

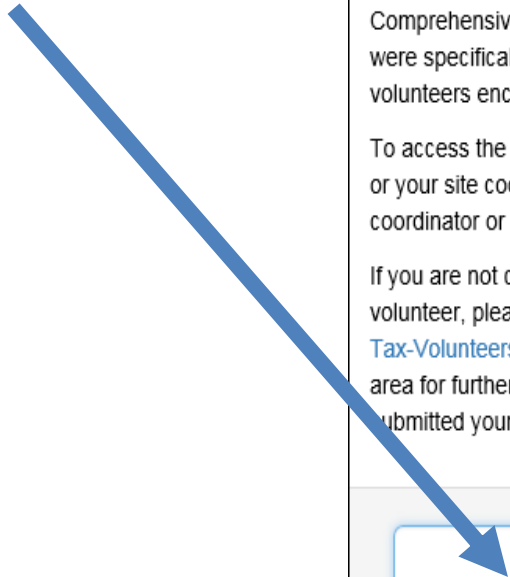
# **TaxSlayer® Pro Online Practice Lab**

# TaxSlayer Pro Online Practice Lab

- Use Google Chrome or Firefox Browser
- For 2023 Practice Lab:  
<https://vita.taxslayerpro.com/IRSTraining>

# Log in – All Volunteers

Enter: **TRAINPROWEB**



### Access Link & Learn Taxes

Hello,

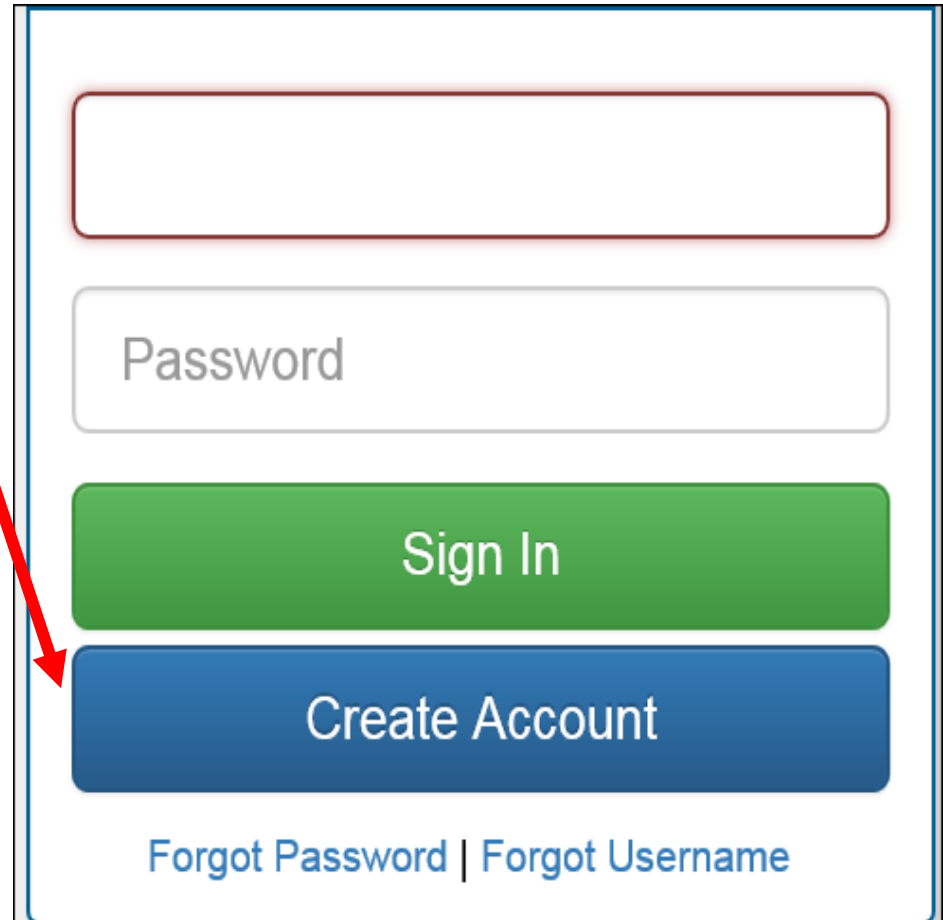
Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook,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

Skip this step if you have an account



The image shows a login form with the following elements:

- A red arrow pointing from the title 'Log in – First Time' to the 'Create Account' button.
- An empty text input field for the username.
- 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.

