

How to Create and View TaxSlayer Notes

TaxSlayer allows you to add notes to a tax return similar to yellow sticky notes. These notes can be useful for documenting information, assumptions, or anything that might be critical or useful to know about a tax return. Viewing existing notes in TaxSlayer for a tax return from one tax year may display notes saved for another tax year for that taxpayer; the notes do not always carry forward from all prior years.

If starting a new return in TaxSlayer and given the option to choose which information from the prior year to carry forward, **always choose to carry forward all notes.**

Tax Program Policy

Tax Program volunteers and staff should leave notes with any information that would be useful in understanding a tax return or would be useful for future year preparers. Examples include but are not limited to:

- An amendment was created and why
- A return initially was rejected by the IRS and why
- A rejection was resolved and how
- Why a return is set to Paper
- A return was started and then deemed out of scope and why

How To Name a New Note

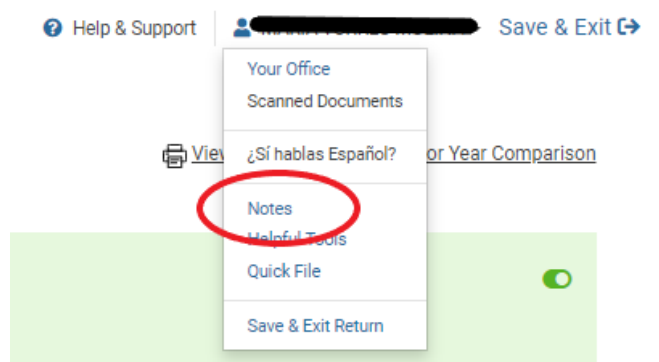
Because notes carry forward, always use this naming convention for Note titles.

Title: TYxx *short description*

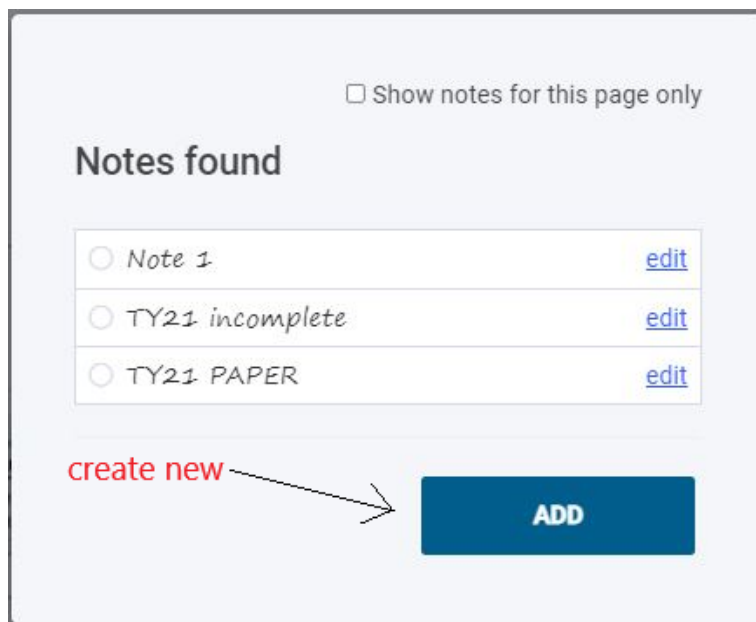
(where xx is the last 2 digits of the tax year of the note). Example: **TY21 Amend**

How To View or Create a Note From Within a Tax Return:

1. In the upper-right corner of the TaxSlayer screen, click on the taxpayer name and select **Notes** from the drop-down list.



2. If there are existing Notes, the **Notes Found** window will appear onscreen. To create a new Note, click on **Add**.



3. If there are no existing Notes in the tax return, the **Add a New Note** screen will appear onscreen.

Add a new note

Note Name

Text for this note

Last Updated:

Color

CANCEL SAVE

4. Enter a **Note Name**. Be sure to use the Note Name naming convention.
5. Add the note content in **Note Text**.
6. Click on **Save**. The **Notes Found** window displays the Note you created.

Show notes for this page only

Notes found

click to remove

click to view

Note 1 [edit](#)

TY21 incomplete [edit](#)

TY21 PAPER [edit](#)

create new







ADD

7. To close the **Notes Found** window, click your cursor outside of the window anywhere onscreen.

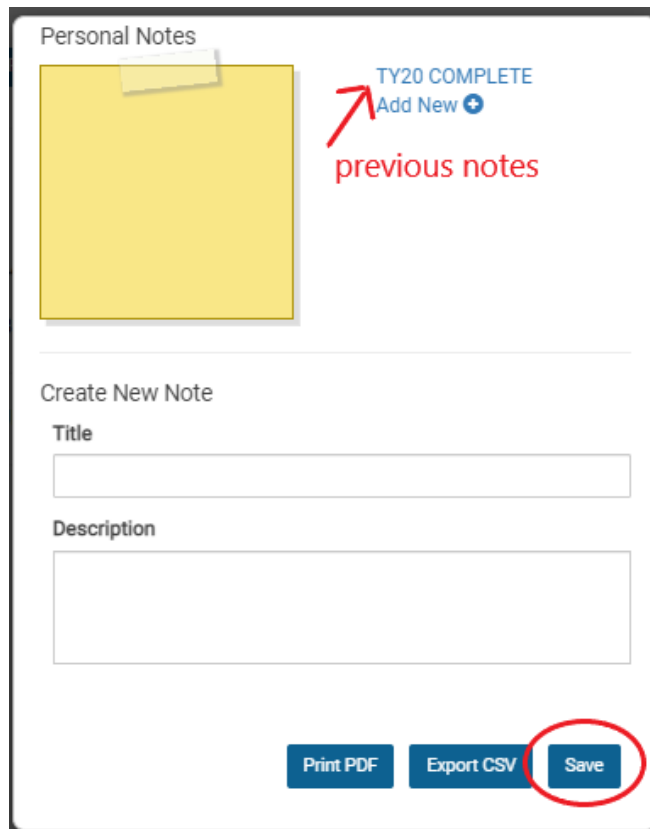
How To View or Create a Note From the Client Search Screen:

1. In the **Client Search** screen of TaxSlayer, click on the flag icon to access the **Personal Notes** window. **Note:** The flag icon will appear blue if there are existing notes.

2 most recent returns

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS					
[REDACTED]				LEA ISGUR	Accepted					Tools	Select
[REDACTED]				MARGARET CAIN	Accepted					Tools	Select

2. The **Personal Notes** window will appear onscreen.



3. To create a new **Note**, enter a **Title** and note **Description**. Be sure to use the Note Name naming convention.
4. Click on **Save**.
5. To view previous notes, click on the note title in the upper right-hand corner of the **Personal Notes** window.
6. To close the **Personal Notes** window, click your cursor outside of the window anywhere onscreen or use the X button.