

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

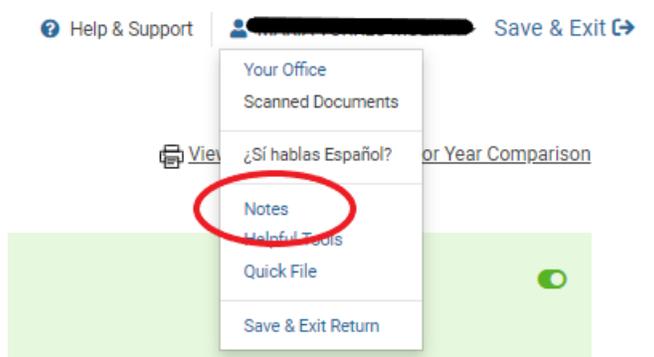
Because notes carry forward, always use this naming convention for Note titles.

Title: TYxx *short description*

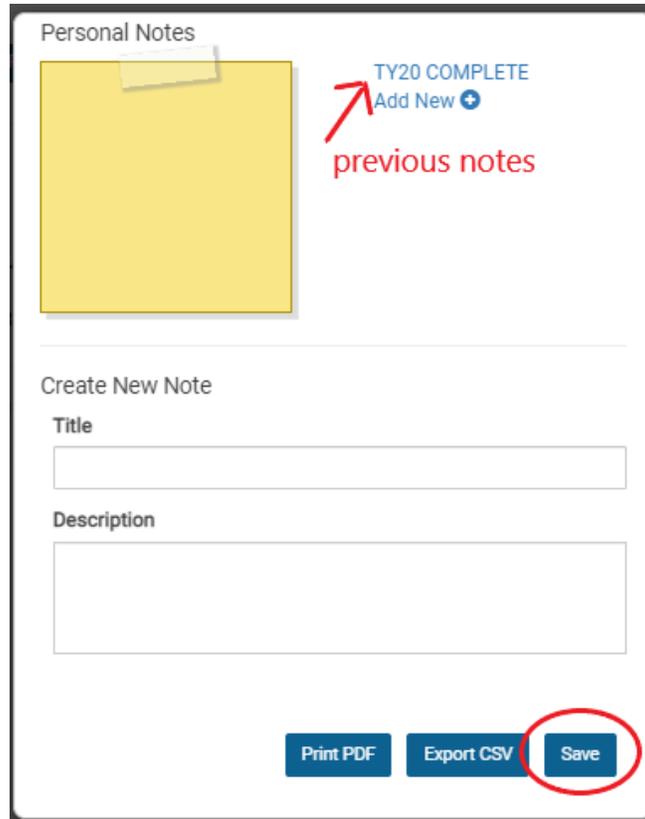
(where xx is the last 2 digits of the tax year of the note). Example: **TY21 Amend**

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.