TaxSlayer PRO ®

2018

Quick Start Manual

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New Tax Brackets – Many of the tax rates and all the brackets have changed for 2018. Below is a comparison of 2017/2018 tax brackets. The 2018 tax brackets are on the left side of the table.

Single			
2017	**2017**	**2018**	**2018**
Marginal Tax Rate	**Taxable Income**	**Marginal Tax Rate**	**Taxable Income**
10%	$0—$9,325	10%	$0-$9,525
15%	$9,326—$37,950	12%	$9,526—$38,700
25%	$37,951—$91,900	22%	$38,701—$82,500
28%	$91,901—$191,650	24%	$82,501—$157,500
33%	$191,651—$416,700	32%	$157,501—$200,000
35%	$416,701—$418,400	35%	$200,001—$500,000
39.6%	$418,401 or more	37%	$500,001 or more
Head of Household			
2017	**2017**	**2018**	**2018**
Marginal Tax Rate	**Taxable Income**	**Marginal Tax Rate**	**Taxable Income**
10%	$0—$13,350	10%	$0-$9,525
15%	$13,351—$50,800	12%	$9,526—$51,800
25%	$50,801—$131,200	22%	$51,801—$82,500
28%	$131,201—$212,500	24%	$82,501—$157,500
33%	$212,501—$416,700	32%	$157,501—$200,000
35%	$416,701—$444,550	35%	$200,001—$500,000
39.6%	$444,551 or more	37%	$500,001 or more
Married Filing Jointly / Qualifying Widow(er)			
2017	**2017**	**2018**	**2018**
Marginal Tax Rate	**Taxable Income**	**Marginal Tax Rate**	**Taxable Income**
10%	$0—$18,650	10%	$0-$19,050
15%	$18,651—$75,900	12%	$19,051—$77,400
25%	$75,901—$153,100	22%	$77,401—$165,000
28%	$153,101—$233,350	24%	$165,001—$315,000
33%	$233,351—$416,700	32%	$315,001—$400,000
35%	$416,701—$470,700	35%	$400,001—$600,000
39.6%	$418,401 or more	37%	$600,001 or more
Married Filing Separately			
2017	**2017**	**2018**	**2018**
Marginal Tax Rate	**Taxable Income**	**Marginal Tax Rate**	**Taxable Income**
10%	$0-$9,325	10%	$0-$9,525
15%	$9,326—$37,950	12%	$9,526—$38,700
25%	$37,951—$76,550	22%	$38,701—$82,500
28%	$76,551—$116,675	24%	$82,501—$157,500
33%	$116,676—$208,350	32%	$157,501—$200,000
35%	$208,351—$235,350	35%	$200,001—$300,000
39.6%	$235,351 or more	37%	$300,001 or more

Major Tax Law Changes for 2018 Tax Returns

Personal Exemptions – For 2018, all personal exemption amounts for taxpayers, spouses and their dependents have been reduced to $0. In prior years, the total personal exemption amount reduced the taxpayer's taxable income. There will be no reduction in taxable income due to personal exemptions on 2018 tax returns.

Standard Deduction – The standard deduction for all filing statuses has increased significantly for 2018 tax returns. For 2018, the standard deduction amount will be $12,000 for Single and Married Filing Separately, $18,000 for Head of Household and $24,000 for Married Filing Joint and Qualifying Widow(er). The additional standard deduction amount for taxpayers who are age 65 or older and/or blind is $1,600 for Single and Head of Household and $1,300 for Married Filing Joint, Married Filing Separate and Qualifying Widow(er). The amount will not change for a dependent filing their own return. The standard deduction remains $1,050 or $350 plus the dependent's earned income, not to exceed the standard deduction amount for their filing status.

Itemized Deductions – Many common itemized deductions have been changed or eliminated for tax year 2018.

- The deduction for **State and Local Taxes** is now limited to $10,000 for all filing statuses other than Married Filing Separate, which is limited to $5,000.
- The **Mortgage Interest Deduction** is now limited to mortgage debt on the primary and second home of up to $750,000. Previously the mortgage interest deduction was limited to mortgage debt of up to $1,000,000. Mortgage interest from a mortgage obtained under the old limits remains deductible.
- **Home Equity Loan Interest** is no longer a separate deduction. Interest from a home equity loan can only be deducted if it meets the requirements for the mortgage interest deduction.
- **Qualified Mortgage Insurance Premiums** (PMI) paid is no longer deductible.
- **Medical Expenses** can be deducted to the extent that they exceed 7.5% of adjusted gross income. This is the same as in 2017; however, this limitation will rise to 10% starting in 2019.
- Cash **Charitable Contributions** can now be deducted up to 60% of adjusted gross income as compared to 50% in prior years.
- **Personal Casualty Losses** will only be deductible if the loss is attributed to a federally declared disaster. A casualty loss will be subject to a $100 deductible and only the amount in excess of 10% of adjusted gross income is deductible. Special rules still exist for 2016 federally declared disasters and certain 2017 disasters (Hurricane Harvey or Tropical Storm Harvey, Hurricane Irma, Hurricane Maria and the California Wildfires).
- All **Miscellaneous Deductions that were subject to the 2%** of the taxpayer's adjusted gross income have been eliminated. This includes unreimbursed employee expenses, tax preparation fees, etc.
- The **Overall Limitation on Itemized Deductions** for higher income taxpayers has been eliminated. Itemized deductions are no longer limited by a taxpayer's adjusted gross income.

Moving Expenses - Taxpayers are no longer able to deduct moving expenses (unless the taxpayer is a member of the Armed Services).

Child Tax Credit and Refundable Child Tax Credit – A qualifying child must have a valid **Social Security Number** to be eligible for the Child Tax Credit for 2018. The amount of the Child Tax Credit has increased to $2,000 for each qualifying child under age 17. $1,400 of this credit is now refundable (up from $1,000 in 2017). A child under the age of 17 with an ITIN or ATIN will no longer qualify for the Child Tax Credit.

The income phase-out for taxpayers claiming the Child Tax Credit has been significantly increased. The new limits are $400,000 for Married Filing Jointly (up from $110,000) and $200,000 for all other filing statuses (up from $75,000 for Single and Head of Household, and $55,000 for Married Filing Separately).

Other Dependent Credit – A credit of $500 is now available for each dependent claimed on the tax return who does not qualify for the Child Tax Credit. This $500 credit will be available for a Qualifying Child age 17 to 24, a Qualifying Relative, or a Child with an ITIN or ATIN living in the United States.

Educator Expenses – The $250 deduction teachers can claim for classroom related expenses remains unchanged for tax year 2018.

Education Credits – The American Opportunity Credit and Lifetime Learning Credit remain unchanged for tax year 2018.

Tuition and Fees Deduction – The tuition and fees deduction has been eliminated for tax year 2018.

Health Care: Individual Responsibility Payment – Remains for 2018 and will be calculated in the same manner as 2017. The Shared Responsibility Payment will be the **greater** of 2.5 % of household income that is more than the taxpayer's filing status or $695 per adult and $347.50 per child**.** Taxpayers who have minimum essential health coverage or a coverage exemption for the entire year will no longer have to file Form 8965 – Health Coverage Exemptions to claim their exemptions but can instead indicate on Form 1040 that they have coverage or an exemption for the entire year. **The Shared Responsibility Payment will be eliminated in 2019.**

Qualified Business Income Deduction – Pass-through business income may qualify for a deduction of up to 20%. Eligible pass-through businesses is income from sole proprietors reported on Schedule C, Partnership income reported on a Schedule K-1 (Form 1065), S-Corporation income reported on a Schedule K-1 (Form 1120S), rental income reported on a Schedule E, and farm income reported on a Schedule F. In addition, certain income from REIT's, farm rentals, publicly traded partnerships and from an estate or trust may also qualify.

