FormGenius - Document scanning into TaxSlayer ProWeb Returns

User Manual for TaxSlayer ProWeb Offices

FormGenius is a smart AI-Powered document processing tool that classifies your uploaded taxpayer tax documents and imports the data directly into the tax return. FormGenius is fully integrated into the TaxSlayer ProWeb software and is available to all offices that have a current TaxSlayer ProWeb license.

Requirements

- Access to the FormGenius feature must be allowed in the Roles and Permissions menu.
- Clear PDF or image files saved to the local hard drive in a folder that is accessible.
- Access to the current TaxSlayer ProWeb tax software.

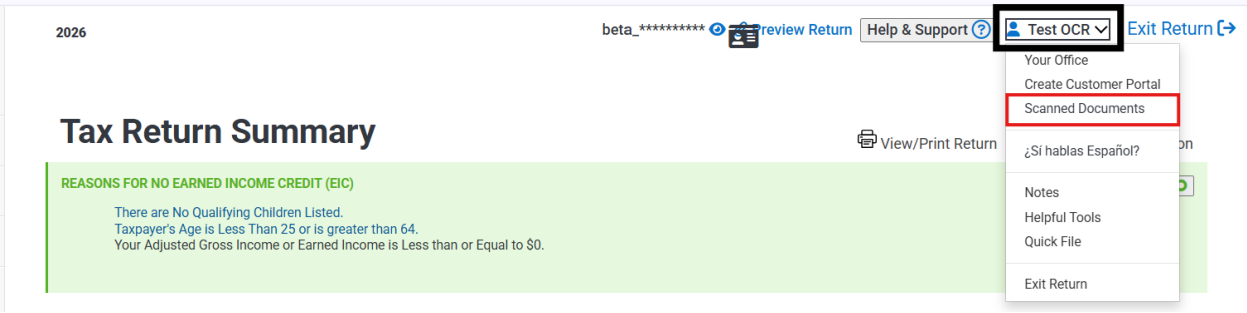
Adding Permissions for preparers to access FormGenius:

By default, FormGenius is disabled for all roles in ProWeb Roles & Permissions (unless no role has been assigned to a preparer). To allow a preparer to utilize FormGenius, it must be enabled within their assigned role. For instructions on how to create and/or edit Roles and Permissions, visit the TaxSlayer Pro Knowledgebase by clicking on the links below:
ProWeb Roles and Permissions
How Do I Enable Form Genius for a Preparer in My Office?

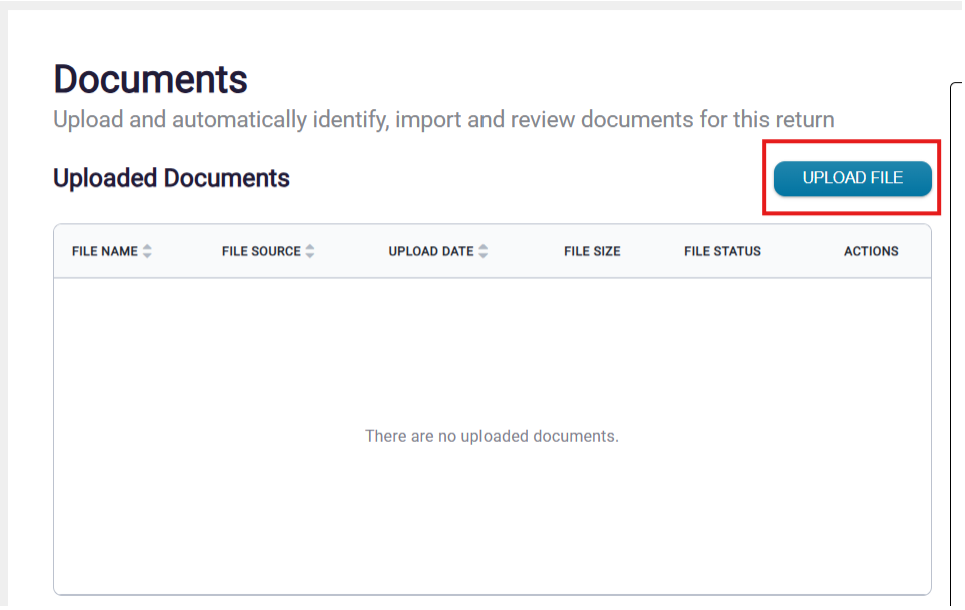
To get started with FormGenius, select a client from the Office Client List or select Start New 20xx Tax Return. (**** 2026 and forward ProWeb programs support this feature).

Enter and/or verify all personal taxpayer information used to create the return.

