Contents

Login and Passwords........................................................................................................4
  Login............................................................................................................................4
  Retrieving Your User Name.......................................................................................6
  Resetting Your Password.........................................................................................8
    Resetting with Security Question........................................................................9
    Resetting with Security Code...............................................................................10
Setting up Site Information.........................................................................................12
  Setting up Your Site ...............................................................................................12
  Setting up EROs ......................................................................................................16
Setting up Security Templates......................................................................................20
  Predefined Security Templates .............................................................................20
  Creating Security Templates ..................................................................................21
  Editing Security Templates .....................................................................................24
  Assigning Security Templates ................................................................................25
Adding Preparers........................................................................................................27
  Creating Users ........................................................................................................27
    SIDN ........................................................................................................................29
  Return Access ........................................................................................................29
  Login Setup .............................................................................................................29
Working with Custom Questions................................................................................33
  Adding Custom Questions ......................................................................................33
Configuring Printing....................................................................................................36
  Predefined Print Sets .............................................................................................36
    View the Master Print ...........................................................................................36
  Create a Custom Print Set .......................................................................................37
Managing Returns ......................................................................................................40
  Working with Return Tags .....................................................................................40
Setting up Return Tags ................................................................. 40
Filtering Returns Using Return Tags ........................................... 42
Deactivating/Deleting Returns ...................................................... 44
Adding Taxpayer Notes ............................................................... 46
Sending Messages ....................................................................... 49
Working with Reports ................................................................. 52
Running Reports ......................................................................... 52
Searching and Sorting ................................................................. 53
Printing ......................................................................................... 53
Exporting .................................................................................... 54
Managing Multiple Sites .............................................................. 54
Using Multiple Office Features ..................................................... 54
  Transferring Settings to Offices .................................................. 55
  Searching by Office (Relational EFIN required) ......................... 56
  Accessing Offices (Relational EFIN Required) ............................ 56
Contingency Procedures ............................................................... 59
  TaxSlayer Pro ........................................................................... 59
Index .......................................................................................... 62
Login and Passwords
After completing this topic, you will be able to:

- Navigate to TaxSlayer Pro Online.
- List the password requirements.
- Change your password the first time you log in.
- Reset your password.

Login
When you are ready to begin working in TaxSlayer Pro Online 2016, use the following steps:

1. Navigate in your web browser to TaxSlayer Pro Online.

Your web browser displays the TaxSlayer Pro Login page:

2. In the appropriate boxes, type the username and password you received from TaxSlayer Pro or your site administrator.
3. Enter the security code you received from TaxSlayer Pro or your site administrator.

TIP: Passwords and security codes are case-sensitive.

4. Click Login.
TaxSlayer Pro Online displays the **Change Password** page:

5. Type a new password.

When you create a new password, make sure your password meets the following requirements:

- Passwords should be alphanumeric. Do not use special characters in the password.
- Create a password that contains at least eight (8) characters.
- Remember that passwords are case-sensitive. If you use a combination of upper-case and lower-case letters, make sure you type the password the same way when you log in later.

6. Type the password again for verification.
7. Click **Submit**.
TaxSlayer Pro Online displays the **Login Page**:

8. Type your user name, **new** password, and your security code.
9. Click **Login**.

**Retrieving Your User Name**

To retrieve your user name, use the following steps from the **Login Page**:

1. Click **Forgot User Name**.

TaxSlayer Pro Online displays the **Forgot User Name** page:

2. Type the email address you or your site administrator used during setup for your Preparer account.
3. Click **Submit**.
TaxSlayer Pro Online displays the **Reminder Sent** page:

![Reminder Sent page]

TaxSlayer sends an email similar to the following:

![Email example]

4. On the **Reminder Sent** page, click **Home** to log in.
Resetting Your Password
If you forget your password, you may need to reset it. If you type the wrong password, TaxSlayer Pro Online displays the following message:

To reset your password, you will need your user name, and either the answer to your security question or your password. Use the following steps:

1. Click **Forgot Password**.

TaxSlayer Pro Online displays the **Forgot Password** page:

2. Type your user name.
3. Click **Continue**.
TaxSlayer Pro Online displays the **Answer Security Question** page:

Reseting with Security Question
If you know the answer to your security question, use the steps in this section.

