



**2021**

**Quick Start Manual**

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## Technical and 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.

**Help Center** – The Help Center can be accessed anywhere in TaxSlayer Pro by selecting Help from the menu at the top of the screen, then Help Center. This is a great resource for quickly locating important phone numbers, pertinent IRS websites, and TaxSlayer Pro Support resources:

**TaxSlayer Pro Support**

|                        |               |
|------------------------|---------------|
| Submit Support Ticket  | Support Site  |
| Remote Desktop Support | Support Hours |
| Knowledgebase          | State Info    |
| Account Hub            | Release Notes |

**Contact Us**

|                        |              |
|------------------------|--------------|
| Customer Support :     | 706.868.0985 |
| Customer Support Fax : | 706.868.0263 |
| Email Customer Support |              |

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|             |              |
|-------------|--------------|
| Sales :     | 888.420.1040 |
| Sales Fax : | 706.868.1955 |
| Email Sales |              |

**Refund Advantage!** **Refund Advantage**  
800.967.4934 / visit site

**IRS Information**

- IRS Website
- IRS Forms and Publications
- Where's My Refund?
- Where's My Amended Return?
- IRS Information for Tax Pros
- EIC Due Diligence Website
- Health Care Information
- IRS Mailing Addresses

**IRS Contacts**

|                           |              |
|---------------------------|--------------|
| E-File Help Desk :        | 866.255.0654 |
| PTIN Support :            | 877.613.7846 |
| Practitioner Assistance : | 866.860.4259 |
| Business Assistance :     | 800.829.4933 |
| Social Security Admin :   | 800.772.1213 |
| Taxpayer Assistance :     | 800.829.1040 |
| Financial Mgmt. Svcs :    | 800.304.3107 |
| IRS Debt :                | 800.808.4262 |
| Identity Theft Hotline :  | 800.908.4490 |
| Report Tax Fraud :        | 800.829.0433 |

**TaxSlayer Pro Knowledgebase** – The Knowledgebase contains hundreds of articles pertaining to the operation and navigation of TaxSlayer Pro. If you have questions on how to perform certain tasks within the program, you will most likely find your answers here. In addition, the Knowledge base will give you specific information about a menu you are currently viewing in the program. For example, if you are preparing a Schedule C and you have a question, you can select the KB Search icon at the top left of the screen to view articles specific to the Schedule C.

**Instructional Videos** – Sometimes it's better to visualize a task; that's why we created our instructional support videos at the TaxSlayer Pro website [here](#). These videos cover the fundamentals of TaxSlayer

Pro. 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.

**The TaxBook WebLibrary** – 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 answers to tough tax questions is critical for your business. For more information about The TaxBook, click [here](#). To purchase The TaxBook, give us a call at 888.420.1040. Once you purchase The TaxBook, TaxSlayer Pro will automatically add The TaxBook WebLibrary icon to the toolbar at the top of the screen.

**Pro Support Blog** – The TaxSlayer Pro [blog](#) features 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.

**Email Support** – If you have a question that is not covered in our available resources, send our customer support staff an email. You can do this one of two ways:

- In the program, select Help at the top of the screen, then Help Center and choose Email Customer Support. This will open your web browser to a form you can complete, including your question.
- Send us an email from your own email account. Our support email address is [support@taxslayerpro.com](mailto:support@taxslayerpro.com).

Either way, we'll respond to your email as soon as possible.

**Phone Support** – Call the TaxSlayer Pro Customer Support line at 706.868.0985. Before the start of the tax season in January, our hours are 8 AM to 5 PM Monday through Friday. Starting January 4, our hours are 8 AM to 9 PM ET Monday through Friday and 9 AM to 5 PM ET on Saturday.

## Pre-installation Information

**What's New in 2021?** – See our knowledgebase article [here](#) to find out what's changing 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 tax returns can be electronically filed.

Video instructions for obtaining your EFIN tracking number from your IRS e-Services account can be viewed [here](#). Instructions can also be found in our knowledgebase [here](#).

**EFIN Validation Code** – When installing TaxSlayer Pro, you will be required to enter the EFIN Validation Code, a 12-character alphanumeric code that the IRS requires to electronically file federal tax returns. This code is available in Account Hub under Account History, then Payment History. During installation, it can be copied and pasted off the screen, or you can just type it in. Codes for the current and prior years are listed in Payment History, so be sure to enter the correct code for the 2020 software.

**Multi-Factor Authentication** – Multi-factor authentication (MFA) is a security system used to control access to Account Hub, requiring two forms of authentication. One factor of authentication is your Account Hub password; the second is a six-digit code sent to your cell phone or e-mail address. If entered correctly, your identity is considered verified and you will be granted access. MFA is not used every time you log into Account Hub, but it's repeated periodically. The e-mail address and phone number used for MFA are listed in Account Hub in the Account Information section.

**Preparer Usernames and Passwords** – Preparers log into TaxSlayer Pro using a unique username and password. If you used TaxSlayer Pro last year you can pull forward last year's usernames and passwords during installation in the new year. Otherwise, you will create the preparer's username in the Preparer(s) menu under the Configuration menu, and when a new preparer attempts to log into TaxSlayer Pro for the first time they will create their password along with the security question and answer. Passwords are required to expire periodically and will be prompted for reset every 180 days.

**The Admin user** – In TaxSlayer Pro, the Admin user exists to configure Firm, ERO, and preparer information as well as custom security roles. The Admin username is simply ADMIN, and the password is the first password created during installation. The Admin user doesn't prepare tax returns and has no settings to be configured other than a password and security question.

**Minimum and Recommended System Requirements** – See our knowledgebase article [here](#) for our minimum and recommended system requirements for TaxSlayer Pro.

**Supported Operating Systems** – If you're running a Windows version that's older than 8.1, or a Windows Server version older than 2012, you'll need to update it before installing TaxSlayer Pro. We can't provide support for TaxSlayer Pro running on versions of Windows that Microsoft no longer supports. For more information, see our knowledgebase article [here](#) regarding supported operating systems.

## Installing TaxSlayer Pro

### Step 1: Log in to your TaxSlayer Pro Account Hub

Go to [www.taxslayerpro.com](http://www.taxslayerpro.com) and select the **LOGIN** button at the top of the screen. Enter your username and password. If prompted to authenticate, follow the onscreen process. Once in Account Hub, look for the Software Options tile. Select 2021 and select the **DOWNLOAD** button. (If you are greeted with a red banner across the top of Account Hub, you may be unable to download the software until you take care of the remaining unfinished business indicated.)

### Step 2: Open the installation file

Depending upon your browser, the download file will either be listed in the top right corner under the Down Arrow icon (FireFox), the bottom left corner (Chrome), at the bottom highlighted in yellow (Internet Explorer), or in a white box at the bottom of the screen (Edge). Once the download is complete, choose either **Open** or **Install** as indicated to begin the installation process.

