



VITA/TCE

2023 TaxSlayer Pro Online
Enhancements

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General TaxSlayer Pro Online Enhancements

After completing this lesson, you should be able to:

1. List and describe general enhancements to TaxSlayer Pro Online for 2023.
2. Hide the ERO address on invoices when printing.
3. Set up cover page printing to only print taxpayer information.
4. Use a password pattern when setting up users.
5. Describe changes to options when creating or editing a custom question.
6. Describe changes to Client List filters for accepted returns.
7. Describe changes to Security Templates, including using the new name for this feature.

Cover Page Printing

When setting up TaxSlayer Pro Online for your site, you can default cover pages to print only taxpayer information. To do so, use the following steps from the Welcome page:

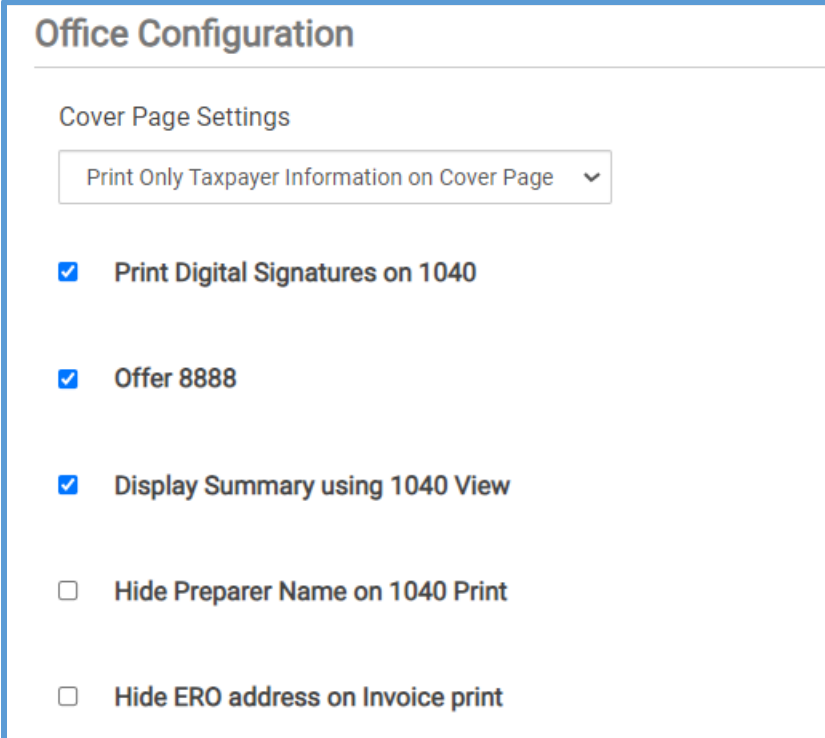
1. Click the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration Menu**:

Configuration Menu - Sample VITA/TCE Site		Return
Consent Forms Create and assign consent forms		Select
Custom Credit Create and edit Custom Credits		Select
Custom Fees and Discounts Enter and Edit Custom Fees or Discounts.		Select
ERO Setup Enter and edit ERO Information.		Select
Fees Setup Enter and Edit Fees.		Select
Office IP Whitelist Manage and maintain IP Office Whitelist		Select
Office Setup Setup Office.		Select

2. Click the **Office Setup** line.

TaxSlayer Pro Online displays the **Office Setup** page. Scroll to the **Office Configuration** section:



Office Configuration

Cover Page Settings

Print Only Taxpayer Information on Cover Page ▾

- Print Digital Signatures on 1040
- Offer 8888
- Display Summary using 1040 View
- Hide Preparer Name on 1040 Print
- Hide ERO address on Invoice print

3. From the **Cover Page Settings** drop-down menu, select **Print Only Taxpayer Information on Cover Page**.

TIP: This setting also allows you to choose to print either ERO information or office information on the cover page.

Hide ERO Address on Invoices

While setting up the office configuration, you can also choose to hide the ERO address when printing invoices. To do this, follow the same steps above and select the **Hide ERO address on Invoice print** check box.

Password Creation

When creating a password for a new user, TaxSlayer Pro Online allows the option for the Admin to use a password pattern or the same password for users. When using this feature, you can ensure that passwords are created consistently, which reduces time spent creating passwords.

Password

A!\$df123456!

Custom Question Options

When selecting custom question options, the previous options for required were either to make the custom question required or not required. With a new option, **Required if MFJ**, spouse questions are only required for married filing jointly returns.

To make this selection, do the following from the **Configuration Menu**:

1. Click the **Question Templates** line.

TaxSlayer Pro Online displays the **Edit Questions** page:

Question	Required	Tax Year		
Example question changing to test pbi	Not Required	All	Edit	Delete
Q01: where do I fall	Not Required	2022	Edit	Delete
sample new question	Not Required	2022	Edit	Delete

+ Add Question

Assigned Questions

Question	Required	Tax Year
1. Would you say you can carry on a conversation in English, both understanding and speaking?	Not Required	2021
1. Would you say you can carry on a conversation in English, both understanding and speaking?	Not Required	2022

2. Either click **Add Question** to add a new question or click **Edit** for a question you would like to change.

TaxSlayer Pro Online displays the **Add Question** page:

Add Question

Question

Required:
Not Required

Tax Year:
All

Available Answers

+ Add Answer

3. After completing other information for the custom question, use the **Required** drop-down list to select **Required if MFJ**, as shown below.