4. Type the answer to your security question.
5. Click **Submit**.

**NOTE:** If you cannot remember the answer to your security question, click **Forgot Answer** to reset using a security code.

TaxSlayer Pro Online displays the **Change Password** page:

6. Type a new password.
7. Type the password again for verification.
8. Click **Submit**.
On the TaxSlayer Pro Online **Login Page**, type your user name, new password, and security code, and then click **Login**.

**Resetting with Security Code**
If you do not remember the answer to your security question, reset your password using the following steps:

1. Click **Forgot Answer**.

TaxSlayer Pro Online displays the **Enter Security Code** page:

TaxSlayer sends an email to the email address listed on your Preparer account, similar to the following:

2. Find the security code in the email.
3. Type the security code from the email in the **Security Code** box.
4. Click **Continue**.
TaxSlayer Pro Online displays the **Change Password** page:

5. Type the new password.
6. Type the password again for verification.
7. Click **Submit**.

TaxSlayer Pro Online displays the **Password Reset Complete** page:

8. Click **Home** to log in to TaxSlayer Pro Online.
Setting up Site Information

After completing this topic, you will be able to:

- Set up your site.
- Set up your EROs.
- Determine the data that carries to the return.

Before you begin using TaxSlayer Pro Online, you need to configure settings. You can set up your site, edit, or delete information for the ERO and preparers. Several items in configuration carry to tax returns so that you only have to enter this information once. This includes items such as the firm/site information.

Setting up Your Site

First, set up your site information. To do so, use the following steps:

1. Log in to TaxSlayer Pro Online.

TaxSlayer Pro Online displays the **Welcome** page:

2. Click **Select** on the **Configuration** line.
3. Click **Select** on the **Office Setup** line.
TaxSlayer Pro Online displays the **Office Setup** page:

4. TaxSlayer populates several boxes on this page based on the information requested by the IRS. Review this information and make changes as needed.
   a. The default **Login Security Code** will be sent with the administrator login credentials. We recommend you change this code before you add preparers.
   b. Select **Disable Third Party Designee Prefill**.
   c. Select **Offer 8888** if your site will be offering split refunds.
Logging In and Configuring TaxSlayer Pro Online

5. Scroll to the **Office Addresses** and **Office Phones** sections.

TaxSlayer Pro Online displays the **Office Addresses** and **Office Phones** sections:

<table>
<thead>
<tr>
<th>Office Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>TYPE</td>
</tr>
<tr>
<td>Physical</td>
</tr>
</tbody>
</table>

- **Office Addresses** and **Office Phones** sections display:

6. Click **Add** in the **Add Address** section.

TaxSlayer Pro Online displays the **Office Information** address page:

<table>
<thead>
<tr>
<th>Office Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Type</td>
</tr>
<tr>
<td>Street Address</td>
</tr>
<tr>
<td>Zip Code</td>
</tr>
<tr>
<td>City</td>
</tr>
</tbody>
</table>

7. Select the type of address (either physical, mailing, or shipping) from the **Address Type** drop-down list.

8. Type the street address, Zip Code, and City in the appropriate boxes.
9. Select the state from the **State** drop-down list.
10. When you finish typing the address, click **Continue**.
11. Click **Add** in the **Office Phones** section.

TaxSlayer Pro Online displays the **Office Phone** page:

![Office Phone page](image)

12. Select the type of phone (either home, business, or fax) from the **Type** drop-down list.
13. Type the phone number in the appropriate boxes.
14. Click **Continue**.
15. When you finish reviewing and adding office information, click **Continue**.

