



# 2021 ProWeb Quick Start Manual

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## Important Information

**What's New in 2021?** – See our knowledgebase article [here](#) to see the tax changes in 2021.

**EFIN Tracking Number** – In order to comply with IRS and industry partners' efforts to prevent fraud and tax-related identity theft, TaxSlayer Pro must verify the EFIN of each ERO using the IRS EFIN Tracking Number. You can obtain your IRS 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.

Video instructions for obtaining your EFIN tracking number from your IRS e-Services account can be viewed [here](#). Instructions can also 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 tax software 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 doing these steps.

- **Google Chrome (Windows):** Select the 3-dot menu at the top right and choose **Settings**. In the left side menu select **Privacy and Security**, and under "Privacy and security" select **Clear browsing data**. Select "Cached images and files", unselect the other two check boxes if they are checked, and select **Clear Data**. Close the browser, then reopen it.
- **Microsoft Edge (Windows):** Select the 3-dot menu at the top right and choose **Settings**. In the left side menu select **Privacy, search, and services**, and under "Clear Browsing Data" select **Choose what to clear**. Select "Cached images and files", unselect the other three check boxes if they are checked, and select **Clear Now**. Close the browser, then reopen it.
- **Mozilla Firefox (Windows):** Click the hamburger icon at the top right and choose **Options**. Select the **Privacy & Security** panel. Under "Cookies and Site Data" select **Clear Data...** Remove the

check from the Cookies and Site Data and leave the check next to Cached Web Content, then select **Clear**. Close the browser, then reopen it.

## Customer Support Options

When it comes to needing answers, TaxSlayer Pro has you covered. We are committed to providing you 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 award-winning support team, we have created several avenues of information that will help you easily find the answers to your questions.

**TaxSlayer Pro Knowledgebase** - 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.

**Instructional Videos** – Sometimes it's better to visualize a task. That's why we created our instructional support videos. Look for **ProWeb Videos** at the TaxSlayer Pro website [here](#).

**Phone Support** – Give us a call at 706-868-0985.

**Email Support** - If you've got a question while working in a return that isn't covered in our available resources, send our customer support staff an email. Click **Send Us A Question** under the Help & Support menu at the top of the window. We'll respond as soon as possible. You can also email us in your own email app at [prosupport@taxslayerpro.com](mailto: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.

**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. Learn more about The TaxBook Web Library and how to purchase in your Account Hub under the Partners Program tile.

**Pro Support Blog** – The Pro Support team has launched a blog that can be accessed from the TaxSlayer Pro Website. Check the blog often for the latest news and pertinent information from the IRS, State Agencies, and TaxSlayer Pro. Subscribe to the blog to have all published posts delivered directly to your email inbox.

## TaxSlayer ProWeb System Requirements

Operating System – MacOS or Windows

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.)

### Configuration

Before you can start creating tax returns, you will need to make sure you have your Office Configuration complete. Some of this information will pull from your Account Hub when you first create your ProWeb office, however it is good to verify the information is correct.

#### Office and ERO Setup

- Office Setup – The Office Setup 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 is where you will report the information for the EFIN and EFIN owner. You can have more than one ERO in your office if needed and can also choose which ERO to use by default.

#### Adding Preparer Accounts

To create Preparer Accounts, select Preparer Setup from the Configuration Menu. For each preparer, you can enter their SSN, PTIN, Acceptance Agent Information (if applicable), active email address, and cell phone number. You will also create the username for the preparer and a password for the 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 deselecting the green "Active" checkmark next to their name.

#### [Creating Security Templates](#)

Security Templates allow you to control what your preparers can access within the program. To create a template, give it a name and check or uncheck any option you wish to allow or not allow for a preparer with this security role. If you're uncertain about what an option is for, hover your mouse over the option for more information about it. When you are finished creating the template, you can assign it to preparers by selecting Assign in the Security Templates menu. You are also able to assign the template to a preparer from within their preparer setup menu. You may create as many templates as you'd like, but only one template may be assigned to each preparer at a time.

