

TaxSlayer® Pro Online Practice Lab

Getting Started – Self-Study

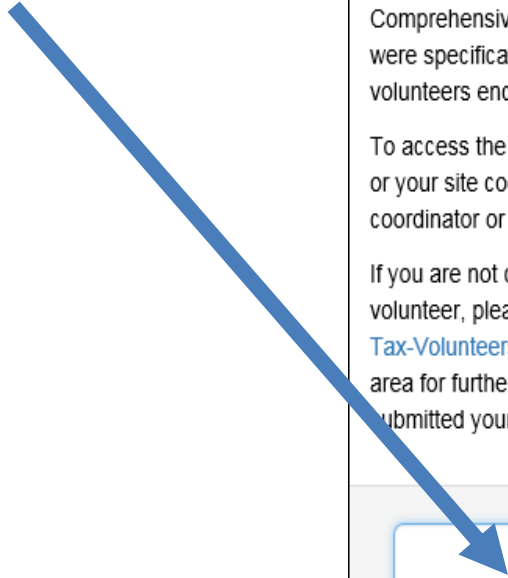
■ TaxSlayer Pro Online Practice Lab Software

- Use Internet Explorer 8.0 or higher, Google Chrome or Safari Browser 5.1.
- For 2018 Practice Lab: <https://vita.taxslayerpro.com/IRSTraining>



Log in - First Time

Enter Universal PW:
TRAINPROWEB



Access Link & Learn Taxes

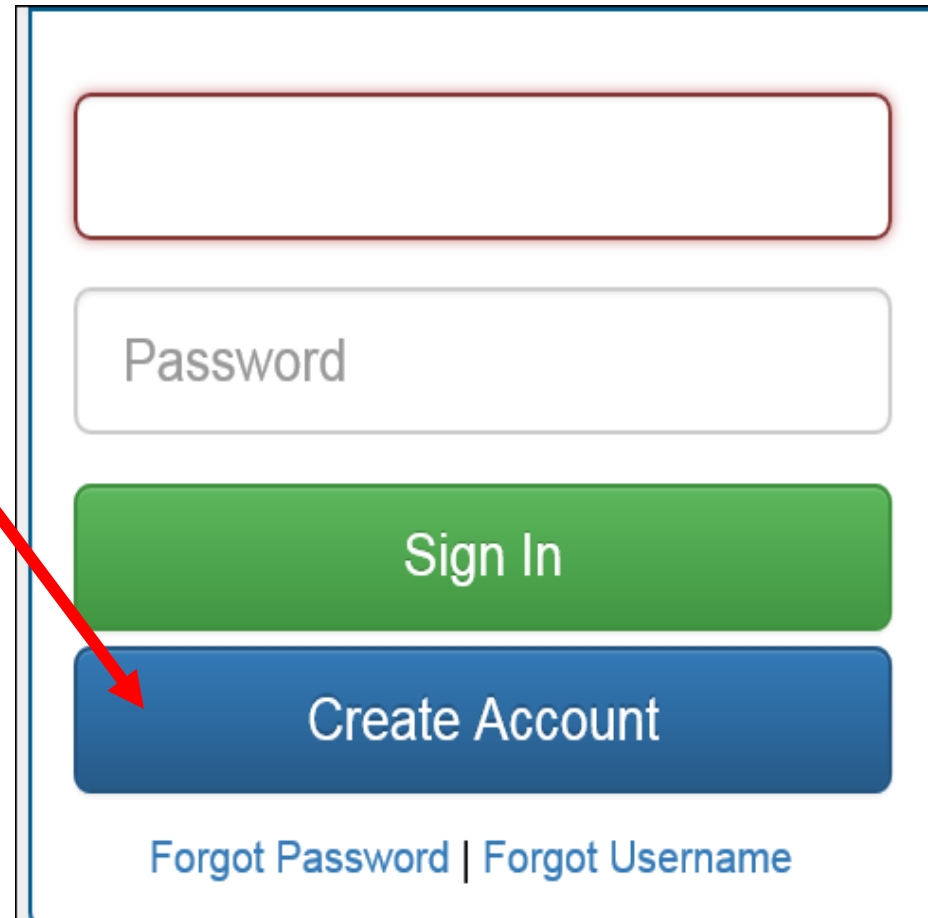

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

Log in – First Time (Continued)