Required:

Not Required

Not Required

Required

Required if MFJ

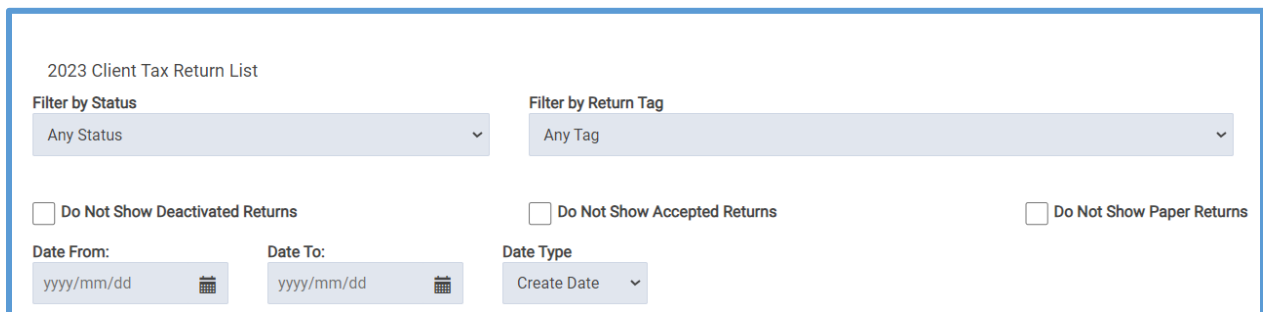
Client List Filters for Accepted Returns

Previously, the client list included state only returns when applying the filter to exclude accepted returns. This could lead some users to think that the state only returns still needed editing or other work. Now, when you filter out accepted returns, state only returns are also excluded from the list.

To use this feature, use the following steps:

1. From the **Welcome** page, click the **Client Search** line.

TaxSlayer Pro Online displays the **Client List**:



The screenshot shows the '2023 Client Tax Return List' filter interface. It includes two dropdown menus: 'Filter by Status' set to 'Any Status' and 'Filter by Return Tag' set to 'Any Tag'. Below these are three checkboxes: 'Do Not Show Deactivated Returns' (unchecked), 'Do Not Show Accepted Returns' (unchecked), and 'Do Not Show Paper Returns' (unchecked). At the bottom, there are date selection fields: 'Date From' (format: yyyy/mm/dd), 'Date To' (format: yyyy/mm/dd), and 'Date Type' (set to 'Create Date').

2. Select the **Do Not Show Accepted Returns** check box.

TaxSlayer Pro Online excludes all accepted returns, including State Only returns, from the client list.

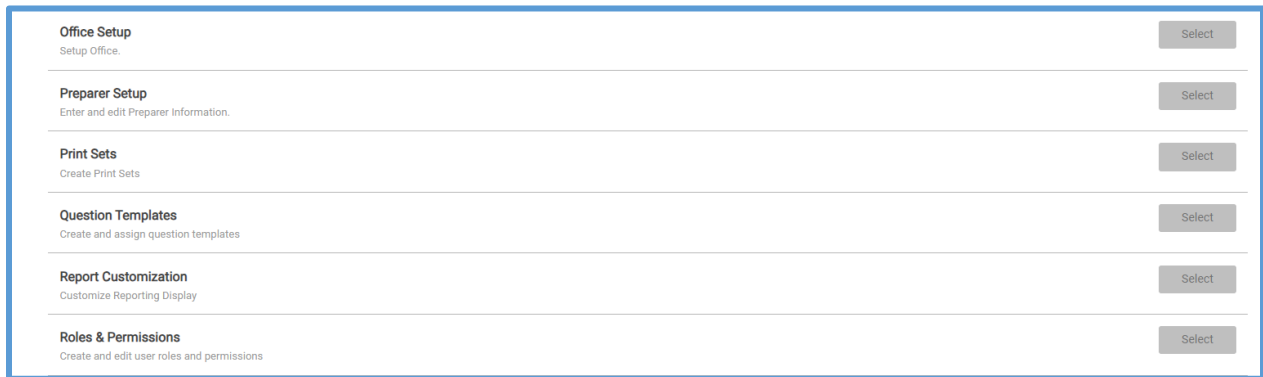
Security Templates is Now Roles and Permissions

Beginning in 2023, the configuration setup formerly known as Security Templates is Roles and Permissions, which more accurately describes the process of assigning roles and permissions to TaxSlayer Pro Online users.