### Step 3: Agree to the software license

Read the TaxSlayer Pro software license agreement. If you agree to the terms set forth in the license agreement, choose "I accept the terms of the license agreement" and select **Next**. The license agreement can be printed by selecting **Print**. (If you do not agree to the terms set forth in the license agreement, select **Cancel** and do not install the software, then contact your sales representative for the next steps to take.)

### Step 4: Select the Installation Drive

Select the drive that you would like to install the program on. Don't change from the Local Disk (C) drive unless you know another drive letter is appropriate for your computer. When finished, select **Next**.

### Step 5: Install and finish

Select **Install**. The program will begin the installation process. This usually takes a minute or two. Once the installation is complete, select **Finish**.

### Step 6: Start the program!

Double-click the 2021 TaxSlayer Pro icon on your Desktop to begin the initial configuration.

## Initial Configuration

### Step 1: Start the Program

Double-click the 2021 TaxSlayer Pro Desktop icon. You will be greeted with a TaxSlayer Pro message advising you of the information that will be entered during the initial program configuration. Press Enter or select **OK**.

A summary of program security information displays next. Read each section carefully. When finished, press Enter or select **OK**.

### Step 2: Network Setup

What does it mean for TaxSlayer Pro to be used in a network?

- If more than one computer in a location will be used to prepare tax returns, and you wish to allow a preparer to work on any return they have permission to access from any computer, you will be using a Network.
- If only one computer in a location will be preparing tax returns, or you will have more than one computer prepare returns but each preparer will work only on their own computer and their returns aren't available to anyone else, you will NOT be using a Network.

If there is not a previous year's installation of TaxSlayer Pro on this computer, you will be asked if you will be using a network. Select **YES** or **NO** as appropriate.

On the other hand, if TaxSlayer Pro is already installed on this computer from the previous tax season, you will be asked if you would like to use the same network configuration as last year:

- If you are not using a network and didn't use one last year, select **YES**.
- If you are using a network and want to use the same settings as last year, select **YES**.
- If your office setup has changed from last year, either a change to using or not using a network, or if the computer designated as the File Server has changed, select **NO** and refer to the [Network Overview and Setup](#) knowledgebase article.

Before moving to the next step, you will be presented with the network configuration to confirm the settings chosen. Two caveats regarding the File Server settings in a networked setup:

- If "File Server?" = NO, the "File Server Address" information should not be the same as the "Local Computer Name" and "Local IP Address" information.
- Only one computer in a TaxSlayer Pro network configuration should have the setting "File Server?" = YES. Unusual problems can occur if more than one computer is indicated as a file server.

If you are using a network, note that if you are installing the program on a computer not designated as the File Server (aka "a Workstation"), many of the following questions will be skipped as the required information will be pulled from the File Server.

### Step 3 – Firm Information

At this screen, simply fill in all the required information. When entering the name and address of your firm, do not enter punctuation, such as apostrophes, commas, periods, etc. If you enter any of these characters, the program will prompt you to remove them before continuing.

The IRS requires that your unique EFIN Validation Code be entered in the software. Your EFIN Validation code can be found by logging in to your **TaxSlayer Pro Account Hub** as follows:

- Log in to [Account Hub](#).
- Select **Account History** in the left side menu.
- Under **Payment History**, select **View**
- Find *this year's* software purchase and note the 12-character code beginning with "7Q":

Store Purchase - Order #1xxxxx | Receipt  
EFIN validation code 7Qxxxxxxxxxx. You will need to enter this into your 2021 Software.

You can copy the code off the screen and paste it into the space provided, or you can manually key it in.

Once you have finished entering the firm information, select **Exit**.

#### **Step 4: Create the Administrator Account Password**

The Administrator account username is ADMIN. The ADMIN account is used to manage firm, ERO, and preparer information as well as preparer security roles. The ADMIN account does not prepare tax returns, and the username cannot be changed, nor can any of its security role or other settings be changed.

You will be prompted to create a password for the ADMIN account, using the same password requirements for preparers. The password must be between 8 and 30 characters in length, and it must contain:

- at least one uppercase letter,
- at least one lowercase letter,
- at least one number, and
- at least one special character, such as \$, @, !, #, etc.

You will also be prompted to create a security question and answer for the ADMIN account. The security question is used in the process of changing the ADMIN password to verify that the user attempting to change the password has permission to do so.

#### **Step 5: Enter/Edit Preparers**

If TaxSlayer Pro 2020 is installed on your computer, you will be prompted with a question asking if you'd like to pull in last year's preparers. Select **YES** to pull the preparers forward. You can edit the information pertaining to each preparer if needed, delete obsolete preparers, and add new preparers.

**NOTE:** Each preparer's username, password, and assigned security role are pulled forward from the previous year. Any of these settings can be modified from the Preparer Setup Menu.

**Adding a new preparer** – If you do not pull forward preparers from the prior year, or if you have a new preparer to add, you will be given the option to enter preparers. To enter a preparer:

- Select **New**
- Enter a Preparer Code. Each preparer is assigned a unique number that appears in their returns and is used to pull their information into the return. You can use any number from 1 to 999999.
- Enter the preparer's SSN, PTIN, first name, middle initial, and last name.



- Finally, enter a username that the preparer will use to log into the program. Each preparer has a unique username. You won't create their password. The preparer will create their own password and security question when they log into the program for the first time.

Select **OK** to proceed to the Preparer Edit Menu. The Preparer Edit Menu gives you the option to add several other items:

- Preparer Practitioner PIN (the 5-digit PIN that populates to federal and state e-file signature forms).
- Preparer Hourly Rate (if you use hourly billing).
- Preparer Prep Fee Commission % (if preparers earn a commission based on a return's prep fees).
- Preparer E-File Fee Commission % (if preparers earn a commission based on a return's e-file fee).
- The preparer's power of attorney information (if the preparer is an Acceptance Agent).
- Indicate if the preparer is supervised, in which case their supervisor's information will appear on tax returns rather than the preparer's information.
- The preparer firm information if it is different from your firm information.
- The preparer's security role and specific security settings, as well as clearing their password and security question to be recreated upon their next login.

Newly added preparers are assigned the default security role "Super User." A Super User has access to all tax returns and all areas of the program except firm, ERO, preparer information, and security roles settings. To change the preparer's default security role, select:

- **Preparer Security**
- **Role**

#### **Step 6: Bank Setup**

For 2021, the following banks are partnered with TaxSlayer Pro:

- EPS Financial
- Refund Advantage
- Santa Barbara TPG

If you will be offering bank products, we encourage you to complete and submit a bank application in Account Hub as early as possible. For more information about these banks, click [here](#).

