



TAX SOFTWARE USER GUIDE



Preparing a Return

Starting a Tax Return

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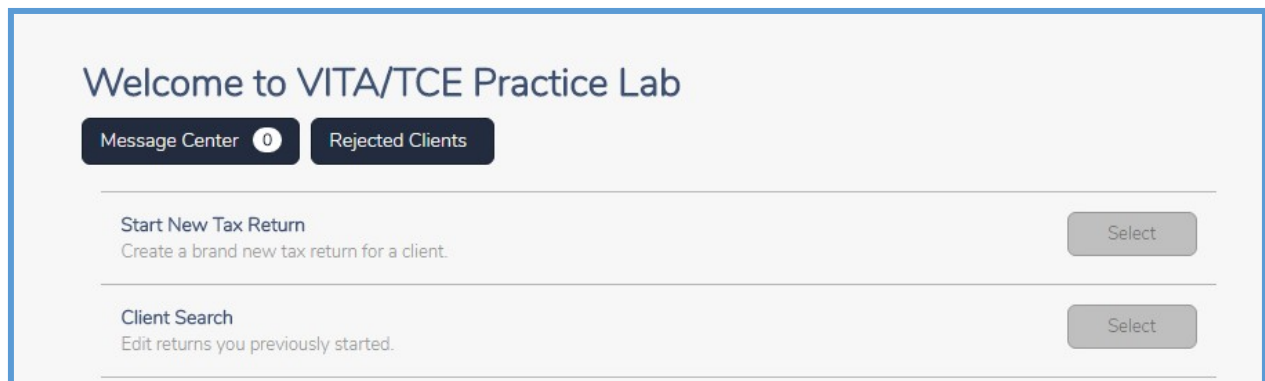
Starting a Tax Return

After completing this topic, you will be able to:

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:



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:

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Enter Social Security Number

Start Return

2. Select a taxpayer profile. For this lesson, select **Basic**.
3. Click **Enter Social Security Number**.

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

Available Taxpayer Profiles

Enter Social Security Number

Social Security Number

... - .. -

Confirm Social Security Number

... - .. -

Start Return

4. Type the taxpayer's Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN).
5. 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.
6. 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. For more information on taxpayer profiles, see the *Entering Basic Income* lesson.

TaxSlayer Pro saves the new return and displays the **What's your filing status** page:

What's your filing status?

Single

Married Filing Joint

Married Filing Separate

Head of Household

Qualifying Widow(er) with Dependent Children

Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

Desktop Tip: If you use the TaxSlayer Pro desktop application, TaxSlayer Pro verifies the primary Social Security number or ITIN when you type the taxpayer information on the **Personal Information Entry** menu.

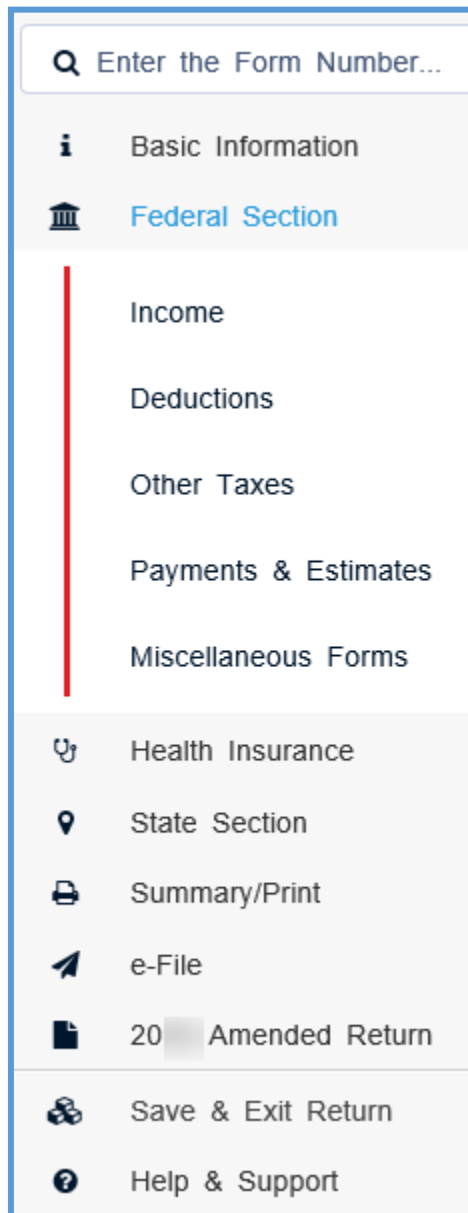
TIP: If you select **Nonresident Alien** select a nonresident filing status, you cannot change back to a resident filing status (i.e. Single, etc.) on the tax return.

