



Account Hub Basics

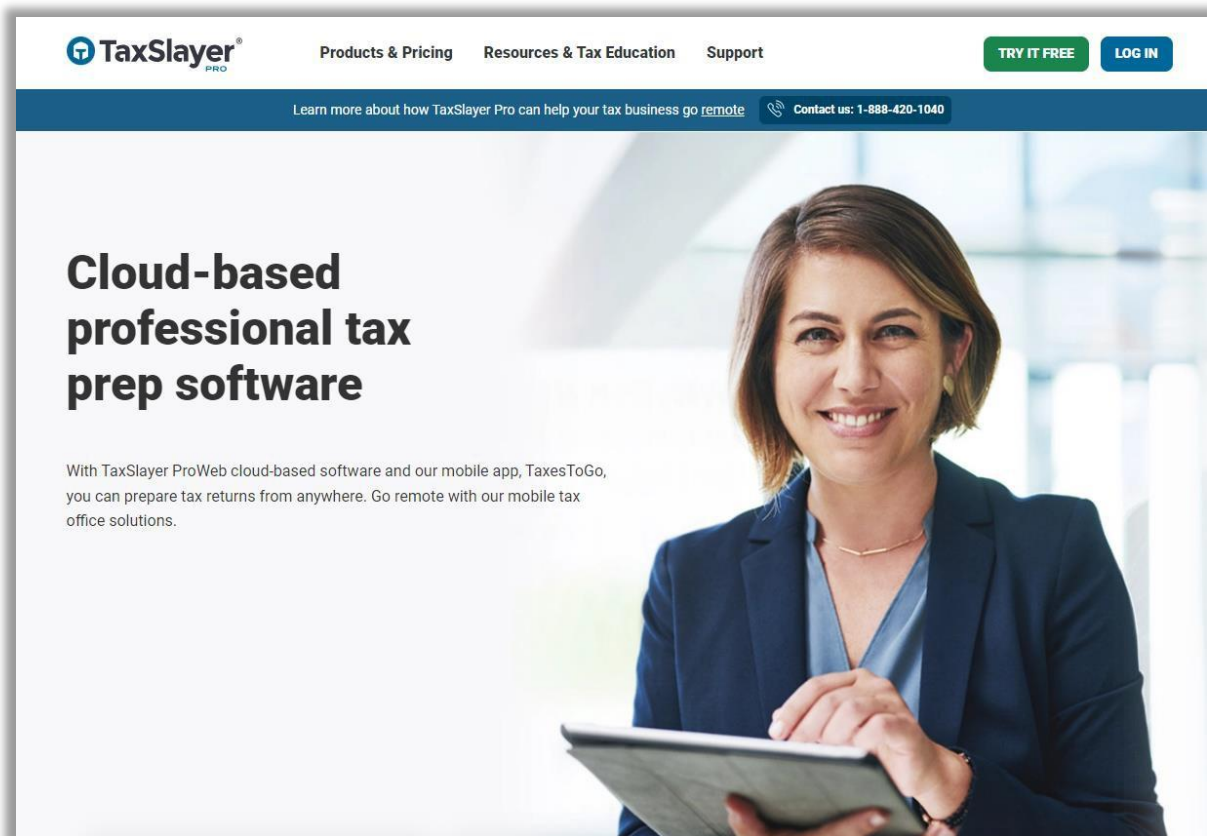
Updated December, 2024

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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.