If you are already approved with one or more banks, the bank(s) should appear in the Banks window. If you do not see your approved bank, contact TaxSlayer Pro Sales.

Once the bank has been selected, you will be shown a menu with bank product options such as advances, pre-ack advances, and the use of debit cards. If the bank has approved you for any of the options shown, select the option and when queried select **YES** to make the option available to present to your client when finalizing their return. Note: A disbursement or advance option will not be available to be offered in a return if it hasn't been selected here.

### **Step 7: Fee Setup Menu**

The amounts specified in the Fees Menu are used to calculate the tax return preparation fee that appears on the Client Invoice. If you used TaxSlayer Pro last year, or you entered fees in the TaxSlayer Pro demo program, you can pull the fees forward by selecting the **Pull Prior Year Fees** button. To change a fee or to enter a new fee, select the line for the form and enter the fee. Before exiting the Fees Menu, look for new Federal and State forms that may have been added to the program. You will need to manually enter fees for these new forms.

If you did not use TaxSlayer Pro last year, you can manually enter the fee you want to charge for each form or select the **Set Range** button. This will allow you to set the same fee for a range of federal or state tax forms.

If you charge by the hour, check the **Charge by the Hour** check box in the lower left-hand corner of the window. Custom Fees and Custom Discounts that can be included on the invoice can also be created in the Fees menu. Select **Exit** when you have finished configuring your fees.

### **Step 8: Client Letters**

You will be prompted to pull from the prior year each customizable client letter. If you made changes to any of the client letters, select **YES** to pull them forward, preserving the changes. Otherwise, select **NO** to use the default client letters.

### **Step 9: Path Menu**

The settings defined within the Path Menu tell the program where prior year data is located and the path to a secondary backup drive. Generally, nothing needs to be changed here.

**Prior Year** - The prior year path only needs to be changed in unusual situations, and if it is incorrectly specified you will not be able to pull prior year client data forward into the current year's return. If your prior year data is stored on a drive other than the drive the current TaxSlayer Pro program is installed on (not typical), the Prior Path location will need to be changed. To change the location, select **Prior Path** and enter the absolute DOS path, i.e., the drive letter followed by a colon plus the directory location on the drive with each directory separated by a backslash, e.g., E:\TAXSLAYER\2020NET\. If you need assistance, please call TaxSlayer Pro Support.

**Secondary Backup Path** - A secondary backup can be specified here if desired. This backup is generally to a removable drive, such as a thumb drive or external hard drive. (Secondary backup to a cloud location is not supported.) To set up a secondary backup path for your tax returns, do the following:

- Plug the drive into the computer
- Select Secondary Backup Path and select the drive letter for the drive.

Two caveats about the secondary backup drive if you have one specified here:

- The drive must be plugged into the computer when working on returns. If it is unplugged, you will receive an error message when exiting a return that the return could not be saved to it.
- Only return data is backed up. Printed PDF copies of the return as well as supporting documents, such as driver's license images, aren't saved.

### **Step 10: MACRO Setup**

A macro, by definition, is a shortcut to a task you do repeatedly. In TaxSlayer Pro, macros reduce the number of keystrokes by allowing you to select an entity from a list or to complete name and address fields simply by entering the EIN. TaxSlayer Pro maintains six macros:

- W-2 employers and 1099 payers
- K-1 entities
- Child Care Providers
- Interest and dividend payers
- Charitable organizations
- Banks

To pull forward prior year macros, or enter new ones, select **YES** when queried. You will be asked about pulling forward each of the six macros and will be given the opportunity to add to or edit each list if desired. Select **Exit** at the bottom of each list to proceed to the next macro list. This isn't a one-time only step; all these macro lists can be revisited and edited after the program has been installed.

### **Step 11: TaxSlayer Pro Premium**

If you purchased TaxSlayer Pro Premium, enter the activation code. The activation code can be found by logging in to your TaxSlayer Pro [Account Hub](#):

- Once you have logged in, select **Pro Premium** in the left side menu.
- Copy and paste the 9-digit activation code into the program, or type it in.

The program will guide you through the process of configuring premium features. If prompted to use prior year settings for PaperCut e-mail, select **YES**. Otherwise enter your email address when prompted. The email method will default to TaxSlayer Pro. You can choose SMTP but you'll need specific settings from your internet service provider, i.e., the server address and port number, whether a username and password are required, the connection timeout setting, and whether or not SSL is required. Contact your internet service provider to obtain this information if you'd like to use SMTP.

Several other premium options can be configured from the Premium Configuration Menu. Visit the TaxSlayer Pro Knowledgebase [here](#) for more information on all the Premium features. If you would like to upgrade to TaxSlayer Pro Premium and take advantage of the Taxes To Go Mobile App, online client status, text messaging, the e-mail and Customer Portal features in PaperCut, contact TaxSlayer Pro Sales at 888.420.1040.

NOTE: If you upgrade to TaxSlayer Pro Premium after installing the program, activate it within TaxSlayer Pro by selecting from the Main Menu:

- **Configuration**
- **Configure Premium Options** - enter the activation code.

To activate PaperCut, change "Use the PaperCut Paperless Office Option" to **YES**.

### **Step 12: Exit Configuration**

Before exiting the final window headed "Software Installed!", check the date, time, and time zone on your computer to ensure they are correct. If the date and time are not correct, the program will not be able to communicate with our server. Adjust the date by clicking the time and date display in the Windows taskbar, typically at the bottom right-hand corner of the screen.

## Post-Installation Considerations

### Network Setup

Setting up the TaxSlayer Pro network takes only a few minutes if your office network is already working properly.

**IMPORTANT – If your office network is not set up or is not functioning properly, our TaxSlayer Pro technicians will not be able to assist you with the TaxSlayer Pro network settings. Contact your local network technician for assistance if needed.**

Here are a few items to consider when setting up the TaxSlayer Pro network:

- The TaxSlayer Pro network operates in a peer-to-peer environment. This means that the TaxSlayer Pro program must be installed on each computer in your office. The program cannot be installed on a central file server for distribution across the network.
- Make sure that File and Printer Sharing is enabled within your anti-virus program. Some anti-virus programs block file sharing on networks.

If you are not familiar with the information listed above or are encountering problems, we suggest contacting a local network or computer technician for assistance in setting up your office network.

In TaxSlayer Pro, only one computer is designated as the File Server and only one computer should be designated as the Transmitting Computer. The simplest and easiest to manage setup is for the same computer to handle both functions.

If you need to return to the network settings menu after initial configuration, from the Main Menu of the TaxSlayer Pro select

- **Configuration**
- **System/Network Configuration Menu**

### Logging In to TaxSlayer Pro

**The ADMIN user** – The Administrator username is ADMIN. The ADMIN account is used to manage firm, ERO, and preparer information as well as preparer security roles. The ADMIN user does not prepare tax returns, and the username cannot be changed, nor can any of its security role or other settings be changed.

