for an ITIN, or you may need to enter an Identity Theft PIN for IRS identification. To do this, use the following steps:

1. From the Federal Section, click **Miscellaneous Forms** from the left navigation panel.

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

Form Name	Action
Injured Spouse Form Form 8379	Begin
Claim a Refund Due to a Deceased Taxpayer Form 1310	Begin
Application for Extension Form 4868	Begin
Married Filing Separately Allocations Form 8958	Begin
IRS Identification Pin	Begin
Installment Agreement Form 9465	Begin
Application for ITIN Form W-7	Begin
Power of Attorney and Declaration of Representative Form 2848	Begin

**TIP:** To complete Form W-7, *Application for ITIN for Person(s)* in a return, type *000-00-0000* for the taxpayer's Social Security number in Basic Information.

## IRS Identity Protection PIN

**NOTE:** In this example, we cover adding IRS Identity Protection PINs. If you need to add another miscellaneous form, click **BEGIN** on the line for that form and complete the information on the new page.

2. Click **BEGIN** on the **IRS Identification Pin** line.



TaxSlayer Pro Online displays the **IRS Identify Protection Pin** page, listing the taxpayer, spouse, and any dependents you listed in the taxpayer's basic information:

## IRS Identity Protection Pin

If you have received a notice from the IRS containing an Identity Theft Pin please enter the Pin here in order to ensure that your tax return is processed without delay.





SINGLE

CHILD RETURN

3. Type the identity protection PINs as issued by the IRS in the appropriate boxes.
4. When you finish typing identity PINs, click **Continue**.

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

## IRS Identity Protection Pin

Name	SSN	IRS Identity Protection Pin	
SINGLE		XXX522	 
CHILD RETURN		No Pin Entered	 

5. Review the information you entered and click **Continue**.

## Summary

You should now be able to:

- Enter federal estimated tax payments.
- Enter state estimated tax payments.
- Enter other federal withholding.
- Figure an underpayment of estimated tax.
- Complete estimated tax vouchers.
- Complete any miscellaneous forms.

To see a video of what you just learned, go to [Entering Payments and Estimates](#). Note that videos are updated each Fall. Use the information in this user guide for the most current steps.