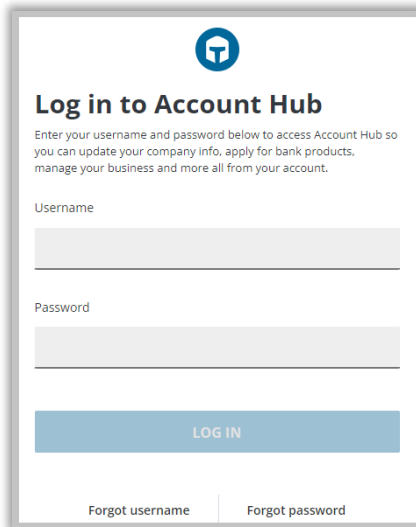


The screenshot shows the TaxSlayer Pro website homepage. At the top left is the TaxSlayer Pro logo. To its right are navigation links: "Products & Pricing", "Resources & Tax Education", and "Support". Further right are two buttons: "TRY IT FREE" and "LOG IN". Below the navigation is a dark blue banner with the text "Learn more about how TaxSlayer Pro can help your tax business go remote" and a phone icon followed by "Contact us: 1-888-420-1040". The main content area features a large image of a smiling woman in a blue blazer holding a tablet. To the left of the image is the heading "Cloud-based professional tax prep software" and a paragraph: "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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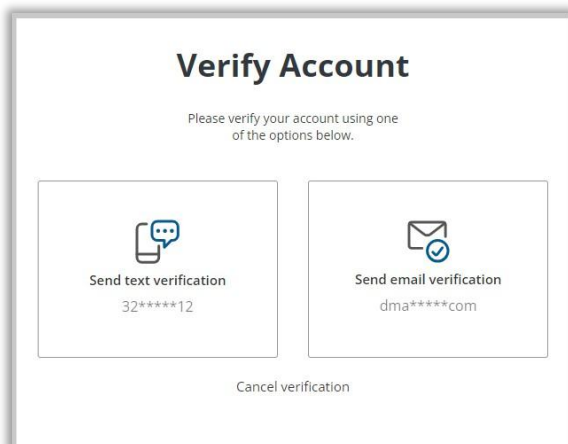
Logging In

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 icon 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 fields 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**.



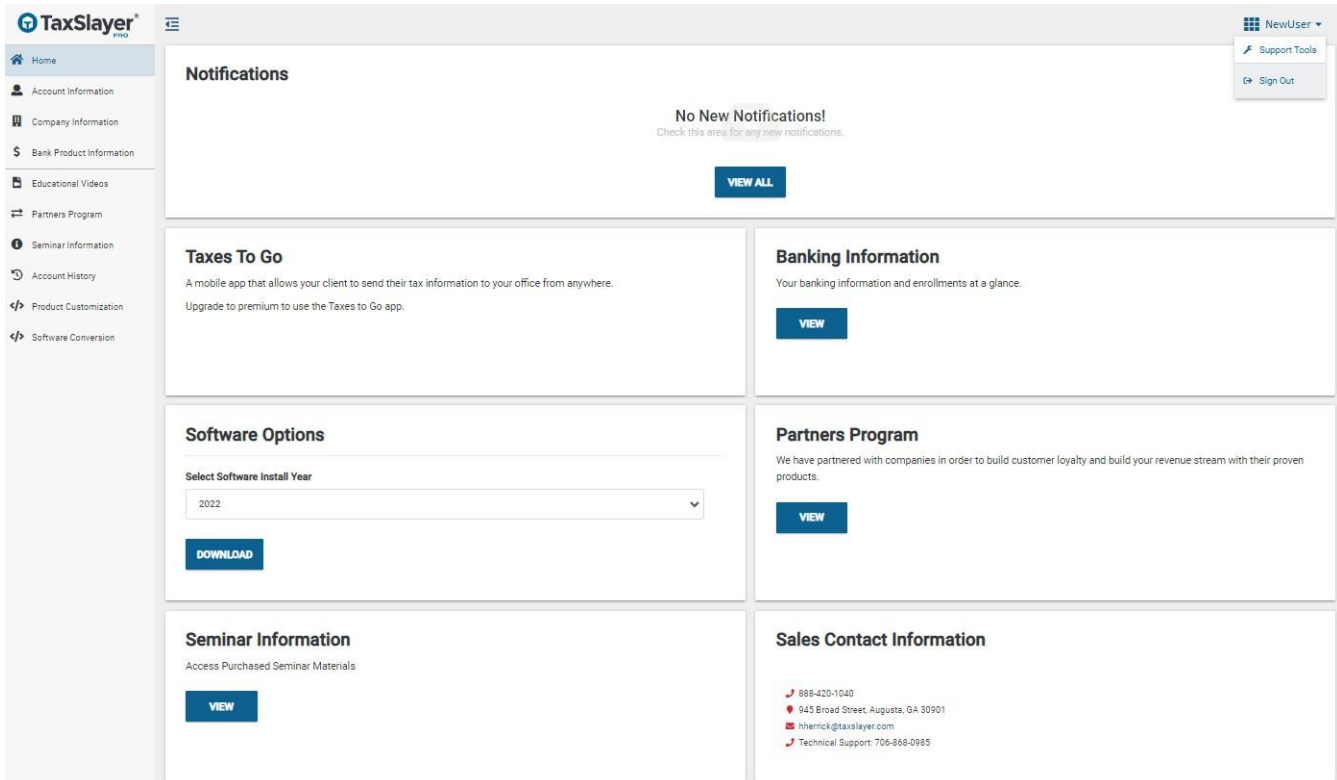
The screenshot shows a verification form titled "Verify Account". Below the title is the text: "Please verify your account using one of the options below." There are two options: "Send text verification" with a phone icon and the code "32*****12", and "Send email verification" with an envelope icon and the code "dma*****com". At the bottom, there is a "Cancel verification" link.

