2026 ProWeb

Quick Start Guide

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Important Information

What's New in 2026 – See our knowledgebase article **here** to see the tax and program changes for 2026. FormGenius, a new document import feature has been implemented into the 2026 program. See here for additional information.

EFIN Tracking Number – In order to comply with IRS and industry partners' efforts to prevent fraud and tax-related identity theft, TaxSlayer Pro uses the IRS EFIN Tracking Number to verify your EFIN. You can obtain your EFIN Tracking Number from your **IRS e-Services** account, and you will enter it into the Company Information section of your TaxSlayer Pro Account Hub. This number must be entered before electronically filing tax returns this tax season.

Instructions for obtaining your EFIN Tracking Number can be found in the TaxSlayer Pro Knowledgebase **here**.

Multi Factor Authentication – Multi factor authentication (MFA) is required for all TaxSlayer Pro cloud- based applications and account websites. MFA is a security system used to control program access. Accessing online TaxSlayer Pro accounts will require two forms of authentication and must be completed for all devices and Internet browsers. One factor of authentication is your account password; the second is a six-digit code sent to your cell phone or e-mail address when you attempt to log in to your accounts. If entered correctly, your identity is considered verified, and you will be granted access to the software or account. The authentication process is repeated periodically and must be completed per device and per internet browser.

Usernames and Passwords – Preparers log into the program using a unique username and password that you will create. Preparer accounts are created in Preparer Setup in the Configuration menu. You will create the initial password for the preparer when setting up their preparer account. When a preparer logs into the software for the first time with their assigned username, they can change their preparer password. Passwords are required to expire periodically and must be reset every 180 days.

Clearing your browser cache – Your web browser may occasionally not display the ProWeb site as it should. Clearing your browser cache is a good first step that may solve the problem. By clearing the cache, old web page data is cleared out and the page is reloaded from TaxSlayer Pro. This doesn't alter the return, only the way your browser interacts with the software. Here's how to clear the cache in several common Windows-based browsers. Quit the return before following the steps in this article.

Technical and Customer Support Options – We're here for you!

When it comes to needing answers, TaxSlayer Pro has you covered. We are committed to providing you with the best technical and customer support in the industry. Our support team is ready and willing to help answer any questions you may have about the operation of the program. In addition to our support team, we have created several avenues of information that will help you easily find the answers to your questions.

TaxSlayer Pro Knowledge Base - The Knowledgebase contains hundreds of articles pertaining to the operation and navigation of TaxSlayer ProWeb. If you have questions on how to perform certain tasks within the program, you will most likely find your answers here. If you're in a return, click **Search Our Knowledge Base** under the **Help & Support** menu at the top of the window or on the left nav pane.

Instructional Videos – Sometimes it's better to visualize a task; that's why we created our instructional support videos section in Account Hub. To access the videos, log in to your TaxSlayer Pro Account Hub here. These videos cover the fundamentals of TaxSlayerPro. If you are new to TaxSlayer Pro or if you have new preparers in your office, the support videos are a great place to start learning more about operating the program.

Email Support - If you have a question that is not covered in our available resources, send our customer support staff an email. Use the email link located in the Help Center section of the program. Enter the required information on the email form, including your EFIN and describe your question in detail. Your email will be responded to as soon as possible. Our email address is prosupport@taxslayerpro.com.

Chat Support - You can chat with our support staff while working in a return. Just click Chat With Us under the Help & Support menu at the top of the window.

Partners Program – Resources for Your Business

The TaxBook Web Library – TaxSlayer Pro has partnered with the best fast-answer tax reference solution – The TaxBook. All current customers of TaxSlayer Pro are offered The TaxBook at a significant discount off the retail price. With the complexity of federal and state tax laws and the ever-changing tax code, having a reliable resource to help you find the answer to the tough tax questions is critical to your business. Y

WorldPay - Tax Slayer Pro has partnered with WorldPay to allow taxpayers to easily pay their balance due with a credit card.

e-Pay - TaxSlayer has partnered with e-Pay to offer simple, transparent payment solutions for tax professionals, enabling credit, debit, and ACH transactions at lower costs with real support and flexible programs for businesses of all sizes.