**Setting up EROs**

After you set up your site’s information, you need to set up EROs. To do so, use the following steps:

1. Click **Select** on the **ERO Setup** line from the **Configuration Menu** landing page.
TaxSlayer Pro Online displays the **Ero(s) Menu** page:

2. Click **Edit** to make modifications to the pre-populated information.
   - a. Click **Add** if TaxSlayer Pro Online does not display any information.

TaxSlayer Pro Online displays the **Ero Setup** page:

3. Type the **ERO’s name** and **EFIN** in the appropriate boxes.
   
   **TIP:** Do **not** enter information in the **EIN** box or select the **Self-Employed** check box.

4. Select the **Default** check box.
5. Click **Add** in the **Ero Addresses** section.
TaxSlayer Pro Online displays the **Ero Address Information** page:

6. Select the type of address (either physical, mailing, or shipping) from the **Address Type** drop-down list.
7. Type the ERO’s address, Zip Code, and city in the appropriate boxes.
8. Select the state from the drop-down list.
9. Click **Continue**.
10. Click **Add** in the **Ero Phones** section.
11. Select the type of phone (either home, business, or fax) from the **Type** drop-down list.
12. Type the phone number in the appropriate boxes.
13. Click **Continue**.
14. When you finish adding ERO information, click **Continue**.

TaxSlayer Pro Online displays the **Ero(s) Menu** page with the ERO listed:

15. When you finish, click **Return**.
Setting up Security Templates

After completing this topic, you will be able to:

- List the pre-defined security templates.
- Determine which security template to use based on the allowed actions.
- Create a new security template.
- Edit an existing security template.
- Assign security templates.

In TaxSlayer Pro Online, use security templates to set the permissions for each preparer. You can use predefined security templates, create your own templates, or edit existing templates as needed.

Predefined Security Templates

In most cases, you need to use the security templates that TaxSlayer Pro Online predefines with your software. You can choose from the following six predefined security templates for each user:

<table>
<thead>
<tr>
<th></th>
<th>Administrator</th>
<th>Super User</th>
<th>Return Preparer</th>
<th>Interviewer</th>
<th>Reviewer</th>
<th>e-file Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selects Mark as Ready to e-file check box</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Submit e-file</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>View acknowledgments</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Move returns between users</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Delete returns</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open existing returns</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Print returns</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Return Query</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Manage users</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reset user’s passwords</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create new return</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

When you set up users/preparers, you can select the security template. See Adding Preparers for information on selecting security templates for users.
NOTE: You cannot edit the predefined security templates and will not see them listed in your site Configuration. You will be able to select a template from them when setting up users. See Adding Preparers for information on selecting security templates for users.

Creating Security Templates
You can create an unlimited number of security templates for your site. To do this, use the following steps from the Welcome page:

1. Click Select on the Configuration line to display the Configuration Menu landing page.
2. Click Select on the Security Templates line.

TaxSlayer Pro Online displays the Security Templates page:

3. Click Add.
TaxSlayer Pro Online displays the **Add Security Template** page:

4. Type a name for your template in the **Template Name** box.
5. Review each item for which you can allow access for this security template. TaxSlayer Pro Online automatically selects each item. If you **do not** want preparers assigned this security template to have access to this item, clear the check box.
6. Click **Continue**.

TaxSlayer Pro Online displays the **Security Templates** page with the new security template listed:
7. If you need to add more security templates, click **Add** and follow the same steps for each security template.
8. When you finish adding security templates, click **Back** to return to the **Welcome** page.
Editing Security Templates

After you add security templates, you can edit those templates at any time. Remember, you cannot edit predefined security templates. To edit security templates you created, use the following steps from the Welcome page:

1. Click Select on the Configuration line to display the Configuration Menu landing page.
2. Click Select on the Security Templates line.