[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. Click the link above for detailed instructions.

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. On the left is a vertical sidebar with navigation links: Home, Account Information, Company Information, Bank Product Information, Educational Videos, Partners Program, Seminar Information, Account History, Product Customization, and Software Conversion. 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." Below this is a blue "VIEW ALL" button.
- Taxes To Go:** A white box with the heading "Taxes To Go" and a description: "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.
- Banking Information:** A white box with the heading "Banking Information" and the text "Your banking information and enrollments at a glance." A blue "VIEW" button is at the bottom.
- Software Options:** A white box 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.
- Partners Program:** A white box 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.
- Seminar Information:** A white box with the heading "Seminar Information" and the text "Access Purchased Seminar Materials." A blue "VIEW" button is at the bottom.
- Sales Contact Information:** A white box with the heading "Sales Contact Information" and a list of contact details:
 - 888-420-1040
 - 945 Broad Street, Augusta, GA 30901
 - hherrick@taxslayer.com
 - Technical Support: 706-868-0985

In the top right corner, there is a user profile menu for "NewUser" with options for "Support Tools" and "Sign Out".

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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.

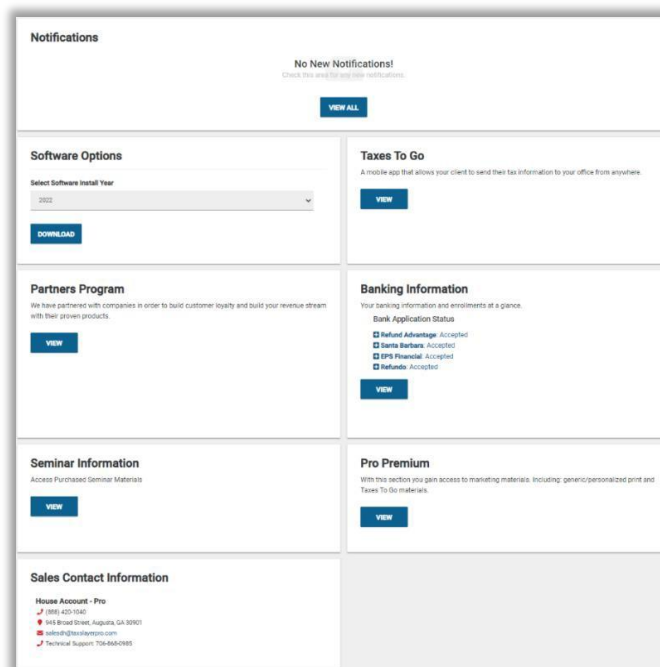
Pro Premium: Only visible to Premium Customers. Displays the code required for activation of Desktop Papercut features and configuration of Marketing Materials.

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

Seminar Information: This card links to the similarly named item in the left side menu to view the video from the annual seminar.

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 the Account Hub interface with the following sections:

- Notifications:** "No New Notifications! Check the email and app notifications." with a "VIEW ALL" button.
- Software Options:** "Select Software Install Year" dropdown menu set to "2022" and a "DOWNLOAD" button.
- Taxes To Go:** "A mobile app that allows your client to send their tax information to your office from anywhere." with a "VIEW" button.
- Partners Program:** "We have partnered with companies in order to build customer loyalty and build your revenue stream with their proven products." with a "VIEW" button.
- Banking Information:** "Your banking information and enrollments at a glance." Under "Bank Application Status", it lists: "Refund Advantage: Accepted", "Santa Barbara: Accepted", "SPS Financial: Accepted", and "Refunds: Accepted". with a "VIEW" button.
- Seminar Information:** "Access Purchased Seminar Materials" with a "VIEW" button.
- Pro Premium:** "With this section you gain access to marketing materials, including generic personalized print and Taxes To Go materials." with a "VIEW" button.
- Sales Contact Information:** "House Account - Pro" with contact details: "1-800-433-1947", "1415 Broad Street, Augusta, GA 30901", "sales@theharmans.com", and "Technical Support: 706-866-0985".

