



TAX SOFTWARE USER GUIDE



Preparing a Return

*Searching for Existing
Taxpayers*

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Searching for Existing Taxpayers

After completing this topic, you will be able to:

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 a completed 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:

Office Client List

2016 Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: Any Tag

Do Not Show Deactivated Returns

Date From: mm/dd/yyyy

Date To: mm/dd/yyyy

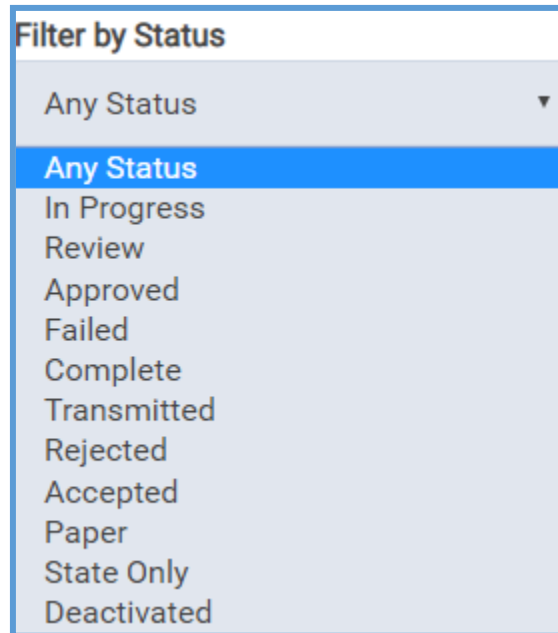
Search Client list

Show 10 entries

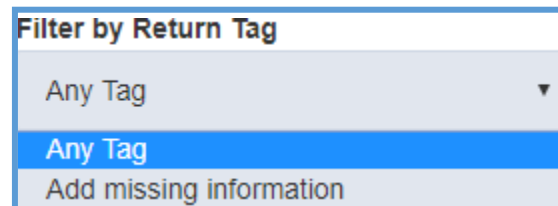
Showing 1 to 10 of 328 entries (filtered from 345 total entries)

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	
000-00-0001	test		(706) 986-7484		In Progress	Tools Select

2. To filter returns by status, select an option from the **Filter by Status** drop-down list, as shown below:



3. To filter by return tag, select an option from the **Filter by Return Tag** drop-down list, as shown below:



4. If you want to filter by dates, select the starting and ending dates from the appropriate boxes.
5. Type client information in the **Search Client list** box. You can search the client list using one of the following:
 - a. Full Social Security number
 - b. Last 4 digits of Social Security number
 - c. First Name
 - d. Last Name
 - e. Phone number
 - f. Preparer
 - g. Status

Note: TaxSlayer Pro Online only enables the auto-find search feature when the site has less than 500 returns.

TIP: If you need to find a return that you previously deactivated, clear the **Do Not Show Deactivated Returns** check box.

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

The screenshot shows a search interface with the following elements:

- Search Client list: Kim Site Admin
- Show 10 entries
- Showing 1 to 10 of 65 entries (filtered from 102 total entries)
- Navigation: Previous, 1, 2, 3, 4, 5, 6, 7, Next
- Table with columns: SSN, FIRST, LAST, PHONE, PREPARER, STATUS, and a Tools/Select button.

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	Tools	Select
000-00-0001	testing	rhode island	(706) 222-3333	Kim Site Admin	In Progress	Tools	Select
103-00-0418	SAMPLE	RETIREMENT	(706) 222-2222	Kim Site Admin	In Progress	Tools	Select

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:

The screenshot shows a search interface with the following elements:

- Search Client list: 117001717
- Show 10 entries
- Showing 1 to 1 of 1 entries (filtered from 345 total entries)
- Navigation: Previous, 1, Next
- Table with columns: SSN, FIRST, LAST, PHONE, PREPARER, STATUS, and a Tools/Select button.

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	Tools	Select
117-00-1717	Taxpayer	Example	(565) 645-4564	[REDACTED]	In Progress	Tools	Select

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

TaxSlayer Pro Online displays the **Summary/Print** page for the return:

Form **1040** Department of the Treasury—Internal Revenue Service (99) **20** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1-Dec. 31, 2016, or other tax year beginning , 2016, ending , 20 See separate instructions.