Working in the Return

Layout and Links

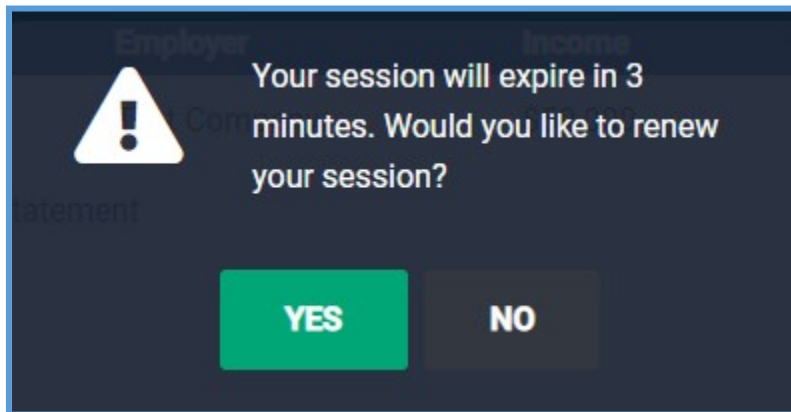
Use the left navigation panel to determine your current section of the tax return. The sub-menu links in the left navigation panel show you more detail on the section.

If you need to close the return, click **Save & Exit Return** at the left.



Session Expiration

If you are inactive for 17 minutes, TaxSlayer Pro Online displays a warning:

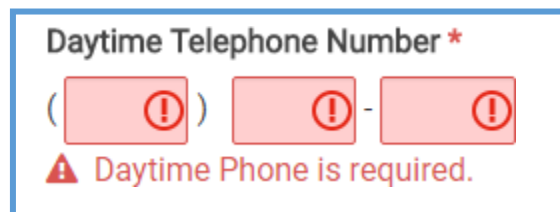


Click **Yes** to remain logged in. If you do not click **YES** within the three minutes, TaxSlayer Pro Online logs you out and displays the Office Client List. You will need to log in again.

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.

Required Information

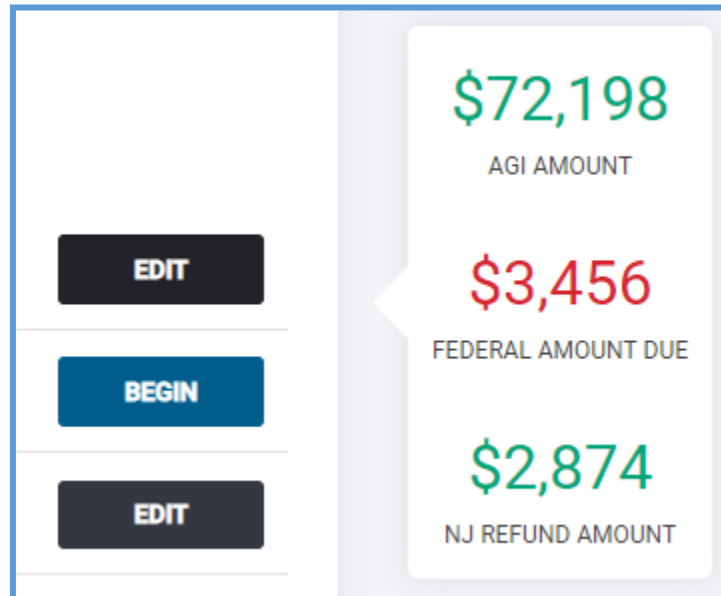
If you do not complete a required box on the page and attempt to continue to the next page, TaxSlayer Pro Online displays a warning in red either at the top of the top of the page or on the box:



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 AGI, federal and state refund amount:



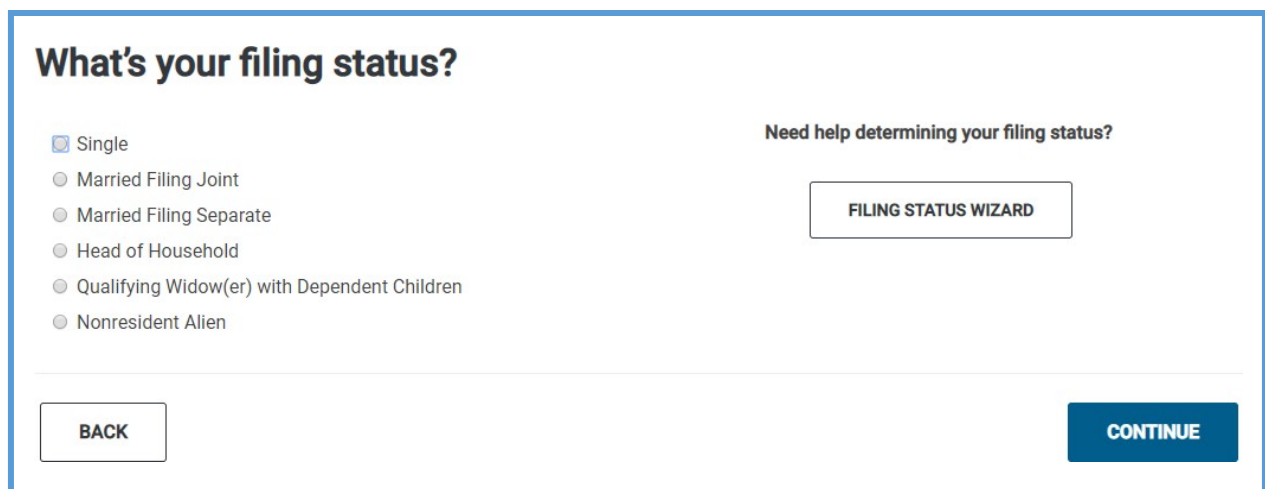
The screenshot shows a summary of tax amounts. On the left, there are three buttons: 'EDIT' (black), 'BEGIN' (blue), and 'EDIT' (black). On the right, a white box displays the following information:

- \$72,198** AGI AMOUNT
- \$3,456** FEDERAL AMOUNT DUE
- \$2,874** NJ REFUND AMOUNT

NOTE: If you have not added a state, TaxSlayer Pro Online displays **N/A** for the state refund amount.

Selecting a Filing Status

When you start a return, TaxSlayer Pro displays the **What's your filing status?** page, as discussed previously:



The screenshot shows the 'What's your filing status?' page. It features a list of filing status options with radio buttons:

- Single
- Married Filing Joint
- Married Filing Separate
- Head of Household
- Qualifying Widow(er) with Dependent Children
- Nonresident Alien

On the right side, there is a link: 'Need help determining your filing status?' with a button labeled 'FILING STATUS WIZARD'.

At the bottom, there are two buttons: 'BACK' (white) and 'CONTINUE' (blue).

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**:

Filing Status Wizard

Were you considered married on December 31st of last year?

Note: You are considered married for tax purposes if your spouse passed away during 20 and you did not remarry.

2. Read each question in the wizard to the taxpayer and click the appropriate answer.

When you finish answering all the questions, TaxSlayer Pro Online determines and displays the appropriate filing status based on your answers:

Filing Status Wizard

Based on your answers, your filing status should be **Head of Household**.

3. Click **Finished**.

TaxSlayer Pro displays the **What's your filing status?** page with the answer from the filing status wizard:

What's your filing status?

Single

Married Filing Joint


Married Filing Separate

Head of Household

Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

FILING STATUS WIZARD

 Based on your answers, your filing status should be **Head of Household**.