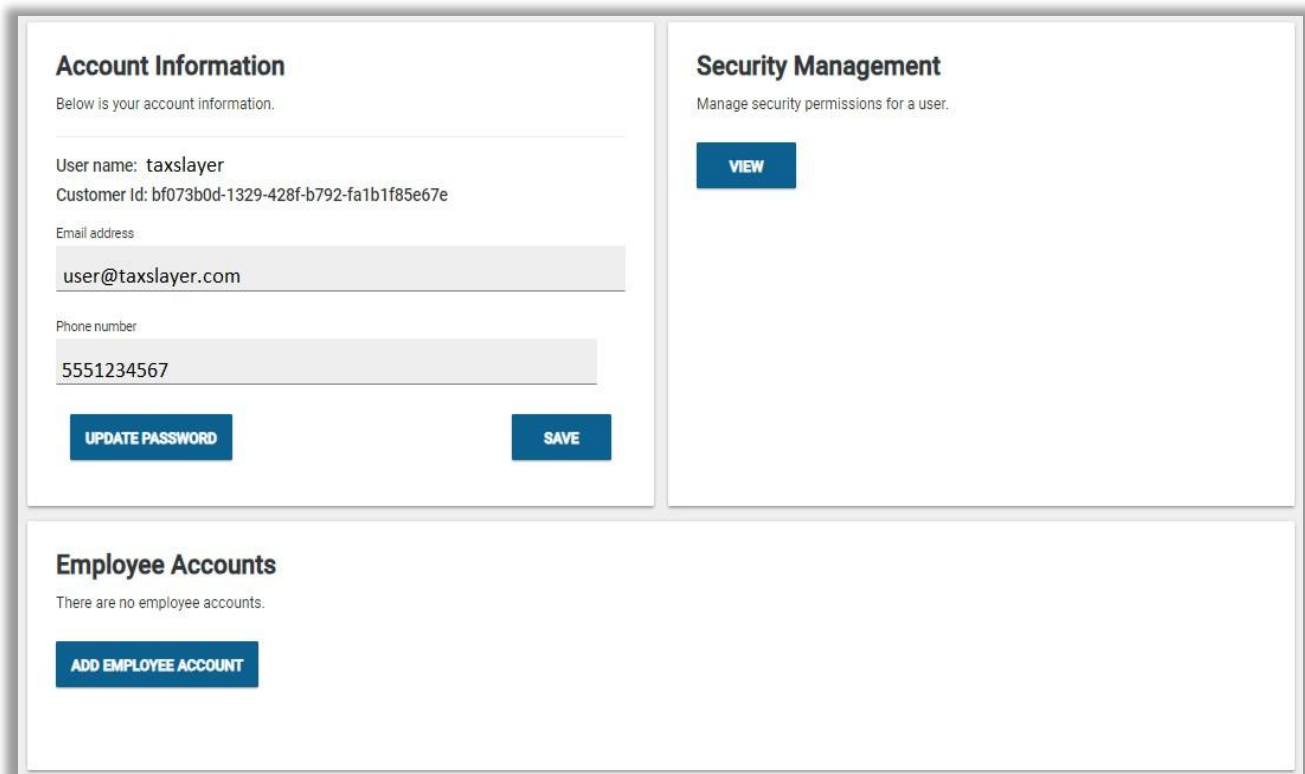
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The Sidebar

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.



The screenshot displays a sidebar configuration interface with three main sections:

- Account Information:** This section contains fields for "User name" (taxslayer), "Customer Id" (bf073b0d-1329-428f-b792-fa1b1f85e67e), "Email address" (user@taxslayer.com), and "Phone number" (5551234567). It includes "UPDATE PASSWORD" and "SAVE" buttons.
- Security Management:** This section includes a "VIEW" button for managing security permissions.
- Employee Accounts:** This section indicates "There are no employee accounts" and features an "ADD EMPLOYEE ACCOUNT" button.

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 <input type="text"/></p> <p>EFIN <input type="text"/></p> <p>PTIN/SIDN <input type="text"/></p> <p>IRS Tracking Number <input type="text"/></p> <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 <input type="text"/></p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Date Of Birth <input type="text"/></p> <p>Social Security Number <input type="text"/></p> <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 <input type="text"/>	First Name <input type="text"/>	Last Name <input type="text"/>	Age Group <input type="text"/>
Alternate Contact 			
Title <input type="text"/>	First Name <input type="text"/>	Last Name <input type="text"/>	Age Group <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.

<h3>Phone Information</h3> <p>Primary Office Number</p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p>Alternate Office Number</p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p>Cell Phone Number</p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p>Fax Number</p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p>SAVE</p>	<h3>Mailing Addresses</h3> <table border="1"> <tr> <td style="vertical-align: top;"> <p>Year Round Address</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p>SAVE</p> </td> <td style="vertical-align: top;"> <p>Physical Address </p> <p><small>This may not be a PO Box</small></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> </td> <td style="vertical-align: top;"> <p>Shipping Address </p> <p><small>This is the address where supplies will be mailed This may not be a PO Box</small></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> </td> </tr> </table>			<p>Year Round Address</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p>SAVE</p>	<p>Physical Address </p> <p><small>This may not be a PO Box</small></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p>	<p>Shipping Address </p> <p><small>This is the address where supplies will be mailed This may not be a PO Box</small></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p>
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To complete this page, provide and confirm your email address. When updating, changing, or renewing, the Company Information Verification must also be completed.