# Log in – Create Account

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



# Log in – Create Account

- Enter & Confirm e-mail address
- Create a username – include train or practice (Ex: GWolfeTrain12345)
- Create a PW – alphanumeric with at least 16 characters (no special characters)
- Confirm password

# Log in – Create Account

- Select “**AARP Tax-Aide**” from “Program Type” drop down window
- (SIDN is not required)
- Select a security question for recovery
- Enter answer to security question
- Click “Create Account”

# Log in – Your Account

First time log in  
your username  
will be shown

Enter PW you  
just created

Click Sign In

mikepractice68

Password

Sign In

Create Account

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

# Create Accounts for Candidates

- Instructor may create an account for each Prospect using:
  1. Student's email address
  2. Username in standard format of 1<sup>st</sup> initial + last name + Train + group Identifier (e.g., site name)
  3. Password is same for all students
  4. Security question/answer is the same for all Prospects

# Creating Accounts for Candidates – Students with Practice Lab account

## Three Options:

1. Student supplies username and PW to instructor
2. Same as above, but student changes PW to instructor supplied PW by using Forgot PW link
3. New account created for student using dummy email (prevents recovery)

# Practice Lab – Home Page (top)

Go to  
Practice  
Area

OR

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

▶ [User Guide](#)

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

### Section 2: Configuring TaxSlayer Pro Online

▶ [User Guides](#)

▶ [Setting up Site Information](#)

▶ [Security Templates](#)

▶ [Adding Preparers](#)

▶ [Working with Custom Questions](#)

▶ [Configuring Printing](#)

▶ [Managing Returns](#)

▶ [Reports](#)

▶ [Managing Multiple Sites](#)

▶ [Contingency Procedures](#)

### Section 3: Installing TaxSlayer Pro

▶ [User Guides](#)

▶ [Contingency Procedures](#)

▶ [Installation and Network Configuration](#)

▶ [Setting up Site Information](#)

▶ [Setting up Security Templates](#)

▶ [Adding Preparers](#)

▶ [Custom Questions](#)

▶ [Printing Configuration](#)

▶ [Managing Returns](#)

▶ [Updating and Transferring](#)

▶ [Working with Reports](#)

# Practice Lab – Home Page (bottom)

## Section 4: Preparing a Return

- ▶ User Guides
- ▶ Starting a Tax Return
- ▶ Entering Basic Income Part 1
- ▶ Entering Basic Income Part 2
- ▶ Entering Adjusted Gross Income
- ▶ Entering Standard and Itemized Deductions
- ▶ Entering Basic Credits
- ▶ Entering Other Taxes
- ▶ Entering Refunds, Payments and Estimates
- ▶ 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
- ▶ Completing an Amended Return
- ▶ Completing 1040-NR

## Section 5: Electronic Filing

- ▶ User Guides
- ▶ Creating the e-file
- ▶ Electronically Filing a State Return
- ▶ The Review Process
- ▶ Submitting e-files
- ▶ Working with Acknowledgements

## Section 6: Enhancements and Miscellaneous

- ▶ User Guide
- ▶ TaxSlayer Scanned Documents
- ▶ TaxSlayer FSA
- ▶ TaxSlayer Enhancements
- ▶ Practice Return 1
- ▶ Practice Return 2
- ▶ Practice Return 3
- ▶ Practice Return 4
- ▶ Practice Return 5
- ▶ Practice Return 6
- ▶ Practice Return 7
- ▶ Practice Returns Puerto Rico
- ▶ Practice Return International
- ▶ Practice Return Military
- ▶ Recorded Webinar 1: Desktop & Contingency
- ▶ Recorded Webinar 2: Site Administration
- ▶ Recorded Webinar 3: Return Preparation 1

# Practice Lab – Welcome Page

Click “Go to Practice Area”

## Welcome to The Practice Lab

Message Center **97**

Rejected Clients **0**

Caution: TSO updates PL  
Recommend waiting to 11/20

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### Start New 2021 Tax Return

Create a brand new tax return for a client.

