

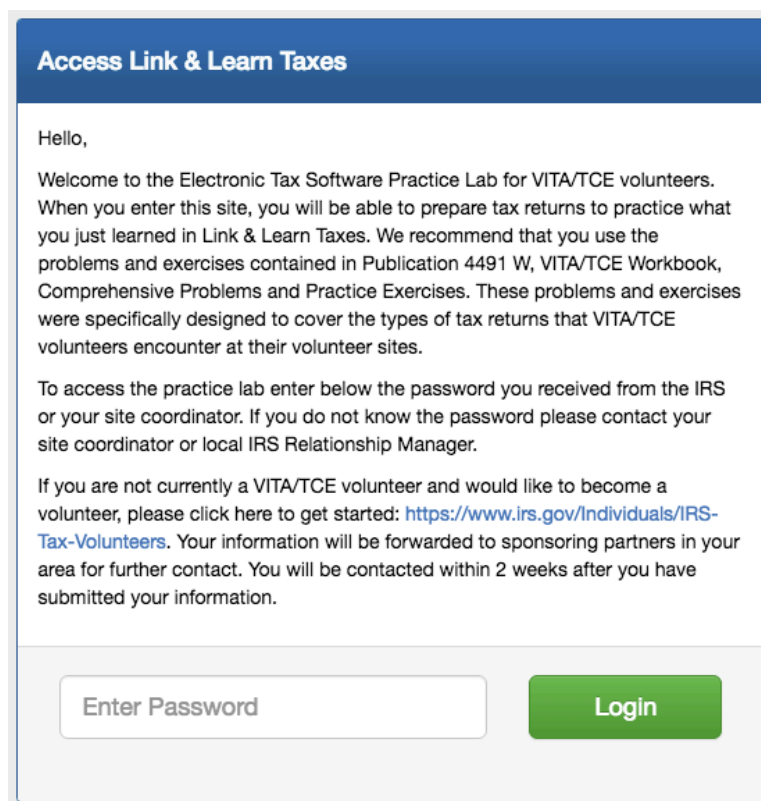
TaxSlayer Basics Guide

TaxSlayer is the IRS sanctioned software that is used to prepare and e-file tax returns. As pictured in Section 2 – Filing Basics, taxpayers will complete an Intake/Interview & Quality Review sheet. The information provided on this sheet will be entered into TaxSlayer and used to prepare a quality tax return.

To access TaxSlayer, go to <http://vita.taxslayerpro.com/IRSTraining>

Enter Password: TRAINPROWEB

Note: You will need to use the link and password whenever accessing the practice lab.



The screenshot shows a web page titled "Access Link & Learn Taxes". The page contains the following text:

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

At the bottom of the page, there is a white input field labeled "Enter Password" and a green button labeled "Login".

Create a new Account

1. Enter the following information
 - a. Email (must confirm email)
 - b. Username
 - i. Use "Test" in the username. For example TestCourtney16
 - c. Create password (confirm password)
 - i. Write password here: _____
 - d. Program Type
 - i. Select VITA
 - e. Site Identification Number (SIDN)
 - i. Use: S81012057
 - f. Select Security Question for Password Recovery
 - g. Provide Security Answer you will remember

TaxSlayer Basics Guide

Create New Account

Account Information

Email Address <input type="text" value="Email Address"/>	Confirm Email Address <input type="text" value="Confirm Email Address"/>
Username <input type="text" value="Username"/>	
Password <input type="text" value="Password"/>	Confirm Password <input type="text" value="Confirm Password"/>
Program Type <input type="text" value="Please Select"/>	
Site Identification Number (SIDN) <input type="text" value="Site Identification Number (SIDN)"/>	

Password Recovery

Security Question <input type="text" value="Please Select a Question"/>
Security Answer <input type="text" value="Security Answer"/>

