



Account Hub Basics

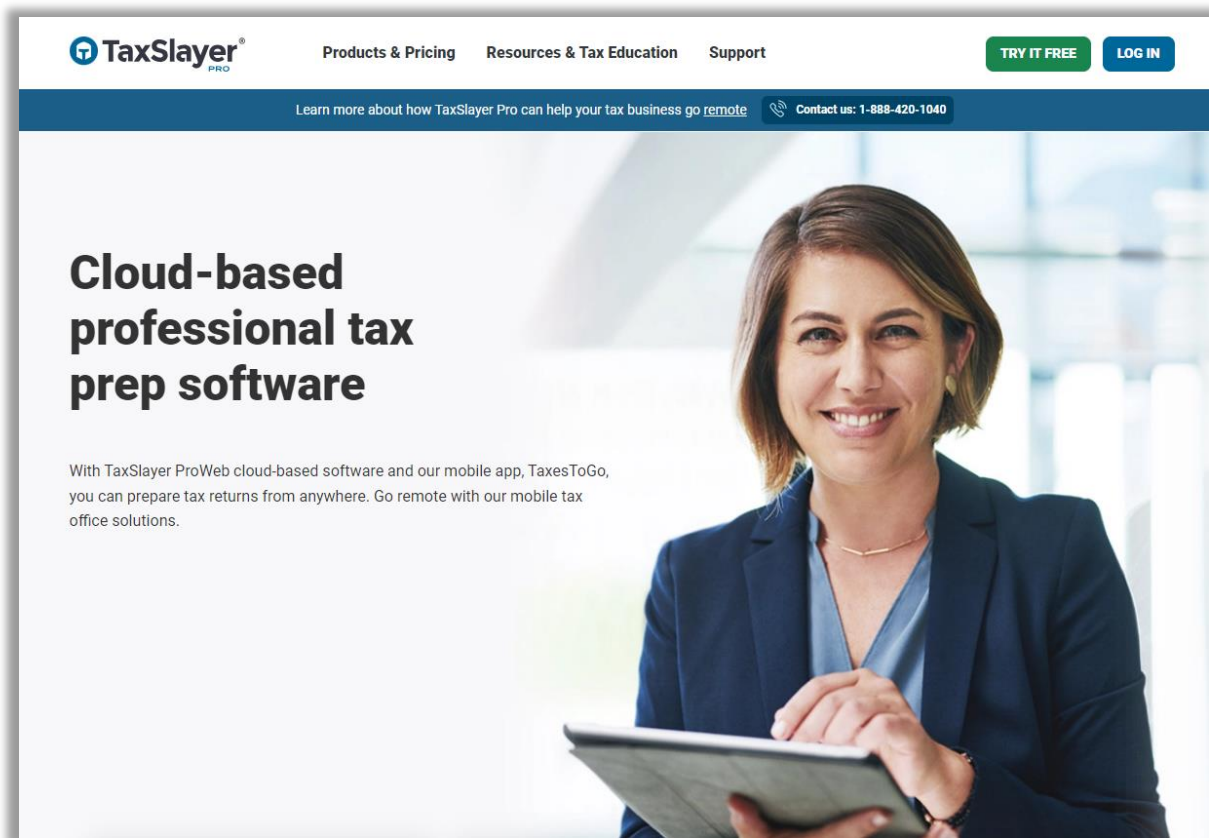
Updated August, 2023

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Welcome to Account Hub

Account Hub is the primary resource for your tax business. You can stay up to date on alerts, configure company information, complete banking enrollment, and access your TaxSlayer Pro Web account. If you are using TaxSlayer Pro for Desktop, this is where you will download all supported years of your Desktop program. From Account Hub you can customize the branding for your Taxes to Go app, access Web Reports and web-based Client Status. Throughout this document you will find links to knowledgebase articles. These articles make use of TaxSlayer Pro software even easier.



TaxSlayer[®] PRO

Products & Pricing Resources & Tax Education Support

TRY IT FREE LOG IN

Learn more about how TaxSlayer Pro can help your tax business go [remote](#) [Contact us: 1-888-420-1040](#)

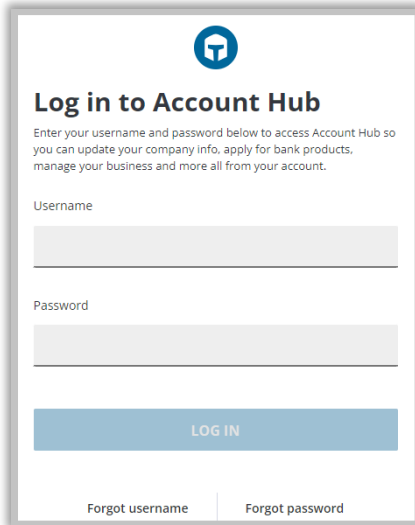
Cloud-based professional tax prep software

With TaxSlayer ProWeb cloud-based software and our mobile app, TaxesToGo, you can prepare tax returns from anywhere. Go remote with our mobile tax office solutions.

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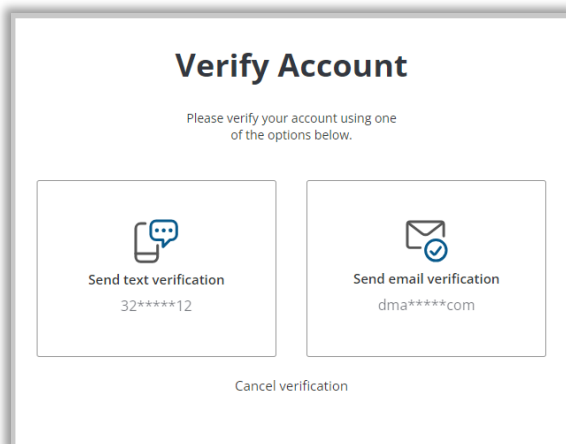
Logging In

New clients are e-mailed an Activation Code to set up Account Hub on the [TaxSlayer Pro website](#). You will create a unique username and password to be used to log in to your Account Hub in the future.