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### Client Search

Edit returns you previously started.

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# Navigation Bar

## Left side Menu

Main Menu
Client Status
IRS website
IRS Mailing Addresses
IRS Publications, Instructions, and Fill-In Forms
Release Notes
VITA/TCE Publications and User Guides
VITA/TCE Blog
Suggestion Box: VITA/TCE Enhancement Requests
COVID19 - Information

Current page

Opens Client List with status for each

IRS website

IRS Filing Addresses

taxstatusnow.com website

TaxSlayer Pro Blog – Notes

Pub's 17, 4012, 4299, +11 more

TaxSlayer Blog

SurveyMonkey.com TSO Suggestions

IRS – COVID relief information

# Client Search Screen

Client search results screen – Use options to narrow results

2021 Client Tax Return List

Filter by Status

Any Status



Filter by Return Tag

Any Tag

Do Not Show Deactivated Returns

Do Not Show Accepted Returns

Date From:

yyyy/mm/dd



Date To:

yyyy/mm/dd












Date Type

Create Date



Search Client List

# Client Search Screen - Options

7644	GILBERT	WASHINGTON	(602) 555-1212	IRS Preparer	In Progress	AZ ...	  
7644	CYNTHIA	SIMON	(602) 555-1212	IRS Preparer	In Progress		  
7644	RAE	SKYWALKER	(602) 555-1212	IRS Preparer	In Progress	AZ ...	  

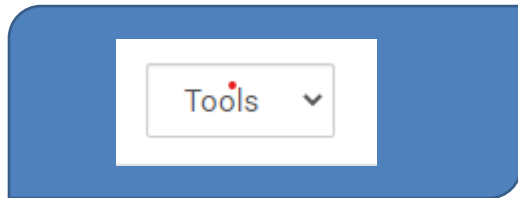
Shows Status

Shows Notes

Shows Tags

Opens PDF to QR or Print

# Client Search Screen - Tools



Tools link will open Client Status

## Client Information

Primary TRAVIS KENNEDY (318-00-7644)

Primary DOB N/A

Home Phone

Cell Phone

Address

[View Detailed Client Information](#)

## Client Return History

**Action Taken** - PRINT

**Username** - AZ5trainWolfe

**Log Time** - 11/25/2020 9:40:53 AM

**Preparer** - IRS Preparer

**Ero** - Practice Lab

**SSN** - 318007644

**Return Information** -

Filing Status - 2

AGI - 30944

Refund - 4385.00

Return Type - Direct Deposit

Account Information - 111000025 / 123456789

**Return Fees** -

# Start New Tax Return

From the Main Screen – Select Start New 2022 Return

## Welcome to The Practice Lab

Message Center

97

Rejected Clients

0

---

### Start New 2021 Tax Return

Create a brand new tax return for a client.

---

### Client Search

Edit returns you previously started.

# Start New Tax Return

The Social Security Input Screen –

1. Enter Taxpayer SSN
2. Confirm Taxpayer SSN
3. Click Start Return

Note – PL fixes 00 in SSN

### Enter Social Security Number

Social Security Number

- 00 -

Confirm Social Security Number

- 00 -

Social Security Number must match.

### Available Taxpayer Profiles

- Basic (No Profile)  
Create a return without a Taxpayer Profile.
- RETIREMENT ↗ ↘
- ITEMIZED DEDUCTIONS ↗ ↘
- RENTAL PROPERTY ↗ ↘
- Master Profile ↗ ↘  
IRS Guidelines: This profile will automatically display

# Navigation

- Information is entered via input screen (nothing entered directly on forms)
- Use “Tab” key to move from field to field within input screen
- Select “Continue” to save information and move from one input screen to the next

# Navigation

- 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 1<sup>st</sup> 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)

# TaxSlayer Practice Lab

Are you Ready?

OR...

Do You Have  
Questions?