To access Roles and Permissions, use the same steps used previously:

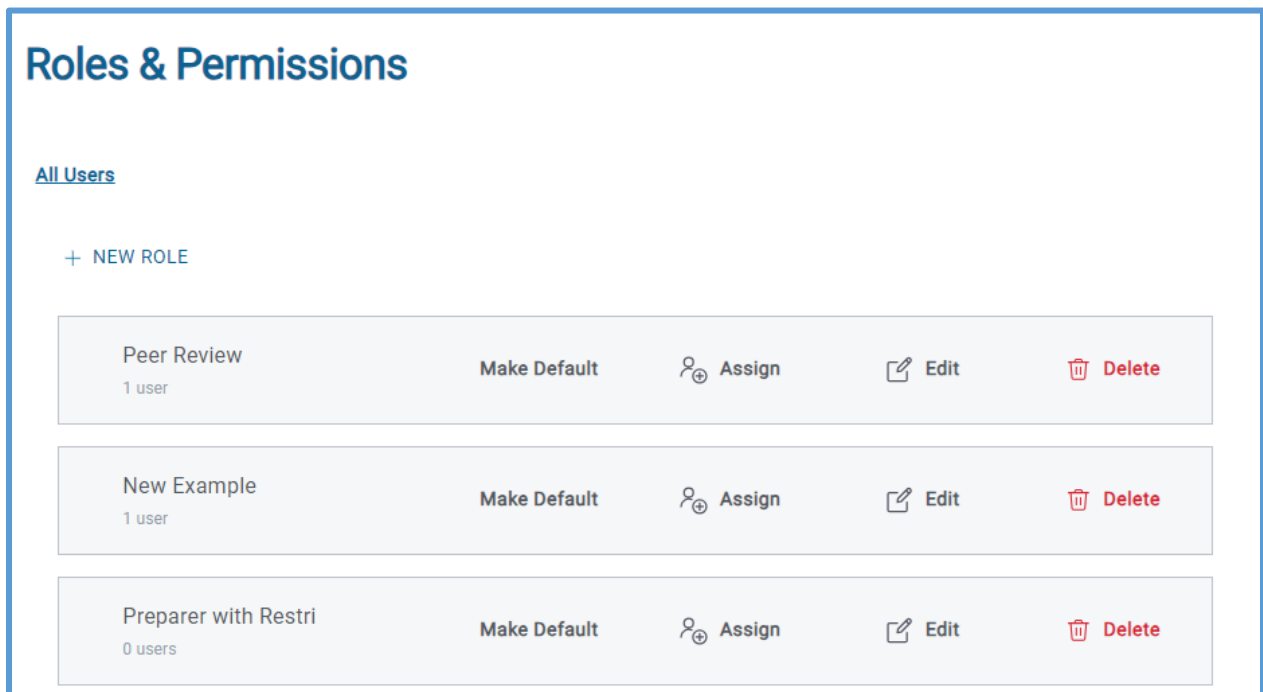
1. From the **Welcome** page, click the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration** menu:



2. Click the **Roles & Permissions** line.

TaxSlayer Pro Online displays the **Roles & Permissions** page:



TaxSlayer has made some changes to the user interface for this page. Below are some of the changes. For full instructions on assigning roles and permissions to users, see the *Setting up Security Roles & Permissions* lesson.

- You can click links on each existing role to make it the default role for new users, assign the role to existing users, edit the role, or delete the role.

Role: New Example

Users (1)

Role Name

 Default Role

Select All

Tax Returns

- Create new tax returns [?]
- Open and Edit tax returns [?]
- Delete tax return notes
- Set tax return passwords
- View full taxpayer SSNs [?]
- Print tax returns
- Transmit tax returns to the IRS
- Mark returns Ready to Review [?]

Preparers

- Assign Roles to users
- Change the Preparer assigned to a tax return

Notifications

- Dismiss Message Center notifications [?]

Client Apps

- Send Customer Portal invites
- View client App Chat History

- When editing or creating a role, the following has changed from previous years:
 - You can select a role as the site's default role with a check box at the top of the page. TaxSlayer Pro Online then makes this the default role when creating a new user.
 - You can select or clear all permissions using the **Select All** check box.

- Permissions are grouped on screen using the following categories:
 - Tax Returns
 - Client List
 - Group Users
 - Documents
 - Reporting
 - Fees
 - Preparers
 - Notifications
 - Client Apps
 - Menus This Role Can Access

TIP: You can find a full list of permissions with any associated changes from previous years in the *Setting up Security Roles & Permissions* topic in the *Configuring TaxSlayer Pro Online* guide.

Tax Return Enhancements

After completing this lesson, you should be able to:

1. List and describe enhancements within the tax return in TaxSlayer Pro Online.
2. Review the warning if Form 1095-A was present in the prior year but not in the current year's return.
3. View the taxpayer's AGI while in the e-file pages.
4. Add a note to a return while in the e-file pages.
5. Add a note to a return through the Taxpayer menu.
6. Describe the new procedure for e-filing a State Only return.

Form 1095-A Warning

When you carry forward a return from a previous year, TaxSlayer Pro Online performs a new check when the previous year's return contained a Form 1095-A. If the current year return does not contain this form, TaxSlayer Pro Online displays a warning in the **Warning** section to let you know that the form has not been added. At that time, you can check with the taxpayer to see if he or she received this form for the current year.

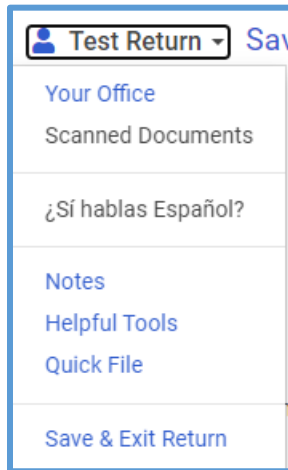
Adding Notes: E-File Page

TaxSlayer added the ability to add notes to a return from the E-File page. This is retroactive to 2021 and 2022 tax returns.