TaxSlayer Pro Online displays the Security Templates page:

3. Click Edit for the security template you want to change.

TaxSlayer Pro Online displays the Edit Security Template page:
9. Make any necessary changes to the template. Clear or select any actions.
10. When you finish, click **Continue**.

TaxSlayer Pro Online displays the **Security Templates** page:

### Assigning Security Templates

You should assign security templates while setting up preparers. However, if you already set up a preparer and need to add a security template, you can do so from the **Security Templates** page. To do so, use the following steps:

1. On the security template you need to assign, click **Assign**.

TaxSlayer Pro Online displays the **Assign Security Template** page:
2. Select the check box(es) for any preparers to which you want to assign this template.
3. Click **Continue**.

TaxSlayer Pro Online displays a confirmation page:

4. Click **Back** to return to the **Configuration Menu** landing page.
Adding Preparers
After completing this topic, you will be able to:

- Create a user/preparer.
- Assign a security template.
- Control return access.
- List password requirements.

Creating Users
After you configure the information for the office and set up security templates, you need to add preparers. To add preparers for your site, use the following steps from the Welcome page:

1. Click Select on the Configuration line to display the Configuration Menu landing page.
2. Click Select on the Preparer Setup line.

TaxSlayer Pro Online displays the Preparer(s) Menu page:

3. Click Add.
TaxSlayer Pro Online displays the **Preparer(s) Setup Menu** page:

4. Do **not** type the preparer’s Social Security number.  
5. Type the preparer’s name in the appropriate boxes.  
6. Scroll to view the remainder of the personal information.

TaxSlayer Pro Online displays the next section of the page:
SIDN
7. From the PTIN OR SIDN box, click Pull from office to have TaxSlayer Pro Online carry the site’s SIDN to the preparer.
8. TaxSlayer Pro Online defaults the PIN to 98765 and carries this PIN to all returns created by this preparer.
9. Do not select the Office Contact or Self-Employed check boxes.

Return Access
10. Select the check box to allow the preparer to view only his or her own returns.
11. Check Required to use Guide? if you want to restrict the preparer to using the Guide Me feature for data entry.
12. Select Prepares NY returns? and select code 09 for NYTPRIN exempt as a volunteer tax preparer if you are preparing returns for New York.

Login Setup
13. Scroll to the Edit Login Account section.
TaxSlayer Pro Online displays the **Edit Login Account** section:

14. Type the preparer’s email address and a unique user name.

**NOTE:** User names are unique across the platform and are assigned to the site in which they are created. Preparers **cannot** use the same user name used in the Practice Lab environment.

**Password Requirements**

15. Type a password for the preparer.
**TIP:** When you create a password for the preparer, make sure that you do not use any special characters (!@#, etc.). Use only letters and numbers and ensure the password contains at least eight (8) characters. This will be the default password for the preparer/user the first time he or she logs in.

16. Select the security question from the drop-down list.
17. Type the answer to the security question. The site administrator will need to give this information to the preparer when they give them the user name and initial password.
18. Select the security template you want this preparer to use from the list.

**TIP:** If you click **Show Definitions**, TaxSlayer Pro Online displays a new window with the actions for which the security template has permission checked, as shown below:

![Security Templates](image)

19. When you finish adding the information for the preparer, click **Continue**.
TaxSlayer Pro Online displays the **Preparer(s) Menu** page, listing the new preparer:

20. If you need to add other preparers, click **Add** and use the same steps to enter information for the preparer.
21. When you finish adding preparers, click **Return**.
Working with Custom Questions

After completing this topic, you will be able to:

- Configure custom questions and answers.

TaxSlayer Pro Online allows you to set up custom questions that preparers can use to capture data during the return preparation process. You can use the predefined questions or add more questions.

While you can add more questions and answers during tax season, we recommend that you finalize your questions before tax season begins to ensure accuracy of reports.