4. Select the appropriate filing status.

TIP: TaxSlayer Pro Online does not automatically select the filing status.

5. Click **Continue**.

Entering Personal Information

After you select the filing status, TaxSlayer Pro Online displays the **Personal Information** page:

Personal Information

FILING STATUS **CANCEL** **CONTINUE**

Taxpayer Information

Primary First Name * MI

Last Name * Suffix (Jr, Sr, etc.)

Social Security Number * - -

Date of Birth *

Occupation

Read each box and type or select the appropriate data.

Taxpayer Information

- TaxSlayer Pro Online automatically enters the primary Social Security number/Individual Taxpayer Identification Number based on the information you typed while starting the return.

TIP: When entering the date of birth, enter 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.

- Check here if the Taxpayer can be claimed as a dependent on someone else's return.
- Check here if Taxpayer was over age 18 and a full-time student at an eligible educational institution.
- Check here if Taxpayer is blind.
- Check here if Taxpayer is deceased.
- Check here if the Taxpayer wishes to contribute \$3 to the Presidential Election Campaign Fund.
- Check here if the Taxpayer or Spouse served in a Combat Zone during the current tax year.

- Select the check boxes to show whether the taxpayer can be claimed as a dependent on another return, is a student, blind, etc.

Note: TaxSlayer changes these selections each year depending on the current year tax law.

Spouse Information

Spouse Information

Spouse First Name *	MI
<input type="text"/>	<input type="text"/>
Last Name *	Suffix (Jr, Sr, etc.)
<input type="text"/>	<input type="text" value="--"/>
Social Security Number *	
<input type="text"/> - <input type="text"/> - <input type="text"/>	
Date of Birth *	
<input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/>	
Occupation *	
<input type="text"/>	

Check here if the Spouse can be claimed as a dependent on someone else's return.

Check here if Spouse was over age 18 and a full-time student at an eligible educational institution.

Check here if the Spouse is blind.

Check here if Spouse is deceased.

Check here if the Spouse wishes to contribute \$3 to the Presidential Election Campaign Fund.

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.

TIP: TaxSlayer Pro Online automatically completes the spouse's last name based on the information you typed for the taxpayer's last name. You can change this box if the spouse has a different last name.

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.

Contact Information

Address and Phone Number

Check here if Stateside Military address.

Check here if foreign address

Address (Number and Street) *

Apartment

ZIP Code *

 -

City, Town, or Post Office *

State *

- Please Select - ▾

Resident State as of 12/31/20 *

None ▾

Daytime Telephone Number *

() -

Secondary Telephone Number

() -

- Select the appropriate check box if the taxpayer has a stateside military address or a foreign address.
- When you type the Zip Code, TaxSlayer Pro Online automatically populates the city, state, and resident state.

TIP: If your resident state is different than the one selected based on your current address, you can change the state. TaxSlayer Pro Online loads the appropriate Resident State Information page based on this selection

Finish Page

When you finish entering the personal information for the taxpayer and, if applicable, the spouse, click **Continue**.

Resident State Information

When you complete personal information with a Resident state, TaxSlayer Pro Online displays the **Just a few more questions** page with questions specific to the state you selected. The following screenshot shows Georgia as an example:

Just a few more questions.

Is your address different from the return you filed last year?

I authorize the electronic notification from taxing authorities at the e-mail address provided regarding any updates to my account(s).

E-mail address

Entering Dependent Information

When you complete the personal information or state information, TaxSlayer Pro Online displays the **Dependents or Qualifying Person(s)** page:

Dependents or Qualifying Person(s)

Do you have any dependents or qualifying person(s) to claim on your return?

Individuals who rely on you for support and reside in your house generally qualify for dependent tax exemptions. However, there are situations when a child's exemption status is more complicated. The IRS has special rules for these situations.