To add a note from the taxpayer menu, use the following steps:

1. Open the taxpayer menu drop-down menu.

TaxSlayer Pro Online displays the taxpayer menu:



2. Click **Notes**.

TaxSlayer Pro Online displays the **Add a new note** window:

A screenshot of the "Add a new note" window in TaxSlayer Pro Online. The window has a light blue background and a blue border. At the top, it says "Add a new note". Below this is a yellow sticky note icon. To the right of the icon are two text input fields: "Note Name" and "Text for this note". Below the input fields are four color selection buttons: yellow, blue, green, and red. At the bottom of the window are two large blue buttons: "CANCEL" and "SAVE".

3. Type the note name and text for the note.
4. If needed, select a color for the note.
5. Click **SAVE**.

Taxpayer AGI in Submission Page

You can now view the taxpayer's AGI from the e-file Submission page. To see this, view the **Client Information** section at the right of the page:

Submission Page

Review the final details and transmit the return.

Return Details Fee Summary Bank Account Taxpayer Consent Custom Questions Custom Credits **Submission Page**

✓ — ✓ — ○ — ○ — ○ — ✓ — ●

TAXPAYER ELECTRONIC SIGNATURE [Edit Signature](#)

CLIENT INFORMATION

Sixteen SOA

SSN: xxx-xx-xxxx

DOB: 10/31/1989

Phone: (876) 876-8768

Address: 123 Test
Bath Springs, TN 38311

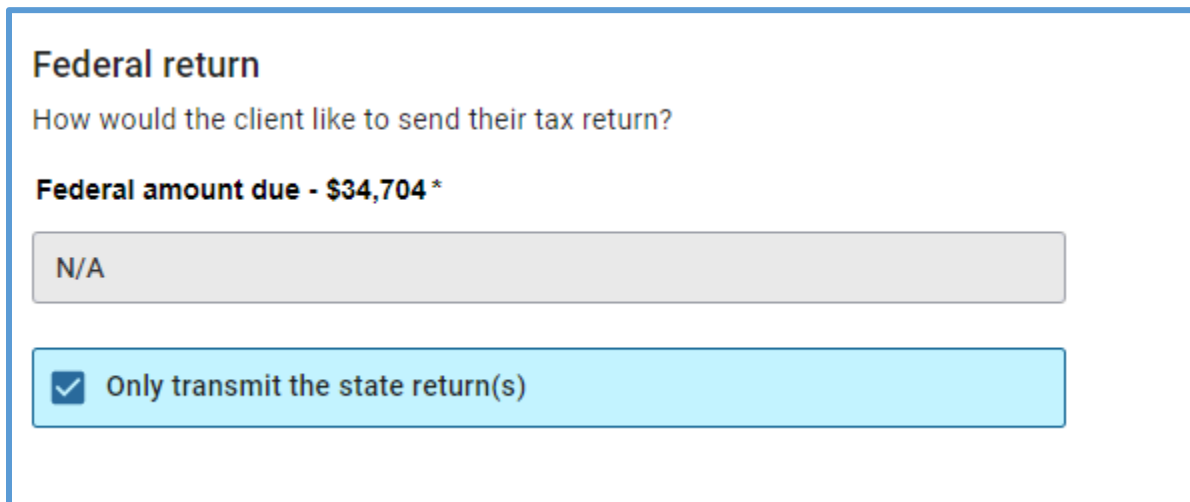
SUMMARY

AGI	\$32,000
Federal	\$216

State-Only Return Procedure

In previous years, you needed to select a Federal return status when the taxpayer needs to send the return to the state only. Beginning in 2023, there is a new procedure for e-filing to the state only. To do this, use the following steps on the e-file pages:

3. Leave the Federal Return Status blank.
4. Select the **Only transmit the state return(s)** check box, as shown below:



The screenshot shows a section titled "Federal return" with the question "How would the client like to send their tax return?". Below this, it displays "Federal amount due - \$34,704 *". There are two options: "N/A" (disabled) and "Only transmit the state return(s)" (checked).

5. Complete the e-file and submission information.
6. Electronically file the state return.
7. TaxSlayer Pro Online adds federal e-file selection in the background, which you will see the next time you log in to the return.

NOTE: This is also similar to the process for mailing the paper return but e-filing the state return.

Reports Enhancements

After completing this lesson, you should be able to:

1. List and describe enhancements to reports in TaxSlayer Pro Online.
2. Run the new Dependents/Qualifying Child report and describe the report.
3. Describe the change to the Federal Returns Not Transmitted Report for State Only returns.
4. Run a Review Report and describe the information contained in this report.
5. Describe added information included on the Site Production Detail Reports for both electronic and printed returns.
6. Run the User Access Report and describe the information contained in this report.
7. Describe the new columns in the Pro Web Detailed Return Report.