The screenshot shows a login form titled "Log in to Account Hub". At the top is a blue circular logo with a white 'T'. Below the title is a paragraph: "Enter your username and password below to access Account Hub so you can update your company info, apply for bank products, manage your business and more all from your account." There are two input fields: "Username" and "Password". Below the password field is a blue "LOG IN" button. At the bottom, there are two links: "Forgot username" and "Forgot password".

TaxSlayer Pro uses Multi-Factor Authentication for additional security. The first method is your username and password. The second method is a security code. Authentication can be done via text or email. Click on the method you prefer. Enter the code into the dedicated field and click **Verify**.



The screenshot shows a verification form titled "Verify Account". Below the title is the text: "Please verify your account using one of the options below." There are two options, each in a box with an icon and a text field:

- Send text verification**: Icon of a smartphone with a speech bubble. Text field contains "32*****12".
- Send email verification**: Icon of an envelope with a checkmark. Text field contains "dma*****com".

At the bottom center is a link: "Cancel verification".

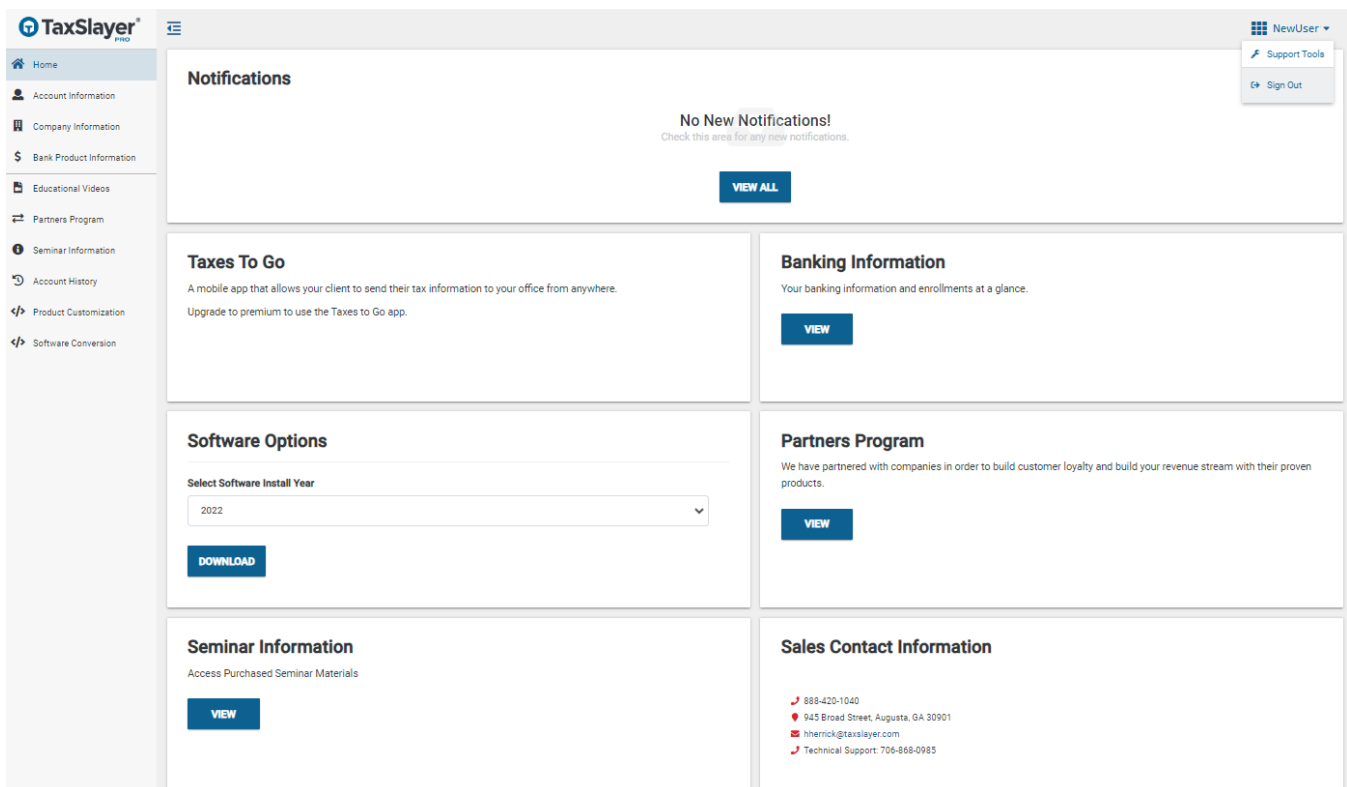
[Forgot Username or Password](#)

If you have forgotten your username or password, select the Forgot option. Usernames will be emailed, and passwords can be reset with verification. Detailed instructions can be found clicking on the link above.

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Home Page Overview

The Account Hub home page consists of four sections for easy navigation. The **Sidebar** with links to program features and resources. The **App Switcher**, access to Location Manager, Web Client Status, Pro Web (for TaxSlayer Pro Web customers), Web Reports and the TaxSlayer Pro Website. **Support Tools** a drop-down arrow to access additional tools or sign out of Account Hub. And the **Hub Cards**, are quick link tiles that can be arranged to preference.



The screenshot displays the TaxSlayer Pro Account Hub home page. At the top left is the TaxSlayer Pro logo. A sidebar on the left contains navigation links: Home, Account Information, Company Information, Bank Product Information, Educational Videos, Partners Program, Seminar Information, Account History, Product Customization, and Software Conversion. The top right corner shows a user profile for 'NewUser' with options for 'Support Tools' and 'Sign Out'.