Username

Password

Sign In

Create Account

[Forgot Password](#) | [Forgot Username](#)



Log in – First Time (Continued)

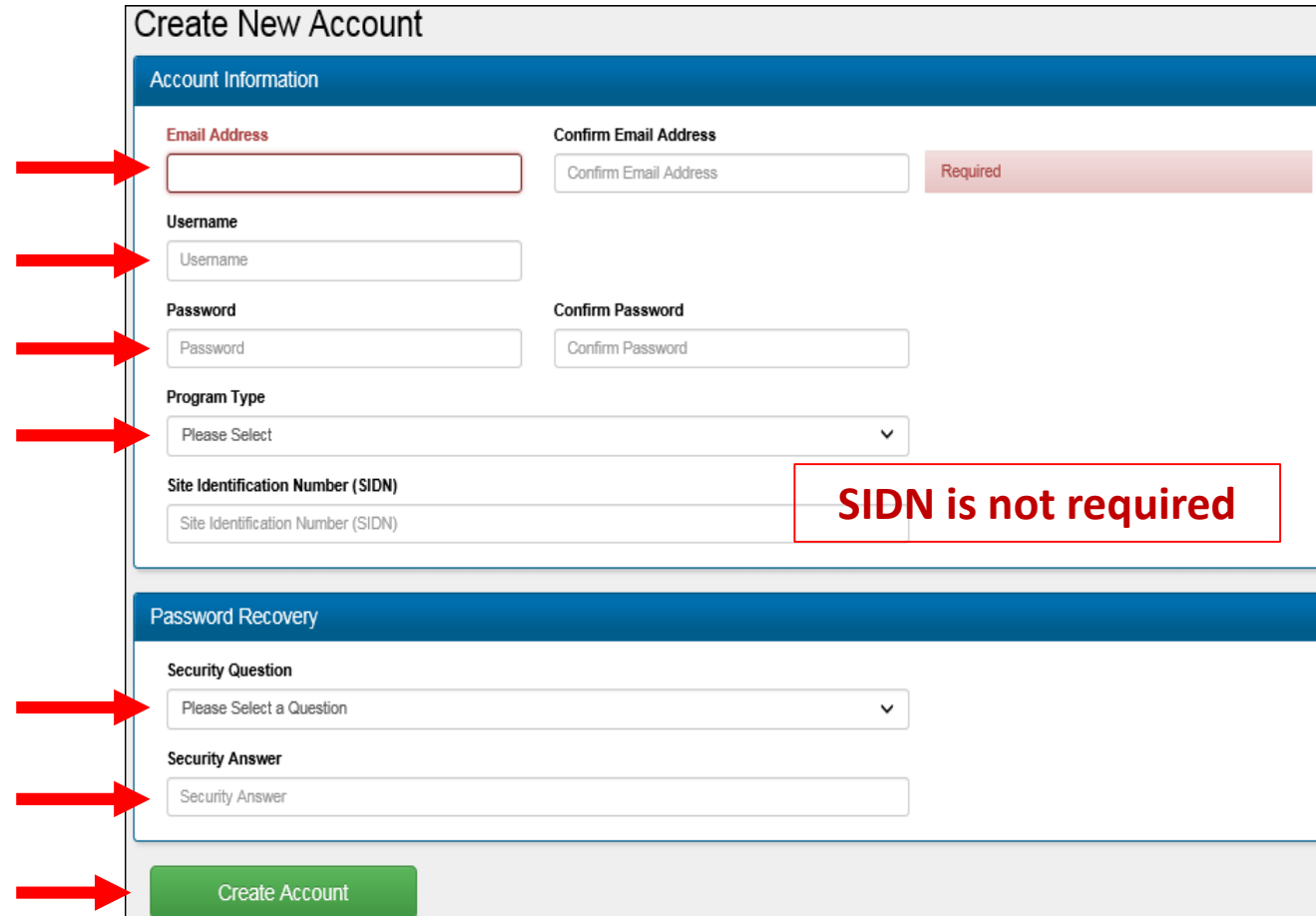
- Enter e-mail address twice
- Create a user name – include train or practice
- Create a password – alphanumeric with at least 6 characters (use only letters and numbers)
- Enter password twice