<h3>Email</h3> <p><small>Incorrect email addresses will cause you to miss out on important information concerning your account with the banking partner(s).</small></p> <p>Email Address <input type="text"/></p> <p>Confirm Email Address <input type="text"/></p> <p>SAVE</p>	<h3>Company Information Verification</h3> <p><small>I have verified that the information entered for this company is accurate and up-to-date for the 2022 Tax Year.</small></p> <p>Signature <input type="text"/></p> <p>SAVE</p>
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\$ 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 Pro's YouTube channel [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](#) [Pro Web](#) [Pro Desktop](#) [Mobile products](#) [Business tips & advice](#)

Additional videos may also be found in TaxSlayer Pro's knowledgebase that will help you understand the process of configuring the program, preparing tax returns, and using the Premium features. New Desktop users will find [these](#) videos helpful. New ProWeb can learn from videos [these](#) in the knowledgebase.

Pro Premium page

Premium subscribers to TaxSlayer Pro's desktop program have access to PaperCut, a document management system that effectively creates a paperless office where paper and digital documents come together in an efficient, cost-effective, and easy-to-use format. The premium activation code can be found on this card.

Features included in the Premium package are:

- PaperCut provides the ability to scan and save your clients' paper documents as well as 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.
- TaxesToGo is our mobile app that your client can use to send images of their tax documents, identification, etc., from their smartphone as well as electronically sign their tax return.
- Document Scanning is available both within PaperCut as well as within the return so you can scan your client's source documents into PaperCut.
- Signature Pad lets you capture client signatures to print on the various forms that require a signature and can accept a digital signature. For supported devices click [here](#).
- Marketing materials that are production ready print media for your office, including banners, promotional handouts, mailers, and e-mail templates.
- Twilio is a subscription third-party app that allows you to message clients while working in their return. 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](#).
- The Business Package includes tax returns for the following entity types: 1120 Corporation, 1120-S S Corporation, 1065 Partnership, 1041 Estate and Trust, and 990/990-EZ/990-PF/990-T Exempt Organization, 706 Estate Tax, and 709 Gift Tax.

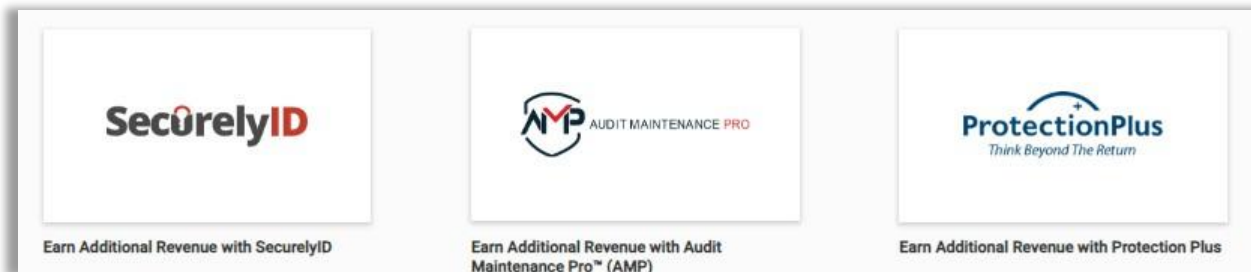
Partners Program

TaxSlayer Pro offers several audit defense and identity theft partner programs. To learn more about each program, click **View Offer** on any tile to access the partner's website.

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

Audit Maintenance Pro provides taxpayers who receive IRS correspondence assistance from an Enrolled Agent or CPA throughout the entire audit process.

Protection Plus has a team of experienced audit 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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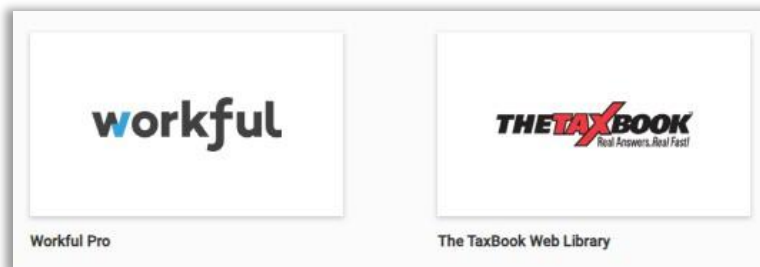
Partners Program cont.