Adding Custom Questions

To access custom questions from the Welcome page, use the following steps:

1. Click Select on the Configuration line to display the Configuration Menu landing page.
2. Click Select on the Question Templates line.

TaxSlayer Pro Online displays the Edit Questions page, listing any custom questions your site has been assigned:
3. To add more questions, click **Add**.

TaxSlayer Pro Online displays the **Add Question** page:

```
Add Question
Question
Is Required
Available Answers
Answer
No existing answers found.
Add Answer
```

4. Type the question in the **Question** box. You can use up to 75 characters.

5. If you want to require preparers to answer this question, select the **Is Required** check box.

**TIP**: If you require the answer to a question, the preparer **cannot** mark the return for e-file unless he or she answers the question.

6. Click **Add** in the **Available Answers** section.
7. Type the first answer choice, up to 20 characters.
8. Click **Add** and type the answer choice for up to 25 answer choices.
9. When you finish adding the question and answer choices, click **Save**.
10. To add more questions, click **Add** and follow the same steps.
Configuring Printing

After completing this topic, you will be able to:

- List the predefined print sets.
- Determine which print sets to use for the taxpayer.
- Create custom print sets.

Predefined Print Sets
TaxSlayer Pro Online contains several print sets that will be presented to the preparer during the print return process. Review these before printing tax returns so you know what forms and how many copies of each form print with each print set. In most cases, you should use the set. TaxSlayer Pro designed this print set to follow the IRS guidelines.

The following print sets will be available for printing the return, but cannot be modified:

- a) One Copy – Federal and State
- b) Two Copies – Federal and State
- c) Three Copies – Federal and State
- d) One Copy – Federal Only
- e) One Copy – 1040 Only
- f) One Copy – State Only
- g) One Copy – Form 8879 Only
- h) Print Invoice

View the Master Print
To view the contents of the Master Print set, use the following steps from the Welcome page:

1. Click Select on the Configuration line to display the Configuration Menu landing page.
2. Click Select on the Print Sets line.
TaxSlayer Pro Online displays the **Print Sets** landing page:

3. To view the **Master Print** set, click **View**. You cannot edit this print set. This print set prints two copies of Form 8879 and one copy of each federal and applicable state return.

**Create a Custom Print Set**

To create a custom print set, use the following steps from the **Print Sets** landing page:

1. Click **Add**.

TaxSlayer Pro Online displays the **Print Set Setup** landing page:
2. Type a name for your print set in the **Print Set Name** box.
3. Change the number of copies for each form you want to include in the print set.

**TIP:** You can type a form name in the **Search forms** box to search for that form, or filter by federal or state forms.

4. If you want to add multiple forms at the same time, click **Set Range**. TaxSlayer Pro Online displays the **Set Print Count by Range** window:

5. Verify the **Beginning Range** and **Ending Range** boxes. These numbers correspond to the number of the form as displayed in the first column of **Print Set Setup** landing page. You can view the number assigned to each form or schedule to change the range. If you want to change the number of copies of all forms for this print set, leave the range as it is.

6. Type the correct number in the **Print Count** box.
7. Click **Submit**.
8. When you finish making changes to the print set, click **Save**.

TaxSlayer Pro Online displays the **Print Sets** page, listing the new print set:

9. Click **Add** and follow the same steps for any additional print sets you want to use.

10. When you finish adding print sets, click **Back** to return to the **Configuration Menu** landing page.
Managing Returns
After completing this topic, you will be able to:

- Set up return tags.
- Filter returns by return tags.
- Delete returns.
- Restore returns.
- Add taxpayer notes.
- Send messages.

Working with Return Tags
TaxSlayer Pro Online allows you to set up return tags to manage the status of your returns. You can create a customized list of return tags to manage the status of the return at your site.

Setting up Return Tags
TaxSlayer Pro Online does not have default return tags. You can create these while configuring the site. To add return tags, use these steps from the Welcome page:

1. Click Select on the Configuration line to display the Configuration Menu landing page.
2. Click Select on the Tags line.