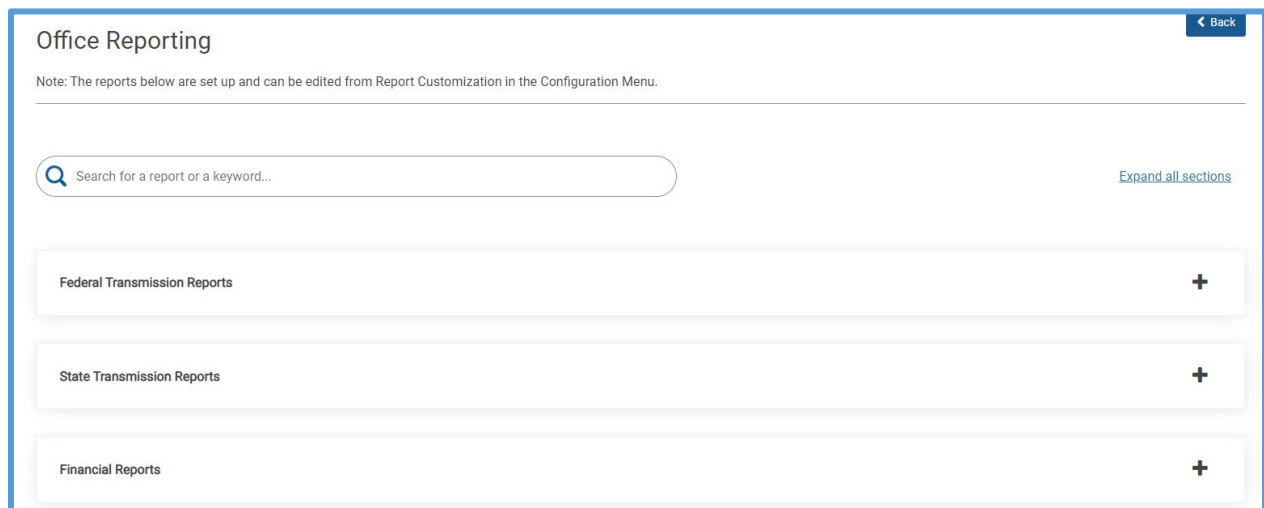
Dependents/Qualifying Child Report

TaxSlayer added a report for dependents and qualifying children. This report lists all dependents and qualifying children, along with the primary taxpayer on whose return they are listed.

To access the report, use the following steps from the **Welcome** page:

1. Click the **Reports** line.

TaxSlayer Pro Online displays the **Office Reporting** page:



2. Click **Other Data Reports** to expand the list.

TaxSlayer Pro Online displays the other data reports:

Other Data Reports
Management Report View Management Reports
Mailing Labels Mailing labels.
Client Retention Report View Client Retention Report.
Marketing Report View Marketing Report.
Username Report List of usernames.
Failed Review Report List of returns that have failed review.
EIN Report List of EIN information for all returns.
Review Report Information for review process.
Dependents/Qualifying Child report Dependent or Qualifying Child Information.

3. Click **Select** on the **Dependents/Qualifying Child report** line.

TaxSlayer Pro Online displays the report:

Showing 1 to 5 of 5 entries

#	EFIN	Last 4 (of primary SSN)	Primary Last Name	First Name of dependent/Qualifying Child	Last Name of dependent/Qualifying Child	Last 4 of dependent/Qualifying Child SSN	Relationship	Date of Birth
1	001111	0001	Smith	testing	Return	2233	Daughter	2/20/2021
2	001111	1234	RETURN OCTOBER	training	RETURN OCTOBER	1234	Daughter	2/2/2021
3	001111	1234	email address	TESTING	email address	1234	Daughter	2/2/2015
4	001111	9138	Flowers	Dahlia	Weeds	6403	Niece	11/15/2021
5	001111	9138	Flowers	Thorny	Bush	1225	Son	2/20/2020

This report displays the following information:

- EFIN
- Last four digits of primary Social Security number
- Primary taxpayer's first name
- Dependent's first and last name
- Last four digits of dependent/qualifying child's Social Security number
- Relationship to primary taxpayer
- Date of birth

Review Report

TaxSlayer Pro Online now includes a Review Report. This report allows reviewers and administrators to track returns that are using the built-in review process. To navigate to the report from the **Office Reporting** page, use the following steps:

1. Click **Other Data Reports** to expand the list.

TaxSlayer Pro Online displays the other data reports:

Other Data Reports
Management Report View Management Reports
Mailing Labels Mailing labels.
Client Retention Report View Client Retention Report.
Marketing Report View Marketing Report.
Username Report List of usernames.
Failed Review Report List of returns that have failed review.
EIN Report List of EIN information for all returns.
Review Report Information for review process.
Dependents/Qualifying Child report Dependent or Qualifying Child Information.