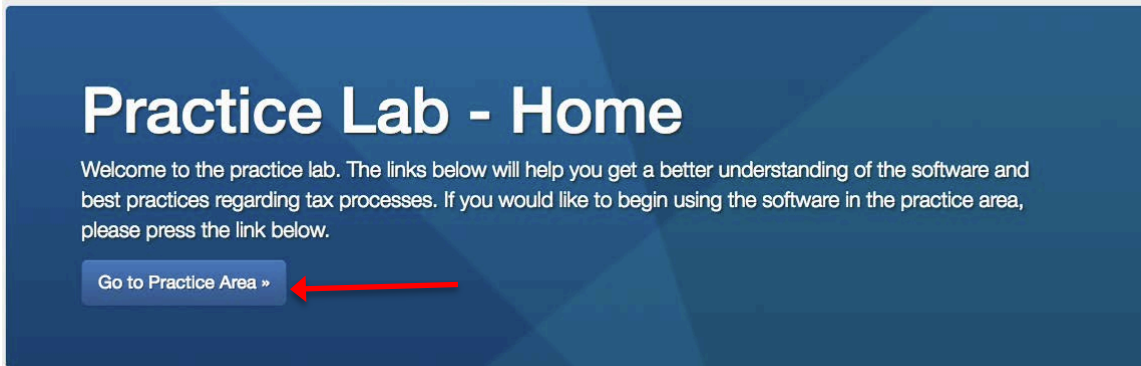
[Create Account](#) [Cancel](#)

Sign into TaxSlayer with Username & Password

Sign In

<input type="text" value="Username"/>
<input type="text" value="Password"/>
Sign In
Create Account
Forgot Password Forgot Username

Select "Go to Practice Area"



From here you can Start a New Tax Return or use the Client Search to continue on a previously created return. **Note: Make sure all information entered on the tax return is in ALL CAPS.**



When starting a new return, enter the Social Security Number exactly as it is on the Social Security Card. **Note: In the practice lab the middle two numbers will be 00. This will not affect completion of practice returns.**



TaxSlayer Basics Guide

1. Basic Information

- You will first enter the filing status of the taxpayer. You can use the Filing Status Wizard to help determine the filing status. NOTE: The filing status wizard will not enter the filing status for you; so make sure to select a filing status.

The screenshot shows the 'Filing Status' tab selected in a navigation bar. The main heading is 'What's your filing status?'. Below this, there are five radio button options: Single, Married Filing Joint, Married Filing Separate, Head of Household, and Qualifying Widow(er) with Dependent Children. To the right of these options is a link that says 'Need help determining your filing status?' with a blue button labeled 'Filing Status Wizard'. At the bottom right, there are two buttons: a red 'Cancel' button and a green 'Continue' button.

- Next, use the intake sheet and social security cards or ITINS to fill all fields for the taxpayer's personal information:
 - Enter the taxpayer's name exactly as it is on the Social Security Card or ITINS.
 - TaxSlayer will fill the Social Security Number field for you.
 - Read the Intake Sheet carefully to determine if any of the boxes need to be checked off.

The screenshot shows the 'Personal Information' form. The 'Taxpayer Information' section includes fields for Primary First Name (DONNA), MI (S), Last Name (MAPLE), and Suffix (Jr, Sr, etc.). The Social Security Number is displayed as 221 - 11 - 1122. The Date of Birth is 5 / 2 / 1986. The Occupation field is filled with 'News Anchor'. Below these fields are several checkboxes for special circumstances: 'Check here if the Taxpayer can be claimed as a dependent on someone else's return.', 'Check here if Taxpayer is a student.', 'Check here if Taxpayer is blind.', 'Check here if Taxpayer is deceased.', 'Check here if the Taxpayer wishes to contribute \$3 to the Presidential Election Campaign Fund.', and 'Check here if the Taxpayer or Spouse served in a Combat Zone during the current tax year.'

TaxSlayer Basics Guide

- Enter taxpayer’s current address and at least one phone number. Select “Continue” after each page to ensure the information saves.