During the initial configuration of the program, you are prompted to create a password and a security question and answer for the ADMIN account. Store this information securely as it may be necessary to log in as ADMIN at a subsequent point in time.

**Usernames** – Each preparer using the software logs into the program using a unique username and a password. During the initial configuration of the program, you will be prompted to assign (or pull forward from the prior year's software) a username for each preparer entered in the Preparer's Menu.

**Passwords** – Each preparer associated with your firm must use their assigned username and the password they created to access the tax program. A preparer's password and security question and answer aren't assigned in the Preparer Security menu. Rather, when a preparer logs into the software

for the first time with their assigned username, they will be prompted at that time to create a password and a security question and answer.

Passwords will expire and need to be reset every 180 days.

Note: If TaxSlayer Pro arrives directly at the Main Menu when started, bypassing the log in screen, the program is experiencing a problem and we recommend that you contact support immediately for technical assistance.

## **Security Roles**

In TaxSlayer Pro, a security role is a predefined set of permissions to access different menus and features. Every preparer is assigned a security role. The software comes with three predefined roles:

- **Unlimited** - Can access any menu.
- **Super User** – Unlimited minus Firm, ERO, and Preparer Setup, and security role configuration.
- **Return Preparer** – Super User minus Utilities, Reports, and Updates, and can only work on their own tax returns.

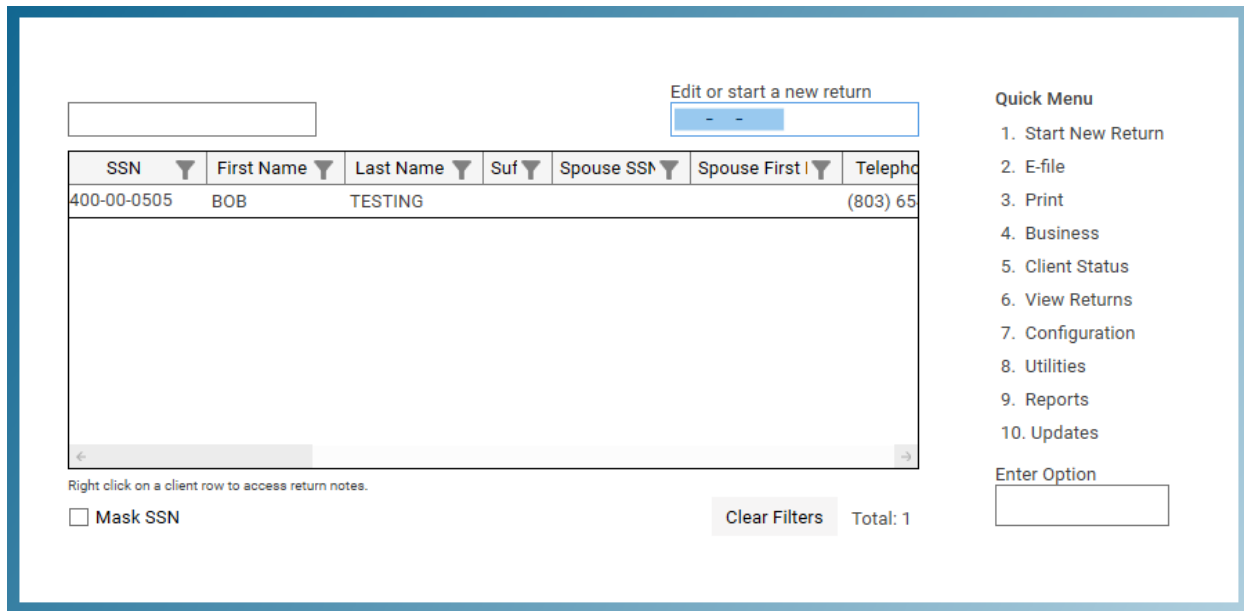
Newly added preparers are defaulted to the Super User role. The settings for these three predefined roles cannot be changed, however any setting can be changed on a preparer-by-preparer basis, and you can create your own security roles as well, allowing or denying menus and functions as desired.

To change a preparer's security role, from the Main Menu of TaxSlayer Pro select:

- **Configuration**
- **Firm/ERO/Preparer Setup**
- **Preparer(s) Menu** – select the preparer
- **Preparer Security**
- **Role** – choose the desired role

For information about creating security roles, see our knowledgebase article [here](#).

## TaxSlayer Pro Main Menu



Once logged into TaxSlayer Pro, the Quick Menu displays either with or without the Client List (also called the Pick List). Both are displayed by default, as in the image above. To display only the Quick Menu select:

- **Configuration**
- **Advanced Configuration**
- **Display Settings**
- **Display Client List on Main Menu** – change to **NO**

If you do wish to display the Client List along with the Quick Menu, there are three settings in the Display Settings Menu you'll want to customize to your taste:

- **Edit Main Menu Size** – use this setting to change the size of the Client List window.
- **Default Cursor Focus on Main Menu Client List** – use this to indicate where you want the cursor to land when you reach this window: in the SSN field, to start or edit a return, or in the Enter Option field for the Quick Menu.
- **Mask SSNs in Lists** – consider setting this to **YES** if your clients can see your display.

There are ten Quick Menu options:

- 1. Start New Return** – Displays the Client List so you can start a new tax return or select an existing return to edit.
- 2. E-File** – Transmit tax returns, receive acknowledgements, rehang acknowledgements, and create and transmit automatic extension applications (Form 4868).
- 3. Print** – Print copies of individual tax returns and extensions, print tax organizers for clients, print blank forms.

**4. Business** – All business return functions: start, edit, e-file, or print; receive and rehang acknowledgements; e-file automatic extension applications; check return and extension status; print organizers; change C corp to S corp. For more information, see the Business Main Menu knowledgebase article [here](#).

**5. Client Status** – Check the current e-File and refund status for your clients, including when the return was accepted or rejected, along with bank approval, check status, and fees payment.

**6. View Returns** – View an individual client return in PDF form.

**7. Configuration** – Customize many aspects of TaxSlayer Pro, including printing, network settings, firm and preparer information, program security, fees, banks, and how certain items display or print. For more information, see the Configuration Menu knowledgebase article [here](#).

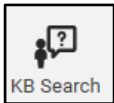
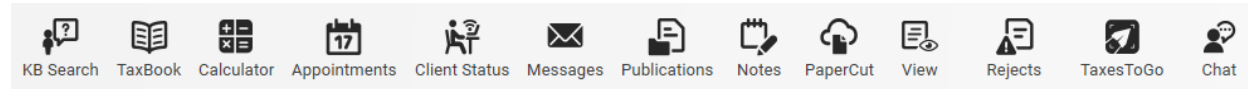
**8. Utilities** – Backup and recall returns, the Quick MFJ Calculator, delete a return, repairing the pick list if it's not displaying correctly, and connect your screen with us for troubleshooting. For more information, see the Utilities Menu knowledgebase article [here](#).

