TAX PREPARER CHECKLIST

1. **<u>TaxSlayer:</u>**

❑ Open a new window tab.

❑ Log into [TaxSlayer](), then click Select on the Start New 2021 Tax Return line.

❑ Enter Client's SSN or ITIN, confirm by typing again, and Select Start Return.

- Check to see that the *Ladder Up Client Agreement* has been <u>signed and dated</u>.
- Verify that all tax documents are correct for the tax year and taxpayer.

❑ *<u>Basic Information</u>*: Enter Filing Status (see *Mini Manual: Filing Status*)

❑ *<u>Basic Information</u>*: Enter Personal Information, use the client (and spouse) SS Cards/ITIN and Form 13615-C to enter all fields correctly. Ensure all questions are appropriately answered.

- <u>Note</u> – If spouse information fields are not present, review Filing Status again.

❑ *<u>Basic information</u>*: Dependents/Qualifying Person determine dependency and enter/verify the correct information has been entered (SSNs/ITINs based on supporting documents, date of birth, and other details).

❑ *<u>Basic Information</u>*: IRS Identity Protection PIN: If taxpayer or spouse have an Identity Protection PIN, enter it here. (Use current year PIN for all years)

❑ *<u>Federal Section:</u>* Enter each section (Income, Deductions, Other Taxes, Payments & Estimates, and Miscellaneous Forms) and enter all documents (W-2s, 1099's, etc.)

- <u>COVID-19 Relief:</u> Enter Recovery Rebate Credit questions.
- <u>Note</u> – In the Deductions section, Credits menu, you will find the: Education Credits, Child Care Credit, and Mortgage Interest Credit.

❑ *<u>Health Insurance:</u>* Answer the Marketplace Insurance question. If yes, enter answers on next page, then add the numbers in APTC section to match the bottom of the client's Form 1095-A.

❑ *<u>State Section:</u>* Click Edit icon to enter State information. Enter each section as needed.

- <u>Note</u> – If e-filing a state return, client will need to provide ONE of three items: Driver's License/State ID information, State AGI from prior year, or IL Signature PIN (see Retrieving IL-PIN document for directions). If this information is not entered, the State e-file will reject.

❑ *<u>Summary/Print:</u>* Tax Return Summary – This section will show a quick summary of the return and reason for EIC status, DO NOT print return yet. Click Continue.

❑ *<u>Warnings on Tax Return:</u>* Fix any errors on the tax return, if necessary. Click Continue.

❑ *<u>E-File</u>*: Return Details – Enter Federal and State Return Type; E-file or Paper Return with how client wants refund or payment.

- Only the current tax year and two-year-prior returns can be e-filed.
- Enter the taxpayer's email and PIN. Skip Optional Questions, click Continue.

❑ *<u>E-file</u>*: Fee Summary – Verify all fees are set to $0. Click Continue.

❑ *<u>E-file</u>*: Bank Account – Enter Direct Deposit information.
(Reference the Mini Manual for Bank Routing Numbers, if needed).

- If the client is splitting their refund or purchasing a savings bond, confirm account and/or savings bond information. (Form 8888)

❑ *<u>E-file:</u>* State ID License – Enter the client's ID information here. This section is optional.

❑ *<u>E-file:</u>* Taxpayer Consent – The Accept option needs to be selected.

- Enter The taxpayer's Primary PIN and Date. Click Continue.

❑ *<u>E-file:</u>* Custom Questions – Enter all answers from the Supplemental Intake and Form 13614c, click Continue.

❑ *<u>E-file:</u>* Custom Credits – Skip this section. Click Continue.

❑ *<u>E-file:</u>* Submission Page – <u>DO NOT PRINT RETURN</u>.

- This page displays refund/balance due for federal and state returns.
- You will have the opportunity to edit the return type or bank account if a change needs to be made.

❑ Select all appropriate Return Status Tag(s) for the tax return.

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- ❑ Check box **Mark tax return ready for review.**
- ❑ **Save and Exit Return**.

If notes are needed for the Quality Reviewer, locate the client in **Client Search** from the Main Page and click the **Note** icon (Flag) 

Tip: Please refer to the TaxSlayer Practice Lab for further guidance on preparing a return here: IRS Practice Lab - Landing Page (taxslayerpro.com) (Password: **TRAINPROWEB**). You must create a separate account to access the Practice Lab.

- ❖ Please contact Letty for any TaxSlayer issues or questions at: ltrain@goladderup.org, Direct Line: 312-448-5276
- ❖ If you cannot reach Letty, please get in contact with Greg at: gwilliams@goladderup.org, Phone Number: 312-466-0771