Alternative Minimum Tax – Alternative minimum tax (AMT) exemption amounts have increased to $70,300 for single taxpayers and taxpayers filing as head of household, $109,400 for married taxpayers filing jointly or qualifying widow(er) and $54,700 for married taxpayers filing separately. For 2018, the AMT exemption phaseout thresholds have been increased to $1 million for married taxpayers filing jointly and $500,000 for all other taxpayers.

IRS, State Tax Agencies and Tax Industry Partners Expand Identity Safeguards for 2018 Filing Season

For the third year, the IRS, state tax agencies and leaders of the tax industry have partnered to enact a series of defenses against identity and refund fraud. The public-private Security Summit partnership has put an additional safeguard in place for the 2018 filing season to further combat identity theft and tax refund fraud.

TaxSlayer Pro is committed to ensuring the data and privacy of its valued customers are protected and has put into place additional security features as outlined by the Security Summit Initiative for the 2018 program and TaxSlayer Pro Account Websites.

New for 2018 – IRS EFIN Tracking Number – In order to comply with the IRS and industry partners' efforts to prevent fraud and tax related identity theft, TaxSlayer Pro must verify the EFIN of each professional customer. The verification process must be completed for each EFIN in order to electronically file returns in 2019.

You will need to obtain your IRS EFIN Tracking Number from your IRS e-Services account and enter it into your TaxSlayer Pro Account. The number will be either a 16 or 20-digit number and must be entered in the Company Information section of your My Account/Account Hub before electronically filing tax returns this tax season.

Video instructions for obtaining your EFIN tracking number from your IRS e-Services account can be viewed **here**. Instructions can also be found in the **TaxSlayer Pro Knowledgebase** by searching the keywords *tracking number.*

Multi Factor Authentication – For the second year, multi factor authentication (MFA) is required for all TaxSlayer cloud-based applications and account websites. MFA is a security system used to control program access. Accessing online TaxSlayer accounts will require two forms of authentication and must be completed for all devices and Internet browsers. One factor of authentication is your account password; the second is a six-digit code sent to your cell phone or e-mail address when you attempt to log in to your My Account/Account Hub. If entered correctly, your identity is considered verified and you will be granted access to the software or account.

The authentication process must be repeated periodically and must be completed per device and per internet browser.

EFIN Validation Code - The IRS has mandated that an EFIN Validation Code be entered in the software. The EFIN Validation Code is a 12-digit code unique to your EFIN. The EFIN Validation Code will be transmitted with each tax return that you e-File. The IRS will use the code to verify that returns transmitted using the EFIN are originating with the owner of the EFIN. Your EFIN Validation code can be found by logging in to your TaxSlayer Pro My Account/Account Hub and selecting the **View button** on the Account History tile. Below your 2018 Software Purchase Order Number, your EFIN Validation Code will be displayed. You can manually enter the Validation Code or copy and paste it into the space provided in the Firm Information Menu.

ADMIN Account – The 2018 TaxSlayer Pro program includes a set of predefined security roles. Roles will be used to set permissions for each preparer. The program includes a pre-defined default ADMIN Account Role which is used to manage permissions for preparers as well as manage preparer usernames and passwords. The ADMIN Account Role cannot be edited. **The ADMIN Account username is ADMIN**. During the initial configuration of the program, the you will be prompted to create a password and a security question and answer for the ADMIN account.

Usernames – Each preparer using the software must log into the program using a unique username and password. During the initial configuration of the program, you will be prompted to assign (or pull forward from the prior year's software) a unique username for each preparer entered in the Preparer's Menu.

Passwords – Each preparer associated with your firm must use their assigned username and a strong password to access the tax program. When a preparer logs into the software for the first time with their assigned username, they will be prompted to create a password and a security question and answer.

Passwords are required to expire periodically and must be reset every 180 days.

Technical and Customer Support Options

When it comes to needing answers, TaxSlayer Pro has you covered. We are committed to providing you the best technical and customer support in the industry. Our support team is ready and willing to help answer any questions you may have about the operation of the program. In addition to our award-winning support team, we have created several avenues of information that will help you easily find the answers to your questions.

Help Center – The Help Center is located on the Main Menu of TaxSlayer Pro. This is a great resource for locating important phone numbers, pertinent IRS websites, and TaxSlayer Pro Support resources:
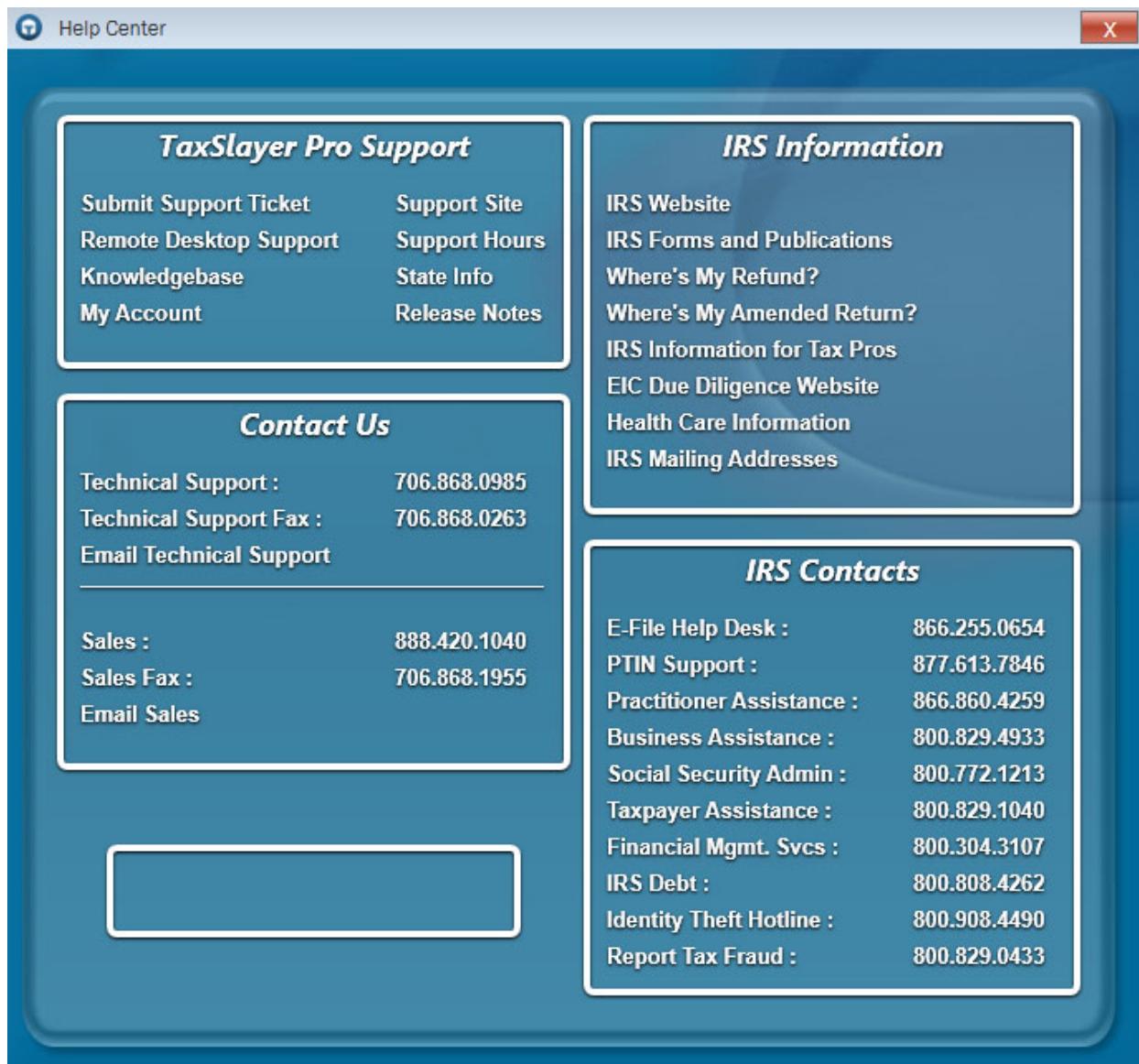
Support Ticket – If you need Technical Support to assist you with setting up your network, trouble-shooting a printer, data conversion to a new computer, or help with anything technical related to TaxSlayer Pro, simply create a Support Ticket for one of our Tier II Technical Support Agents to call you back.