ERO Cyber Security - ERO Cyber Security Risk Management provides online risk management tools, procedures, and training to help policyholders and their workforce understand data security risk and how to best mitigate and prepare for a breach.

Surgent Accounting & Financial Education - Get the tools, certifications, and knowledge you need to advance your career in tax. All current customers of TaxSlayer Pro are offered a significant discount on Annual Filing season Program, Individual or Small business Taxes and EA Exam Review Course.

You can purchase any of the partner programs by logging in to your My Account/Account Hub and selecting the Partners Program tile.

Configuration – Let's get started!

Office and ERO Setup

- **Office Setup -** The Office Setup menu allows you to select general configuration settings for your office. This menu has a series of checkboxes for you to configure and customize your office to suit your needs. For details on Office Setup Menu Options, click **here**.
- **ERO Setup -** The ERO Setup menu is where you will report the information for the EFIN and EFIN owner. You may have more than one ERO in your office in needed and can also choose which ERO to use as default.

Adding Preparer Accounts

To create Preparer Accounts, select Preparer Setup from the Configuration Menu. When creating the account, you will need to have basic information for the preparer including SSN, PTIN, Preparer Agent Information, active email address and cell phone number. You will need to create the username and password for each preparer account. The preparer can choose to change the password later, but the username may not be changed once created. Preparer Accounts cannot be deleted but can be made inactive by selecting the green checkmark next to their name.

Roles and Permissions

In TaxSlayer ProWeb, you can control what each of your preparers are allowed to do by assigning them a Role. Roles are configured in the Roles & Permissions menu under the Configuration menu. Each Role has nearly five dozen permissions you can set, giving you the flexibility to create multiple Roles that can be easily changed and assigned as needed. For details on adding Roles and Permissions , click here.

Report Customization

Report Customization allows you to select which reports will be generated in the Reports Menu of ProWeb. This allows you to remove unnecessary reports and get to the information you need faster. To use Report Customization, type the report in the Report Type (Lookup) or press the down arrow on your keyboard. Select each report you intend to use. This will add it to the list of reports shown in the menu.

Setting up Fees, Custom Fees and Custom Discounts

- **Fees -** Your office fees can be set up in the Fee Setup menu. You have the choice to set a Minimum Preparer Fee for all returns or to set fees based on forms. You can search for forms by Federal and State. When amounts are added next to the forms, they are updated in real time to the program.
- **Custom Fees -** If you have a fee that isn't quite covered by the Fee Setup, you can use the Custom Fees configuration to add it to the program. Custom fees can be set for anything you need. When adding a custom fee, you will need to put the amount and the title of the fee. You will then have the option to select if it is charged by default, able to be removed and if the amount is able to be edited on the return.
- **Custom Discounts -** Just like Custom Fees, if you have a discount within your office, you can create it here to add into the program. When adding a custom discount, you will need to put the amount and the title of the discount. You will then have the option to select if it is applied by default, able to be removed and if the amount is able to be edited on the return.

Other Configuration Options

- **Consent Forms -** If you offer other products besides bank products and you need additional custom consent forms, you can add the information for the consent forms into the program.
- **Custom Credit -** This is typically used if a state offers an obscure credit that is not allowed in the program.
- **Office IP Whitelist -** If your office has **static** IP Addresses, you can set up the Office IP Whitelist. This allows you to control where your preparers can access the program from so you can minimize any unauthorized access. Please Note: most IP Addresses are dynamic. To use this feature, you will need to have an IT Professional change your IP Addresses to static IP Addresses. This cannot be done by TaxSlayer Pro's Technical Support.
- **Print Sets -** The program offers a variety of print options, however, if you find you need something a little different you can make custom print sets here.
- **Question Template -** This is mainly used for your own internal marketing and analysis. You can create any question you wish along with a series of answers, and the questions are asked at the end of the return process. The Question Statistics report can be run at any time to view the answers.
- **Tags -** Return tags are added at the end of the return on the Submission page, and they help you filter the client list to make it easier to find certain clients. You can create return tags to help track anything you wish. In the client list, choose the "Filter by Return Tag" drop down menu to filter the list by tags, and you can run the Return Tag Report to see a list of returns that have been tagged.
- **Taxpayer Profiles -** Taxpayer profiles help you quickly navigate the return preparation process by giving you the ability to specify the forms that will appear first on a return. To use a profile, select it when starting a new return, right after entering the SSN/ITIN.