The main content area is divided into several sections:

- Notifications:** A large white box with the heading 'Notifications' and the message 'No New Notifications! Check this area for any new notifications.' A blue 'VIEW ALL' button is centered below the message.
- Taxes To Go:** A card with the heading 'Taxes To Go' and the text: 'A mobile app that allows your client to send their tax information to your office from anywhere. Upgrade to premium to use the Taxes to Go app.' A blue 'VIEW' button is at the bottom right.
- Banking Information:** A card with the heading 'Banking Information' and the text: 'Your banking information and enrollments at a glance.' A blue 'VIEW' button is at the bottom right.
- Software Options:** A card with the heading 'Software Options' and a form labeled 'Select Software Install Year' with a dropdown menu showing '2022'. A blue 'DOWNLOAD' button is at the bottom left.
- Partners Program:** A card with the heading 'Partners Program' and the text: 'We have partnered with companies in order to build customer loyalty and build your revenue stream with their proven products.' A blue 'VIEW' button is at the bottom right.
- Seminar Information:** A card with the heading 'Seminar Information' and the text: 'Access Purchased Seminar Materials'. A blue 'VIEW' button is at the bottom left.
- Sales Contact Information:** A card with the heading 'Sales Contact Information' and contact details:
 - Phone: 888-420-1040
 - Address: 945 Broad Street, Augusta, GA 30901
 - Email: hherrick@taxslayer.com
 - Technical Support: 706-866-0985

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The Hub Cards

Notifications: This card displays notifications pertaining to your Account Hub. These action items will display in red and indicate incomplete account information.

Partners Programs: Provides a brief description of our different partners' services and links to the direct webpages.

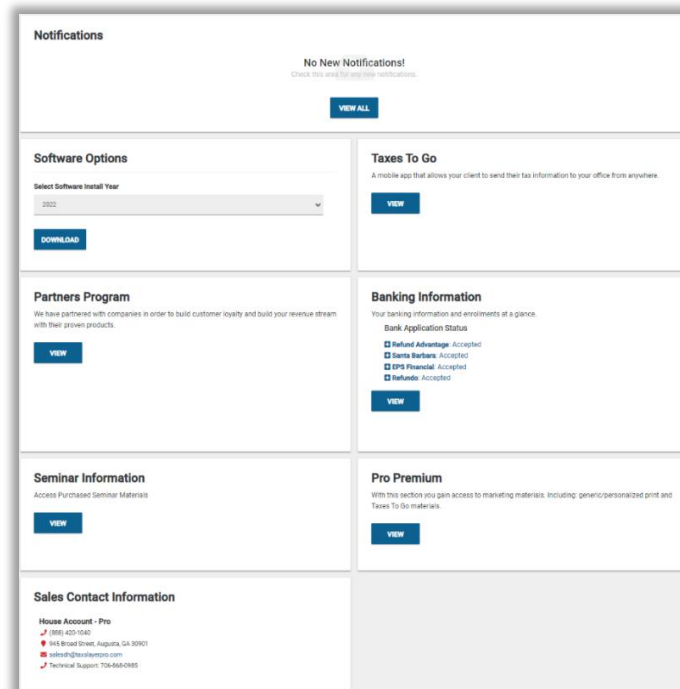
Taxes To Go: This card is only visible to Premium Customers and links to the configuration of branded Taxes To Go app.

Pro Premium: Only visible to Premium Customers. Displays the code required for activation of Desktop Papercut features and configuration of Marketing Materials.

Software Options: This card displays the link for new ProWeb user activation or Software Downloads for Desktop users.

Banking Information: This card links to your bank applications. Here, you can configure or review the status of your applications.

Sales Contact Information: This card provides you with the name and contact information of your personal Sales Associate.



The screenshot displays a grid of account management cards. At the top is a 'Notifications' card with a 'No New Notifications!' message and a 'VIEW ALL' button. Below it are two columns of cards. The left column includes 'Software Options' (with a 'Select Software Install Year' dropdown set to 2022 and a 'DOWNLOAD' button), 'Partners Program' (with a 'VIEW' button), 'Seminar Information' (with a 'VIEW' button), and 'Sales Contact Information' (listing contact details for House Account - Pro). The right column includes 'Taxes To Go' (with a 'VIEW' button), 'Banking Information' (showing 'Bank Application Status' with four 'Accepted' items: Banked Advantage, Santa Barbara, EPS Financial, and Infolink, each with a 'VIEW' button), and 'Pro Premium' (with a 'VIEW' button).

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The Sidebar

Located on the left side of the screen the Sidebar gives you quick access to configuration items and additional resources listed below.

Account Information

The username, email address and phone number listed here are for your Multi-Factor Authentication. Multi-Factor Authentication (MFA) is an electronic security system that requires two methods of authentication to verify your identity when logging in to an online account. The first method is your username and password. The second method is a security code. For information on how to update your MFA visit [this](#) knowledge base article.

<h4>Account Information</h4> <p>Below is your account information.</p> <hr/> <p>User name: taxslayer Customer Id: bf073b0d-1329-428f-b792-fa1b1f85e67e</p> <p>Email address <input type="text" value="user@taxslayer.com"/></p> <p>Phone number <input type="text" value="5551234567"/></p> <p><input type="button" value="UPDATE PASSWORD"/> <input type="button" value="SAVE"/></p>	<h4>Security Management</h4> <p>Manage security permissions for a user.</p> <p><input type="button" value="VIEW"/></p>
<h4>Employee Accounts</h4> <p>There are no employee accounts.</p> <p><input type="button" value="ADD EMPLOYEE ACCOUNT"/></p>	

Each client receives a unique customer ID that can be found on the account information card. This unique ID is assigned by TaxSlayer and is required when setting up your ERO in TaxSlayer ProWeb.

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Account Information cont.

Employee Accounts setup: Creating an employee account gives your employees access to the different sections and features within Account Hub. This will create a separate log in from the Admin. You can create as many employee accounts as needed, each with different security settings.

User name

Phone number

Confirm Phone Number

Email address

Confirm Email Address

Assigned Template

No Template

Is Inactive

Password

- One lowercase character
- One uppercase character
- One special (@\$!*?&)
- One number
- 8 characters minimum
- 25 characters maximum

Confirm Password

Note: Employee Account logins will give access to Account Hub. These are not logins for TaxSlayer ProWeb to prepare tax returns.

Security Management: You can choose to use [Security Templates](#) to help control exactly what sections your employees have access to.