TaxSlayer Pro Online displays the Office Tags page:
3. Type a tag name in the Add new tag box; for example: Missing Information.
4. Click Add.

TaxSlayer Pro Online displays the new return tag in the list:

5. Repeat the steps until you add all the return tags you want.
6. When you finish adding return tags, click Back to return to the Configuration Menu landing page.

When a preparer is working in a return, he or she can designate a return tag on the Submission page:
You can also add a return tag by clicking the Add Tags icon in the Office Client List:

Filtering Returns Using Return Tags
You can filter returns by return tags. When you do this, you can determine any actions that you need to take to complete returns. To filter returns, use the following steps from the Welcome page:

1. Click Select on the Client Search line.
2. Select the return tag for which you want to search from the Filter by Return Tag drop-down list.

TaxSlayer Pro Online displays any returns with the return tag you selected:
Deactivating/Deleting Returns

In rare events, you may need to delete a return. You can do this in the Office Client List.

_TIP_: Use this feature with caution. Do not delete a return that you may need later.

When you deactivate a return, TaxSlayer Pro Online makes it unavailable for edits. To deactivate a return, use the following steps from the Welcome page:

1. Click **Select** on the Client Search line.

   TaxSlayer Pro Online displays the Office Client List page:

   ![Office Client List](image)

2. Find the return you want to deactivate.

   ![Office Client List](image)
3. From the **Tools** drop-down list, select **Deactivate**, as shown below:

TaxSlayer Pro Online displays the **Deactivate Return** page, asking you to confirm that you want to deactivate the return:

4. Select **Yes** from the drop-down list.
5. Click **Continue**.

TaxSlayer Pro Online deactivates the return and changes the status on the **Office Client List** to **Deleted**:

If you later need to prepare a return for this taxpayer, start a new return. You will need to rekey any information you entered previously.

**NOTE:** You **cannot** restore any deleted returns.
Adding Taxpayer Notes
You can add notes to a tax return so you can review information later. For example, if you add a Missing Information return tag, you may want to add a note to remind you of what information you still need from the taxpayer. You can either add a taxpayer note while in the return or from the return list.

To add a note while in a tax return, use the following steps:

1. Click the Tools drop-down list, as shown below:

2. Click Notes.
TaxSlayer Pro Online displays the Found Notes window:

3. Click Add.

TaxSlayer Pro Online displays the Add a new note window:

4. Type a name and the text for the note in the appropriate boxes.
5. Click Save.
TaxSlayer Pro Online displays the **Found notes** window with the new note listed:

6. If you need to add another note, click **Add** and use the same steps to add the new note.
7. If you need to remove a note, click **Remove**.

If you want to add a note outside of the return, use the following steps from the **Office Client List**:

1. Find the taxpayer in the list.
2. Click the **Edit Notes** icon, as shown below:
TaxSlayer Pro Online displays the **Personal Notes** window:

3. Click existing notes (listed at the upper right) to review them. In the screenshot above, the existing note is named **Example**.
4. To add a new note, type the title and description in the appropriate boxes.
5. Click **Save**.
6. If you need to add more notes, click **Add New** and use the same steps to add the new note.
7. When you finish adding notes, click the **X** to close the window.

**Sending Messages**

You can send a message through TaxSlayer Pro Online to any or all preparers at your site. To do so from the **Welcome** page, use the following steps:

1. Click **Message Center**.
TaxSlayer Pro Online displays the **Message Center** page:

2. Review any received messages in the list.
3. To create a new message, click **Create Message**.

TaxSlayer Pro Online displays the **CREATE MESSAGE** page:

4. Click **Select recipients** and select any other preparers at your site to which you want to send the message.
5. Type the message you want to send in the message box. You can type up to 500 characters.
6. When you finish typing your message, click **Send**.
Working with Reports
After completing this topic, you will be able to:

- Run reports.
- Filter reports.
- Export reports.

