TAX PREPARER CHECKLIST

I. **Getting Started:**

1. Log into TaxSlayer Pro with your given username and chosen password.

Note: Please make sure that you login into correct location; Springfield, River North, Dunning, Gage Park, Pullman, and Uptown for the returns that need to be prepared.

II. **Preparing Returns:**

1. Select Client Search.
2. Find and select "**Preparation Ready**" in the drop-down menu of Filter by Return Tag
3. Select a client to begin preparing a tax return.
4. Select Scanned Documents from the taxpayer drop-down list.
5. Click the name of the document to open it.
6. Click Go Back.
7. Click each document as needed and use it to prepare the taxpayer's return.

III. **Review all Tax Documents:**

- Verify all the documents (SS/ITIN Card, ID's, etc.) in **Scanned Documents** matches the information entered in the **Basic Information** tab. Check each section in order.
  - This includes sections – Filing Status, Personal Information, Dependents/Qualifying Person, IRS Identification Protection PIN and Recovery Rebate Credit.

Note: This information was entered by the Drop-Off Specialist when tax documents were uploaded into TaxSlayer.

IV. **Preparing a Tax Return: (Sections are in order)**

- *Federal Section* – Based on the tax documents in **Scanned Documents.**
  - Enter any Income, Deductions, Other Taxes, Payments and Estimates and Miscellaneous Forms in the appropriate sections here.

Tip: If you are unable to find a specific tax document, use **Form Find**er located on the top left corner in TaxSlayer Pro and select the appropriate form.

- *Health Insurance* – Based on the client's answer on Form 13614-C, select an answer.
  - If you select **YES**: Verify household members and complete the **Advanced Premium Tax Credit (1095-A) form**.
- *State Section* – Click Add **State** if client is filing state return, (all returns are filing a State return unless marked Federal Only).
  - States Ladder Up currently prepares Illinois, Indiana, and Wisconsin.
  - Client **must** be a full-time Illinois resident, but may receive income from another state. (Select Resident)
    - This section also includes: E-filing Information, Basic Personal Information, Additions and Subtractions to Income on Schedule M, Subtraction from Income, Tax, Credits, Payments, Charitable Donations, and Miscellaneous Forms.
    - Commonly accessed areas are:

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- E-filing Information –Enter Driver's License or State ID information if provided.
- Basic Personal Information – **Enter** county of residence, **Skip** Living in Nursing Home, answer **No** to Farming, and **Skip** Not Required to File Previous Year Return
- Use Tax – found under Tax section; answer can be found on Supplemental Intake pg. 1, Tax Information, 3rd question.
- IL Property Tax Credit – found under Credit Section; would have a property tax bill included in Scanned Docs.

- *Summary/Print* – You have the chance to review all the information that has been entered in the client's tax return here in 1040 view mode.
  - o If the tax return looks correct, Select **Continue.**

TaxSlayer Pro Online displays the e-file page, with any errors concerning the return:

- ▪ If TaxSlayer Pro Online displays an error on the return, read the error carefully and click **Visit** for that error.
- ▪ Make corrections to the return to eliminate the error.
- ▪ Click **e-File** again.
- ▪ Click **Visit** for each e-file error until you correct all errors.

- *E-File* – Complete all the required fields in this section.
  - o Return Type: Select the way the tax return will be transmitted to the IRS according to the client's request in form 13614-C.
    - a. Electronically file the return and receive a paper check for the refund **(E-file: Paper Check).**
    - b. Electronically file the return and receive a direct deposit for the refund **(E-file: Direct Deposit).**
    - c. Mail the return and receive a paper check **(Paper Return).**
    - d. Mail the return and receive a direct deposit for the refund **(Paper Return with Direct Deposit).**
  - o Tax Preparation and E-file Information: Enter client email addresses only in this section.
  - o State Return: Select an option according to form 13614-C. (E-file vs. Paper File)
  - o Taxpayer Bank Account Information: Refer to page 3 question 3 of 13614-C and account information should be found in the Supplemental Intake Page 1 Question 1.
    - ▪ If client is **NOT** splitting their refund or purchasing savings bonds, click P**ull Refund** amount.
    - ▪ If the client is splitting their refund or purchasing a savings bond, confirm account and/or savings bond information.
  - o Third Party Designee Info: Skip this section.