Permission List

- Allow Access to MyAccount
- Allow Access to Client Status
- Allow Access to Account Hub
- Allow Access to modify additional locations
- Allow Access to modify company configuration
- Allow Access to download/access software
- Allow Access to view receipts and rebate information
- Allow Access to view premium information
- Allow Access to make modifications to employee accounts
- Allow Access to make modifications to customization
- Allow Access to modify fees on bank application
- Allow Access to Web Reports
- Allow Access to Customer Portal
- Allow Access to modify bank application
- Allow Access to mobile app configuration
- Allow Access to modify security assignments and permissions
- Allow Access to view account history information
- Allow Access to view seminar information
- Allow Access to view partner information
- Allow Access to view support tools and functionality
- Allow Access to view and directly access sub locations

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Company Information

The Company Information card displays your company name, EFIN, PTIN and IRS tracking number. To complete your TaxSlayer Pro Account Hub and to electronically file tax returns with TaxSlayer, you must have a valid EFIN and an IRS Tracking Number. Your EFIN and Tracking Number can be obtained by logging into your [IRS e-Services Account](#).

Company Information	Principal/Owner
<p>Your personal company information at a glance.</p> <p>Company Name</p> <input type="text"/> <p>EFIN</p> <input type="text"/> <p>PTIN/SIDN</p> <input type="text"/> <p>IRS Tracking Number</p> <input type="text"/> <p><small>* Your IRS Tracking Number is issued by the IRS and must be obtained by logging into your IRS e-services account and viewing your application landing page.</small></p> <p>SAVE</p>	<p>Title</p> <input type="text"/> <p>First Name</p> <input type="text"/> <p>Last Name</p> <input type="text"/> <p>Date Of Birth</p> <input type="text"/> <p>Social Security Number</p> <input type="text"/> <p>SAVE</p>

An alternative contact can be listed here allowing TaxSlayer support agents to assist when the primary is unavailable.

Contact Information			
Primary Contact			
Title	First Name	Last Name	Age Group
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Alternate Contact			
Title	First Name	Last Name	Age Group
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SAVE			



Company Information cont.

Provide up to three contact phone numbers as well as your primary address and shipping address. The shipping address may not be a P.O. Box.

Phone Information	Mailing Addresses		
Primary Office Number Number <input type="text"/> Extension <input type="text"/> Alternate Office Number Number <input type="text"/> Extension <input type="text"/> Cell Phone Number Number <input type="text"/> Extension <input type="text"/> Fax Number Number <input type="text"/> Extension <input type="text"/> <input type="button" value="SAVE"/>	Year Round Address Address Line 1 <input type="text"/> Address Line 2 <input type="text"/> Zip <input type="text"/> City <input type="text"/> State <input type="text"/>	Physical Address <small>This may not be a PO Box</small> Address Line 1 <input type="text"/> Address Line 2 <input type="text"/> Zip <input type="text"/> City <input type="text"/> State <input type="text"/>	Shipping Address <small>This is the address where supplies will be mailed This may not be a PO Box</small> Address Line 1 <input type="text"/> Address Line 2 <input type="text"/> Zip <input type="text"/> City <input type="text"/> State <input type="text"/>
	<input type="button" value="SAVE"/>	<input type="button" value="SAVE"/>	<input type="button" value="SAVE"/>

To complete this page, provide and confirm your email address. When updating, changing, or renewing, the Company Information Verification must also be completed.

Email	Company Information Verification
Incorrect email addresses will cause you to miss out on important information concerning your account with the banking partner(s). Email Address <input type="text"/> Confirm Email Address <input type="text"/> <input type="button" value="SAVE"/>	I have verified that the information entered for this company is accurate and up-to-date for the 2022 Tax Year. Signature <input type="text"/> <input type="button" value="SAVE"/>

\$ Bank Product Information

Tax-related bank products can be offered to your clients to assist in paying their tax preparation fees and ensure timely refunds. Your preparation fees will automatically be deducted from the taxpayer's income tax refund and deposited into your bank account. We strongly encourage getting your office set up to offer tax-related bank products as early as possible before the tax season to help avoid unnecessary delays at the beginning of the season.

TaxSlayer partners with four different banks. You can apply with any of the banks throughout much of the year. Bank Products may only be applied to current year tax returns.

You may also Choose to Opt-Out of Enrollments if you do not wish to provide Bank Products.

<p>Refund Advantage</p> <p>To submit your banking information to Refund Advantage you will need to complete their specific application.</p> <p>BEGIN APPLICATION</p>	<p>Santa Barbara</p> <p>To submit your banking information to Santa Barbara you will need to complete their specific application.</p> <p>BEGIN APPLICATION</p>
<p>EPS Financial</p> <p>To submit your banking information to EPS Financial you will need to complete their specific application.</p> <p>BEGIN APPLICATION</p>	<p>Refundo</p> <p>To submit your banking information to Refundo you will need to complete their specific application.</p> <p>BEGIN APPLICATION</p>
<p>Bank Enrollment Preference</p> <p>I am not offering bank products for the 2022 tax season.</p> <p>Please note: If you have opted out of bank enrollments, locked bank applications will not send unless you opt back into bank enrollment.</p> <p><input checked="" type="checkbox"/> Opting out of Enrollments</p>	<p>Partner Products</p> <p>See which product you are currently enrolled with and edit your preferences.</p> <p>VIEW MY PRODUCT</p>

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Educational Videos

TaxSlayer has created comprehensive online video training. Our tutorial videos cover a range of topics, including setting up your account hub, creating basic returns, and staying up to date with current year tax law changes. These lessons break down program processes and delve into more complex tax law. Additional videos can be found on TaxSlayer's YouTube channel by clicking [here](#).

Educational resources

Watch the videos below to learn how to use all our TaxSlayer Pro products, grow your tax business, and more.

Account Hub

Learn more about how to use Account Hub.

- [IRS Tracking Number & TaxSlayer Account Hub](#)
- [What is AccountHub?](#)
- [Account Hub Setup](#)
- [Added Transmission Fee](#)

Pro Desktop

Learn more about how to use our desktop-based software.