**9. Reports** – This menu includes reports to help you monitor your office's performance, keep track of unacknowledged returns and extensions, print Form 9325 for a client, and more. For more information, see the Reports Menu knowledgebase article [here](#).

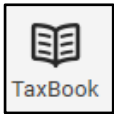
**10. Updates** – Download and install available updates to the program as well as configure which state updates will always be checked and installed when the program is started.

## Toolbar Icons

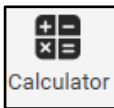
At the top of the TaxSlayer Pro window is a toolbar with icons for different program functions. Some icons are visible all the time, whether you are working on a return or not, while others are visible only within a return. Below is a brief description of each toolbar icon and what it does.



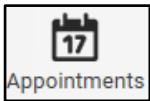
**Knowledgebase** – Select the KB Search icon to open your web browser to the TaxSlayer Pro knowledgebase consisting of numerous helpful articles. For most menus in the program, selecting KB Search links to an article contextualized for where you are in the program. Another shortcut to the knowledgebase is to press the F1 key on your keyboard anywhere in the program.



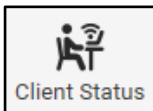
**The Tax Book** – Select the TaxBook icon to access your TaxBook online subscription. Don't have a subscription? Click [here](#) to find out more, then call your TaxSlayer Pro sales rep for a discounted price. Another shortcut to the Tax Book is to press the F3 key on your keyboard anywhere in the program.



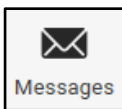
**Calculator** – Select the calculator icon for a calculator that includes a tape-like feature to keep track of your entries. Another shortcut to the calculator is to press the F6 key on your keyboard from anywhere in the program.



**Appointments** – The Appointment Calendar allows you to keep track of client appointments. You can add notes and print reports to view a breakdown of the day's events.



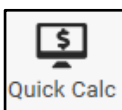
**Client Status** – Check on the e-File and refund status of a client's return no matter where you are in the program.



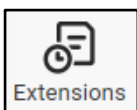
**Messages** – Throughout the tax season, TaxSlayer Pro will release messages to the Message Center to keep you informed. A red exclamation mark appears over the icon when a new message arrives. Select the icon to view new or old messages.



**Publications** – We have compiled the most widely used IRS Publications, Instructions, and fill-in forms and made them readily available to you through the Publications icon.

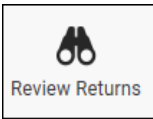


**Quick Calc** – The Quick Calc is a refund calculator designed to give your customer an estimate of his or her expected refund.

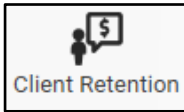


**Extensions** – Create a new individual extension or edit an existing extension.





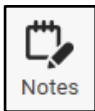
**Review Returns** – If you are using Return Review Workflow, select the Review Returns icon to see returns that need review or have failed review. (This icon is only visible if Return Review Workflow is on.) See our knowledgebase article [here](#) for more information about Return Review Workflow.



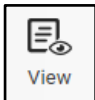
**Client Retention** – Client Retention can be used to generate two lists: If you used TaxSlayer Pro last year, the Prior Year Client List lists all clients that have not returned this year. The Call/Thank You list shows a list of clients who have had their returns completed for the current year.



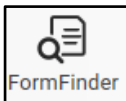
**Rejected Returns** – Any federal or state returns that come back as rejected will be listed here. You can double-click on a client in the list to open the return.



**Notes** – Select the Notes icon from inside a client's tax return to enter notes specific to the client. The notes can be marked to be displayed when entering the tax return and/or when exiting the tax return. (Return notes can also be pulled forward to the following year via a Configuration setting.)



**View Form** – Select View Form to view a PDF of the form currently being edited. This icon is available in most federal form and schedule menus as well as in each state return's main menu.



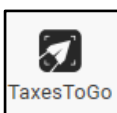
**Form Finder** – The Form Finder icon appears in state returns only and helps you locate a particular form in the return you are preparing. You can search the Form Finder by name or form number.



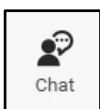
**State Tax Info** – Within each state program is a State Tax Info icon. The icon links to our knowledgebase with information relevant to the state you are working in, including contact information, the state's "Where's My Refund" link, forms and instructions, general filing and e-file information, and mailing addresses.



The **PaperCut** icon is visible for TaxSlayer Pro Premium users. Paper Cut stores PDF copies of all tax returns, management reports, and e-File reports that have been printed to PDF. PaperCut is the place to go to e-mail returns to clients as well as to access the Customer Portal.



The **TaxesToGo** icon is visible for TaxSlayer Pro Premium users. Clients who have used your branded Taxes To Go mobile app to upload their tax return information will appear here. Select the icon to see who's sent you info and start their return.



The TaxestoGo Chat icon is visible for TaxSlayer Pro Premium users and can be used by the preparer and mobile app client to communicate via text messages.

## Overview of Creating a Tax Return

Follow the steps below to create a tax return.

**Step 1:** If you're displaying the Client List at the Main Menu, key in the social security number. Otherwise select **Start New Return** from the Quick Menu.

The screenshot shows a software interface with a table of client information and a quick menu. The table has columns for Address, City, State, Zip, Completed, Fees Paid, and Receipts. The quick menu is on the right and includes options like Start New Return, E-file, Print, Business, Client Status, View Returns, Configuration, Utilities, Reports, and Updates. A red box highlights the 'Edit or start a new return' button and the '1. Start New Return' option in the quick menu.

| Address         | City    | State | Zip   | Completed  | Fees Paid | Receipts |
|-----------------|---------|-------|-------|------------|-----------|----------|
| 945 BROAD ST    | AUGUSTA | GA    | 30901 |            | 0.00      | 0.0      |
| 3003 ALLEN PKWY | EVANS   | GA    | 30809 | 11/08/2020 | 0.00      | 1.0      |
| 945 BROAD ST    | EVANS   | GA    | 30809 |            | 0.00      | 0.0      |

Quick Menu

1. Start New Return
2. E-file
3. Print
4. Business
5. Client Status
6. View Returns
7. Configuration
8. Utilities
9. Reports
10. Updates

Enter Option

If you go the Quick Menu route and you're offering bank products, you may be prompted to print the IRC section 7216 Consent To Use before entering the SSN. If so, print the form, get it signed, then key in the SSN. (Note: If you aren't offering bank products, no consent form will be prompted or needed).

**Step 2:** If a return for this SSN doesn't already exist, you'll be queried *Do you want to Create a NEW Return?* Select **Yes**.