2. Click **Select** on the **Review Report** line.

TaxSlayer Pro Online displays the **Review Report** page:

Date Range
Review Report

Please select your date range

From: 11/11/2023 To: 12/01/2023

Nov 2023 Dec 2023

Su Mo Tu We Th Fr Sa Su Mo Tu We Th Fr Sa

1 2 3 4 1 2

5 6 7 8 9 10 11 3 4 5 6 7 8 9

12 13 14 15 16 17 18 10 11 12 13 14 15 16

19 20 21 22 23 24 25 17 18 19 20 21 22 23

26 27 28 29 30 24 25 26 27 28 29 30

31

3. Select the dates for which you want to run the report.
4. Click **Continue**.

TaxSlayer Pro Online displays the review report:

#	EFIN	Last Name	Last 4	Ready for Review	Preparer	Current Review Status	Approved	Failed	Reviewer	Reason
1		DO NOT FORCE				Review				

5. Review the following columns on this report:
 - a. EFIN
 - b. Last name
 - c. Last 4 (of Social Security number)
 - d. Ready for Review (date)
 - e. Preparer
 - f. Current Review Status
 - g. Approved (date)
 - h. Failed (date)

- i. Reviewer
 - j. Reason (if marked Failed)
6. TaxSlayer Pro Online displays only the latest information for each return.
 7. If the return was rejected by the IRS, TaxSlayer Pro Online shows one row for each e-file attempt.

Federal Returns Not Transmitted Report: State Only

When running the Federal Returns Not Transmitted report, TaxSlayer Pro lists all federal returns that have not been e-filed. This includes state-only returns. Beginning in 2023, the **Status** column shows if the return is state only. This allows preparers and administrators to quickly identify the reason these returns have not been transmitted to the IRS.

2022 5/11/2023 -- Federal Returns Not Transmitted

Search:

Showing 1 to 14 of 14 entries

	⇅ Efin	⇅ Office Name	⇅ Last Name	⇅ L4SSN	⇅ Preparer	⇅ Status
1	001111	Sample VITA/TCE Site	NATURAL DISASTER	1860	Kim admin (instruct	Failed
2	001111	Sample VITA/TCE Site		1820	Kim admin (instruct	In Progress
3	001111	Sample VITA/TCE Site	DISAPPEARING DOCS	6747	Kim admin (instruct	State Only

Site Production Detail Report Changes

TaxSlayer has added multiple columns to the Site Production Detail Report, as listed below.

Columns Added to both Electronic and Paper Return Reports

- Form 8880
- Form 2441
- Dependents
- Form 1116
- Form 2555
- Spouse ITIN (Yes/No indicator)
- Secondary email (Spouse's email address)
- Telephone number
- Last Edited Date

Note: These columns will be filled for paper returns only if they were previously e-filed and rejected returns that were switched to paper.

Columns Added to Paper Return Reports

- Filing Status

Columns Added to Electronic Return Reports

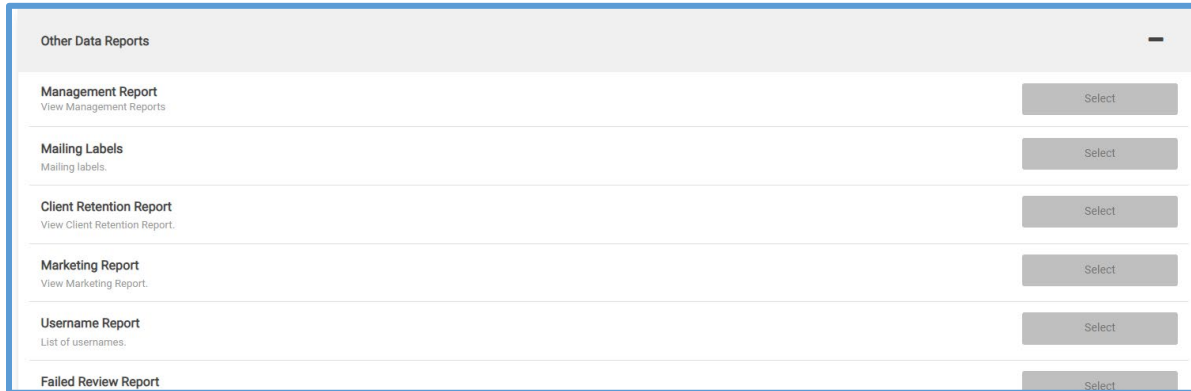
- Total Income

User Access Report

Administrators can now run a report showing the date and time each user logs into TaxSlayer Pro Online. To run this report, use following steps from the **Office Reporting** page:

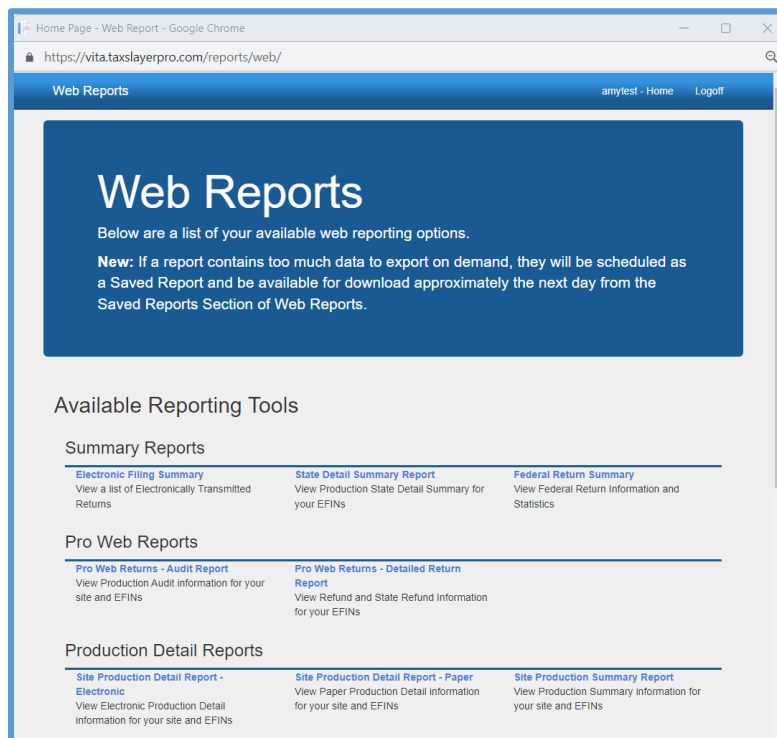
1. Click **Other Data Reports** to expand the list.