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:

Dependent/Qualifying Child Information

First Name * **Middle**

Last Name *

Date of Birth *

Social Security Number *

- -

Check box if the dependent does not have an SSN/ITIN/ATIN

Relationship *

Number of months this person lived in your home during 20

Note: If this dependent was born in 20 , you must select 12 months

2. Type the dependent or qualifying child's name.

TIP: TaxSlayer Pro Online completes the **Last Name** box based on the taxpayer's last name. You can change this information if the dependent has a different last name.

3. Select the date of birth from the lists.

4. If the dependent does not have a taxpayer identification number, select the **Check if the dependent does not have an SSN/ITIN/ATIN** check box.

TaxSlayer Pro Online displays a new question to determine whether Form W-7 is needed in the return:

Check if the dependent does not have an SSN/ITIN/ATIN

This dependent will be completing a Form W-7, Application for ITIN

Yes

No

5. Select the answer to the question.
6. If the dependent does have a taxpayer identification number, type the dependent's Social Security number or other identifying number.
7. Select the dependent's relationship from the list.
8. Select the number of months the dependent lived in the home during the year. If the dependent lived in Canada, Mexico, or was not in the home for other reasons, select the appropriate option from the list.
9. Select any appropriate check boxes. TaxSlayer Pro Online may display additional boxes for you to complete based on the check boxes you select.

Please answer the following

- This person was over age 18 and a full-time student at an eligible educational institution.
- Check if this person was DISABLED.
- Check if this qualifying child is NOT YOUR DEPENDENT.
- Check if you wish NOT to claim this dependent for Earned Income Credit purposes.
- Check if this dependent is married.
 - Check if this dependent is filing their own tax return with the sole purpose of receiving a refund because of no tax liability.
- This dependent qualifies for a Multiple Support Declaration.

10. When you finish typing the dependent's information, click **Continue**.

TaxSlayer Pro Online displays the **Dependent or Qualifying Child** page, listing the dependent you just entered:

First Name	Last Name	Social Security Number		
CHILD	RETURN	xxx-xx-0802		

11. 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 in the **Dependent or Qualifying Child** section.

12. When you finish entering dependents, click **Continue**.

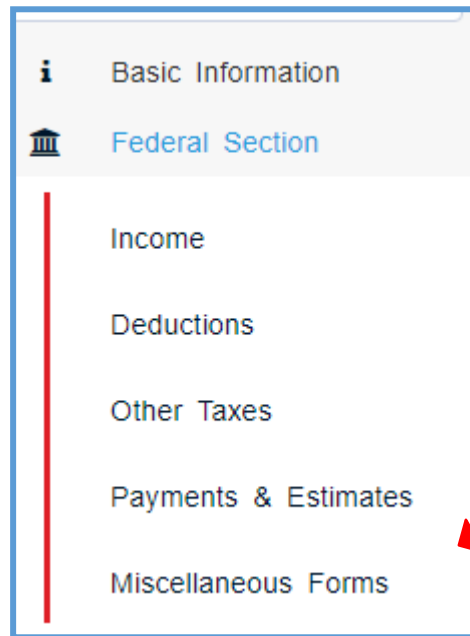
TaxSlayer Pro Online displays the **Basic Information** page:

Filing Status	Edit
Personal Information	Edit
Dependents / Qualifying Person	Edit

13. To review the filing status, personal information, or dependent information, click **Edit** for that row.
14. When you finish reviewing basic information, click **Continue**.

Entering IRS Identification PINs

When you finish the personal information, TaxSlayer Pro Online displays the **Federal Section**.



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**.
2. Click the **BEGIN** button on the **IRS Identification PIN** line.

3. Type the appropriate PINs.

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.

SAMPLE RETURN (XXX-XX-0815)

CHILD RETURN (XXX-XX-0815)

CANCEL **CONTINUE**

4. Click Continue.

Desktop Tip: Enter the Taxpayer/Spouse Identity Theft PIN by clicking **Other Categories** and then **Identity Protection PIN** from the **Personal Information** review menu.

NOTE: Enter the Dependent **Identity PIN** by selecting **Identity Protection PIN** from the **Dependent Information** review menu.

We cover adding IRS identity protection PINs in more detail in the *Payments and Estimates* lesson.

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