Log in – First Time (Continued)

- Select “AARP Tax-Aide” from “Program Type” drop down window
- Enter SIDN (if known – not required)
- Select security question
- Enter answer to security question

Log in - First Time (Continued)



Create New Account

Account Information

Email Address **Confirm Email Address** **Required**

Username

Password **Confirm Password**

Program Type

Site Identification Number (SIDN) **SIDN is not required**

Password Recovery

Security Question

Security Answer

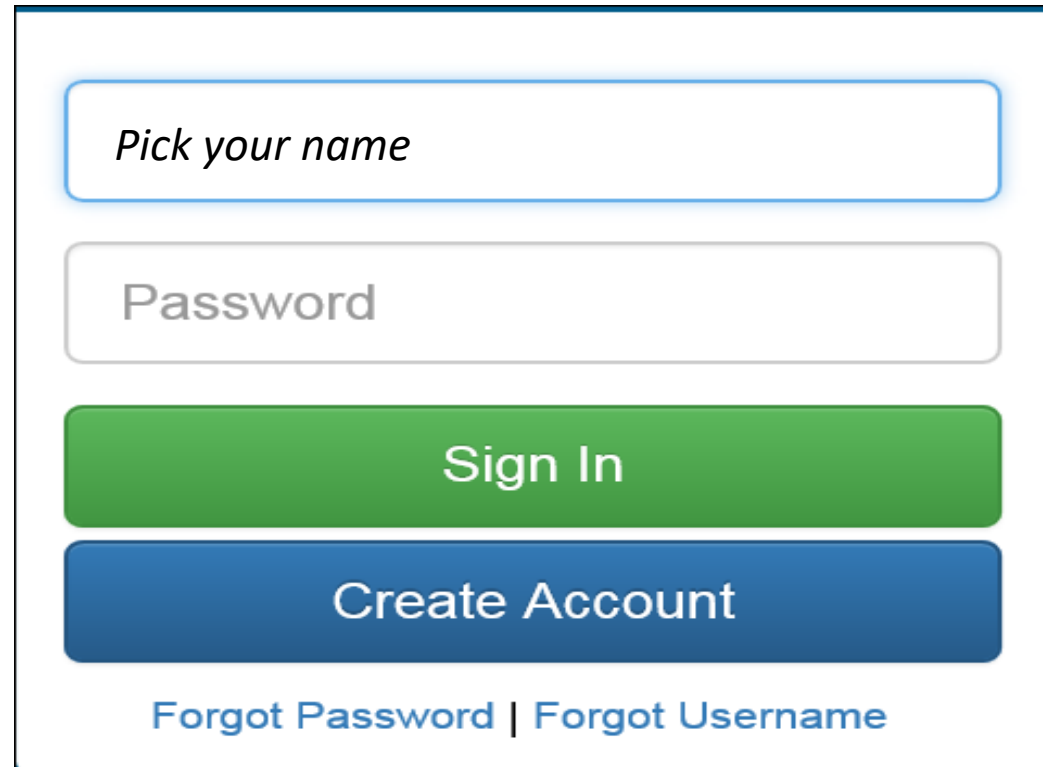
Create Account



Log in – First Time (Continued)

First time
you log in
your user
name will
be shown

Enter PW you
just created and
click on Sign in



The login form is enclosed in a blue border. It contains two input fields: the first is labeled 'Pick your name' and the second is labeled 'Password'. Below these fields are two buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom of the form, there is a link that reads 'Forgot Password | Forgot Username'.



Practice Lab – Home Page

To
Practice
Lab

Select a
training
video

Practice Lab - Home

Welcome to the practice lab. The links below will help you get a better understanding of the software and best practices regarding tax processes. If you would like to begin using the software in the practice area, please press the link below.