TaxSlayer Pro Knowledge Base - The Knowledge Base contains hundreds of articles pertaining to the operation and navigation of TaxSlayer Pro. If you have questions on how to perform certain tasks within the program, you will most likely find your answers here. In addition, the Knowledge Base will give you specific information about a menu you are currently viewing in the program. For example, if you are preparing a Schedule C and you have a question, you can select the Help icon at the top of the screen to view articles specific to the Schedule C.

Instructional Videos – Sometimes it's better to visualize a task; that's why we created our instructional support videos. The support videos can be found under 'Customer Resources > Educational Portal' on the TaxSlayer Pro website. These videos cover the fundamentals of TaxSlayer Pro. If you are new to TaxSlayer Pro or if you have new preparers in your office, the support videos are a great place to start learning more about operating the program. https://www.taxslayerpro.com/education/index

Email Support - If you have a question that is not covered in our available resources, send our customer support staff an email. Use the email link located in the Help Center section of the program. Enter the required information on the email form and describe your question in detail. Your email will be responded to as soon as possible. Our support email address is prosupport@taxslayerpro.com.

The TaxBook Web Library – TaxSlayer Pro has partnered with the best fast-answer tax reference solution – The TaxBook. All current customers of TaxSlayer Pro are offered The TaxBook at a significant discount off the retail price. With the complexity of federal and state tax laws and the ever-changing tax code, having a reliable resource to help you find the answer to the tough tax questions is critical for your business. You can purchase The TaxBook Web Library by logging in to your My Account/Account Hub and selecting the Partner's Program tile. Once you purchase the program, your TaxSlayer Pro software will automatically add the TaxBook Library to the toolbar at the top of the screen.

Pro Support Blog – The Pro Support team has launched a blog that can be accessed from the TaxSlayer Pro Website. Check the blog often for the latest news and pertinent information from the IRS, State Agencies and TaxSlayer Pro. Subscribe to the blog to have all published posts delivered directly to your email inbox.

<h1 style="text-align:center">System Requirements</h1>

Recommended System Requirements:

Computer – Processor with a minimum PassMark score of 7500 for the transmitting computer or a minimum score of 5000 for a workstation (https://www.cpubenchmark.net/)
Operating System – Windows 7, 8, 8.1, or 10 (Note: Windows 10 S is not supported)
Memory – 8 GB RAM
Disk Space – 1GB per tax year will be sufficient *(Additional disk space may be needed if you have a large client database and utilize the Paper Cut paperless office)*
USB or Flash Drive for backing up data *(USB 3.0 or higher strongly recommended)*
Printer – HP Compatible Laser Printer *(Inkjet printers are not recommended for check printing)*
Screen Resolution – 1024x768
Internet Connection – High Speed Internet Connection – Internet Explorer 11, or the latest version of Chrome or Firefox
Latest Version of Adobe Acrobat Reader
Latest version of Microsoft .NET Framework

Minimum System Requirements:

Computer – Processor with a minimum PassMark score of 3000 for the transmitting computer or a minimum score of 2500 for a workstation (https://www.cpubenchmark.net/)
Operating System – Windows 7 with the latest updates (Note: Windows 10 S is not supported)
Memory – 4 GB RAM
Disk Space – 750MB per tax year
Printer – HP Compatible Laser Printer *(Inkjet printers are not recommended for check printing)*
Screen Resolution – 1024x768
Internet Connection - High Speed Internet Connection - Internet Explorer 11, or the latest version of Chrome or Firefox
Latest Version of Adobe Acrobat Reader
Latest version of Microsoft .NET Framework

Requirements for Scanners:

Scanners used with the PaperCut program should be TWAIN and/or WIA compliant.

*Caution – TaxSlayer Pro should not be installed on any computers running Windows 95, 98, ME, NT, 2000, or XP, Vista or Windows 10S. Microsoft has ended all support for these operating systems and therefore the programming languages used to develop TaxSlayer Pro are no longer compatible with these versions of Windows. In addition, TaxSlayer Pro is not compatible with Mac computers. Windows 10 S is designed to only run Microsoft Store applications; therefore, it cannot run TaxSlayer Pro desktop.

Installing TaxSlayer Pro

Step 1: Close all software applications. If you have anti-virus software running, you should temporarily disable it before installing TaxSlayer Pro. To disable your anti-virus software, right-click on the anti-virus software icon – this will bring up a dialog box to temporarily "Disable" or "Exit" the anti-virus software. Your anti-virus software will reactivate when you restart your computer.

Step 2: Log in to your TaxSlayer Pro My Account/Account Hub by going to www.taxslayerpro.com and selecting 'My Account Login' from the main page. Enter your username and password. If prompted to authenticate, follow the onscreen process to access your Account. Select 2018 and click the **DOWNLOAD** button on the Software Options tile to download the program.

Step 3: Depending upon your browser, the download file will either be listed in the top right corner under the 'Down Arrow' icon (FireFox), bottom left corner (Chrome), at the bottom highlighted in yellow (Internet Explorer), or in a white box at the bottom of the screen (Edge). Once the download is complete, choose either 'Open' or 'Install' to begin the installation process.

Step 4: License Agreement – Please read the TaxSlayer Pro software license agreement. If you agree to the terms set forth in the license agreement, choose "I accept the terms of the license agreement" and click 'Next'. The license agreement can be printed by selecting the 'Print' button. If you do not agree to the terms set forth in the license agreement, select Cancel and do not install the software. Contact TaxSlayer Pro Sales for further information.

Step 5: Select the Installation Drive – Select the drive that you would like to install the program on. TaxSlayer Pro should be installed on your local hard drive, usually the 'C' drive in most cases. Select 'Next' after making your selection. The next menu will give you the option to continue with the installation of TaxSlayer Pro by selecting 'Install'.

Step 6: The program will begin the installation process which may take several minutes depending on the speed of your computer. Once the installation is complete, select 'Finish'.

Step 7: After installation, a 2018 TaxSlayer Pro icon will be placed on your desktop. Double-click the icon to begin the initial configuration of TaxSlayer Pro. For step by step instructions on initial configuration of the program, click here.

Initial Configuration

Step 1: Open the Program – Double-click the TaxSlayer Pro Icon. You will be greeted with a TaxSlayer Pro message advising you of the information that will need to be input in to the program during the initial configuration. Select OK. A summary of program security standards will be displayed on the screen. Read each section carefully. Click on the provided link to view step by step program setup instructions.

Step 2: Network Setup – If you do not have TaxSlayer Pro 2017 installed on this computer, you will be prompted to decide if you will be running TaxSlayer Pro on a network. If you are not using a network, select **No** to skip this step. Continue with Step 3 below to complete program configuration. You can always come back to the network setup options from the main menu of the program by selecting Configuration and then System/Network Configuration Menu.