**Step 3:** Select the appropriate filing status or select 1040-NR if you are completing the Nonresident return. Note: if you are preparing a 1040-NR, you must indicate that here. If you start the 1040 and then later wish to change to 1040-NR, you will need to remove the client and start over.

**Step 4:** Personal Information Entry Menu – Enter the taxpayer's personal information. If the return filing status is MFJ or MFS, enter the spouse's information as well. After entering personal information, you'll be able to review your entries as well as enter additional info such as a military address and identity protection PIN, as well as indicate that the taxpayer is blind, deceased, or a student.

**Step 5:** You are next prompted if you would like to enter dependents. If so, select **Yes**, then at the Dependent Information window select **New**. Enter the dependent's name, date of birth, social security number, relationship, and number of months in the home. Select **OK** when finished, and you may be prompted to enter the qualifying dependent care expenses, if any, and be queried about the dependent's citizenship status. Finally, review the remaining entries about the dependent, including eligibility for certain credits, their identity protection PIN, and marital status. Select **Exit** when finished to return to the Dependent Information window to add another dependent if needed.

If you entered an amount paid for qualifying dependent care expenses, after exiting the Dependent Information window you will be prompted to enter the childcare provider information. You can enter the info at this point or enter it later in the return when completing Form 2441.

**Step 6:** After exiting the Personal Information window you will be queried if anyone enrolled in health insurance through the federal health insurance marketplace. If yes, you'll use their Form 1095-A to complete Form 8962 later in the return.

**Step 7:** Next you will be queried if you'd like to enter a W-2. If so, answer **Yes**. At the Form W-2 menu select **New**, then enter the information from the taxpayer's W-2. After exiting the W-2 window, select **New** to enter a second W-2 if needed or select **Exit** to continue. When you exit the W-2 menu, you will be directed to the Income Menu. If the taxpayer has additional forms of income, select the applicable menu line and enter the required information.

**Step 8:** When all items of income have been entered, exit the Income Menu. If the taxpayer is eligible for the Earned Income Credit, the program will prompt you to answer due diligence questions from the EIC checklist. Answer the questions, and if the taxpayer qualifies EIC will be calculated.

**Step 9:** After completing the EIC checklist, you will be directed to the 1040 Main Menu. At the 1040 Main Menu, you can navigate through the remainder of the return three ways.

- Use the menus from the left-hand side of the screen to jump to a particular category
- Use the Form Finder to locate a form or schedule
- Select amount on the line in the 1040 or one of its schedules displaying in the interactive screen

**Step 10:** When all remaining entries have been made on the federal tax return, if you're e-filing the return select **Mark Return Electronic**. Select the type of return to e-file:

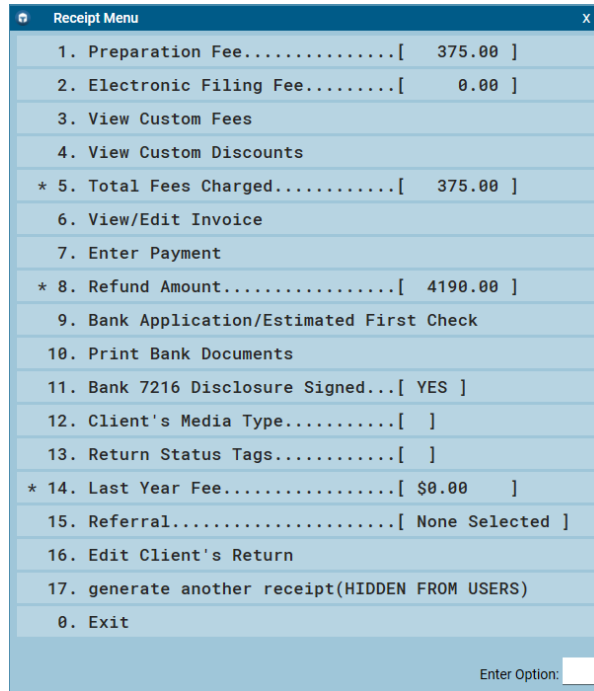
- for a refund return, whether using a bank product or not and how the refund will be paid.
- for a balance due return, whether payment will be by direct debit.

After selecting the type of return, you will be directed to the Practitioner PIN Menu showing the Taxpayer, Spouse (if applicable), and ERO PIN numbers and signature date for Form 8879, *IRS e-file Signature Authorization*. After exiting the Practitioner PIN Menu. You will be given the option to print Form 8879. The taxpayer and spouse (if applicable) must sign Form 8879 prior to electronically filing the tax return. EROs are required to keep Form 8879 on file for 3 years.

If your client is choosing to use a bank product, you will have additional information to enter that varies by bank and can include identification, opting in to receiving text messages from the bank along with a cell phone number, and a security question and answer. In the E-File Menu you can also schedule tax year 2021 estimated tax payments for electronic withdrawal if the taxpayer desires.

**Step 11:** If you have one or more state returns to complete, select menu item **10. State Return** from the left side menu. Select the state and create the return. Most info on the federal return will pull into the state return, nevertheless, always review every menu in the state return for completeness and accuracy. If you're e-filing the state return, visit the **Electronic Information Menu**. As with the federal return, the state return will need to have its return type set: for a refund return, whether or not using a bank product, or for a balance due return whether or not payment will be by direct debit.

**Step 12:** When finished working on the federal and/or state returns, select **Exit** in the federal return to arrive at the Receipt Menu.



The Receipt Menu provides an overview of the calculated fees, giving you the option to edit the fees, include additional fees or discounts, view and edit the invoice, enter a payment, and if the taxpayer has applied for a bank product show them an estimate of the first payment. If you need to reenter the return, you can select **Edit Client's Return**, otherwise when finished in this menu select **Exit**. You will be queried, *Are You Ready to Mark the Return as Completed and Ready for Transmission?* Answer **No** if the return is not complete or **Yes** to mark the return complete, and you will return to the TaxSlayer Pro Main Menu.

Two caveats:

- Once a return is marked Complete, it cannot be reverted to "Incomplete". It can still be edited after it's marked Complete, but if it includes a bank product or is fully paid it will always be listed in the e-file Transmission Table, ready to be transmitted.
- If a non-bank product return is marked Complete but isn't paid in full, it won't automatically appear in the Transmission Table, but it can be manually added to the table for transmission if desired.

## Transmitting a Tax Return

To e-file your returns through TaxSlayer Pro, follow the steps below:

**Step 1:** From the Main Menu of TaxSlayer Pro select **E-File**, then select **Transmit Electronic Returns**.

**Step 2:** The Transmission Table shows returns that have been both marked for electronic filing and marked complete. Returns that don't include a bank product and aren't paid in full aren't automatically listed in the table, though they can be added.