TaxSlayer Pro Online provides several reports that you can run to help manage returns.

Running Reports
To run a report, use the following steps from the Welcome page:

1. Click Select on the Reports line.

TaxSlayer Pro Online displays the Office Reports page:

![Office Reports](image)

**NOTE:** TaxSlayer will deliver additional reports to help with the management processes of the site.

2. Click Select for the report you want to run. For purposes of this topic, run the Return Questions report, but you should use the same steps for other reports.
TaxSlayer Pro Online displays the **Return Questions** page:

3. Review the information on the report.

**Searching and Sorting**

4. To search for information in the report, type the data for which you want to search in the **Search** box. For example, you can search for a Social Security number or sort by answers to questions in this report.

5. Click the column heading to sort by that column.

**Printing**

6. To print the report, click either **PDF** or **HTML**.
   a. If you click **PDF**, TaxSlayer Pro Online saves a PDF copy of the report to your computer. Open the file and print using Adobe Reader’s tools.
   b. If you click **HTML**, TaxSlayer Pro Online displays your browser’s **Print** page so you can print the report.

**TIP:** Remember, you must follow all the security, privacy, and confidentiality rules to ensure taxpayer data is stored in a secure location.
Exporting

7. To export the report, click either CSV or Excel, depending on the format you want to use for the report.

TaxSlayer Pro Online saves the .csv or .xlsx file to your computer. Open the file and use Microsoft’s tools to work with the report.

Managing Multiple Sites

After completing this topic, you will be able to:

- Log in as the multi-site administrator.
- List management options.

If you manage multiple sites, your site administrator login allows you access to different features, and your Welcome page looks different based on your login profile. Log in to TaxSlayer Pro Online as you would with any other user name, password, and security code. When you log in, TaxSlayer Pro Online displays the Welcome page:

Using Multiple Office Features

You can access the same features as any other site. However, as the manager of multiple offices with a Relational EFIN, TaxSlayer Pro Online provides additional features.
Transferring Settings to Offices
When you configure certain settings, you can transfer those to offices. You can transfer the following settings:

a) Security Templates  
b) Question Templates/Custom Question  
c) Taxpayer Profiles  
d) Print Sets  
e) Return Tags

For this example, when you set up custom questions, you can assign the questions to groups or offices, as shown below:

**NOTE:** This feature is available to **ALL** multi-site administrators.
Searching by Office (Relational EFIN required)
In many features, you can search by office. This way, you can run reports or search for clients in one of your offices. For example, on the Client Search page, you can search by office, as shown below:

When you search by an office, TaxSlayer Pro Online displays only returns created by that office:

Accessing Offices (Relational EFIN Required)
You can access each of your offices through the multiple site administration if you are using a Relational EFIN. To do so, use the following steps:

1. Click Select on the Office Access line.
2. Click **Edit** for the office you want to access.

TaxSlayer Pro Online displays the **Welcome** page for that office:

3. You can use all of the features for this office just as discussed in the other topics.
4. If you need to select another office to access, click **Select** on the **Select Another Office** line.
5. When you finish working with this office, click **Return** to return to your multiple office **Welcome** page.
Contingency Procedures

After completing this topic, you will be able to:

- Describe the TaxSlayer Pro Online contingency plan.
- Download TaxSlayer Pro’s desktop application.

TaxSlayer Pro

TaxSlayer makes a contingency procedure available in the rare event that the web site becomes unavailable. If that happens, you can use TaxSlayer Pro’s desktop application to prepare and e-file returns.

Download the desktop application in advance so that your site does not have any downtime. Do not install TaxSlayer Pro on a network as a contingency plan. Instead, install on a standalone computer with an internet connection.

