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.

To begin a new return select **Start New Return**

Access the E-file section to transmit/e-file returns and extensions, check acknowledgements and print reports.

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.

To edit an existing return, select the return in the **Client List.**

Select **Print** to print returns, extensions, and blank forms.

Utilities – this menu allows you to backup and recall returns, and do other administrative tasks.

Configuration – to set up the program defaults, preparers, etc.

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.
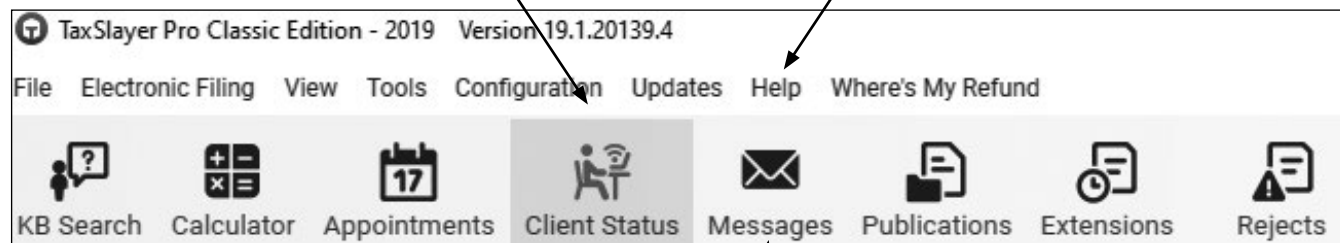
Navigating TaxSlayer® Pro (Desktop)
(continued)

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.

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File   Electronic Filing   View   Tools   Configuration   Updates   Help   Where's My Refund

KB Search   Calculator   Appointments   Client Status   Messages   Publications   Extensions   Rejects
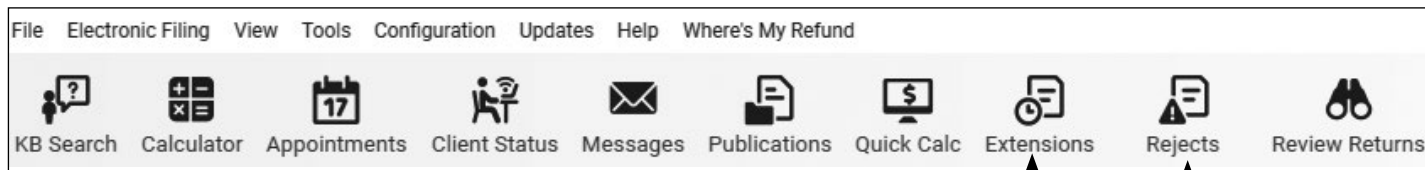
Select **KB Search** to search the knowledge base

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.

File   Electronic Filing   View   Tools   Configuration   Updates   Help   Where's My Refund

KB Search   Calculator   Appointments   Client Status   Messages   Publications   Quick Calc   Extensions   Rejects   Review Returns

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.