Creating a Tax Return

Creating a return in TaxSlayer ProWeb is simple. Follow these steps below to begin a basic tax return.

Step 1 – Select *Start New 20xx Tax Return* from the welcome page of the program.

Step 2 – Enter the SSN of the Primary taxpayer. Once you confirm the SSN, you can click Start Return. If you're offering bank products, be sure you get the section 7216 Consent to Use Tax Return Information signed before starting a new return.

Step 3 – Determine the taxpayer's filing status. If you are uncertain, you can use the Filing Status Wizard for assistance.

Step 4 – Enter all the personal information for the taxpayer and spouse if applicable. *For returns with bank products, you will need to provide two different telephone numbers in the return.*

Step 5 – If you have dependents to report on the tax return, select Yes to the question *Do you have any dependents or qualifying person(s) to claim on your return*? You will be guided to enter the dependent's information. Once complete, click Continue. If you have more than one to add, click Add a Dependent or Qualifying Child for each entry.

Step 6 – Once these sections have been completed, you will be guided to the Income section of the Federal Return. You can choose to enter the income information yourself or use the Guide Me feature if you are uncertain how to report certain income.

Step 7 – After entering income, the program will guide you through the other parts of the Federal Return. Once the Federal Section has been completed, you will be prompted to answer the Health Insurance questions.

Step 8 – Once you have completed the Federal Section of the return, add the state return, if any.

Step 9 – When all entries have been completed on the tax return, go to the Summary/Print page to review the return. On the Calculation Summary page, you can see the refund/amount due, print the return, see an interactive display of Form 1040 and Schedules 1, 2, and 3 and if no EIC was calculated, the reason.

Step 10 – If everything checks out on the tax return, you will continue to the E-file page to enter all the necessary e-file information. Please see the following page for Electronic Filing.

Electronic Filing

Before a return can be electronically filed, you must first select the return type and mark it complete. From the Calculation Summary page of the return, select Continue to go to the E-File / Submission page. Select the type of return to e-file by choosing a refund disbursement method. If the client is receiving a refund they can choose to receive it by Direct Deposit, Mailed Check, or they can utilize a bank product. If there is an amount due, you can enter an electronic payment (direct debit). For details on the E-File process, click **here**.

On the E-File window you will be able to complete all the necessary information for e-filing the return. This includes sections such as State E-File, Third Party Designee Info, and entering State IDs (required by a few states and required by the bank if the taxpayer is utilizing a bank product). Once all the sections have been completed, click Save to move on to the Submission page.

Before transmitting the return, be sure to review the information on the Submission page. Once the return has been marked complete, you can click the Transmit button, or you can save and exit the return and transmit multiple returns as a batch from the ProWeb Transmission menu.

To transmit a batch of returns, select Transmissions from the ProWeb Welcome page. Returns will automatically be added to this list once they have been marked complete and marked paid (if applicable). Returns can also be added to this table if needed.

Printing the Tax Return

Printing the tax return can be done in four places: from the Client List, and inside the tax return from either the Calculation Summary page or the Submission page.

- **Printing from the Client List:** To print from the Client List, select the Printer Icon next to the client's name. You will see the option to Print Return.
- **Printing from the Calculation Summary page:** On the Calculation Summary page select View/ Print Return to print the entire return. This will guide you to the Print Results page. There you will need to select Print your 2018 Tax Return.
- **Printing from the Submission page:** You have the option to print the completed return at the end for each client on the Submission page. The Submission page will allow you to print the entire return or to print using your Print Sets. To choose your Print Set, select the dropdown to choose your option before clicking Print Return.
- **Printing from the Client Status:** To print from the Client Status, select Client Search and next to the return you wish to print, select the drop-down that says Tools and choose the option Client Status. If you have amended a return and do not have a copy of the original, Client Status gives you the option to print the original or amended return.