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 bookkeeping tool to manage your client's payroll, streamline employee time tracking, and automatically file their payroll taxes. (TaxSlayer Pro does not include payroll forms.)

The TaxBook is a trusted name in tax research and provides 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.





The TaxesToGo 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.

TaxesToGo 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.

To see your branding, a taxpayer must download the app via your referral link. The link can be emailed, sent via text, or posted on your company website. When a taxpayer uses your branded TaxesToGo app their info can be directly imported into TaxSlayer Pro.

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

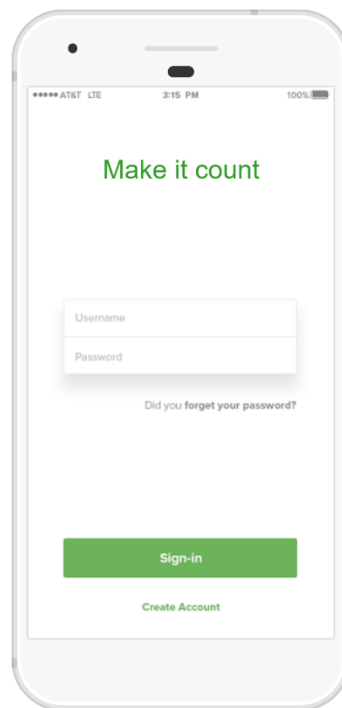
Apply the same configuration to additional locations

Upload Logo

No file chosen

[Need Help?](#)

Branded App setup in Account Hub



As seen by taxpayer on their mobile device after download.

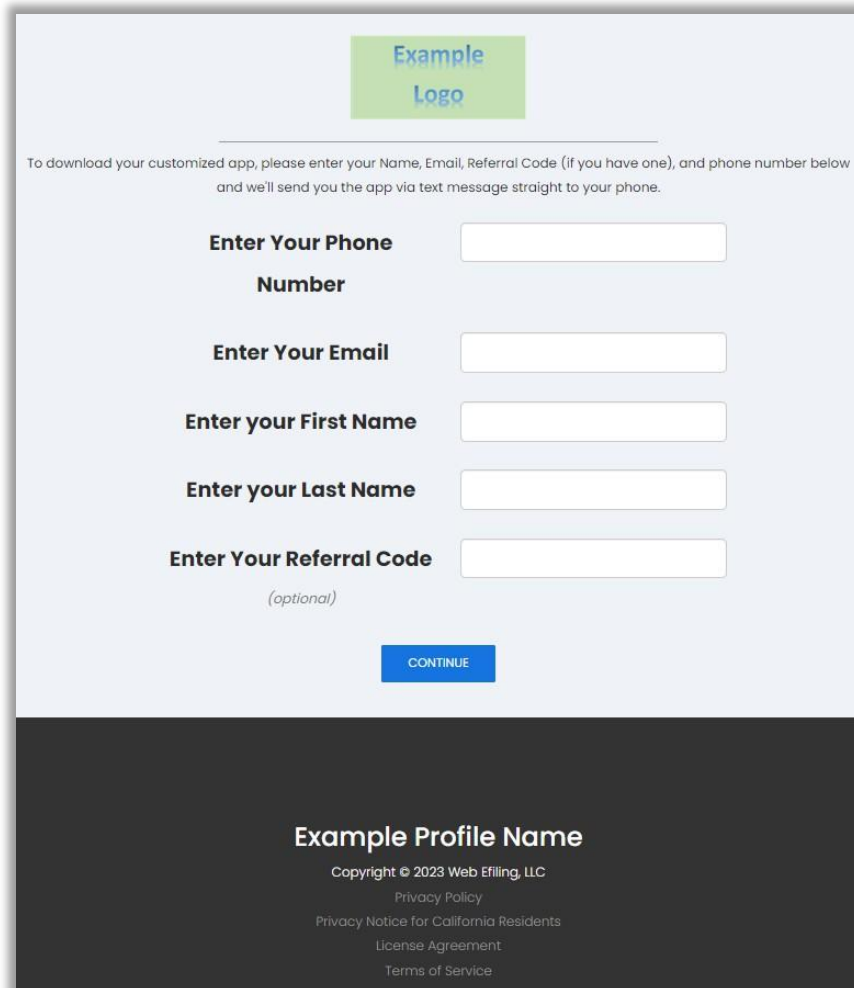
TaxesToGo.com.t.

The TaxesToGo 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 TaxSlayer Pro.

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

If you have already started your client's tax return in your program, the taxpayer can still use the TaxesToGo app 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, FAQs and access to the Preparer's and Taxpayer's customized Taxes to Go Manuals click [here](#).