If you intend to run TaxSlayer on a Network, select **Yes**. You will be asked a series of questions pertaining to your network setup. Refer to the Network Setup section of this guide for network setup procedures.

If you have TaxSlayer Pro 2017 installed and configured on this computer, you will be prompted to pull forward network configuration from the prior year.

Step 3 – **Firm Information** – If TaxSlayer Pro 2017 is installed on this computer, the 2017 Firm Information will pull forward to the 2018 program. Review the information that pulled forward to ensure all entries are still correct. If this is a new computer or your first year with TaxSlayer Pro, you will need to fill in all of the required information.

Tip – When entering the name and address of your firm, do not enter characters such as apostrophes, commas, periods, etc. If you enter any of these characters by mistake, the program will prompt you to remove them before continuing.

The IRS requires that your unique EFIN Validation Code be entered in the software. Your EFIN Validation code can be found by logging in to your TaxSlayer Pro My Account/Account Hub and selecting the **View button** on the Account History tile. Below your 2018 Software Purchase Order Number, your EFIN Validation Code will be displayed. You can manually enter the Validation Code or copy and paste it into the space provided in the Firm Information Menu.

Step 4 – Create an Admin Account - The 2018 TaxSlayer Pro program includes a set of predefined security roles. Roles will be used to set permissions for each preparer. The default ADMIN Account Role will be used to manage permissions for preparers as well as manage preparer usernames and passwords. The ADMIN Account Role cannot be edited. The ADMIN Account username is ADMIN. This username cannot be changed.

You will be prompted to create a password for the default Admin Account. The password must contain between 8 and 30 characters and use both uppercase and lowercase letters, use a number and use a special character.

You will also be prompted to create a security question and answer for the Admin Account. The security question will be used to verify the Admin Account if you forget your password.

Step 5 – **Enter/Edit Preparers** – If TaxSlayer Pro 2017 is installed on your computer, you will be prompted with a question asking to *Pull Preparers from Prior Year*. If you would like to pull the preparers forward, select **Yes**. Once the preparers have been pulled forward, you can edit or delete information pertaining to each preparer. Note – Prior year usernames, passwords and assigned security roles will pull forward to the 2018 program. These settings can be modified from the Preparer Setup Menu.

Adding New Preparers
If you do not pull forward preparers from the prior year, you will be given the option to enter preparers. To enter a preparer, select **New**. You will be prompted to enter a Preparer Code. A unique preparer code must be assigned to each preparer entered. You can use any number from 1 to 99999. Next, enter the preparer's SSN, PTIN, first name, middle initial, and last name. Enter a username that the preparer will use to log into the program. The preparer will create their own password when they log into the program for the first time.

Select OK to proceed to the Preparer Edit Menu. The Preparer Edit Menu will give you the option to change the Preparer Practitioner PIN, enter the preparer's power of attorney information (if the preparer is an Acceptance Agent), and set program permissions and security for the preparer. For detailed information on Program Security, visit the TaxSlayer Pro Knowledgebase and search for keywords "Security Roles."

Security Roles – New preparers are assigned the default security role "Super User." A Super User has access to all areas of the program except Firm and Preparer Information. A Super User also has unlimited access to tax returns. To change the default security role, select Preparer Security > Role.

Step 6 – **Bank Setup** – If you will be offering bank products, we encourage you to apply with a bank as soon as possible if you have not already done so. The following banks are affiliated with TaxSlayer Pro: Refund Advantage, Refundo, Republic Bank, River City, Santa Barbara TPG and EPS. If you are already approved with a bank, the bank should appear in the pick list. If you do not see your approved bank, please contact TaxSlayer Pro Sales or Support.

Step 7 – **Fee Setup Menu** – Fees entered in to the Fees Menu will be used to calculate the total tax return fee that will appear on the Client Invoice. If you used TaxSlayer Pro last year, or you entered your fees in to the TaxSlayer Pro demo program, you can pull the fees forward by clicking the *Pull Prior Year Fees* button. To change a fee or to enter a new fee, select the line for the form and enter the fee. If you charge by the hour, check the box in the lower left-hand corner of the screen. Default Custom Fees and Custom Discounts can also be created from the Fees menu. Select the *Exit* button when you have finished configuring your fees.

Step 8 – Client Letters – You will be prompted to pull forward each customizable client letter from the prior year. If you made changes to any of the client letters and would like to pull the changes forward, select **Yes.**

Step 9 – **Path Menu** – The settings defined within the Path Menu tell the program where to backup current data and where to pull prior year data from. The default settings will work for most TaxSlayer Pro customers. If your prior year data is stored on a drive other than the drive the current TaxSlayer Pro program is installed on, the Prior Path settings will need adjusting. To adjust the Prior Path, select the

Prior Path Menu and change the location of the prior year data. If you need assistance, please call TaxSlayer Pro Technical Support. If you would like to setup a secondary backup path for your tax returns, you can select the backup path from the drop-down menu for *Secondary Backup Path*. The Secondary Backup Path is used for backing up data to a flash drive or a secondary hard drive.

Step 10 – **MACRO Setup** – A MACRO, by definition, is a shortcut to a task you do repeatedly. For purposes of tax preparation, MACROs reduce the number of keystrokes required to complete a return. If you have TaxSlayer Pro 2017 installed, you can pull forward your prior year MACROs. If not, you can enter MACROs now or you can re-enter the Configuration Menu and type in your MACROs at a later date.

Step 11 – **TaxSlayer Pro Premium** – If you purchased TaxSlayer Pro Premium, the program will guide you through the process of configuring premium features. If prompted for an activation code, login to your TaxSlayer Pro My Account/Account and select the **VIEW** button on the Pro Premium tile to obtain the code.

If TaxSlayer Pro Premium 2017 is configured on this computer, you will be prompted to pull forward the configuration settings. Enter your email address. The email method will automatically be defaulted to TaxSlayer Pro. For a description of other email options, visit the TaxSlayer Pro Knowledgebase and search for keywords "Premium Options."

Several other premium options can be configured from the Premium Configuration Menu. Visit the TaxSlayer Pro Knowledgebase and search for keywords "Premium Options" for detailed information on all of the Premium features. If you would like to upgrade to TaxSlayer Pro Premium and take advantage of the Taxes to Go Mobile App, online client status, text messaging, and PaperCut, contact TaxSlayer Pro Sales at 1.888.420.1040.

*TaxSlayer Pro Premium can be activated after the initial configuration by selecting Configuration from the main menu of TaxSlayer Pro. Next choose Configure Premium Options. To activate Paper Cut, change "Use Paper Cut Paperless Office Option" to Yes. To activate the Text Messaging feature, change "Send Text Message to Clients" to Yes.

Step 12 – **Exit Configuration** – Once you have completed the initial configuration, TaxSlayer Pro will close to apply all of the new settings to the program. Before exiting, check your system date. If the date displayed is not correct, change the date by clicking the time display in the bottom right-hand corner of your screen.

When you re-open the program, you will be prompted to enter your username and password. Enter your username in the space provided and select **Ok.** The program will prompt new preparers to enter and confirm their password. New preparers will also be prompted to select a security question and provide an answer. The security question will be used to recover your password in case it is forgotten.

Network Setup

Setting up the TaxSlayer Pro network takes only a few minutes if your office network is already working properly.

IMPORTANT – If your office network is not set up or is not functioning properly, our TaxSlayer Pro technicians will not be able to assist you in setting up the TaxSlayer Pro network. You will need to contact your local network technician for assistance.