- [Onboarding your new tax prep software](#)
- [Scanned Document Feature](#)
- [Client Portal Overview](#)

Pro Web

Learn more about how to use our cloud-based tax preparation software.

- [Why Clients Love TaxSlayer Pro](#)
- [Remote Tax Office Solutions](#)
- [File your Client's Taxes from Anywhere](#)
- [How to File 1099-A and 1099-C in TaxSlayer Pro Web](#)

[View More](#) ▾

Mobile products

Learn more about our mobile app, TaxesToGo®, and other mobile products.


- [TaxesToGo Tax Preparation App](#)
- [Tax Prep for Professionals](#)

Business tips & advice

Learn how to run your tax business, earn additional revenue, and more.

- [Overview of 2020 Tax Law Changes](#)
- [How to Sell Partner Products](#)
- [How TaxSlayer Pro Helps Service Bureaus](#)
- [Bank Products Deeper Dive](#)

[View More](#) ▾



Additional videos may also be found in TaxSlayer's Knowledgebase that will help you understand the process of configuring the program, preparing tax returns, and using the Premium features. New Desktop users may find [this](#) video helpful, while new ProWeb users can click [here](#).

Pro Premium page

TaxSlayer has created a document management system, creating a paperless office where paper and digital documents are woven together in an efficient, cost-effective, and easy-to-use format that will revolutionize the way you run your tax office. For TaxSlayer Pro Desktop users, the premium activation code can be found on this card.

Features included in the Premium package are:

- PaperCut which provides the option to scan and save all your client's documents and to e-mail your client an encrypted copy of their tax return. For an overview of PaperCut, click [HERE](#).
- Customer Portal is a secure method for you and your client to exchange documents and send them a copy of their return for their signature.
- Taxes To Go is our mobile app that your client can use to send images of their tax documents, identification, etc., from their smartphone as well as electronic signing of tax documents.
- Document Scanning allows you to scan your client's driver's license, tax documents, etc. Documents required to be transmitted with the return in PDF form can also be scanned and included with the return when e-filed.
- Signature Pad will let you capture client signatures on a signature pad to print on the various forms that require a signature. For supported devices click [HERE](#).
- AdPack provides production ready print media for your office, including banners, promotional handouts, mailers, and e-mail templates.
- Twilio is a feature that allows you to automatically send refund updates to clients via SMS. Click [HERE](#) for more information on Twilio SMS and its setup.
- 2D Barcode Scanning supports the scanning of Form W-2s that contain 2D barcodes. The data contained on the Form W-2 will be captured and automatically filled into the Form W-2 edit menu with the use of any hand-held scanner. For additional information on scanning documents using a 2D Barcode scanner click [HERE](#).
- Business Package is a separate package that can be downloaded and is included with the purchase of TaxSlayer Pro Premium. The business package includes tax returns for the following entity types: 1120 Corporations, 1120-S Corporations, 1065 Partnerships, 1041 Estates and Trusts and 990/990EZ/PF/T Exempt Organizations. 706 Estate returns and 709 Gift Tax returns.

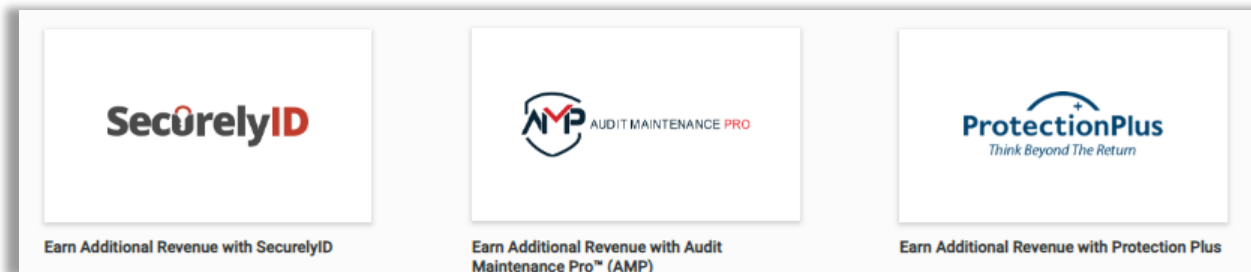
Partners Program

TaxSlayer Pro offers a variety of partner programs. To sign up for the partner program, Select **View Offer** on any tile to access the Partner's Homepage with more detail on their products.

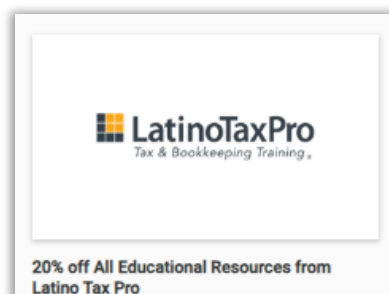
For your clients, **SecurelyID** offers identity theft and monitoring protection. SecurelyID comes with a complete suite of tools to monitor, protect, and restore identity.

AMP provides taxpayers who receive IRS correspondence assistance from an Enrolled Agent(EA) or a CPA throughout the entire audit process.

Protection Plus has experienced audit assistance professionals that can provide advice for even the most complicated inquiries with a simple phone call. Protection Plus works directly with the tax preparer and the IRS or state to resolve the matter.



TaxSlayer Pro has partnered with **Latino Tax Pro** to provide our preparers with bilingual tax education. As a TaxSlayer Pro customer, you can receive 20% off all Latino Tax Pro continuing education classes. LTP's Instructor Program is part of a complete Professional Training System that turns your office into a Virtual Training Center where you can train your way and recruit high-quality employees to grow your business.



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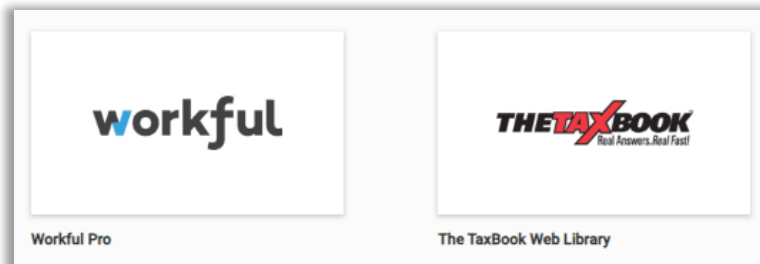
↷ Partners Program cont.