To download the desktop application, use the following steps:

1. Log in to TaxSlayer Pro Online.
2. Click Contingency Software, located as shown below:

   ![Publication 4012 Contingency Software](image)

   TaxSlayer Pro Online begins downloading the setup file:

   ![setuppro (1).msi](image)

3. When TaxSlayerPro.com completes the download, click the file.
4. Complete installation and setup as described in the *Installing TaxSlayer Pro Desktop* section.

**TIP:** For a complete listing of contingency options, refer to IRS Publication 4396-A, *Partner Resource Guide*.

In order for the TaxSlayer Pro Desktop contingency plan to work successfully, it is important to keep the designated computers updated with the latest desktop software versions. TaxSlayer Pro Desktop automatically updates the first time you open it each day. We recommend that you do this daily or weekly.

If a software system outage necessitates the use of a temporary contingency plan, you can use the installed and updated version of TaxSlayer Pro Desktop to complete any returns you need to prepare during the outage. Sites will be able to work the return completely from the desktop application, including e-filing and getting acknowledgments. The return will remain in the desktop application for the duration of the filing season.
**TIP:** Returns prepared using the desktop software during a contingency plan will be transmitted from the desktop software. You will also use the desktop software to retrieve any acknowledgement associated with the returns transmitted from the desktop software.

When TaxSlayer Pro Online is available again, use it to prepare new returns and complete any returns you started previously in TaxSlayer Pro Online.
Index

Address, 6, 10, 15, 16, 18, 30
Administrator, 20
Business, 16, 19
Checks, 29
Configuration, 12, 13, 16, 21, 24, 26, 27, 33, 36, 39, 40, 41
Configure, 12, 27, 55
Contingency plan, 33, 59, 60, 61
CSV, 54
Custom print set, 36, 37
Custom questions, 33, 55
Deactivate, 44, 45
Delete, 12, 20, 40, 44
e-file, 20, 34, 59
e-file Manager, 20
EFIN, 17, 54, 56
EIN, 17
ERO, 12, 16, 17, 18, 19
Excel, 54
Firm, 12
Form 8879, 36, 37
Guide Me, 29
HTML, 53
Install, 59
Interviewer, 20
Message Center, 49, 50
Multi-site administrator, 54, 55
Network, 59
Notes, 40, 46, 47, 48, 49
NYTPRIN, 29
Office Access, 56
Office Client List, 42, 43, 44, 45, 48
Office Reports, 52
Office Tags, 40
Password, 4, 5, 6, 8, 9, 10, 11, 27, 30, 31, 54
PDF, 53
Permissions, 20
Personal Notes, 49
Phone number, 16, 19
PIN, 29
Predefined, 20, 21, 24, 33, 36
Preparers, 12, 14, 20, 21, 22, 25, 26, 27, 30, 32, 33, 34, 49, 50
Prepares NY returns?, 29
Print, 20, 36, 37, 38, 39, 53, 55
Print set, 36, 37, 38, 39, 55
PTIN, 29
Question template, 33, 55
Range, 38
Relational EFIN, 54, 56
Reports, 33, 52, 56
Required, 29, 34, 56
Required to use Guide?, 29
Reset, 4, 8, 9, 10, 11, 20
Restore, 40, 45
Return Preparer, 20
Return Query, 20
Return tags, 40, 41, 42, 55
Review, 14, 22, 36, 46, 49, 50, 53
Reviewer, 20
Security code, 4, 6, 9, 10, 14, 54
Security Question, 8, 9, 10, 31
Security Template, 20, 21, 22, 23, 24, 25, 27, 31, 55
SIDN, 29
Site administrator, 4, 6, 54, 55
Social Security number, 28, 53
Split refund, 14
State, 16, 18, 36, 37, 38
Submission, 41
Super User, 20
Taxpayer notes, 40, 46
Taxpayer Profile, 55
Third party designee, 14
Transfer, 55
User name, 4, 6, 8, 10, 30, 54
ZIP code, 15, 18