For descriptions of each of the security template options, click [here](#).

#### [Report Customization](#)

Report Customization allows you to select which reports will be available in the Reports menu, leaving out the ones you don't need. To use Report Customization, in the "Report Type (Lookup)" field start typing a report keyword to filter the list, or just press the keyboard down arrow to see all the reports. Select each report you wish to use. When finished, click **Save**. The reports you selected will be added to the Reports menu on the Welcome page.

### Setting up Fees, Custom Fees, and Custom Discounts

- Fees – Your office’s fees can be set in the Fee Setup menu. You can set a fee for each form and set a minimum fee for all returns. Use the search field to search and filter the list by both federal and state forms. When an amount is added to a form, it is updated 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 created for anything you wish to include with a return's preparation fee. You also have the option to charge the fee by default or allow it to be removed or edited in the return.
- Custom Discounts – Just like Custom Fees, you can also create custom discounts, and you also have the option to apply the discount by default or allow it to be removed or edited in the return.

### **Other Configuration Options**

- Consent Forms – If your office has personalized consent forms, you may 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 or available in the program.
- Office IP Whitelist – If your office has static IP Addresses, you can set up the Office IP Whitelist to control where your preparers are able to access the program from to help minimize any unauthorized access. In most routers and switches, IP Addresses are typically dynamically assigned, so to use this feature you will need to have your user's IP Addresses changed to static IP Addresses. If you don't know how to do this, you'll need local IT assistance. This is one area that TaxSlayer Pro’s Technical Support team cannot assist.
- Print Sets – The program offers a variety of return print sets, however you can make your own custom print sets to print just the forms you want.
- Question Templates – 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

Log in to [TaxSlayer ProWeb](#), then follow these steps below to create a tax return.

**Step 1** – Select *Start New 2021 Tax Return* from the welcome page of the program.

**Step 2** – Enter the SSN of the Primary taxpayer twice, select a taxpayer profile if desired, and click Start Return. *If you're offering bank products, be sure to get the Section 7216 Consent to Use Tax Return Information signed before starting the return.*

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

**Step 4** – Enter the taxpayer's personal information and the information for the spouse, if applicable. *Two different telephone numbers are required if the return will include a bank product.*

**Step 5** – If one or more dependents are being reported, 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 information. If you have more than one to add, click Add a Dependent or Qualifying Child for each entry, otherwise click Continue.

**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, going directly to the income source in the menu, or you can use the Guide Me feature to be queried about each menu item in turn.

**Step 7** – After the income section, 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 Questionnaire for the purpose of calculating the Premium Tax Credit on Form 8962, if applicable.

**Step 8** – Once the Federal Section of the return is complete, you can add a state return if needed.

**Step 9** – When all entries have been completed on the tax return, or at any point in time, select Summary/Print to review the status of the federal and state refund or amount due, print the return, and see why no Earned Income Credit was calculated if applicable. This page also displays an interactive Form 1040 where you can click an amount on the form to straight to it for editing.

**Step 10** – If everything checks out on the tax return, continue to the E-file page to enter all the necessary e-file information.

**Step 11** – Click Continue to go to the E-File page. In the Federal Return Type drop down, select whether the return will be e-filed or paper filed, and if e-filed the method of receiving the refund or paying the amount due, as applicable.

The E-File page has up to eight sections to review to set the fees, indicate the state filing method, enter identification information (required if a bank product is being used), and enter other optional information such as third-party designee info, custom consent, and custom credits.

Once all the sections have been completed, click **Save** to move on to the Submission page.

Review the information on the Submission page, and if all is correct and the return is ready to be transmitted click the "Is Complete" check box. You have two options for transmitting returns: either do a batch transmission from the Transmission section of the program or transmit each return individually at the end its Submission page.

## Electronic Filing

As previously noted, you can transmit returns individually or in batches. To transmit a batch of returns, select Transmissions from the Welcome page of the program. Returns are added to this list once they have been marked complete and, if applicable, marked paid. Returns can also be added to the list by choosing AddReturns. When you're ready to transmit, select "Transmit selected return(s) to IRS".