Surgent offers accounting and financial education ranging from the AFSP to EA Exam reviews. This is an excellent resource for tax professionals with exam prep, professional development and skill building courses, you will advance with confidence.



Workful Pro is an all-in-one tool to manage your client's payroll, streamline employee time tracking and automatically file their payroll taxes. Payroll forms and returns are not included in TaxSlayer programs.

The TaxBook is the most trusted name in tax research to provide affordable, fast, and accurate online tax research. TaxSlayer Pro customers receive exclusive savings when using our promotional code.



ERO Cyber Security offers comprehensive cyber liability in the event your customer and/or tax office data is compromised. ERO Cyber Security 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.

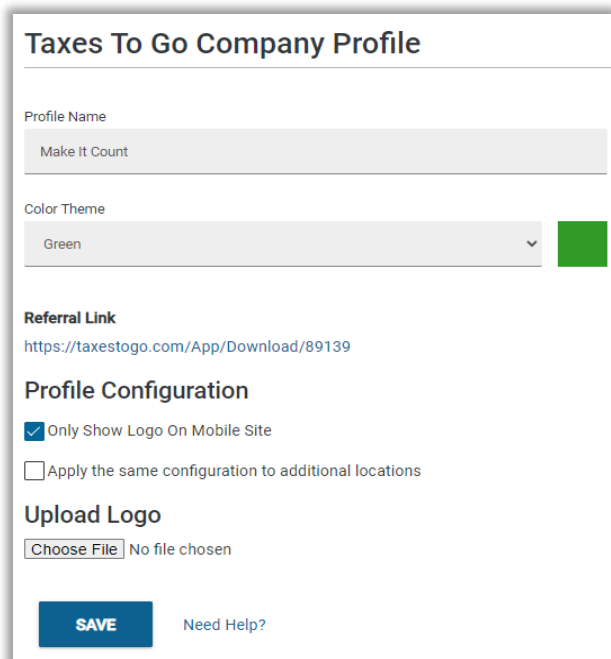


Taxes To Go

The Taxes to Go Mobile App allows taxpayers to snap pictures and submit their tax documents to you, complete their tax return and even get a bank product from anywhere, without ever stepping foot in your office. The app includes a chat feature that is fully integrated to your Tax Program so you can always stay in contact with your customers.

Taxes to Go is a generic mobile app available for Android and iOS devices, however you have the option to brand the app to your tax office. The branded Taxes to Go mobile app allows you to customize the color and logo shown within the app.

For taxpayers to have access to the Branded Application they must download from the referral link. This can be emailed, sent via text, or posted on your company webpage. Using the Branded Taxes To Go App imports the returns directly to your Desktop or ProWeb App Clients List.



Taxes To Go Company Profile

Profile Name
Make It Count

Color Theme
Green

Referral Link
<https://taxestogo.com/App/Download/89139>

Profile Configuration

Only Show Logo On Mobile Site

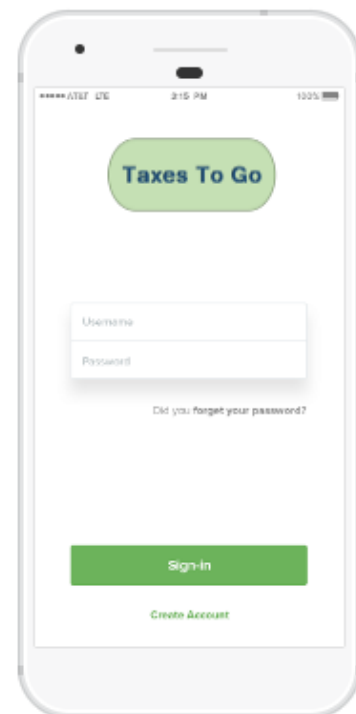
Apply the same configuration to additional locations

Upload Logo

No file chosen

[Need Help?](#)

Branded App setup in Account Hub



As seen by taxpayer on mobile device after download.

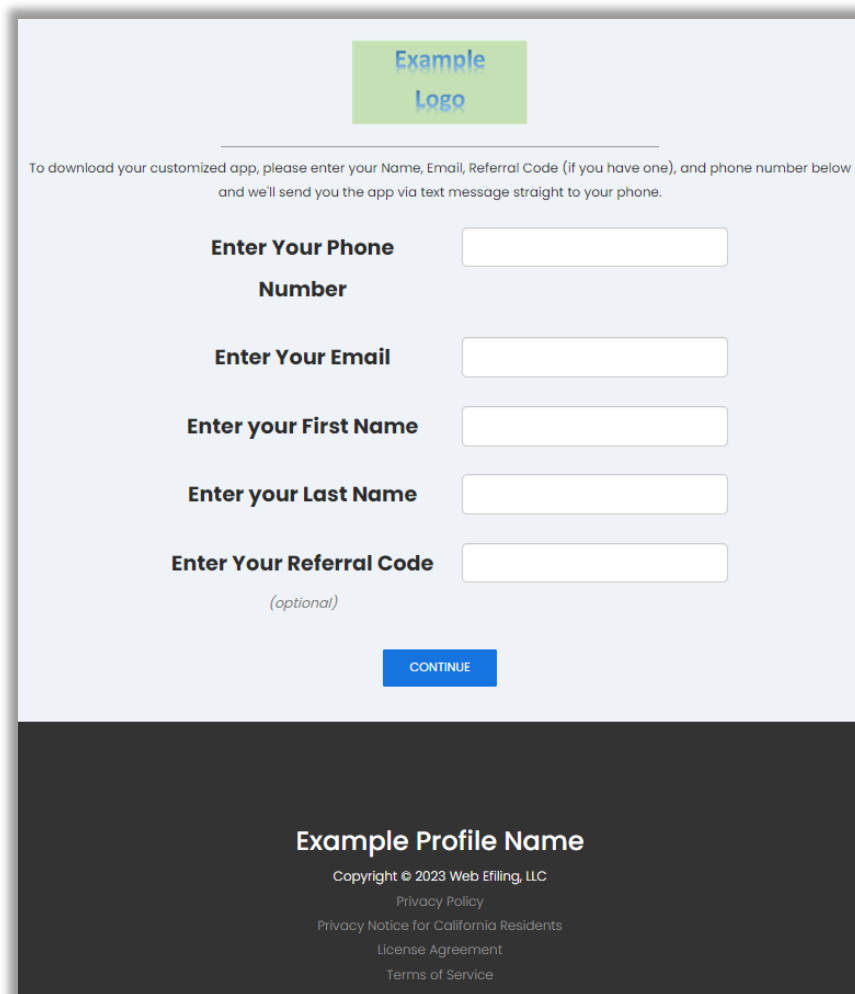
Taxes To Go cont.