- Consent to Disclosure Tax Return Information to VITA/TCE Tax Prep Sites: Select the GRANT option in this section.
    - Enter the Primary PIN (Last 5 digits of client's SSN/ITIN) and Date.
    - If client has a Spouse, enter Secondary PIN (Last 5 digits of the spouse's SSN/ITIN) and Date.
- Consent to Disclose/Use Information to the VITA programs Relational Office:
    - Enter the Primary PIN (Last 5 digits of client's SSN/ITIN) and Date.
    - If client has a Spouse, enter Secondary PIN (Last 5 digits of the spouse's SSN/ITIN) and Date.
- Questions: Complete all questions. Answers can be found in the client's Supplemental Intake Sheet and/or Form 13614-C.
- State ID: Enter if provided in Scanned Documents.

Once all sections have been completed, click **Save.**

V. Final Steps:

- You will be directed to the Submission Page. DO NOT PRINT RETURN.
- Scroll down To **Return Tag(s)** section and select the appropriate Return Tags(s).
- **Save and Exit Return**.
- If additional information is needed from client to complete the preparation of the tax return, select return tag of **Preparation Follow-Up Needed**. Then add a note to client file, by locating client in **Client Search** and click the **Note** icon (Flag).
    - Site Manager will follow-up and when information is available, return tag will be changed to **Preparation Follow-Up Complete** and add **Note** and documents if needed.
        - Ensure reports are being pulled for the Return Tag **Preparation Follow-Up Complete** daily so it is known when the follow-up is completed, and it is ready to complete the return.
- If notes are needed for the Exit Interviewer, locate client in **Client Search** and click the **Note** icon (Flag).

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VII. <u>Return Tag(s):</u>

The following Return Tags is to be used by Preparation Sites only:

- Basic: Basic Tax Return based off 13614-c pg. 2 answers
- Advanced: Advanced Tax Return based off 13614-c pg. 2 answers
- HSA: Health Savings Account, see 13614-c, Part V, question #1
- ITIN: Client has an ITIN not an SSN, number starts with a 9
- Rideshare: Client drivers for Uber/Lyft, see 13614-c, Part III, question 7
- Self-Employment: Self-employment income, see 13614-c, Part III, question 7
- Indiana: Full-time resident of Illinois with Indiana Income
- Wisconsin: Full-time resident of Illinois with Wisconsin Income
- Educational Credit: Education Income/Expenses, see 13614-c, Part III & IV, question 3
- Paper File Needed: Tax Return cannot be e-filed, must mail return (e.g., MFS, Zero Income)
- Form 8888: Client splitting refund, see 13614-c pg. 3 question 3
- <u>Docs scanned:</u> All documents are scanned and uploaded into TaxSlayer file
- <u>Preparation Ready</u>: Ready for Volunteer/Site Staff to prepare tax return
- Virtual Exit Adv: Advanced Virtual Exit Interview Scheduled
    - ***In Acuity First Name is the Full Name & Last Name is the Drop-off Location**
- Virtual Exit Basic: Basic Virtual Exit Interview Scheduled
    - ***In Acuity First Name is the Full Name & Last Name is the Drop-off Location**
- In-Person Exit Adv: Advanced In-Person Exit Interview Scheduled
    - ***Exit interview is always scheduled to Drop-off Location**
- In-Person Exit Basic: Basic In-Person Exit Interview Scheduled
    - ***Exit interview is always scheduled to Drop-off Location**
- 1-5 Documents: Client has 1-5 tax documents
- 6-10 Documents: Client has 6-10 tax documents
- 11+ Documents: Client has 11+ tax documents
- Preparation Follow-Up Needed: Preparer needs more information **<u>Make Note on Client File</u>**
- Preparation Follow-Up Complete: Follow-up completed **<u>Make Note on Client File</u>**
- Ready for Review: **Return Status** – Preparation completed, ready to assign Exit Interview

<u>Tip:</u> Please refer to the TaxSlayer Practice Lab for further guidance in preparing a return here: IRS Practice Lab - Landing Page (taxslayerpro.com) (Password: TRAINPROWEB). Must create a separate account to access the Practice Lab.

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