# TAX PREPARER CHECKLIST

**<u>TaxSlayer:</u>**

- ❑ Log into [TaxSlayer](), then click **Select** on the **Start New 2023 Tax Return** line.
- ❑ Enter Client's SSN or ITIN, confirm by typing again, and **Select Start Return**.
    - o Check to see that the ***Ladder Up Client Agreement*** has been <u>signed and dated</u>.
    - o Verify that all tax documents are correct for the tax year and taxpayer.
- ❑ Prior Year Data *returning clients ONLY*.
    - o TaxSlayer will ask "Do you want to create a *new return using the information from last year*?"
    - o Answer **YES** to pull prior year information.
    - o You can check what information from last year applies to this season's tax return.

**<u>Basic Information</u>:**

- ❑ **Filing Status**: Select a filing status. (Reference: *Mini Manual: Filing Status*)
    - o Nonresident Alien ***Out of Scope***
- ❑ **Personal Information**: Use SS Cards/ITIN and Form 13614-C to enter all fields correctly.
    - o <u>Married Filing Separate (MFS):</u> If spouse information fields are not present, it <u>MUST</u> be a **paper file return**.
    - o 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 (**Retrieving IL-PIN** instructions below).
- ❑ **Dependents/Qualifying Person:** Determine dependency and enter information from SSNs/ITINs and supporting documents.
- ❑ **IRS Identity Protection PIN**: Enter IP PIN If present, use <u>CURRENT YEAR PIN</u> for **ALL** years filing.

**<u>Federal Section:</u>**

- ❑ Go through each section (**Income, Deductions, Other Taxes, Payments & Estimates, and Miscellaneous Forms)** and enter all applicable tax documents (W-2s, 1099's, etc.)
    - o <u>Note</u> – In the **Deductions** section, **Credits menu**, you will find the: Education Credits, Childcare 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.
    - o Form 1095-A <u>MUST</u> include everyone on the return, if not it's ***Out of Scope.***

**<u>State Section:</u>**

- ❑ Click **Edit** icon  to enter State information. Enter each section as needed.
    - o **TIP:** Don't forget to deduct retirement and add property taxes, when applicable

**<u>Summary/Print:</u>**

- ❑ **Tax Return Summary** – DO NOT print return yet. Click **Continue**.
- ❑ ***Warnings on Tax Return:*** 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.
    - o Enter the taxpayer's email and leave this PIN alone. **Skip** Optional Questions, **Continue.**
- ❑ **Fee Summary –** Verify all fees are set to $0. Click **Continue.**
- ❑ **Bank Account** – Enter Direct Deposit information. (See *Mini Manual* for Bank Routing #'s).
    - o If client wishes to split refund, you <u>must</u> fill out **Form 8888**
- ❑ **Optional:** Enter taxpayers **State ID/License** information
- ❑ **Taxpayer Consent** – The **Accept** option needs to be selected for both consents.
    - o Enter The taxpayer/spouse's Primary PIN (Last 5 digits of SSN) and Date. **Continue.**
- ❑ **Custom Questions –** Enter ALL answers from the **Supplemental Intake** and **Form 13614-C.**
- ❑ **Custom Credits – Skip this section.** Click **Continue.**

**<u>Submission Page</u>** – <u>DO NOT PRINT RETURN</u>.

- ❑ This page displays refunds/balance due for federal and state returns.

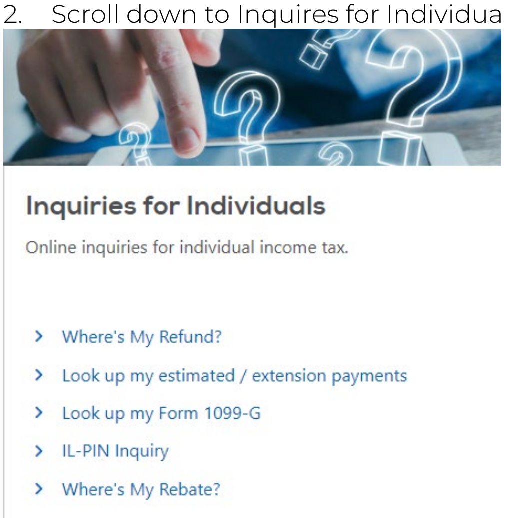
  - <u>DO NOT</u> disclose any refund/owe amounts to the taxpayer.
- ❑ **Select** all appropriate **Return Status Tag(s)** for the tax return.
- ❑ Check box **mark tax return** ***<u>READY FOR REVIEW</u>***.
- ❑ **Save and Exit Return**.

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

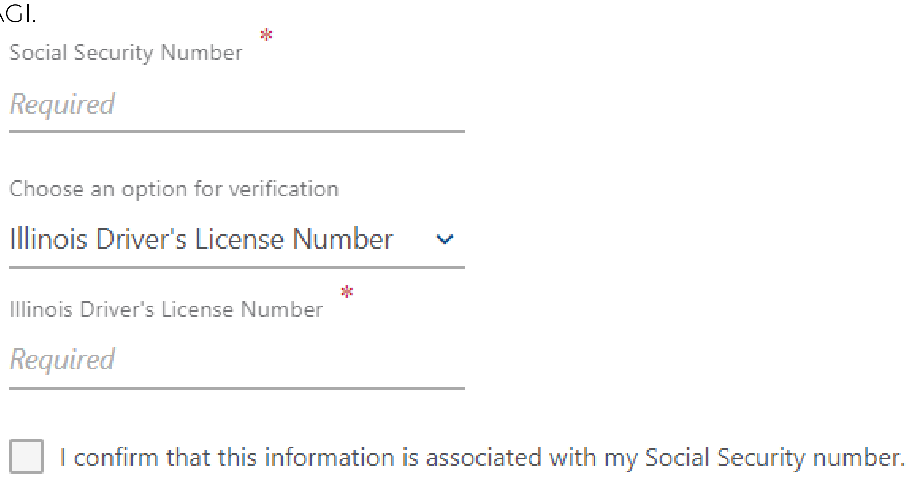
# Retrieving IL-PIN Instructions

1. Navigate to MyTax Illinois on your favorites tab, a. Website: https://mytax.illinois.gov/_/

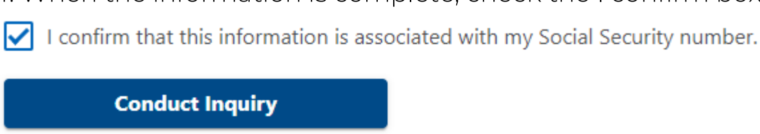
2. Scroll down to Inquires for Individuals, then click IL-PIN Inquiry




3. Enter requested information, you can choose Driver's License, State ID, or Prior Year AGI. AGI.




4. When the information is complete, check the I confirm box, then click Conduct Inquiry.




5. Copy the IL-PIN to clients 13614-C or enter software.