The Taxes to Go Mobile App is for your taxpayers. As a Tax Preparer, you will not download the app. Everything you receive from the app or send to the app will be done within your Tax Software.

When your client clicks on the referral link, they will be taken to the Taxes To Go Registration page.

If you have already started your client's tax return in your program, the taxpayer can still use the Taxes to Go to send you their information and to sign documents. The information entered on the registration page must match what's been entered in the tax return.

For more information, troubleshooting, FAQ's and access to the Preparer's and Taxpayer's customized Taxes to Go Manuals click [HERE](#).



Example Logo

To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

Enter Your Phone Number

Enter Your Email

Enter your First Name

Enter your Last Name

Enter Your Referral Code
(optional)

CONTINUE

Example Profile Name
Copyright © 2023 Web Efilng, LLC
[Privacy Policy](#)
[Privacy Notice for California Residents](#)
[License Agreement](#)
[Terms of Service](#)

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Account History

<p>Refund Policy Agreements</p> <p>View the state of each year's Refund Policy Agreement</p> <ul style="list-style-type: none"> 2018 Refund Policy Agreement - Signed 2019 Refund Policy Agreement - Signed 2020 Refund Policy Agreement - Signed 2021 Refund Policy Agreement - Signed 2022 Refund Policy Agreement - Signed 	<p>License Agreements</p> <p>View the state of each year's License Agreement</p> <ul style="list-style-type: none"> 2020 Software License Agreement - Signed 2018 Software License Agreement - Signed 2017 Software License Agreement - Signed 2019 Software License Agreement - Signed 2021 Software License Agreement - Signed 2022 Software License Agreement - Signed
<p>Payment History</p> <p>View your account purchase history and retrieve your EFIN validation code to enter into your software.</p> <p>VIEW</p>	<p>Data Security Plan Template</p> <p>Download the data security plan template.</p> <p>Data Security Plan Template</p>

Refund Policy

TaxSlayer Pro detailed refund policy.

License Agreements

License Agreement and Terms of Service for use of TaxSlayer Pro's websites, desktop software, mobile applications, products, tools, and/or related electronic filing services

Payment History

Account purchase history, rebate history and EFIN validation code for TaxSlayer Pro users. TaxSlayer issues rebate checks twice a year to clients. This information is available for you to review on page 3 of their bank application.

Data Security

The Federal Trade Commission's Safeguards Rule requires professional tax preparers to prepare a "written information security plan" (WISP) describing how they protect customer information. The plan must be appropriate to the firm's size and complexity, the kinds of work it does, and the sensitivity of the customer information that it handles. TaxSlayer Pro has drafted a data security plan template in Microsoft Word format you can use to prepare your own plan.

</> Software Conversion

If you are new to TaxSlayer Pro Desktop and have previously prepared tax returns in another desktop tax program, you may be able to convert some of that program's prior year return data to pull forward into the current year returns prepared in TaxSlayer Pro.

If you are new to TaxSlayer ProWeb and have previously prepared tax returns in another **desktop tax program**, you may be able to convert some of that program's prior year return data to pull forward into the current year returns in TaxSlayer ProWeb. Returns prepared in a web-based program cannot be converted for use in TaxSlayer Pro.

The TaxSlayer data conversion converts basic biographical information. TaxSlayer provides detailed instructions for conversion of software. Instructions for Desktop users can be found in the Desktop program or [here](#), in the Knowledgebase.

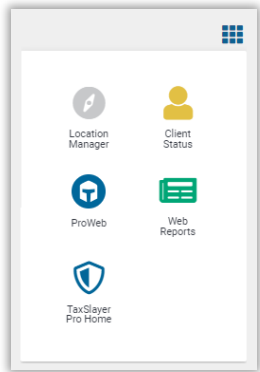
The screenshot shows a document viewer interface with a dark header bar containing a menu icon, the title 'ConversionHow...', page number '1 / 7', zoom level '68%', and various utility icons. Below the header is a blue banner with the text: 'STEP 1: Ensure that all returns needing to be converted have been consolidated into a version of your current software on the computer that will be used as the file server by TaxSlayer Pro.' The main content is a table with three columns: 'Software Package', 'Individual', and 'Business'.

Software Package	Individual	Business
ATX	Y	N
TaxWise	Y	N
Drake	Y	N
ProSeries	Y	N
Crosslink	Y	N
LaCerte	N	N
OLT	Y	N
TaxAct	Y	N

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App Switcher

The App Switcher is a cluster of 9 blocks at the top-right of Account Hub. Clicking on App Switcher provides direct passthrough into featured content.