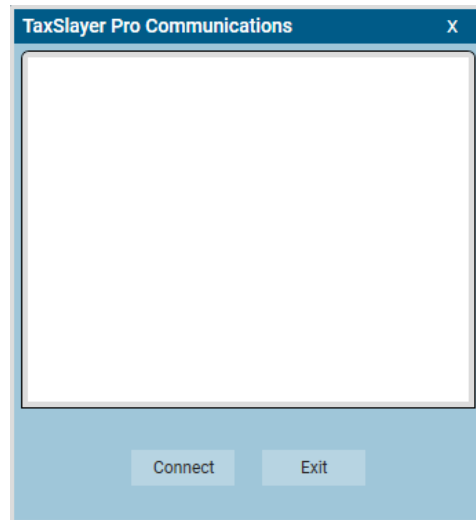
| SSN         | First Name | Last Name | Federal Ty  | S                        | S | State Only | Prepa | EFIN   | Fees | EFile | Sent |
|-------------|------------|-----------|-------------|--------------------------|---|------------|-------|--------|------|-------|------|
| 400-00-0505 | DEMO       | RETURN    | Dir Deposit | <input type="checkbox"/> |   |            | 1     | 121121 | 0.00 |       | 0    |

Note the sixth column from the right headed "State Only". If you wish to transmit only the state return, select the State Only check box. You'll be queried to confirm you'd like to do this as well as indicate which state(s) to transmit. When finished, you'll see a check mark in the State Only check box.

There are seven buttons at the bottom of the transmission table window:

- **Add Client** – Select Add Client to add a return to the transmission table. You'll need to do this, for example, when you have corrected an IRS reject and now wish to resubmit the return, or if you'd like to transmit a non-bank product return that hasn't been paid in full. Select Add Client and select the return from the list. If a return you'd like to e-file isn't listed, it either hasn't been marked for electronic filing or it hasn't been marked complete.
- **Clear Filters** – If while examining the table you have filtered the table by a value in one or more of the columns, select Clear Filters to remove the filters and see the entire table again.
- **Print** – Select Print to print the list of clients in the Transmission Table to paper or PDF, giving you the option to select what columns you'd like to include.
- **Export** – This function allows you to export the list of clients shown in the Transmission Table to a comma-separated values (CSV) file to be opened in your spreadsheet software, such as Excel. As with printing, you can choose which columns to include.
- **Remove Client** – Select Remove Client to remove one or more returns or all returns from the Transmission Table. If you choose not to remove all returns, you'll be queried if you'd like for the removed returns to be in the table the next time you wish to transmit.
- **Cancel** – Select Cancel to abort the process and return to the E-File Menu.
- **Transmit** – When you are satisfied with the list of returns to be transmitted, select Transmit.

**Step 3:** After selecting **Transmit** you'll be asked, *Do You Want a Printed List of Clients to Send?* We recommend that you always print the list so you will have a record of what you wished to transmit. Note that this is a list of clients *to be* transmitted; transmission hasn't yet occurred. You will be asked if the printed information is correct. If it is correct, select **Yes**. If you select **No**, you will be returned to the E-File Menu. After answering **Yes**, you'll be taken to the TaxSlayer Pro Communications window:



**Step 4:** At the TaxSlayer Pro Communications window select **Connect**. The returns will be transmitted, and if there are any acknowledgements awaiting pickup they will be received. Messages in the window indicate what's happening at each step in the process, and the final message will tell you that it's finished and that you can exit, so at that point select **Exit**. Note that once transmitted, returns cannot be retrieved or "gotten back".

**Step 5:** After transmission you'll be asked if you'd like to print the Transmission Confirmation Report listing the returns that were transmitted. Again, it's a good idea to print this report, either to paper or PDF, for your records. Returning to the E-File Main Menu, if you see two arrows on the **Print Reports** menu line, select it and print whatever reports are waiting to be printed, as indicated by two arrows on the particular report line.

The Transmission Confirmation Report lists the last name and SSN of the taxpayers who were transmitted. Keep this with the report that was printed before transmitting.

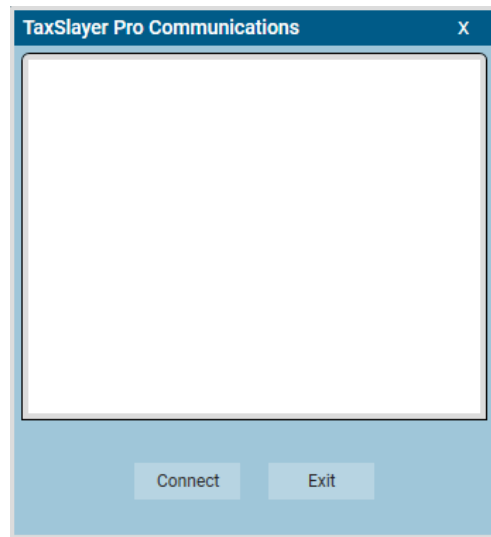
**IMPORTANT: If you DO NOT receive a Transmission Confirmation Report, the returns DID NOT get sent to TaxSlayer Pro.**

The IRS generally acknowledges returns within 15 minutes. State agency acknowledgement time frames vary by state, generally anywhere from 15 minutes to 10 hours.

## Receiving Acknowledgements

The IRS and the states release acknowledgements continuously throughout the day. You will automatically receive any available acknowledgements each time you transmit tax returns unless you've configured otherwise. To manually check for acknowledgements, follow the steps below:

**Step 1:** From the Main Menu of TaxSlayer Pro on the Transmitting computer, select **E-File**, then **Receive Acknowledgements Only**. This will open the TaxSlayer Pro Communications window:



**Step 2:** At the TaxSlayer Pro Communications window, select **Connect**. You will see a description of each action during the retrieval process, and the final message will tell you that it's finished and that you can exit, so at that point select **Exit**.

**Step 3:** From the E-File Menu, select **Print Reports**. Each report available to print will be marked with two arrows next to the menu number. On the IRS and State Acknowledgement reports look for rejects and validation errors. Rejects are returns that the IRS or state authority rejected and are indicated with a reject code and explanation. A return that doesn't pass validation did not get sent to the IRS, and the explanation will reveal why.

## Printing a Tax Return

There are three ways to print a return in TaxSlayer Pro:

- In the return, from the **View Results** menu
- At the Main Menu of TaxSlayer Pro
  - **Print** menu
  - **View Returns** menu

When we use the term print, we mean the result will either be on paper or in PDF form, however it's configured for you, both in Microsoft Windows as well as in TaxSlayer Pro. In Windows, you may have PDF files associated with a PDF application such as Adobe Acrobat Reader, or they may open in your web browser. Likewise, you can configure TaxSlayer Pro to print to PDF or to your printer on paper. Printing to PDF has the advantage of not wasting paper and toner unnecessarily by letting you view what's going to print before going to paper.

See the knowledgebase article [here](#) for more information about printer configuration and how to default to PDF for all printing. See the knowledgebase article [here](#) for more information about print options included in TaxSlayer Pro and how to create your own print options.

