

TAXSLAYER TIPS AND TRICKS

TAXSLAYER PRO VITA BLOG

<https://vitablog.taxslayerpro.com/>

TAXSLAYER 2016 USER GUIDES, Preparing a return: pages 70-106

<https://vitablog.taxslayerpro.com/2016/11/17/taxslayer-2016-user-guides/>

PRACTICE LAB: LAST 4 DIGITS OF SSN

Use your birth month and date in the last four digits of clients' SSN

SCHEDULE C: BUSINESS CODE

Open the list of Business Codes and use ctrl+F to search for it; when selected, it will populate the code and the description

HOW TO NAVIGATE FROM SUMMARY/PRINT SCREEN

Type in search box the form you want to go back, e.g. Schedule C

CAPITAL GAIN/VARIOUS DATES

If exact date of sale or purchase is unknown, select * **Alternate Option**; it will give VARIOUS date option

TAGS=RETURN STAGES

You can assign them from e-file screen or from Client list screen

ALIMONY PAID, NO SSN

If there is no SSN of person to whom alimony was paid → enter 000-11-000 instead

NEW ITIN

If filing form W-7 with the return to get ITIN, then use 000-00-0000 instead of SSN

UNREPORTED TIPS

This box is on W-2 form