

## 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.

Notes carry from year to year; they are associated with a SSN in TaxSlayer. Viewing existing notes from a tax return from any tax year will display all notes saved in TaxSlayer for that taxpayer.

### 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

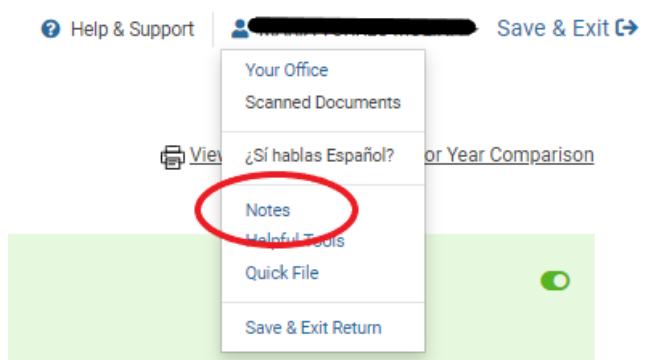
Because notes carry forward, always use this naming convention for Note titles.

**Title:** TYxx *short description*

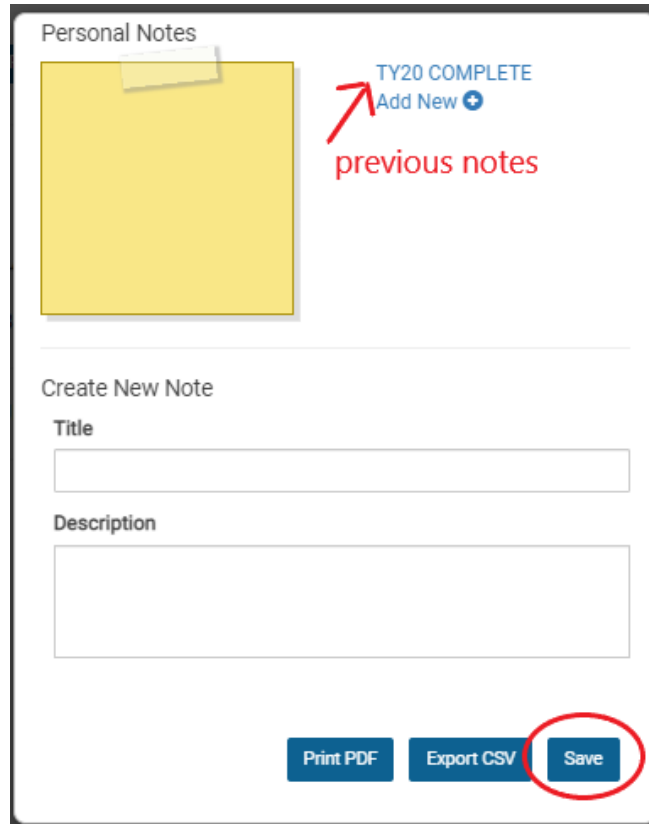
(where xx is the last 2 digits of the tax year of the note). Example: **TY21 Amend**

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







3. To create a new **Note**, enter a **Title**. Be sure to use the note Title naming convention.
4. Add the note content in **Description**.
5. Click on **Save**.
6. To view previous notes, click on the note title in the upper right-hand corner of the **Personal Notes** window.
7. To close the **Personal Notes** 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]	[REDACTED]	[REDACTED]	[REDACTED]	LEA ISGUR	Accepted				Tools	Select
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	MARGARET CAIN	Accepted				Tools	Select

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

Personal Notes

TY20 COMPLETE  
Add New +

previous notes

Create New Note

Title

Description

Print PDF Export CSV Save

3. To create a new **Note**, enter a **Title** and note **Description**. Be sure to use the note Title 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.