The screenshot shows a registration form for the TaxesToGo mobile app. At the top, there is a green box with the text "Example Logo". Below this, a horizontal line separates the header from the main content. The main content area has a light blue background and contains the following text: "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." Below this text are five input fields, each with a label to its left: "Enter Your Phone Number", "Enter Your Email", "Enter your First Name", "Enter your Last Name", and "Enter Your Referral Code". The "Enter Your Referral Code" field has "(optional)" written below it. At the bottom of the form is a blue button labeled "CONTINUE". Below the form is a dark grey footer area with the text "Example Profile Name" in white, followed by "Copyright © 2023 Web Efilng, LLC", "Privacy Policy", "Privacy Notice for California Residents", "License Agreement", and "Terms of Service" in smaller white text.

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"> 2019 Refund Policy Agreement - Signed 2018 Refund Policy Agreement - Signed 2021 Refund Policy Agreement - Signed 2020 Refund Policy Agreement - Signed 2022 Refund Policy Agreement - Signed 2023 Refund Policy Agreement - Signed 2024 Refund Policy Agreement - Unsigned 	<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 2021 Software License Agreement - Signed 2019 Software License Agreement - Signed 2022 Software License Agreement - Signed 2023 Software License Agreement - Signed 2024 Software License Agreement - Unsigned
<p>Terms of Service Agreements</p> <p>View the state of each year's Terms of Service Agreement</p> <ul style="list-style-type: none"> 2023 Terms of Service Agreement - Signed 2024 Terms of Service Agreement - Unsigned 	<p>Privacy Policies</p> <p>View the state of each year's Privacy Policy</p> <ul style="list-style-type: none"> 2023 Privacy Policy - Reviewed 2024 Privacy Policy - Needs Review
<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 Agreement - TaxSlayer Pro detailed refund policy.

License Agreement - License Agreement for the use of TaxSlayer Pro software, websites, the TaxesToGo mobile application, products, tools, and related electronic filing services.

Terms of Service Agreement - Terms of Service for the use of TaxSlayer Pro software, websites, mobile application, products, tools, and related electronic filing services.

Privacy Policy – The Privacy Policy explains TaxSlayer’s collection, use, retention, and security of information about you. It also describes your choices regarding use, access, and correction of your personal information.

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 Plan Template - 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. See here for more information about your responsibilities vis-à-vis WISP.