Address and Phone Number

Check here if Stateside Military address.

Check here if foreign address

Address (Number and Street) Apartment

Zip Code -

City, Town, or Post Office

State Resident State as of 12/31/2015

Daytime Telephone Number
() -

Secondary Telephone Number
() -

- Dependents – If the taxpayer has dependents, select Yes

Dependents or Qualifying Person(s)

Do you have any Dependents or Qualifying Person(s) to claim on your return?

Individuals who rely on you for support and reside in your house generally qualify for dependent tax exemptions. However, there are situations when a child's exemption status is more complicated. The IRS has special rules for these situations.

- Dependent/Qualifying Child Information- Fill all fields
 - Enter the Dependent(s) name as it is on the Social Security Card.
 - Note: TaxSlayer will automatically fill in the dependent’s last name with the taxpayer’s last name. Make sure to correct this if the dependent’s last name is different.
 - Use the intake sheet/ask the taxpayer questions to check off all appropriate boxes.

TaxSlayer Basics Guide

Dependent / Qualifying Child Information

First Name: Middle: Last Name:

Date of Birth:

Check if the dependent does not have an SSN/ITIN/ATIN

Social Security Number: - -

Relationship:

Number of months this person lived in your home during 2015:

(Note: If this dependent was born in 2015, you must select 12 months)

Please answer the following:

Check if this person was a FULL-TIME student.

Check if this person was DISABLED.

Check if this qualifying child is NOT YOUR DEPENDENT.

Check if you wish NOT to claim this dependent for Earned Income Credit purposes.

Check if this dependent is married.

2. Federal Section

- Select “Enter Myself” for all sections.
- It is important to enter information exactly as it appears on all tax forms.
- Income: Work down the forms list to report all income such as W2, 1099, etc. It is important to enter information exactly as it appears on all tax forms. Double check addresses and withholding amounts on all forms. If a taxpayer’s current address does not match the address listed on the tax form, correct the address on TaxSlayer to match the form. This will not change their mailing address on the basic information page.
- Deductions: This is where you report deductions, adjustments, and credits.
- Other Taxes: This is where you report miscellaneous taxes, like the First-time Homebuyer Repayment.
- Payments and Estimates: This is where you enter estimated payments and withholdings.
- Miscellaneous Forms: Includes Injured Spouse form and ITIN Application.

TaxSlayer Basics Guide

3. **Health Insurance:** Report information about health coverage. Includes Marketplace coverage, Penalties and Penalty Exemptions.
4. **State Section:** Add state return here. **Note: For most Tax Help Colorado locations, only the Colorado State return can be completed.**
5. **Summary/Print:** Here you can preview form 1040. Clicking on the amount on any line will direct you to the specific page associated with the line.
6. **E-File**
 - You will be prompted to answer questions regarding the EIC, if the taxpayer appears eligible for the tax credit.
 - Nonresident alien: Answer accordingly
 - Taxpayer a qualifying child: Answer accordingly
 - Did you complete form 8867 and/or perform the due diligence required: Answer yes to this question if you went through the intake sheet with the taxpayer thoroughly and ensured that the dependents listed are qualifying children for EITC purposes. See section 9 in the curriculum or 4012, Tab I for more information.
 - Additional questions: Answer “Does Not Apply”
 - Records: As a VITA site, we do not need to keep any records
 - Documents to confirm business: Only necessary if they were self-employed. If the taxpayer is not self-employed, select, “Did not rely on any documents”.
 - Qualifying Child Question: Answer accordingly
 - Document used to determine residency: Select, “Did not rely on any documents”.

EIC Checklist

Qualifying Information

Was the taxpayer a nonresident alien for any part of the year?	-- Please Select
Is the taxpayer (or spouse) a qualifying child of another person?	-- Please Select
Did you complete form 8867 and/or perform the due diligence required based on current information provided by the taxpayer or reasonably obtained by you?	-- Please Select
Did you ask this taxpayer any additional questions that are necessary to meet your knowledge requirement?	-- Please Select
Did you comply with the EIC due diligence knowledge requirements?	-- Please Select

i To comply with the EIC knowledge requirement, you must not know or have reason to know that any information used to determine the taxpayer's eligibility for, and the amount of, the EIC is incorrect. You must not ignore the implications of information furnished to or known by you, and you must make reasonable inquiries if the information furnished appears to be incorrect, inconsistent, or incomplete. At the time you make these inquiries, you must document in your files the inquiries you made and the taxpayer's responses.

Records

Did you keep the records found below?	-- Please Select
---------------------------------------	------------------

i --Form 8867 (or your own form or files).
--The EIC worksheet(s) or your own worksheet(s).
--Record of how, when, and from whom the information used to prepare the form and worksheet(s) was obtained.

TaxSlayer Basics Guide

Documents Used To Confirm Business Existence And Income

- Business License
- Forms 1099
- Records of gross receipts provided by taxpayer
- Taxpayer summary of Income
- Records of expenses provided by taxpayer
- Taxpayer summary of expenses
- Bank Statements
- Reconstructions of income and expenses
- Other
- Did not rely on any documents, but made notes in file
- Did not rely on any documents

Qualifying Child #1 - JERRY FLEMING 243-00-1111

Is this child currently, or intended to be, a qualifying child on any other individual's tax return? -- Please Select

Qualifying Child #2 - TARA FLEMING 242-00-1111

Is this child currently, or intended to be, a qualifying child on any other individual's tax return? -- Please Select

Documents used to determine Residency

- School records or statement
- Landlord or property management statement
- Health care provider statement
- Medical records
- Child care provider records
- Placement agency statement
- Social service records or statement
- Place of worship statement
- Indian tribal official statement
- Employer Statement
- Other
- Did not rely on any documents, but made notes in file
- Did not rely on any documents

Continue

- **Return Type:** If direct deposit information is desired select either “Direct Deposit” or “Paper Return with Direct Deposit”.

Return Type

Your return is now ready to be e-Filed to the IRS.
Please make sure that all information you enter below is correct.

In order for us to transmit your client's return to the IRS you must complete all Steps in the e-File Process.

CAUTION: Your client's return will not be sent to the IRS unless you complete ALL steps. Some of the information is saved until all information is entered and the "Continue" button below is clicked.

To continue the e-File process, please first select a return type and the form will ask for all required information.

Refund summary

Send State Only

Federal Return Type: Direct Deposit

ERO Information

EFile# 269258
EroName# Practice Lab

Next

- **Tax Preparation and E-File Information** – Do Not use this section
- **State Return** – Select how the taxpayer would want to receive their state refund and return type

TaxSlayer Basics Guide

- **Taxpayer Bank Account Information** – Use information provided by taxpayer to fill out the direct deposit information. **When confirming the routing and account numbers, do not use the numbers already entered but once again take it from the information provided by the taxpayer to ensure accuracy. If either account numbers are entered incorrectly, the taxpayer may not receive their refund.**

Taxpayer Bank Account Information

Note: This bank information MUST be accurate for your return to process correctly.

Name of Bank	GUILFORD NATIONAL BANK
Type of Account	Checking
Routing Transit Number	322070239
Confirm Routing Transit Number	322070239
Bank Account Number	0020204523456
Confirm Bank Account Number	0020204523456

Next

The diagram shows a check with the following fields and labels:

- DATE**: 1355
- PAY TO THE ORDER OF**: _____
- \$**: []
- DOLLARS**: _____
- Memo**: _____
- Routing Number**: 0000000000
- Account Number**: 0000000000
- Check**: 1355

7. **2015 Amended Return** - Here you can find information for amending the current return.
8. **Save & Exit Return** - When you need to exit a return, be sure to save.