Amended federal returns can also be e-filed (Tax years 2019 forward). After creating the amended return, look for the "Amended Return Information" submenu on the E-File page where you will indicate that you wish to e-file the amended return. Then, on the Submission page look for the amended return transmission button.

## Printing a Tax Return

Printing the tax return can be done from four areas of the tax program:

- Printing from the Client List: Select the Printer Icon next to the client's name, then **Print Return**.
- Printing from the Calculation Summary page: Select **View/Print Return**, then **Print your 2020 Tax Return**. This prints the entire return.
- Printing from the Submission page: Click **Print Return** to print the print set that you've selected to be the default printing, otherwise select the drop-down menu and select the print set to use, then click **Print Return**.
- Printing from the State Section: In the State Return list, click the printer icon to print the state return.

## Emailing a Tax Return

Emailing the tax return can be done from two places in the tax program:

- Emailing from the Client List: Select the "Tools" drop down and choose **Email Return**. The PDF attachment will automatically generate.
- Emailing from the Submission page: Select **Email Return**. The PDF attachment will automatically generate.

The PDF will be encrypted using the 8-character password you create. You will need to communicate this password separately to your client.



## Tax Office Checklist

### IRS

- Apply for new EFIN(s)\* (if applicable, i.e. additional locations, new tax preparation business).
- Renew PTIN – This is an IRS annual requirement.
- Obtain IRS Tracking Number from IRS e-Services.

\*If you are changing your EFIN, please fax the new EFIN letter from the IRS to 706.868.1955.

Also, please follow up with a quick email to [sales@taxslayerpro.com](mailto:sales@taxslayerpro.com), informing us of the change and including the old EFIN, the new EFIN, and the reason for the change.

### 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 2021.

### TaxSlayer Pro Software

- Purchase TaxSlayer Pro software for 2021.
- Verify and update your firm info in [Account Hub](#).
- First year customers: Contact Sales to complete conversion agreement.
- First year customers: Contact TaxSlayer Pro Support to arrange for prior year data to be converted so that it can be pulled forward into new returns in the current year.
- Purchase the [TaxBook Web Library](#) for use with the 2021 TaxSlayer Pro software.

### My Account/Account Hub

- Complete a Bank Application or opt out of offering bank products.
- Order Check/Card Stock from your bank.
- Familiarize yourself with all bank products and related bank fees.
- Complete Bank Compliance Requirements as needed (varies by bank).

### Office and Computer Equipment

- Upgrade computers as needed and update browser software.
- Run Windows Updates to ensure all operating system security updates and service packs are installed on all computers.
- Test printers.
- Order office supplies to include paper and toner.
- Test document scanners and signature pads for use with TaxSlayer ProWeb.
- Test internet connection for speed and reliability. Wired is better than wireless.
- Train employees on computer policies and equipment use.

### IRS

- Familiarize yourself with tax law changes, including current phase out limits.
- Know the EITC Compliance Requirements.

## Bank

- Ensure your bank application is approved.
- Follow up on check and card stock and order from your bank.
- Indicate your bank in Office Setup under Configuration.
- Print a test check, ensuring the print is aligned,

## TaxSlayer ProWeb Software

- Configure TaxSlayer ProWeb software.
- Review fee structure in the Fees Setup menu.
- If you have multiple preparers, configure Security Templates and assign them.
- Explore the [Knowledgebase](#) and the [Tax Book](#).
- Train employees to navigate and use TaxSlayer ProWeb.
- Create practice returns.

## Clients

- Begin preseason scheduling.
- Implement your Marketing Strategy.

**Thank you for purchasing TaxSlayer Pro!**

If you've got additional questions or need assistance setting up TaxSlayer ProWeb, you've got options:

- Search for an answer in our Knowledgebase [here](#).
- Contact TaxSlayer Pro Support at 706-868-0985.
- Email your question: [prosupport@taxslayerpro.com](mailto:prosupport@taxslayerpro.com)
- Click **Chat With Us** under Help & Support