[Go to Practice Area »](#)

Section 1: Getting Started with TaxSlayer Pro Online

- [▶ Pro Online: Login and Passwords](#)

Section 2: Configuring TaxSlayer Pro Online

- [▶ Setting up Site Information](#)
- [▶ Setting up Security Templates](#)
- [▶ Adding Preparers](#)
- [▶ Working with Custom Questions](#)
- [▶ Configuring Printing](#)
- [▶ Managing Returns](#)
- [▶ Working with Reports](#)
- [▶ Managing Multiple Sites](#)
- [▶ Contingency Procedures](#)

Section 3: Installing TaxSlayer Pro

- [▶ Contingency Procedures](#)
- [▶ Installation and Network Configuration](#)
- [▶ Setting up Site Information](#)
- [▶ Setting up Security Templates](#)
- [▶ Adding Preparers](#)
- [▶ Working with Custom Questions](#)
- [▶ Configuring Printing](#)
- [▶ Managing Returns](#)
- [▶ Updating and Transferring](#)
- [▶ Working with Reports](#)



Practice Lab – Home Page (Continued)

Section 4: Preparing a Return	Section 5: Electronic Filing	Section 6: Enhancements and Miscellaneous
▶ Starting a Tax Return	▶ Creating the e-file	▶ Contingency Procedures
▶ Entering Basic Income Part 1	▶ Electronically Filing a State Return	▶ Practice Return 1
▶ Entering Basic Income Part 2	▶ The Review Process	▶ Practice Return 2
▶ Entering Adjusted Gross Income	▶ Submitting e-files	▶ Practice Return 3
▶ Entering Standard and Itemized Deductions	▶ Working with Acknowledgements	▶ Practice Return 4
▶ Entering Basic Credits		▶ Practice Return 5
▶ Entering Other Taxes		▶ Practice Return 6
▶ Entering Refunds, Payments and Estimates		▶ Practice Return 7
▶ Working with the Affordable Care Act		
▶ Completing a State Return		
▶ Advanced Tax Topics Part 1		
▶ Advanced Tax Topics Part 2		
▶ Printing a Return		
▶ Searching for Existing Taxpayers		




Practice Lab – Welcome Page

2016 Tax Program

Current User: IRS P

Change Tax Year ▾

Logout 

Welcome to The Practice Lab

Message Center 0

Rejected Clients

Start New Tax Return

Create a brand new tax return for a client.

Select

Client Search

Edit returns you previously started.

Select



Client Search Screen

Office Client List

2016 Client Tax Return List

Filter by Status
Any Status ▼

Filter by Return Tag
Any Tag ▼

☐ Do Not Show Deactivated Returns

Date From:
mm/dd/yyyy

Date To:
mm/dd/yyyy

Search Client list

Show 10 ▼ entries

Previous 1 2 3 4 5 6 Next

Showing 1 to 10 of 52 entries

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	
XXX-XX-1112	james	daniels	(555) 555-5555	IRS Preparer	Review	▼ <div>Tools ▼ <div>Select</div></div>



Start New Tax Return Screen

Available Taxpayer Profiles

Office Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

RETIREMENT ↗

ITEMIZED DEDUCTIONS ↗

RENTAL PROPERTY ↗

Assigned Profiles

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed:
Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B,

Enter Social Security Number

Start Return

Click:
Start Return



Enter Social Security Number

Available Taxpayer Profiles

Enter Social Security Number

Social Security Number

- 00 -

Confirm Social Security Number

- 00 -

Please fix all fields with errors
(marked in red) before starting
this return.

Start Return



Navigation/Input Rules

- All information is entered via input screen
- “Tab” key moves from field to field within input screen
- Select “Continue” to save information and move from one input screen to another



Navigation/Input Rules (Cont)

- Do not enter leading zeros when entering dates of birth:
- Three method of inputting data:
 1. Guide me
 2. Enter myself
 3. 1040 View on Calculation Summary page




Navigation


- Filing Status is 1st screen you must complete after entering SSN
- Filing Status Wizard available
- Personal Information screen must then be completed
- Dependent screen next (one screen for each dependent)





Practice Lab


« Collapse Menu

 Basic Information

 Federal Section


 Health Insurance


 State Section


 Summary/Print


Summary


Print Results

 e-File

 2016 Amended Return

 Save & Exit Return

 Help & Support

 Save & Exit Return

Filing Status Screen

What's your filing status?