Here are a few items to consider when setting up the TaxSlayer Pro network:

> 1.) The TaxSlayer Pro Network operates in a peer-to-peer environment. This means that the TaxSlayer Pro program must be installed on each computer in your office. The program cannot be installed on a file server and distributed to each workstation.
>
> 2.) If you have multiple user accounts on your office network, every user must have an account on each computer in the office. For example, if on your transmitting computer you have an account for Charles, Beth, and John you must also have a user account for Charles, Beth, and John on each workstation.
>
> 3.) Permissions – 'Full Control' or at least 'Modify' privileges need to be set for the 'Everyone' group on the TaxSlayer folder located on the Transmitting computer before the workstations and transmitting computer can share return information.
>
> 4.) File and Printer Sharing – Make sure that File and Printer Sharing is enabled in your network settings for your operating system and within your anti-virus program. Some newer anti-virus programs will block file sharing on networks.

If you are not familiar with the information listed above, we suggest contacting a network or computer technician to assist with the network setup.

Once the office network is set up, follow the steps below to network TaxSlayer Pro.

Transmitting Computer:

During initial configuration of the program, you will be asked if this computer is the File Server. Select **Yes.** You will then be asked if this is the transmitting computer. Select **Yes**. The computer's name and Local IP address will automatically populate.

To return to the System/Network Configuration Menu after initial configuration, from the main menu of the program select 7. Configuration. 5. System/Network Configuration Menu.

Configuration of Workstation Computers

Once configuration on the transmitting computer is complete, the configuration settings can be copied to your workstation computers. Workstation computers are any computers that are used to prepare tax returns, but not to electronically file. For TaxSlayer Pro purposes, you must designate only one transmitting computer.

How you copy configuration to the workstation computers will be determined by whether your office computers are networked or if all computers are stand-alone computers. If the computers are networked, see the section below titled 'Configuration of Networked Workstation Computers' if the computers are stand-alone (non-networked) see the section 'Configuration of Stand-Alone Computers'.

Configuration of Networked Workstation Computers

Configuration can be recalled from the Transmitting computer through your network.

Step 1: Install TaxSlayer Pro on the Workstation computer.

Step 2: Open TaxSlayer Pro by double-clicking on the TaxSlayer Pro icon on the desktop.

Step 3: Select OK on the TaxSlayer Pro Welcome Message.

Step 4: Select Yes when asked "Do you want to restore configuration from a backup disk?"

Step 5: TaxSlayer Pro will search your computer for drives that contain the configuration file. If the workstation computer is properly connected to the network, the network drive will appear. Select the drive and click OK. The configuration settings will be recalled and the program will automatically set the computer to be a TaxSlayer Pro workstation.

If you receive a message stating "The configuration could not be restored," the workstation computer may not be properly mapped or networked to the transmitting computer. Contact TaxSlayer Pro Technical Support for assistance.

Configuration of Stand-Alone Computers

A USB Flash drive is needed to complete the following steps.

Step 1: Insert a USB Flash drive into the *Transmitting Computer*.

Step 2: From the Main Menu of TaxSlayer Pro, select Configuration and then Configuration Utilities. Select, 'Copy Configuration to Disk' and select the drive letter associated with the USB drive. Select OK. The configuration file will be copied to the USB Flash drive.

Step 3: Remove the USB Flash drive from the transmitting computer and insert the USB drive in to the workstation computer.

Step 4: Install TaxSlayer Pro on the workstation computer. Once installed, open the program by double-clicking on the TaxSlayer Pro icon located on the desktop.

Step 5: Select OK on the TaxSlayer Pro Welcome Message.

Step 6: Select Yes when asked "Do you want to restore configuration from a backup disk?"

Step 7: TaxSlayer Pro will search your computer for the USB drive containing the configuration file. Once found, select the drive letter and select OK. The configuration settings from the Transmitting Computer will be copied to the workstation.

Step 8: Repeat the steps above on all stand-alone workstation computers.

TaxSlayer Pro Main Menu

Navigating through the TaxSlayer Pro Main Menu is relatively easy. In the center of the screen, you will notice four icons called the Fast Access icons along with a list of ten menu options. The Fast Access icons take you directly to the most common tasks performed within TaxSlayer Pro. The ten menu options on the right-hand side are described below:

1: Tax Returns – Start a new tax return or select an existing return to edit.

2: E-File – Transmit tax returns, receive acknowledgements, and print bank checks.

3: Print – Print copies of Individual Returns and Individual Extensions. Print organizers for the current year or a prior year. Print blank forms.

4: Business – Start a new business return or edit an existing business return. E-File Business Returns and Extensions, Receive Business Acknowledgements, Print Business Returns and Organizers.

5: Client Status – Check the current e-File and refund status for your clients. Information in the Client Status module includes when the return was accepted or rejected, bank approval status, check status, fees paid, and basic return information.

6: View Returns – View client returns. Select a client and pick a form to view from the list of completed forms and schedules.

7: Configuration – Customize TaxSlayer Pro to include print setup and preferred settings, network settings, firm and preparer information, program security, fee setup, bank setup, etc.

To view a list of all configuration settings, visit the TaxSlayer Pro Knowledgebase and search for keywords "*Configuration Menu*".

8: Utilities – Items in the Utilities Menu include the backup and recall returns utility, Quick MFJ Calculator, delete a tax return, and ScreenConnect. To view a list of all items contained in the Utilities Menu, visit the TaxSlayer Pro Knowledgebase and search for keywords "*Utilities Menu*".

9: Reports – Keep track of the performance of your office by running various types of reports such as Master Report, Client Reports, and Returns / Extensions Not Accepted Reports. To view descriptions for all reports contained in the Reports Menu, visit the TaxSlayer Pro Knowledgebase and search for keyword "*Reports*".

10: Updates – Download and install updates to the program. If you have configured automatic updates in the Update Manager, your selected updates will download and install automatically when you open the program for the first time each day. Updates and state programs can also be downloaded manually through the Updates Menu.

Toolbar Icons

The icons located at the top of each screen are called the toolbar icons. Below is a brief description of each icon and the benefits they provide.

Knowledge Base – The knowledge base icon is a direct link to the TaxSlayer Pro database of program related articles. The knowledge base is searchable using key words and phrases. The knowledge base can also be accessed from anywhere in the program by pressing the F1 key on your keyboard.

The Tax Book – We have partnered with the best tax resource site available, The Tax Book. You can purchase a discounted online version of The Tax Book by logging in to your My Account/Account Hub. After purchasing, you will have access to The Tax Book within the TaxSlayer Pro software. The Tax Book can also be accessed by pressing the F3 key on your keyboard from within the program.

Calculator – At any time you can select the calculator icon to display a calculator which includes a tape like feature to keep track of your entries. The calculator can also be accessed by pressing the F6 key on your keyboard from within the program.

Appointments – The Appointment Calendar allows you to enter new appointments, create notes, and print reports to view a breakdown of the day's events.

Client Status – Check on the e-File and refund status of a client's return no matter where you are in the program.

Messages – Throughout tax season, TaxSlayer Pro will release messages to keep you informed. When a red exclamation point appears over the icon, you have a new message from TaxSlayer Pro to read. Click the icon to read your messages.

Publications – We have compiled the most widely used IRS Publications, Instructions and Fill-In Forms and made them readily available to you through the Publications icon.

Quick Calc – The Quick Calc is a refund calculator designed to give your customer an estimate of his or her expected refund.

Extensions – Create a new individual extension or edit an existing extension.