Your first name and initial Last name
John W Doe

If a joint return, spouse's first name and initial Last name
Jane E Doe

Home address (number and street). If you have a P.O. box, see instructions. Apt. no.
123 Willow Lane

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).
Augusta GA 30389

Foreign country name Foreign province/state/country Foreign postal code

Filing Status

1 Single 4 Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶

2 Married filing jointly (even if only one had income)

3 Married filing separately. Enter spouse's SSN above and full name here. ▶

5 Qualifying widow(er) with dependent child

Check only one box.

Exemptions

6a Yourself. If someone can claim you as a dependent, do not check box 6a. } Boxes checked on 6a and 6b 2

b Spouse } No. of children on 6c who: - lived with you 1

c **Dependents:** (2) Dependent's social security number (3) Dependent's relationship to you (4) if child under age 17 qualifying for child tax credit (see instructions)

(1) First name Last name Molly Doe XXXX XX 1414 Daughter

If more than four dependents, see instructions and check here ▶

d Total number of exemptions claimed 3

Income

7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 35,000.00

8a Taxable interest. Attach Schedule B if required 8a 100.00

b Tax-exempt interest. Do not include on line 8a 8b 25.00

9a Ordinary dividends. Attach Schedule B if required 9a 0.00

Attach Form(s) W-2, 1099, etc.

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:

Search Client list 117001717

Show 10 entries

Showing 1 to 1 of 1 entries (filtered from 345 total entries)

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	
117-00-1717	Taxpayer	Example	(565) 645-4564	[REDACTED]	In Progress	Tools Select

1. From the **Tools** drop-down list, select **Client Status**.

TaxSlayer Pro Online displays the **Client Status** page with detailed client and dependent information:

Client Status

EFIN [REDACTED] | Preparer Name [REDACTED]

Client Information

Primary TERISA [REDACTED] [REDACTED] 9223)

Primary DOB 1/31/1995

Home Phone [REDACTED] 9693

Cell Phone

Address 637 EAST 82ND STREET, [REDACTED]

Enter Return

Federal Information	State Information
IRS Code Accepted	State Agency NY
Return Type 1040A	State Code Accepted
Disbursement Direct Deposit	Form Type IT203
Transmitted To IRS 6/20/2017 7:04:52 AM	Disbursement Direct Deposit
Received Ack from IRS 6/20/2017 7:14:53 AM	Transmitted To State 6/20/2017 7:15:00 AM
Submission ID [REDACTED] 68411	Received Ack 6/20/2017 11:09:04 PM
Times Sent 1	Submission ID [REDACTED] 4750
Federal Refund/Balance \$765.00	Times Sent 1
Federal Deposit \$0.00	State Refund/Balance \$559.00
Direct Debit Received No	State Deposit \$0.00
Fed Ack Outstanding No	Direct Debit Received No
	State Ack Outstanding No

Dependent(s)

SSN	First Name	Last Name	Date of Birth	Relationship
[REDACTED] 2874	JUSTIN	[REDACTED]	11/18/2015	SON

2. Review the return history in the **MeF Status History** 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 **Federal Information** section, you can find information on the type of return, date sent, and other information, as shown below:

Federal Transmissions								
State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Return Type	...
FD	4/4/2018 6:19:51 PM	4/4/2018 6:30:18 PM	2640332	[REDACTED]	Accepted	\$755.00	1040A	

State Transmissions								
State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Form Type	...
CT	4/4/2018 6:32:58 PM	4/5/2018 3:15:32 AM	2640332	[REDACTED]	Accepted	\$0.00	CT1040	

MeF Status History						
State	Sent Date	Batch ID	Submission ID	Status	Type	
CT	4/5/2018 3:15:32 AM	2640332	[REDACTED]	acknowledged	1040A	
FD	4/4/2018 6:30:14 PM	2640332	[REDACTED]	acknowledged	1040A	

TaxSlayer Pro Online shows whether the IRS or State accepted or rejected the return in the **Federal Transmissions** and **State Transmissions** sections. If the IRS rejected the return, you can also find explanations for the rejection in this section of the **Client Status** page.

Federal Transmissions								
State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Return Type	
FD	2/23/2018 5:31:20 PM	2/23/2017 5:40:39 PM	1036951	[REDACTED]	36951 Rejected	\$2,337.00	1040A	

Transmission Details		Collapse
Reject Code: IND-181-01 Category: Database Validation Error Severity: Reject and Stop		
The Primary Taxpayer did not enter a valid Identity Protection Personal Identification Number (IP PIN). Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number.		
*** Additional Information: xxx-xx7899 ***		

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