- ☐ Single
- ☐ Married Filing Joint
- ☐ Married Filing Separate
- ☒ Head of Household
- ☐ Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

Filing Status Wizard

[< Back](#)

Cancel Continue



Personal Information Screen

Filing Status

CancelContinue

Taxpayer Information

Primary First Name *

GAIL

MI

Last Name *

ARCHER

Suffix (Jr, Sr, etc.)

--

Social Security Number *

021

-

00

-

1716

Date of Birth *

4

▼

16

▼

1989

▼

Occupation *

MANAGER

Scroll to view the rest of the page

Dependent Information Screen

Dependent or Qualifying Child

Add a Dependent or Qualifying Child

First Name	Last Name	Social Security Number	
GRACE	ARCHER	022-00-1716	<div><div></div><div></div></div>

Add a Dependent or Qualifying Child

Continue

■ Dependent / Qualifying Child Information

Dependent / Qualifying Child Information

First Name * Middle Last Name *

Date of Birth *

MM ▼ DD ▼ YYYY ▼

Social Security Number *

☐ Check if the dependent does not have an SSN/ITIN/ATIN

Relationship *

- Please Select - ▼

Number of months this person lived in your home during 2016

12 ▼

Note: If this dependent was born in 2016, you must select 12 months

Scroll to view the rest of the page



Income Screen

Let's look at the money you earned

Money isn't everything, except on your tax return. Tell us about your W-2, interest and dividends and retirement distributions. Follow our step-by-step guide to ensure accurate entry of your income. Or, enter the information on your own if you are familiar with the forms.

[Guide Me](#) -OR- [Enter Myself](#)

[< Back](#) [Skip Income](#)

- **Select “Guide Me” or “Enter Myself” ...
checkout Pub 4012, Tab O-6**



Exit or Close a Return

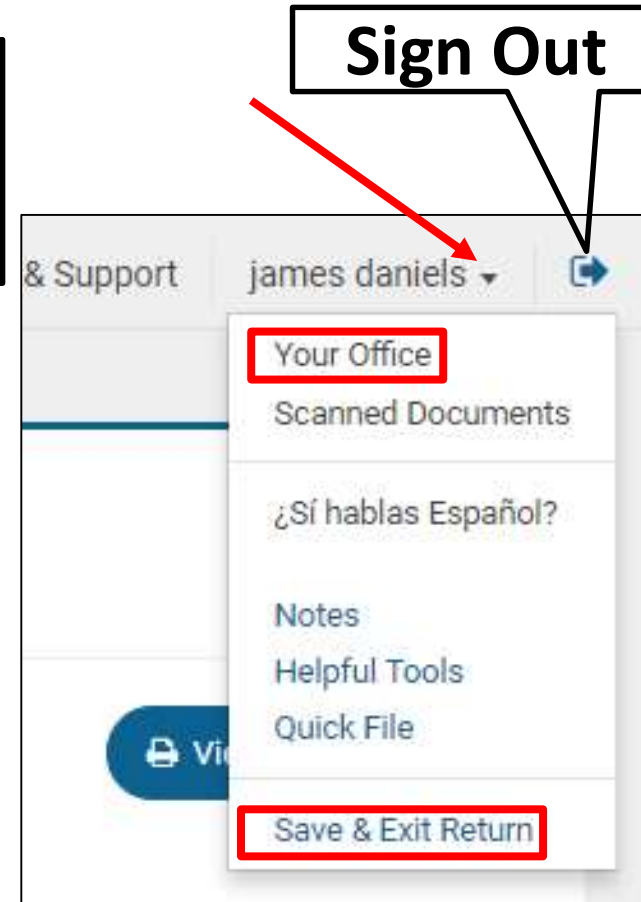
- Click to open pop out:

1. Select:
“Your Office”

**Does not
Save**

2. Select:
“Save and Exit
Return”

**Saves the
Return**





Questions...



Comments...