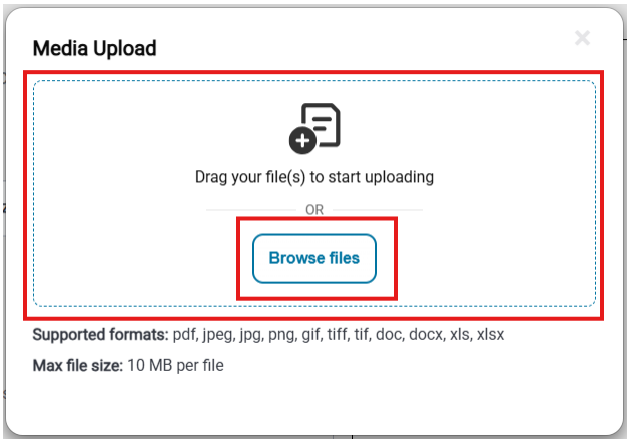
Click on the taxpayer's name from the top right-hand side of the screen and select Scanned Documents:



Select **UPLOAD FILE** to add a document:



Either drag the files into the display window, or select Browse files to navigate to where the PDFs or images are saved:



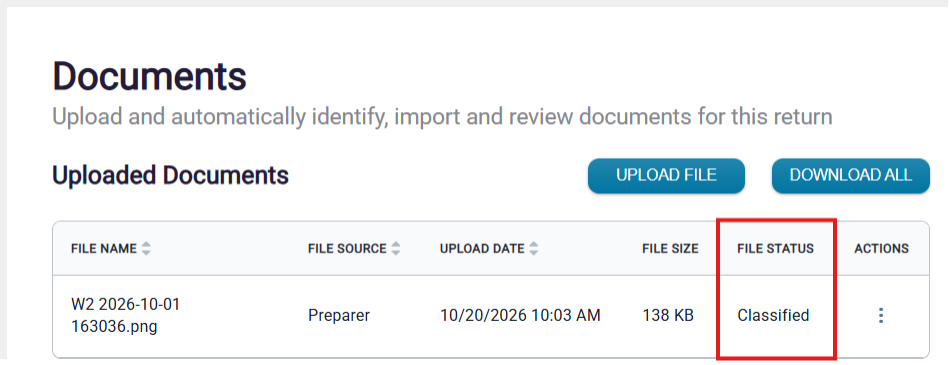
Note: supported file formats include pdf, jpeg, jpg, png, gif, tiff, tif, doc, docx, xls, and xlsx.

When a file or files have been uploaded to the return, the program will automatically try to classify them. Documents that can be classified include:

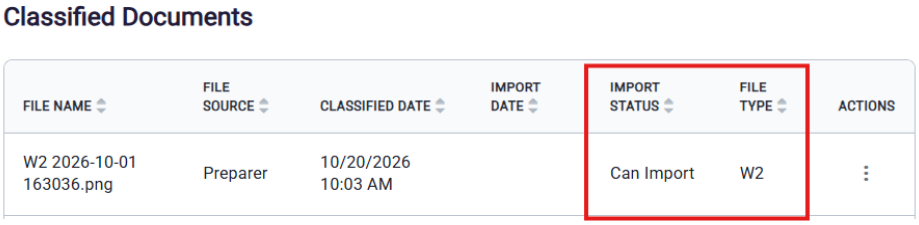
- W-2 Wage and Earning Statement
- 1099-R
- 1099-G (for unemployment)
- 1099-INT
- 1099-DIV
- 1099-OID
- 1099-C
- 1099-K (not yet available)
- 1099-MISC
- 1099-NEC

**Only documents that have been classified will be available to import into the return.

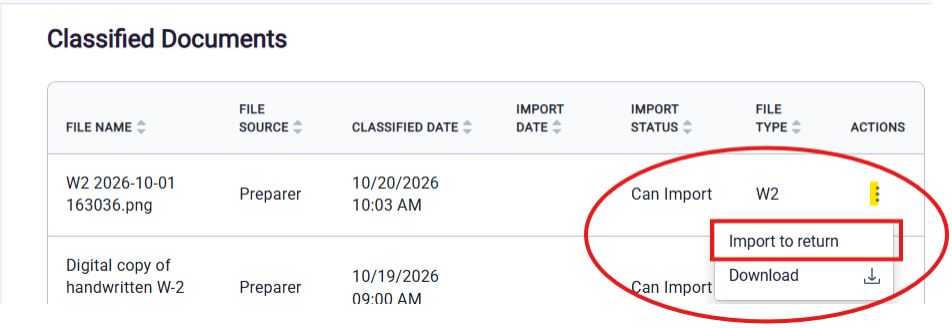
Once a document has been recognized and classified, the FILE STATUS column will reflect this:



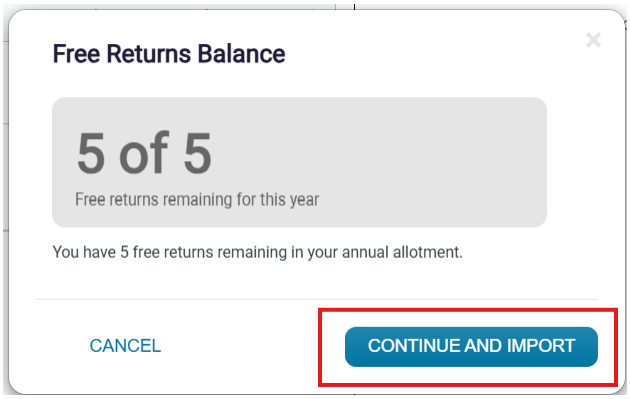
The document will then appear in the **Classified Documents** section of the menu and will be available to import into the tax return:



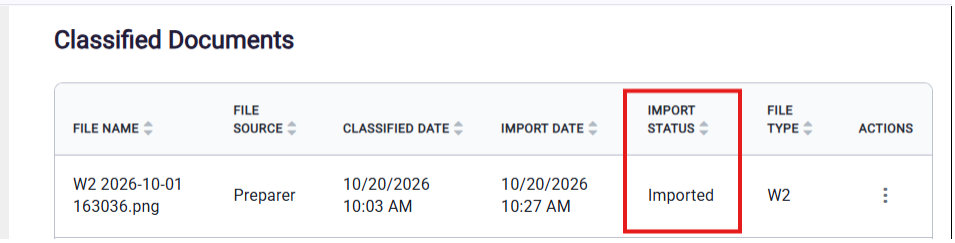
Select the 3-dot icon from the ACTIONS column to import the document's data into the tax return:



For tax year 2026, FormGenius includes the ability to import documents into 25 returns at no charge. A message will display showing your remaining balance before the import: Select **CONTINUE AND IMPORT** to import the data into the tax return:



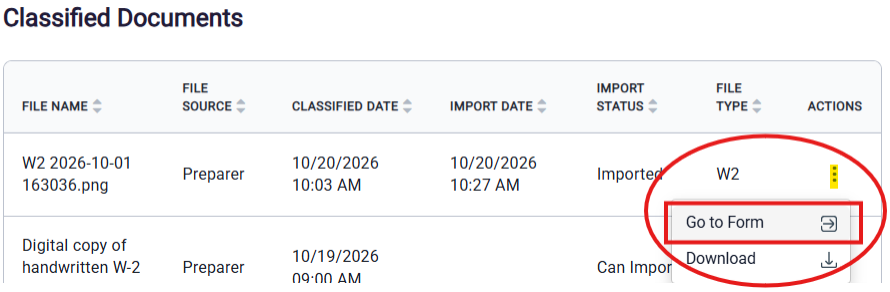
All documents that have been imported to the return will reflect this in the IMPORT STATUS column of the Classified Documents menu:



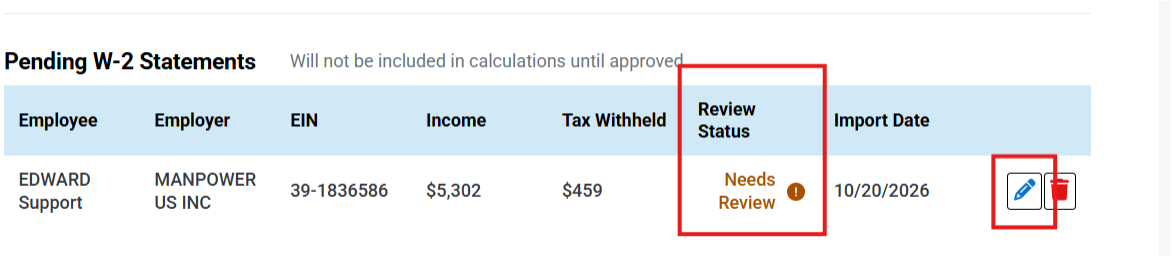
To view either an uploaded or classified document, click on it, and it will appear on the right side of the window.

Each document imported into the return needs to be reviewed for accuracy. To review a document, select the 3-dot menu from the Classified Documents section to go straight to

the form within the return:



Pending documents ready for your review will be displayed and will not be included in the return calculations until they are approved. Click on the pencil icon to review an imported document:



An image of the uploaded document will be displayed on the right side of the screen. Compare each field on the left side menu to the image of the scanned document and add or change any field as needed.

FormGenius reduces manual entry work but does not replace preparer review. Compare all imported data with the source document before relying on calculations or filing. The preparer is ultimately responsible for the accuracy of all entries included in the tax return.

After reviewing the entries for accuracy, select the **APPROVE AND SAVE** button at the bottom of the menu:

