

TaxSlayer® Practice Lab

An Introduction

■ Lesson Topics

- Creating an account in Practice Lab
- TaxSlayer Practice Lab videos
- Starting a return in Practice Lab
- E-filing in Practice Lab

■ TaxSlayer Practice Lab

- Most Internet browsers work
 - Edge
 - Google Chrome
 - Safari
 - Firefox
- For Practice Lab
 - <https://vita.taxslayerpro.com/>
 - <https://vita.taxslayerpro.com/IRSTraining>
 - <https://www.linklearncertification.com>

■ <https://www.linklearncertification.com>

■ Link and Learn

VITA/TCE Central

IRS

Instructor Tools

- Classroom Presentations
- Lesson Plans
- Instructor Guide 4555e

More Help

- Getting Started Tutorial
- IRS Publications and Forms
- Get Adobe® Reader®

Quick Links

- Link & Learn Taxes Lessons
- Certification Test/Retest PDFs
- VITA/TCE Training Guide PDFs
- Evaluations
- Practice Lab
- VSOC Training
- Intake/Interview and Quality Review Training

Practice Lab

■ First Time Practice Lab Login

Enter Universal
password:
TRAINPROWEB

Access Link & Learn Taxes

Hello,

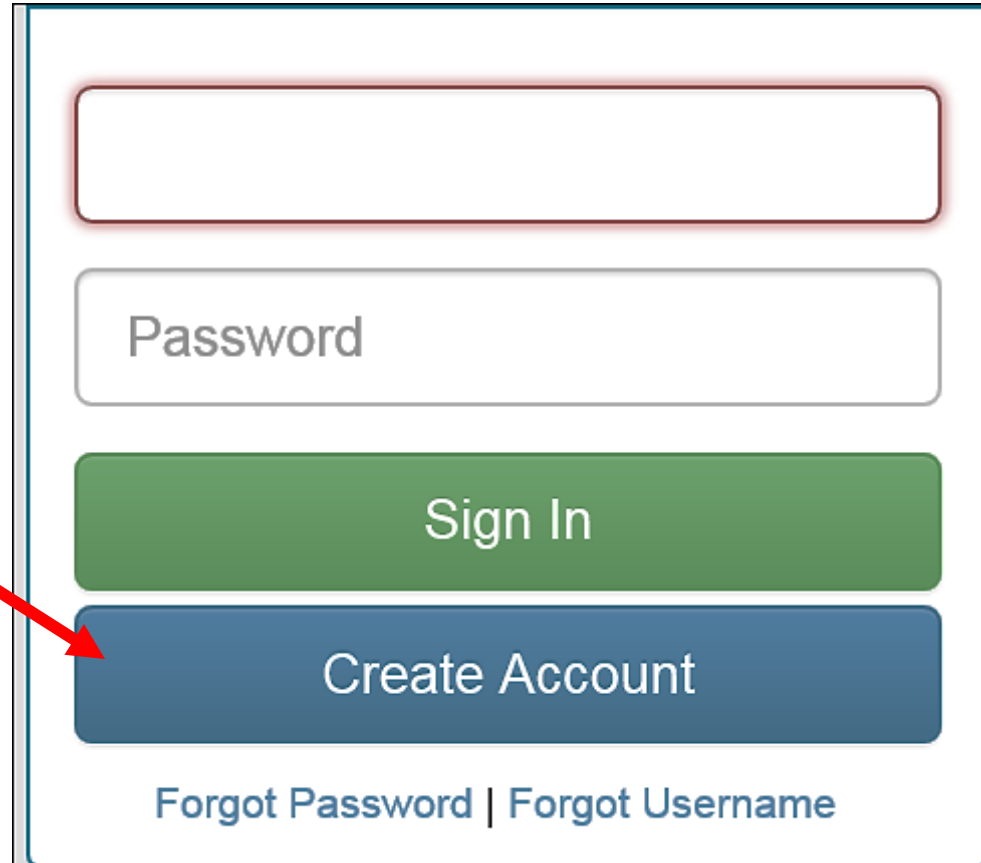
Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, 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.

■ Creating an Account in Practice Lab

Select: Create Account



A screenshot of a web form for account management. It features two input fields at the top: the first is empty, and the second is labeled "Password". Below these are two buttons: a green "Sign In" button and a blue "Create Account" button. At the bottom, there are links for "Forgot Password" and "Forgot Username". A red arrow points from a text box on the left to the "Create Account" button.

■ Creating an Account in Practice Lab

- Enter e-mail address twice
- Create a user name
- Create a password
 - Alphanumeric with at least 15 characters, both upper and lower case, and one special character
- Enter password twice
- Password may expire after 90 days

■ Creating an Account in Practice Lab

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

■ Creating an Account in Practice Lab

Create New Account

Account Information

Email Address

Confirm Email Address
 Required

Username

Password

Confirm Password

Program Type

Site Identification Number (SIDN)

Password Recovery

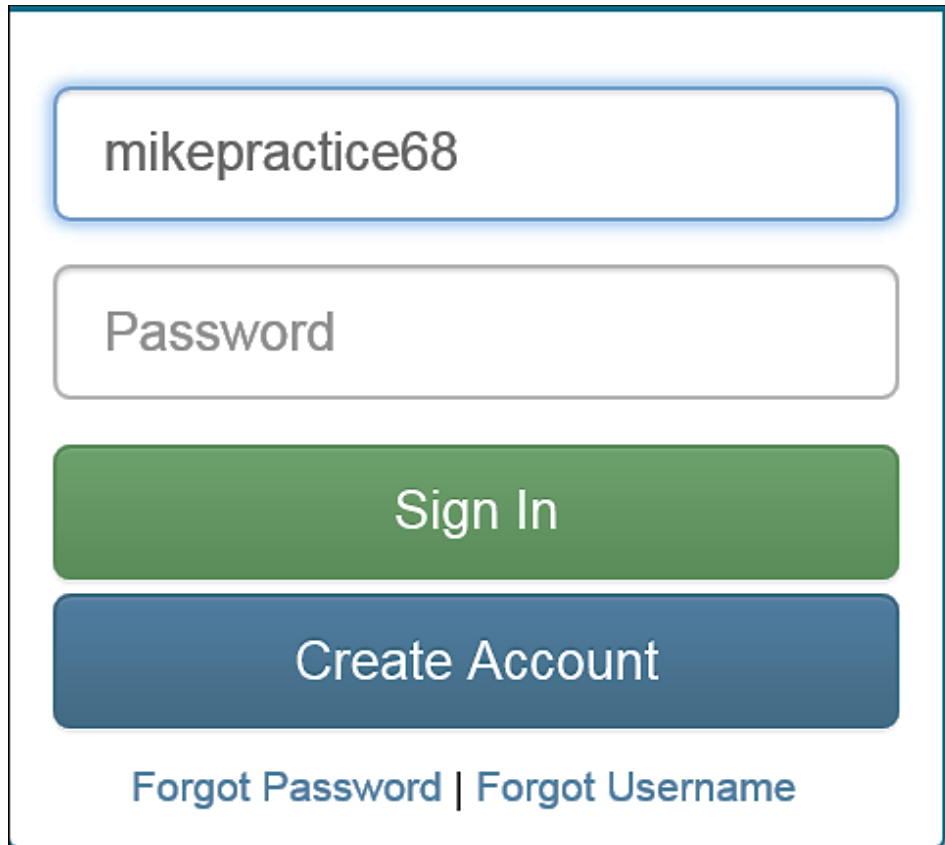
Security Question

Security Answer

Create Account

Make a record of your password and security answer

Practice Lab Login



The image shows a login form with the following elements:

- A text input field containing the username "mikepractice68", which is highlighted with a blue glow.
- A text input field labeled "Password".
- A green button labeled "Sign In".
- A blue button labeled "Create Account".
- Links for "Forgot Password" and "Forgot Username" at the bottom.

