

Navigating TaxSlayer® Pro (Desktop)

Note: This tab provides key highlights for using the desktop software TaxSlayer Pro. For specific tax law content refer to the appropriate tab in the Publication 4012, VITA/TCE Volunteer Resource Guide. See VITA/TCE: TaxSlayer® Pro Desktop User Guide on the VITA/TCE Springboard for software details on starting and preparing a return, working with the Premium Tax Credit, entering income, deductions, etc., completing a state return, and finishing a return.

The screenshot shows the TaxSlayer Pro desktop software interface. At the top, there is a search bar labeled "Search Client List" and a button labeled "Edit or start a new return". Below the search bar is a table with columns: First Name, Last Name, Suf, Spouse First, Telephone, Type, Preparer, Complete, Refund/, and Extension. The table contains three rows of data:

First Name	Last Name	Suf	Spouse First	Telephone	Type	Preparer	Complete	Refund/	Extension
SCHEDULE	TAXPAYER	()	-	Paper	706		<input checked="" type="checkbox"/>	1316	<input type="checkbox"/>
FORM	EIGHTYSIXFIFTE	()	-	Paper	706		<input type="checkbox"/>	1413	<input type="checkbox"/>
NONRESIDENT	ALIEN			(706) 898-9787	Paper	706	<input type="checkbox"/>	603	<input type="checkbox"/>

Below the table, there is a "Mask SSN" checkbox and a "Right click on a client row to access return notes." instruction. At the bottom of the interface, there are buttons for "Clear Filters", "Print", and "Export", along with a "Total: 3" indicator. On the right side, there is a "Quick Menu" with options: 1. Start New Return, 2. E-file, 3. Print, 4. Business, 5. Client Status, 6. View Returns, 7. Configuration, 8. Utilities, 9. Reports, and 10. Updates. Below the menu is an "Enter Option" input field.

Callout boxes provide additional information:

- To begin a new return select **Start New Return****: Points to the "Edit or start a new return" button.
- Access the E-file section to transmit/e-file returns and extensions, check acknowledgements and print reports.**: Points to the "E-file" option in the Quick Menu.
- Client Status - search by SSN and display the taxpayer's Social Security number, phone numbers, address, Federal return type, IRS Transaction date, and Reject information.**: Points to the "Client Status" option in the Quick Menu.
- To edit an existing return, select the return in the **Client List**.**: Points to the "Search Client List" search bar.
- Select **Print** to print returns, extensions, and blank forms.**: Points to the "Print" button.
- Utilities – this menu allows you to backup and recall returns, and do other administrative tasks.**: Points to the "Utilities" option in the Quick Menu.
- Configuration – to set up the program defaults, preparers, etc.**: Points to the "Configuration" option in the Quick Menu.
- View Returns – allows you to enter a specific SSN or pick from the client list and choose from View/Print options. You cannot edit a return from View Returns.**: Points to the "View Returns" option in the Quick Menu.

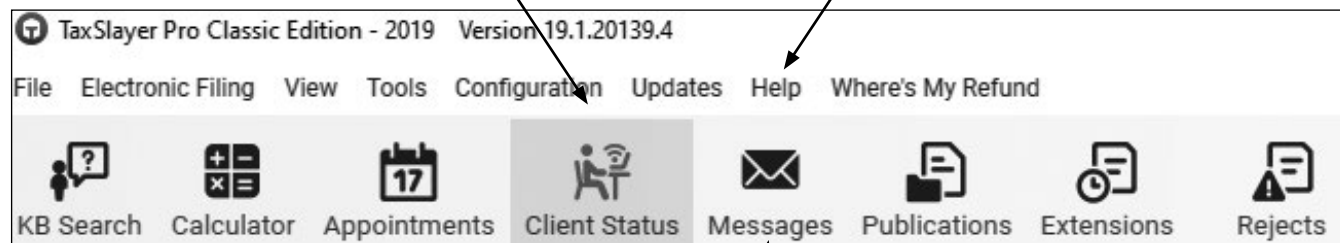
Navigating TaxSlayer® Pro (Desktop) (continued)

The toolbar appears at the top of the screen throughout the program, although some icons may not appear on all screens:

This icon brings up a Client Status screen. You can search by SSN and display the taxpayer's Social Security number, phone numbers, address, federal return type, IRS Transaction date, and Reject information.

The HELP button takes you to the VITA/TCE Blog. You can search by category or keyword. Requires an internet connection.

Many input screens provide an icon at the top of the screen that allows you to view the form from the current menu.

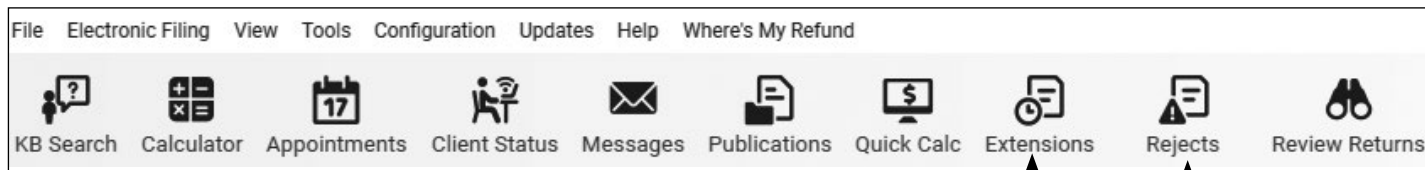


Select **KB Search** to search the knowledge base

Check the Message Center

Brings up a link to IRS publications, forms and instructions. Requires an internet connection

View from the exit screen when you mark the return as not complete.



Brings up the extension menu, where you can create or select an extension

View rejected returns. The number here reflects the rejected returns for the whole site.