E-mailing the Tax Return

Emailing the tax return can be done from two parts of the tax program. You can either email the return from the Client List or from the Submission page at the end of the return.

- **Emailing from the Client List:** To email from the Client List, select the drop-down that says *Tools* and choose the option Email Return. The PDF attachment will automatically generate, and the File Password will default to the last 4 of the client's SSN.

- **Emailing from the Submission page:** Once on the Submission page, you may email the return to your client by selecting Email Return. The PDF attachment will automatically generate, and the File Password will default to the last 4 of the client's SSN.

Tax Office Checklist

- Apply for new EFIN(s)* (if applicable, i.e. Adding additional locations, new to the tax preparation business)
- Renew PTIN – This is an IRS annual requirement
- Obtain IRS Tracking Number from IRS e-Services
- Familiarize yourself with tax law changes
- Review current phase out limits
- Know the EITC Compliance Requirements
- Review Tear Over Year Tax Provisions Comparison (located on the left navigation menu in the program)

* In addition to other Action Items that may need your attention in Account Hub, the option is now available to upload a copy of your IRS EFIN Application Summary (EAS). This is a one-time verification for each EFIN and does not need to be completed annually. Click here for instructions.

State

Familiarize yourself with:

- State e-Filing mandates
- Your state's requirements for bank products
- Requirements for filing extensions
- Requirements for filing business returns
- State Tax Law Changes for 2026

TaxSlayer Pro Software

- Purchase TaxSlayer Pro Software
- Update My Account/Account Hub at http://www.taxslayerpro.com
- Contact Sales to complete conversion agreement (1st year customers only)
- Contact TaxSlayer Pro Technical Support to convert prior year data (1st year customers only)
- Purchase the TaxBook Web Library for use with the 2026 TaxSlayer Pro software

My Account/Account Hub

- Complete Bank Application
- Order Check/Card Stock from your bank
- Familiarize yourself with all bank products and related bank fees
- Complete Bank Compliance Requirement (varies by bank)

Office and Computer Equipment

- Review Recommended System Requirements for TaxSlayer Pro 2026 Software.
    - Operating System – MacOS or Windows 11
    - Printer – HP Compatible Laser Printer (Inkjet printers are not recommended for check printing) Internet Connection – High Speed Internet Connection
    - Web browser: Latest version of Chrome, Firefox, or Edge. (Safari on Macs is discouraged.)
- Perform routine maintenance on computers (this should be done by an IT professional) to include:
    - Defragment all hard drives.
    - Remove old / unwanted programs.
    - Clean up start up programs.
    - Renew subscriptions to anti-virus/firewall software.
    - Run Windows Updates to ensure all operating system security updates and service packs are installed on all computers.
    - Train employees on computer policies and equipment use.
- Test printers for use with TaxSlayer Pro.
- Order office supplies to include paper and toner.
- Update / install Adobe Reader on all computers (Adobe Reader DC is recommended)
- Test document scanners, barcode scanners and signature pads for use with TaxSlayer Pro.
- Test Internet Connection. A Cable or DSL modem is required to run TaxSlayer Pro. Wireless connections are not recommended.

Bank

- Contact Bank to check on Bank Approval.
- Follow up on Check/Card Stock order from your bank.
- Configure your bank product provider in TaxSlayer Pro.
- Print a Test Check, Align Printer if necessary.

  *All banks will print checks at their respective web sites.

TaxSlayer Pro Software

- Configure TaxSlayer Pro software.
- Review fee structure in the Fee Setup Menu.
- Configure Preparer Security.
- Explore the Knowledgebase and the Tax Book.
- Train employees to navigate/use TaxSlayer Pro Software

- Create practice returns
    - Transmit practice returns to ensure your computer is communicating with the TaxSlayer Pro server

Clients

- Prepare and mail organizers for prior year clients
- Begin preseason scheduling
- Implement your Marketing Strategy

Thank you for purchasing TaxSlayer Pro!

If you need further assistance in setting up TaxSlayer Pro or you have additional questions, check out our Online Knowledge Base at www.taxslayerpro.com/kb. Or contact TaxSlayer Pro Support via Chat or Email or call 706-868-0985. Emails can be sent to prosupport@taxslayerpro.com