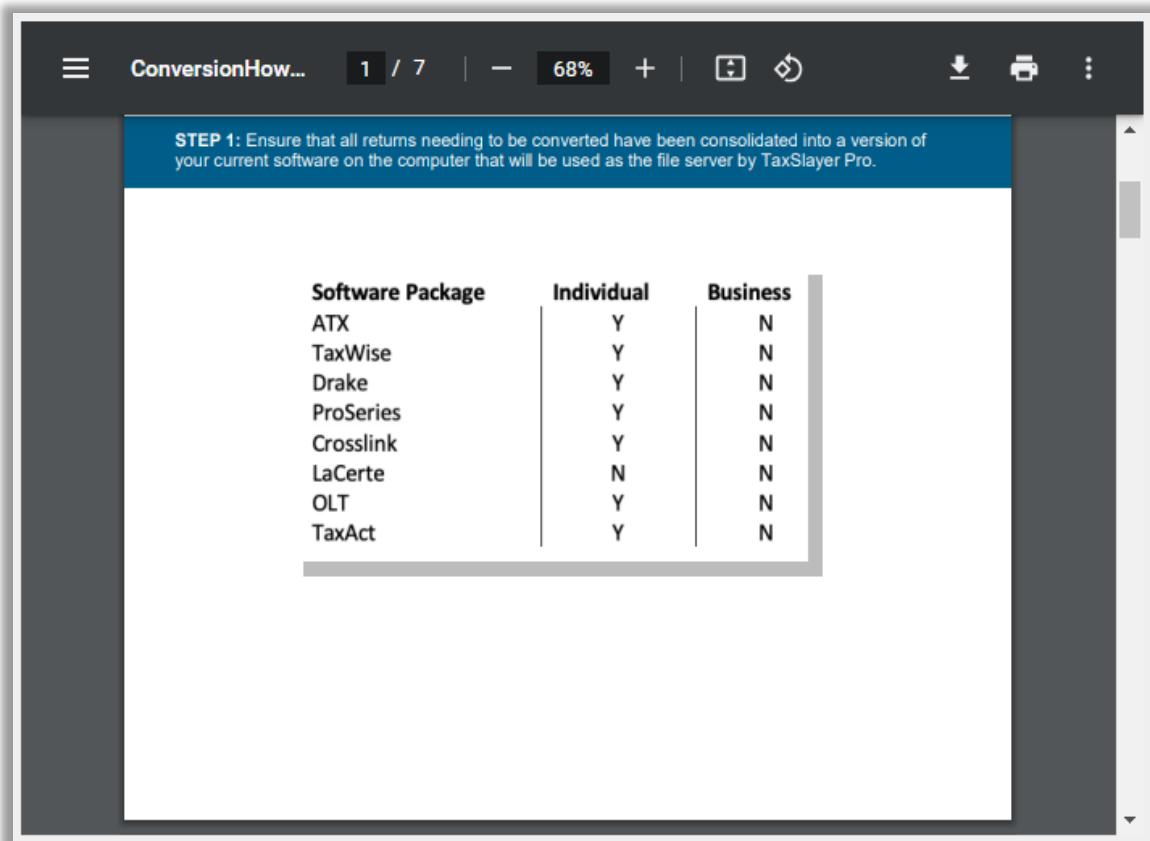
</> Software Conversion

If you are new to TaxSlayer Pro's desktop program 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 make it available to be pulled forward into the current year's 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 make it available to be pulled forward into the current year's returns in TaxSlayer ProWeb.

Returns prepared in another 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 in the knowledgebase [here](#).



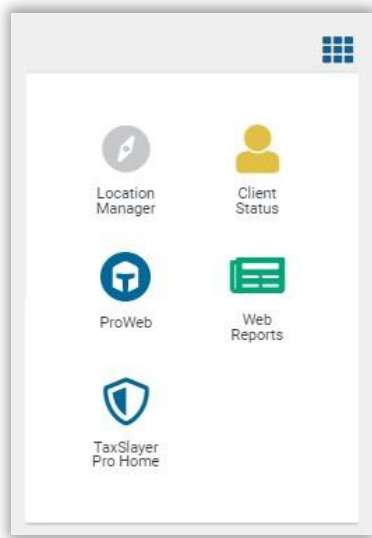
STEP 1: Ensure that all returns needing to be converted have been consolidated into a version of your current software on the computer that will be used as the file server by TaxSlayer Pro.

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 menu that looks like 9 squares at the top-right of Account Hub. Clicking the App Switcher provides direct passthrough into featured content.

**Location Manager**

Affiliates and Multi-Office Users use this tool to manage additional locations, including the office configuration and submission of their bank enrollment applications. More details are provided in Account Hub for Service Bureaus.

Client Status

Use Client Status to look up the status of electronically filed tax returns. Being on the web it can be accessed from any computer, either via this menu or [here](#) using your Account Hub Credentials. Look up any return, Individual or Business using EFIN, SSN, EIN, Submission ID or Return ID.

ProWeb Passthrough

Logs the owner directly into ProWeb using their ProWeb credentials.

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

This website allows you to run detailed reports on your tax returns. As with Client Status, it can be accessed from any computer, either via this menu or here using your Account Hub Credentials.

See our knowledgebase article here for an overview of the available reports as well as links to instructions for each report.

TaxSlayer Pro Home:

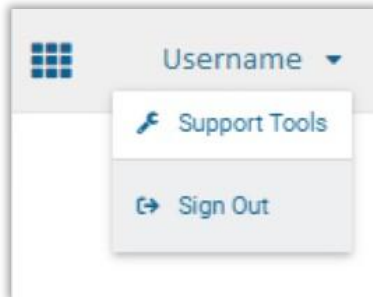
Links to the TaxSlayer Pro Homepage for product information, resources, and support.

 Products & Pricing Resources & Tax Education Support		
Tax Preparer Resources	Training & Seminars	Blog & Resources
Become a Tax Preparer	Annual Seminar	Blog Homepage
Get an EFIN Number	IRS Tax Forums	Exclusive Resources
PTIN Requirements	New User Webinar	Tax Software Conversion
Tax Reform Updates	Latino Tax Pro	Refund Calculator
Practice Tax Returns	Training/Tax Preparer Videos	
	Surgent Tax Education	

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Support Tools

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



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](#)

For TaxSlayer Pro desktop users, our technical support staff use this code when attempting to recover e-filed returns to your client lists. Return Recoveries can take 24-72 hours to verify.

For TaxSlayer Pro desktop users, 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.

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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 Pro Blog](#)

- [Tax Tips](#)
- [Grow Your Business](#)
- [Tax Laws for Preparers](#)

[Practice Tax Returns](#)

[IRS Tax Forums](#)