Client Retention – Client Retention can be used to generate two types of reports: A Prior Year Client List and a Call/Thank You List. If you used TaxSlayer Pro in 2017, you can generate a report of all clients that have not returned for 2018. The prior year client data is accessed by preparer number and can be password protected to prevent unauthorized access. A *Call / Thank You* list can be generated to show a list of clients who have had their returns completed for the current year.

Rejected Returns – Any returns that come back from the IRS or state as rejected will be listed in the *Rejects Utility*. Double-click on a client in the list to open the return. The list can be sorted based on federal or state rejects and reject codes.

Notes – Selecting the notes icon from inside a client's tax return will allow you to enter notes specific for the client. The notes can be marked to be displayed when entering the tax return and/or when exiting the tax return. Return notes will also pull forward in future year returns.

View Form – The View Form feature allows you to review the form from the current menu. This feature is available for federal forms and schedules as well as state forms and schedules.

Form Finder – The Form Finder icon will appear in any state return to help you locate a particular form in the state return you are preparing. The Form Finder will allow you to search for a form by name or by form number.

State Tax Info – Within each state program is a State Tax Info icon. The icon links to information that is relevant to the state you are working in. Information includes contact information, a Where's My Refund link, state forms and instructions and mailing addresses.

TaxSlayer Pro Premium Icons:

The **PaperCut** icon is only visible for TaxSlayer Pro Premium users. Paper Cut stores PDF copies of all tax returns, management reports, and e-File reports that have been printed to PDF. The Email tax returns option is also available through the PaperCut Icon.

Taxes to Go Queued App Returns – Clients who have uploaded their tax return information from the Taxes to Go Mobile App will appear in the queued app returns menu until the return is started.

Taxes to Go Mobile App Chat – The Taxes to Go Chat feature allows the tax preparer and mobile app clients to send messages back and forth.

Creating a Tax Return

Creating a tax return in TaxSlayer Pro is simple. Follow the steps below to begin a basic tax return.

Step 1 – Select *Tax Returns* from the Main Menu of TaxSlayer Pro. After reviewing the IRC 7216 regulations, select Yes to print the consent form. (Note: If you do not offer bank products, a consent form will not print).

Step 2 – Enter the SSN of the Primary taxpayer and press the Enter key. A question will appear asking if you want to create a new return; select Yes.

Step 3 – Select the appropriate filing status. Note – If this is a 1040NR return, you must make that selection from this menu.

Step 4 – Personal Information Entry Menu – Enter the taxpayer's personal information. You will be prompted to enter the taxpayer's SSN for a second time to check for accuracy.

Step 5 – After entering personal information, the program takes you to a review menu to look over the personal information that you entered. From this menu you can mark that the taxpayer is blind, deceased, or a student. The taxpayer's email address, dependent on another return designation and military information is also entered in this menu.

Step 6 – Dependent Information – If the return you are preparing includes dependents, select 'Yes' to begin entering the dependent information. Select New and enter the personal information of the first dependent. Select OK once finished. If the taxpayer paid qualifying dependent care expenses, enter the amount when prompted. Review the dependent information on the screen and make any necessary changes. To enter additional dependents, select New and enter the information for the next dependent.

Note – If you entered an amount paid for qualifying dependent care expenses, you will be prompted to enter the child care provider information. If you choose not to enter the provider information now, the program will remind you later that this information has not been entered.

Step 7 – Enter your Preparer Code and press the Enter key. From the Personal Information Menu, you can add, edit, or delete any information that was previously entered. If everything is correct, exit the menu.

Step 8 – Health Care Coverage – The program will prompt you to answer questions about the taxpayer's health care coverage for the year.

Step 9 – Next you will be prompted to enter W-2s. To enter a W-2 select New. Enter the information from the taxpayer's W-2 in to the W-2 menu. Once complete, press the Enter key to exit. Select 'New' to enter a second W-2 or select Exit to continue. When you exit the W-2 menu, you will be directed to the Income Menu. If the taxpayer has additional forms of income, select the applicable menu and enter the required information.

Step 10 – When all items of income have been entered, exit the menu. If the taxpayer is eligible for EIC, the program will prompt you to answer due diligence questions from the EIC checklist. If the questions are answered correctly, and the taxpayer qualifies, the program will calculate EIC.

Step 11 – After completing the EIC checklist, you will be directed to the 1040 Main Menu. At the 1040 Main Menu, you have multiple ways to navigate through the tax return. You can select one of the menus from the left-hand side of the screen to jump to a particular category, you can use the Form Finder to locate a certain form, or you can click directly on to the 1040 menu.

Step 12 – When all entries have been made on the tax return, you can mark the return for electronic filing. For details on electronic filing, read the electronic filing section of the Quick Reference Guide following Step 13. To exit the return without marking the return for electronic filing, press enter or select the Exit button.

Step 13 – The Receipt Menu displays an overview of the calculated fees. You have the option to view and edit the invoice, enter a payment, and show the client a breakdown of their estimated first check if the client applied for a bank product. Select Exit. You will be asked *Are You Ready to Mark the Return Completed and Ready for Transmission?* Answer **No** if the return is not complete. Answer **Yes** to mark the return complete and exit back to the TaxSlayer Pro Main Menu.

Electronic Filing

Before a return can be electronically filed, you must first mark it for electronic filing. From the main 1040 screen of the return, select *Mark Return Electronic*. Select the type of return to e-file by choosing a refund disbursement method. The client can choose to receive their refund by Direct Deposit, Electronic Mailed Check, or Bank Product. If there is an amount due, you can enter an electronic payment (direct debit).

After selecting the type of return, you will be directed to the Practitioner PIN Menu. The Practitioner PIN Menu will generate Form 8879. Note - The ERO must keep Form 8879 on file for 3 years; do not mail the Form to the IRS. The taxpayer's PIN, spouse's PIN and the ERO's PIN will automatically be generated. You must verify the Signature Date. Once all information has been entered, exit the Practitioner PIN Menu. You will be given the option to print Form 8879. You MUST have the taxpayer (and if applicable) have the spouse sign Form 8879 prior to electronically filing the tax return.

Review the information on the E-File Menu. If all entries are correct, exit to the client's 1040 menu and then exit to the Receipt Menu. Verify the information on the Receipt Menu and then exit the return. You will be asked *Are You Ready to Mark the Return as Complete and Ready for Transmission*? Select **Yes** and the return will be sent to the E-File Transmission Table.

E-Filing a Tax Return

To e-File your returns through TaxSlayer Pro, follow the steps below:

Step 1 – From the Main Menu of TaxSlayer Pro Select *E-File*.

Step 2 – Select *Transmit Electronic Return(s)*. This will display the Transmission Table. Returns that have been marked for electronic filing and marked "Ready to Transmit" are automatically pulled onto the Transmission Table.

The buttons at the bottom of the transmission table are defined below:

Add Client – This function allows you to add returns to the transmission table. As an example, when you have corrected an IRS reject on a return you must manually add the return to the transmission table to resubmit the return. Select 'Add Client' and then enter the taxpayer's SSN. If you receive a message stating, "The Client Was Not Found", the return has not been marked for electronic filing or the return has not been marked complete.

Clear Filters – If any filters have been applied to the list of clients in the transmission table, use this function to remove them.

Print – This function allows you to print the list of clients shown in the Transmission Table. When you click Print, you will be given a list of the available columns to print. Select the columns you wish to be displayed on your report and click OK.

Export – This function allows you to export the list of clients shown in the Transmission Table to a comma-separated values (CSV) file. This file may then be opened in other programs such as Excel. When you click Export, you will be given a list of the available columns to export. Select the columns to be included in the file and click OK.