TaxSlayer Pro Online displays the other data reports:



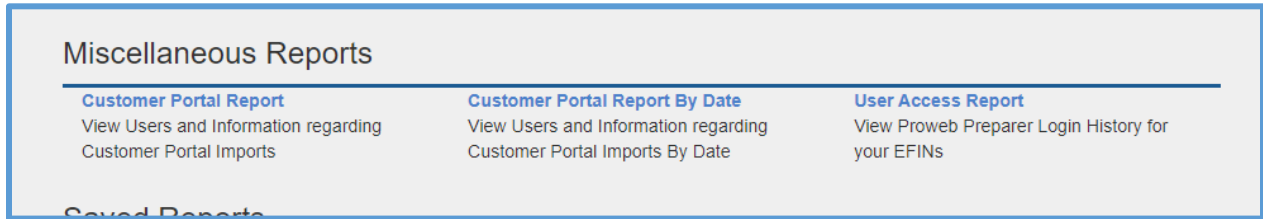
2. Click **Select** on the **Management Report** line.

TaxSlayer Pro Online displays the **Web Reports** page in a separate window:



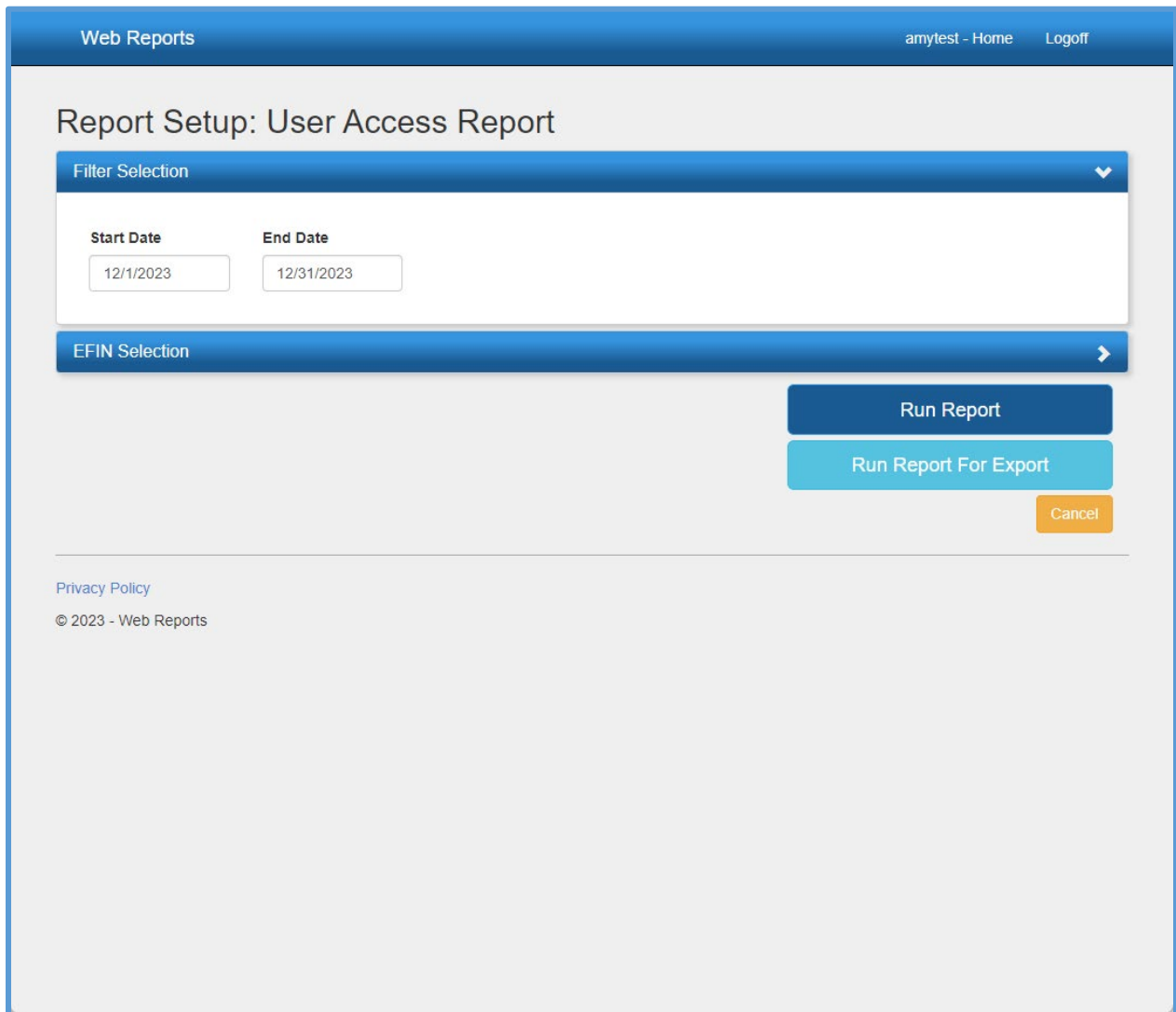
3. Scroll to the **Miscellaneous Reports** section.