First time you log in your user name may be shown

Enter password you just created and click on Sign in

■ Exploring TaxSlayer: Practice Lab Videos

**Create a
Practice
Return**

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 »](#)

**Practice Lab
Videos**

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](#)

■ Exploring TaxSlayer: Practice Lab Videos

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		▶ Recorded Webinar 1: Site Administration
▶ Completing a State Return		▶ Recorded Webinar 2: Return Preparation
▶ Advanced Tax Topics Part 1		▶ Recorded Webinar 3: Desktop & Contingency
▶ Advanced Tax Topics Part 2		▶ Recorded Webinar 4: Enhancements
▶ Printing a Return		
▶ Searching for Existing Taxpayers		

Practice Lab: Beginning a Practice Return

2018 Tax Program **Defaults to current year** Current User: IRS P Change Tax Year ▾ Logout ↗

2018
2017

Can choose a different year

Welcome to The Practice Lab

Message Center 0

Rejected Clients 0

Start New 2018 Tax Return

Create a brand new tax return for a client.

Select

Client Search

Edit returns you previously started.

Select

■ TaxSlayer and Volunteer Resource Guide Pub 4012

Pub 4012 Tab O

- NTTC Pub 4012 Tab O provides TaxSlayer Navigation and instruction

Navigating TaxSlayer

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
1099-R IRA Distribution	-R	6(S1-15)	Income>IRA/Pension Distributions> Add or Edit a 1099-R	D-34
1099-R Pension Distributions	-R	6(S1-16)	Income>IRA/Pension Distributions> Add or Edit a 1099-R	D-34
1099-S Proceeds from Real Estate Transaction	CAP	6(S1-13)	Income>Capital Gain and Losses>Capital Gains and Loss Item	D-30
1099-SA HSA	HSA	7(S1-25)	Deductions>Adjustments>Health Savings Account Form 8889	D-3
1310	1310		Miscellaneous Forms>Claim a Refund ...	
2120 Multiple Support Declaration	N/A	N/A	Not in TaxSlayer, take exemption, keep form in taxpayer files	Pub 17
4852 Substitute for Form 1099-R	495	6(S1-15) 6(S1-16)	Income>IRA/Pension Distributions>Add a 1099-R>Check here if this is a substitute 1099-R	D-34
4852 Substitute for Form W-2	W2	1	Income>Wages>Add a W-2>This is a substitute W-2	D-4
5498-QA ABLE Account	N/A or out	N/A	Not taxed as long as money taken from the account	Pub 17

■ TaxSlayer and Volunteer Resource Guide Pub 4012

- Where can you find information about entering state returns in TaxSlayer in the Volunteer Resource Guide?
 - Index “State returns” (Page Index-10 in 2018)
 - Multiple sub-headings
 - For Navigation Aids
 - Tab O (State ...) (Page O-12 in 2018) has multiple entries

■ E-Filing in TaxSlayer

Return Type

Your return is now ready to be e-Filed to the IRS.

⚠ Please make sure that all information you enter below is correct.

In order for us to transmit your client's return to the IRS you must complete all Steps in the e-File Process.

CAUTION: Your client's return will not be sent to the IRS unless you complete ALL steps. None of the information is saved until all information is entered and the "Continue" button below is clicked.

To continue the e-File process, please first select a return type and the form will ask for all required information.

■ E-Filing in TaxSlayer

- This is as far as you go in Practice Lab
- Tax return is now calculated and will not change
- Return is ready to start TaxSlayer's E-file process
- Resources for E-file process Training
 - “Finishing the Return” Slide Presentation
 - Refer to Pub 4012 Volunteer Resource Guide Tab K

■ TaxSlayer Training

Questions?



Comments...