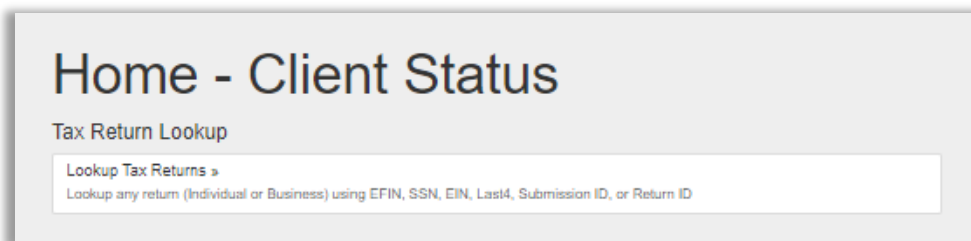


Location Manager

For Affiliates and Multi-Office Users, with this tool can manage additional locations, including the office configuration and submission of their bank apps. More details are provided in Account Hub for Service Bureaus.

Client Status <https://www.taxstatusnow.com/clientstatus>

Client Status in TaxSlayer ProWeb gives you important information about a tax return. This site can be accessed from any computer. Client status can be manually logged into with your Account Hub Credentials or your Employee Accounts Credentials without installing the program or accessing ProWeb. Look up any return, Individual or Business using EFIN, SSN, EIN, Submission ID or Return ID.



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ProWeb

Logs the owner directly into ProWeb, bypassing multi-factor authentication if they have Sync'd their credentials.

Web Reports <https://www.taxstatusnow.com/reports/web/>

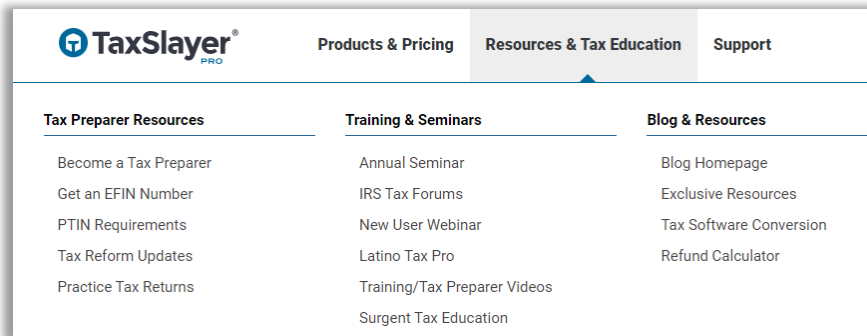
This website allows you to run detailed reports on your tax returns. Just like Client Status, you do not need the program installed to use this website. Client status can be manually logged into with your Account Hub Credentials or your Employee Accounts Credentials if given permission.

Available Reporting Tools		
Summary Reports		
Federal Return Summary View Federal Return Information and Statistics	State Return Summary View State Return Information and Statistics	State Detail Summary Report View Production State Detail Summary for your EFINs
Summary Report View an Overall Summary of Return Statistics for your Groups and EFINs	Summary Report By Date View an Overall Summary of Return Statistics for your Groups and EFINs By Date	Bank Product Funding View Bank Product Funding Information
Electronic Filing Summary View a list of Electronically Transmitted Returns	Proweb Demo Prospect Report View Proweb Demo Prospect Information	
Pro Web Reports		
Pro Web Returns - Return Report View Your Returns created in ProWeb	Pro Web Returns - Detailed Return Report View Refund and State Refund Information for your EFINs	Pro Web Returns - Audit Report View Production Audit information for your site and EFINs
Production Detail Reports		
Office Production Detail Report - Electronic View Electronic Production Detail information for your office and EFINs	Office Production Detail Report - Paper View Paper Production Detail information for your office and EFINs	
Return Reports		
Submitted Returns View Submitted and Bank Return Statistics	Returns Awaiting Acknowledgement View Your Returns Awaiting Acknowledgement	Extension Report View Your Return Extension Report
Business Returns View transmitted Federal Business Return Information for your EFINs		
Customer Reports		
Bank Approvals View Bank Application Statuses by EFIN	Customer Contact Report View Your Customer Contacts (additional locations)	Customer Order Code Report View Your Customer EFIN Validation Code Report
Miscellaneous Reports		
Customer Portal Report View Users and Information regarding Customer Portal Imports	Customer Portal Report By Date View Users and Information regarding Customer Portal Imports By Date	Taxes To Go Report View Users and Information regarding Taxes To Go Imports
Taxes To Go Report By Date View Users and Information regarding Taxes To Go Imports By Date	Bank Involvement Report View special Invoicing data for partner products	User Access Report View Proweb Preparer Login History for your EFINs
Saved Reports		
View Saved Reports View and Run Custom Formatted Reports		

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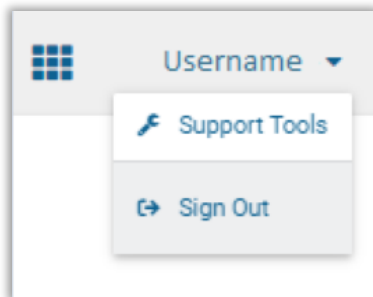
TaxSlayer Pro Home:

Links to the TaxSlayer Pro Homepage for product information, resources, and support.



Support Tools

To access Support Tools, use the drop-down arrow in the top-right of Account Hub next to your username.



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Return Recovery

Get a recovery code to download your E-Filed returns.

[GET RECOVERY CODE](#)

Program Password Reset

Get a temporary password to unlock the program and reset your ADMIN password.

[GET RESET CODE](#)

Hub Configuration

Reset Hub Cards:

[RESET](#)

When recovering e-filed tax returns our technical support staff will need this code as part of our verification. Return Recoveries can take 24-72 hours to verify.

In the event that the admin account password and security question are both forgotten or unknown, a temporary override can be obtained here.

Resets tiles on the main screen of your Account Hub.

Additional Resources

[Product Support Center](#)

- [Creating a ProWeb Account](#)
- [Downloading and Installing TaxSlayer Pro for Desktop](#)
- [Tax-Related Bank Products Overview](#)
- [Partner Programs](#)
- [TaxSlayer Premium Overview](#)

[Seminars](#)

- [New User Online Webinar](#)

[TaxSlayer Blog](#)

- [Tax Tips](#)
- [Grow Your Business](#)
- [Program Tips](#)

[Practice Tax Returns](#)

[IRS Tax Forums](#)