Remove Client – This function allows you to remove returns from the transmission table. Deleting the return from the Transmission Table will prevent the return from being e-Filed at this time.

Cancel – To abort the transmission process, select the cancel button.

Transmit – When you are satisfied with the transmission table, select 'Transmit' to proceed with e-filing the return(s).

Step 3 – After selecting *Transmit* the following screen will ask, "Do You Want a Printed List of Clients to Send?" We recommend that you always print the list so you will know what will be transmitted and when the transmission occurred. You will be asked if the printed information is correct. If it is correct, select **Yes**. If you select **No**, you will be returned to the E-File Main Menu.

Step 4 – The *Transmit/Receive from TaxSlayer Pro* window will be displayed. Click the *Connect* button. In the box, you will see a description of each action during the transmission process. When prompted, click on the *Exit* button.

Step 5 –From the E-File Main Menu, select *Print Reports*. Each report ready to print will be marked with an arrow next to the menu number. At a minimum, you will have a Transmission Confirmation Report.

This report will list the last name and SSN of the taxpayers who were transmitted. Keep this with your List of Clients to Send report.

*IMPORTANT – **The List of Clients to Send only shows that you created a Transmission Table. It does not mean you actually made a transmission. If you DO NOT receive a Transmission Confirmation Report, the returns DID NOT get sent to TaxSlayer Pro.***

The returns will be processed and acknowledged by the IRS within 24 hours. The IRS does reserve the right to wait 48 hours before giving an acknowledgement for any return.

Receiving Acknowledgements

The IRS and states release acknowledgements continuously throughout the day. You will automatically receive any available acknowledgements each time you transmit tax returns. To manually check for acknowledgements, follow the steps below:

Step 1 – From the Transmitting computer, select *E-File*. From the E-File Main Menu, choose *Receive Acknowledgements Only*.

Step 2 – The TaxSlayer Pro Communications screen will be displayed. Click the Connect button. In the box, you will see a description of each action during the retrieval process. When prompted, click on the Exit button.
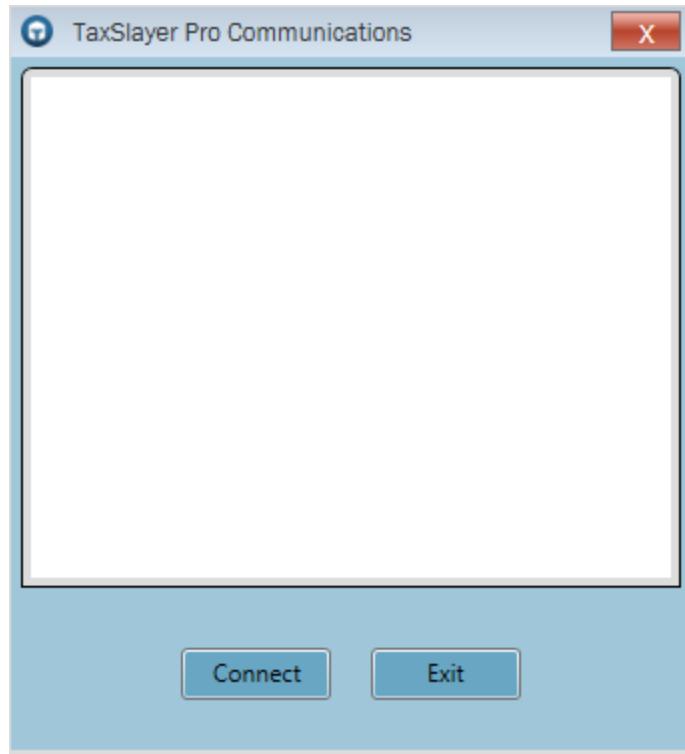
Step 3 –From the E-File Main Menu, select *Print Reports*. Each report available to print will be marked with an arrow next to the menu number. The IRS and State Acknowledgement report will display an acceptance or rejection code. In most cases, an explanation of the reject code will also be displayed.

Printing a Tax return

There are two ways to print a return in TaxSlayer Pro. Returns can be printed from the Print Menu and the View Results Menu.

Print Menu – From the Main Menu of TaxSlayer Pro select *Print Returns* and select *Print Individual Returns*. A list of your clients will appear in a pick-list. Enter the SSN of the tax return you would like to print or select the client from the list. A box will appear with a list of print options. Choose the print option you prefer and select OK. Once you have made your print selections, press the *Print Selected* button. The return will be sent to your printer.
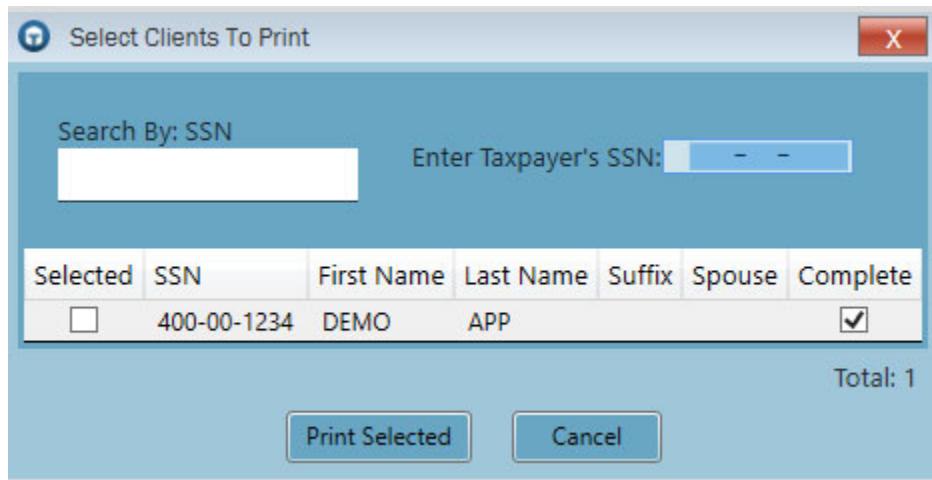
View Results – From inside the tax return, select *View Results*. Select *Print Return*. A box will appear with a list of print options. Choose the print option you prefer and select OK. The return will be sent to your printer. You can also print a single form from the View Results menu by highlighting the form and selecting OK. The form will display on the screen. To print the form, select *File* and then *Print*.

Program Updates

TaxSlayer Pro has a built-in utility to download and install program updates as they are released throughout the year. When the program is opened for the first time each day, the update utility will check for any available updates and automatically download and install the updates for you. If you need to manually download and install an update during the day, follow the steps below.

To manually download and install updates:

Step 1 – Select Updates from the Main Menu of TaxSlayer Pro.

Step 2 – Select *Download / Install Updates*.