**View Results** – From inside the tax return, select **View Results**. You can select **Print Return** to choose from among the print options or select an individual form or state return as desired. Double-click what you'd like to print, or single click and then click **OK**.

**View Returns menu** – The View Returns menu is the equivalent of the View Results menu within a return, the difference being that you don't have to open the return to print. From the Main Menu of TaxSlayer Pro select **View Returns**. In the Client List, double-click the client you wish to print. You can select **Print Return** to choose from among the print options or select an individual form or state return as desired. Double-click what you'd like to print, or single click and then click **OK**.

**Print Menu** – Printing from the Print menu is a convenient way to print multiple returns at one time. From the Main Menu of TaxSlayer Pro select **Print**, then **Print Individual Returns**. A list of your clients will appear in a pick list. Select the client from the list or enter their SSN. Once selected, you'll be given a list of print options (Note that only Print Options can be selected here, not individual forms or state returns alone.) Make your selection, then select **OK**. If you have other clients to print, select them and indicate a print option. When finished, select **Print Selected** and all the returns will be printed.

| Selected                 | SSN         | First Name | Last Name | Suffix | Spouse | Complete                            |
|--------------------------|-------------|------------|-----------|--------|--------|-------------------------------------|
| <input type="checkbox"/> | 400-00-0505 | DEMO       | RETURN    |        |        | <input checked="" type="checkbox"/> |



## Program Updates

TaxSlayer Pro has a built-in utility to download and install program updates as they are released throughout the year. By default, federal updates and updates for your state are checked every time you start the program, and if there is an update it will be downloaded and installed.

To check for updates while logged in to TaxSlayer Pro, follow the steps below.

**Step 1:** From the Main Menu of TaxSlayer Pro, select **Updates**.

**Step 2:** In the Internet Update Utility window, select **Download/Install Updates**. In the window that appears, you'll see the federal update as well as the state updates. You'll also see three colors used:

**White** – You're up to date

**Red** – An update is available

**Gray** – When you select an update the color changes to gray indicating you wish to download and install it.



**Step 3:** Select each update you want to download or select the **Check All Needed** check box, then select **Download**. A status window will appear showing the progress of the download. Downloading and installation can take a few seconds to a few minutes depending on how many downloads have been chosen, the speed of your Internet connection, and the speed of your computer's processor. Once the installation is complete, select **Exit**.

Note: Individual and Business updates download together, so you don't need to make selections in both the Individual and Business tabs. Selecting a state in one tab will get both updates.

### **Installing Updates Across a Network**

In an office using TaxSlayer Pro networked, workstation computers get their updates from the computer designated as the File Server, therefore updates should be gotten each day on the File Server first. Once the File Server has finished updating, start TaxSlayer Pro on the workstations.

To manually update a workstation at any time during the day, from the Main Menu of TaxSlayer Pro select **Updates**. Any new updates will be retrieved from the File Server.

See our knowledgebase article [here](#) for more information about how to configure which states will automatically update every time you start the program.

## Tax Office Checklists

### IRS

- Apply for new EFIN(s) if necessary, e.g., additional locations or this is a new tax prep business. If your EFIN is changing, please fax the new EFIN letter from the IRS to us at 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.
- Renew PTIN. This is an IRS annual requirement.
- Obtain IRS Tracking Number from IRS e-Services.

### 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.

### Getting Ready for the New Season

- Purchase TaxSlayer Pro software for 2021.
- Verify your firm info in [Account Hub](#), updating it as needed.
- 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 WebLibrary](#) for use with the 2021 TaxSlayer Pro software.

### Account Hub

- Familiarize yourself with all bank products and related bank fees.
- Familiarize yourself with ancillary products; some can be offered with or without bank products.
- Complete a bank application or opt out of offering bank products.

### Office and Computer Equipment

- Back up the TaxSlayer folder to removable media, such as a thumb drive or portable hard drive. This can be done by dragging and dropping in Windows File Explorer, or you can use the backup utility in TaxSlayer Pro. See our knowledgebase article [here](#) for more info.
- Compare our minimum and recommended system requirements [here](#) against your computer hardware and upgrade computers as needed. If you do purchase a new computer, contact TaxSlayer Pro support to schedule one of our technical support representatives to assist with data migration.
- Check the C drive on your computers, which is typically where TaxSlayer Pro is installed, to ensure you're not running out of storage space.
- Run Windows Updates on all computers to ensure all security updates and service packs are installed. However, if your computer's operating system is older and no longer supported by Microsoft, we can't provide support as well. See our knowledgebase article [here](#) for more info.
- If they have expired, renew subscriptions to anti-virus/firewall software. Exclusions for TaxSlayer Pro may need to be set.
- Test printers. If you print to PDF first, then to paper, does the PDF print?
- Order office supplies such as paper and toner. Have extra toner on hand.

- Premium users: Test the document scanner and signature pad for use with TaxSlayer Pro.
- Test internet connection for speed and reliability. Wired is typically better than wireless in terms of both speed and stability.
- 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 Products, if using**

- Ensure your bank product application is approved.
- Log in to the bank's website, learn where things are such as reports and check printing.
- Complete bank compliance requirements as needed (varies by bank).
- Order check stock and card stock from the bank.
- Indicate your bank in the Bank Setup menu under Configuration.
- Print a test check, ensuring the print is aligned.

#### **TaxSlayer Pro Network, if using**

For best results and an easier installation, your office network should be set up *prior* to installing TaxSlayer Pro. This should be completed by your local IT Technician/Professional.

- If possible, hardwire all computers to the network to ensure stable and secure connection.
- Read our knowledgebase article [here](#) on networking TaxSlayer Pro. If you need assistance, contact us. (Note that you don't have to wait for your 2020 software to get prior year TaxSlayer Pro programs installed and networked. Getting prior years configured and working properly will make installation of the current year's software easier.)
- If you use a network printer, ensure all computers can print to it.

#### **TaxSlayer Pro Software**

- Ensure all preparers have been added in Configuration and that their assigned security role is appropriate.
- Review your fees in the Fee Setup Menu under Configuration.
- Premium users: Configure Premium Options:
  - PaperCut Paperless Office
  - Email configuration
  - Signature pad, if using
  - Twilio text messaging, if using
- Train employees on how to use TaxSlayer Pro.
- Create practice returns.
- Transmit practice returns to ensure your computer is communicating with TaxSlayer Pro.
- Download and install all federal and state updates for each prior year program.

#### **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 have additional questions ...

- Query our online knowledgebase: [support.taxslayerpro.com](https://support.taxslayerpro.com)
- E-mail us: [support@taxslayerpro.com](mailto:support@taxslayerpro.com)
- Call TaxSlayer Pro Support: 706.868.0985.