TaxSlayer Pro Online displays the **Miscellaneous Reports** section:



4. Click **User Access Report**.

TaxSlayer Pro Online displays the **Report Setup: User Access Report** page:



5. Add the start and end date for the report.

6. Click **EFIN Selection** and select EFINs for which you want to run the report.
7. Click **Run Report**.

TaxSlayer Pro Online displays the user access report, showing the user name and access date and time:

Report: User Access Report

Go Back Export Save Report

Column Selection

Drag a column and drop it here to group by that column

Username	AccessDate
KIMINSTRU...	05/25/2023 07:31:20 AM
KIMINSTRU...	05/25/2023 07:31:14 AM
KIMINSTRU...	05/25/2023 07:31:07 AM
KIMINSTRU...	05/25/2023 07:30:48 AM
KIMINSTRU...	05/25/2023 07:30:33 AM
KIMINSTRU...	05/25/2023 07:30:30 AM
KIMINSTRU...	05/25/2023 07:30:22 AM
KIMINSTRU...	05/25/2023 07:30:17 AM
KIMINSTRU...	05/25/2023 07:30:10 AM
KIMINSTRU...	05/24/2023 08:14:11 AM
KIMINSTRU...	05/24/2023 08:14:06 AM
KIMINSTRU...	05/24/2023 08:14:01 AM
KIMINSTRU...	05/24/2023 08:13:54 AM
KIMINSTRU...	05/17/2023 07:06:43 AM
KIMINSTRU...	05/17/2023 07:06:37 AM
KIMINSTRU...	05/17/2023 07:06:32 AM
KIMINSTRU...	05/15/2023 10:07:20 AM
KIMINSTRU...	05/15/2023 10:07:16 AM
KIMINSTRU...	05/12/2023 08:49:47 AM
KIMINSTRU...	05/12/2023 08:49:23 AM
KIMINSTRU...	05/11/2023 08:41:22 AM
KIMINSTRU...	05/11/2023 07:31:32 AM
KIMINSTRU...	05/11/2023 06:20:54 AM

Pro Web Detailed Return Report: Added Columns

Beginning in 2023, TaxSlayer has added the following columns to the Pro Web Detailed Return Report:

- Federal Date Accepted
- State Date Accepted
- Social Security Benefits (Yes/No indicator)

Other Enhancements

After completing this lesson, you should be able to:

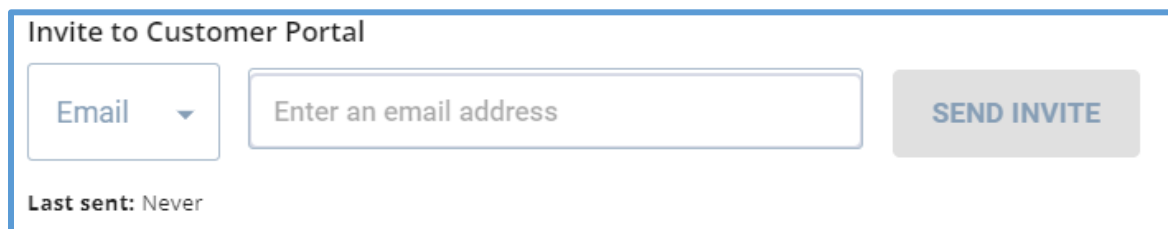
1. List and describe other enhancements in TaxSlayer Pro Online.
2. View taxpayer's information when messaging taxpayers through the Customer Portal.
3. Choose email or phone number to send an invitation to the Customer Portal.

Customer Portal Messaging Changes

In previous years, the Customer Portal chat feature displayed limited information to identify the taxpayer during messaging. Beginning in 2023, the **Chat History** displays the taxpayer's last name and the last four digits of the Social Security number, which allows you to easily identify the taxpayer during messaging.

Customer Portal Invitations

When inviting a taxpayer to the Customer Portal, TaxSlayer Pro Online displays a drop-down list. From this list, you can select either email or phone, as shown below:



The screenshot shows a form titled "Invite to Customer Portal". On the left, there is a dropdown menu with "Email" selected. To its right is a text input field with the placeholder text "Enter an email address". Further right is a grey button labeled "SEND INVITE". Below these elements, the text "Last sent: Never" is displayed.

If the taxpayer has an email address in Personal Information, TaxSlayer Pro Online defaults the email address.

If you choose **Phone** from the drop-down list, TaxSlayer Pro Online **does not** automatically fill the phone number. Please ask the taxpayer for a phone number that can receive texts.

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