There are three colors displayed on the page:

> **Red** – A new update is ready to download
> **Gray** – Update has been selected for download
> **White** – The latest update is installed on your computer
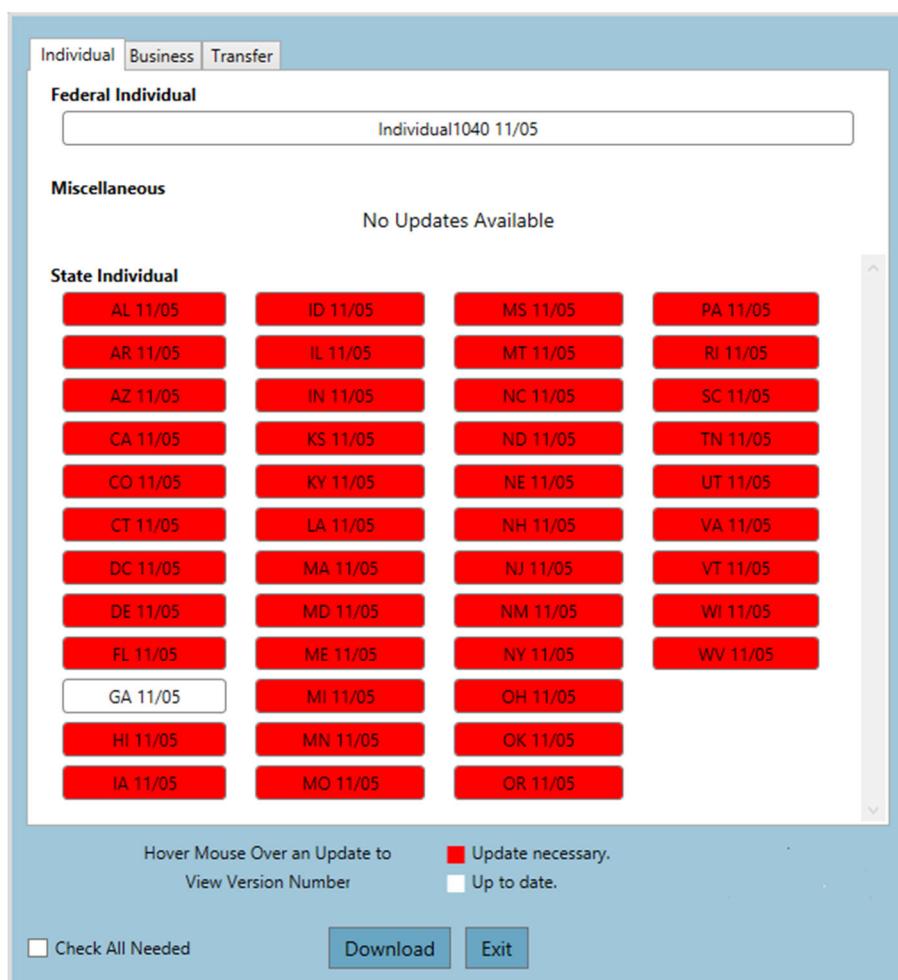
Step 3 – Select each update you want to download and click the Download button. A status window will appear displaying the progress of the download. This may take a few minutes depending on the speed of your Internet connection. When all the updates have downloaded, the program will proceed to install each update. Once the installation is complete and each update turns white, the update process is complete.

If you wish to install ALL available updates, click the check box 'Check All Needed' and then click the Download button.

Installing Updates Across a Network

Once you download an update on the transmitting computer, the workstations will be able to use the downloaded file. The available updates from the Transmitting Computer will be automatically installed on the workstations the first time the program is opened on the workstation each day.

To manually update a workstation, select Updates. Updates will begin to sync between the workstation and transmitting computer.

Tax Office Checklists

IRS

- ☐ Apply for new EFIN(s)* (if applicable, i.e. Adding additional locations, new to the tax preparation business)
- ☐ Renew PTIN – This is an IRS annual requirement
- ☐ Obtain IRS Tracking Number from IRS e-Services

*If you are changing your EFIN, please fax the new EFIN letter from the IRS to 706.868.1955. Also, please follow up with a quick email to sales@taxslayerpro.com, informing us of the change. Make sure to include the former EFIN, the new EFIN, and a reason for the change.

State

Familiarize yourself with:

- ☐ State e-Filing mandates
- ☐ Your state's requirements for bank products
- ☐ Requirements for filing extensions
- ☐ Requirements for filing business returns
- ☐ State Tax Law Changes for 2018

TaxSlayer Pro Software

- ☐ Purchase TaxSlayer Pro Software for 2018
- ☐ Update My Account/Account Hub at http://www.taxslayerpro.com
- ☐ Contact Sales to complete conversion agreement (1st year customers only)
- ☐ Contact TaxSlayer Pro technical support to convert prior year data (1st year customers only)
- ☐ Install TaxSlayer Pro 2018 on all computers (available for download in mid to late November)
- ☐ Purchase the TaxBook Web Library for use with the 2018 TaxSlayer Pro software

My Account/Account Hub

- ☐ Complete Bank Application
- ☐ Order Check/Card Stock from your bank
- ☐ Familiarize yourself with all bank products and related bank fees
- ☐ Complete Bank Compliance Requirement (varies by bank)

Office and Computer Equipment

- Create a backup – Copy the entire TaxSlayer folder to a removable storage device
    - A program backup utility is available in the Utilities Menu
- Review Recommended System Requirements for TaxSlayer Pro 2018 Software
- Upgrade computers and software as needed:
    - Contact TaxSlayer Pro for assistance migrating data to any new computers.
- Perform routine maintenance on computers (this should be done by an IT professional) to include:
    - Defragment all hard drives
    - Remove old / unwanted programs
    - Clean up start up programs
- Run Windows Updates to ensure all operating system security updates and service packs are installed on all computers
- Test printers for use with TaxSlayer Pro
- Order office supplies to include paper and toner
- Update / install Adobe Reader on all computers (Adobe Reader DC is recommended)
- Test document scanners, barcode scanners and signature pads for use with TaxSlayer Pro
- Test Internet Connection. A Cable or DSL modem is required to run TaxSlayer Pro. Wireless connections are not recommended.
- Download and install updates for prior year programs

For network users:

* Your office network should be set up PRIOR to downloading the software. This should be completed by your local IT Technician/Professional.

- Hardwire all computers to the network to ensure stable and secure connection
- Contact TaxSlayer Pro Technical Support for assistance with setting up your software on your network. You do not have to wait for your 2018 software to get prior year TaxSlayer Pro programs installed and networked
- Test network printers for use with TaxSlayer Pro

For additional information, visit the TaxSlayer Pro Knowledgebase and search for the keyword '**Network'.**

IRS

☐ Familiarize yourself with tax law changes

☐ Review current phase out limits

☐ Know the EITC Compliance Requirements

☐ Review Tax Implications of the Tax Cuts and Jobs Act

Bank

☐ Contact Bank to check on Bank Approval

☐ Follow up on Check/Card Stock order from your bank

☐ Configure your bank product provider in TaxSlayer Pro

☐ Print a Test Check, Align Printer if necessary
  o This year all banks will print checks at their respective web sites

TaxSlayer Pro Software

☐ Configure TaxSlayer Pro software

☐ Review fee structure in the Fee Setup Menu

☐ Configure Preparer Security

☐ Configure Premium Options – Premium Package Only
  ☐ PaperCut Paperless Office
  ☐ Text Messaging
  ☐ Secure Email configuration

☐ Explore the Knowledgebase and the Tax Book

☐ Train employees to navigate/use TaxSlayer Pro Software

☐ Create practice returns
  ☐ Transmit practice returns to ensure your computer is communicating with the TaxSlayer Pro server

Clients

☐ Prepare and mail organizers for prior year clients

☐ Begin preseason scheduling

☐ Implement your Marketing Strategy

Office and Computer Equipment

☐ Renew subscriptions to anti-virus/firewall software.

    ☐ Exclusions for TaxSlayer Pro may need to be set.

☐ Run Windows Updates to ensure all operating system security updates and service packs are installed on all computers.

☐ Train employees on computer policies and equipment use

☐ Test document scanners, barcode scanners and signature pads for use with TaxSlayer Pro (Premium Only)

Thank you for purchasing TaxSlayer Pro!

If you need further assistance in setting up TaxSlayer Pro or you have additional questions, check out our Online Knowledge Base at www.taxslayerpro.com/kb. Or contact TaxSlayer Pro Support at 706-868-0985. Emails can be sent to prosupport@taxslayerpro.com