

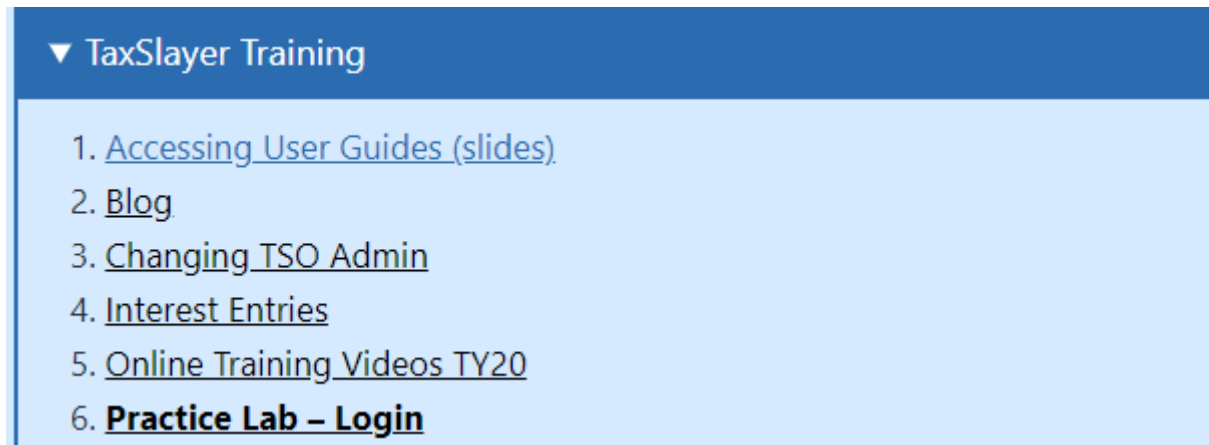
# TaxSlayer Pro

## Accessing User Guides

# ■ TSO User Guides

## ■ One way to locate and download TSO User Guides

- Log into the AZ Tax Aide website
  - Go To Tax Preparation Tab – Training and TaxSlayer
  - Click on #2 Blog



- Launch Blog directly [Taxslayerpro](https://taxslayerpro.com) from Chromebook browser

# ■ TSO Home Menu

- Select the “What’s New” link at the top



HOME

WHAT'S NEW

SOFTWARE NEWS ⌵

- Scroll down to locate TSO Guides



# TSO Training Area

- Select a User Guide located in each of the Sections

## Section 1: Getting Started with TaxSlayer Pro Online [Download Mini Guide](#)

Logging in and Password Reset

## Section 2: Configuring TaxSlayer Pro Online [Download Mini Guides](#)

Setting up Site Information   Security Templates   Adding Preparers   Custom Questions

Printing Configuration   Return Management   Reports   Managing Multiple Sites

## Section 3: Installing TaxSlayer Pro Desktop [Download Mini Guides](#)

Contingency Procedures   Installation and Network Configuration   Setting up Site Information

Setting up Security Templates   Creating Users/Preparers   Custom Questions

Printing Configuration   Managing Returns   Updating and Transferring   Working with Reports

## Section 4: Preparing a Return [Download Mini Guides](#)

Starting a Return   Basic Income Part 1   Basic Income Part 2   Adjusted Gross Income

Standard and Itemized Deductions   Basic Credits   Other Taxes   Payments and Estimates

Affordable Care Act   State Income Tax   Advanced Topics Part 1   Advanced Topics Part 2

**To get Guides (PDF) click on “Download Mini Guides” link in desired section.**

# ■ TSO Guides

Select an Attachment – Log in screen will appear

Fill in Name, Email and select AARP Tax-Aide

The author of this presentation would like some information about you.  
Click Submit when you have entered the requested information.

First Name \*  
Geofrey

Last Name \*  
Wolfe

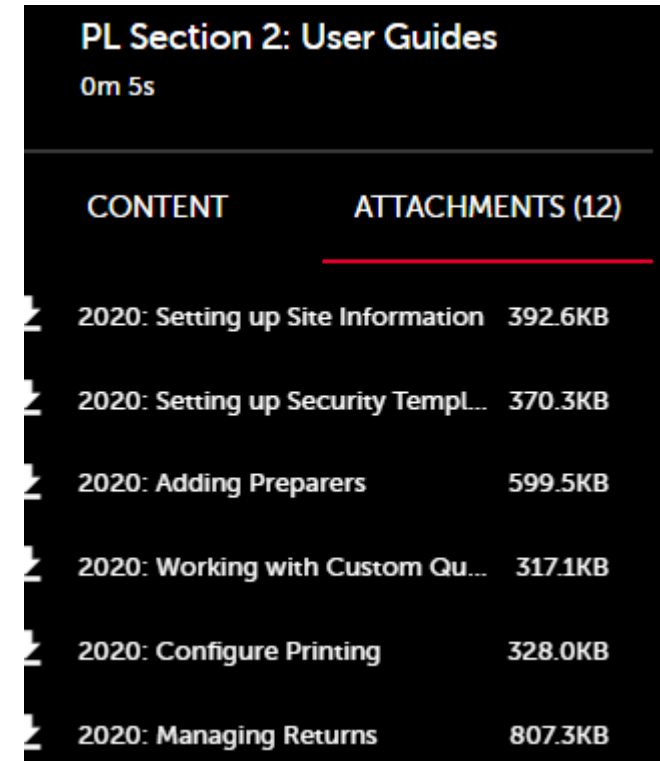
Email  
GeofWolfe@yahoo.com

Program Type \*  
AARP Tax-Aide

SIDN

# ■ TSO Guides

- A Brainshark video guide will start
- Click the Content link to open video
- Click the Attachments link to download documents
- 2021 is available – will be updated



PL Section 2: User Guides  
0m 5s

CONTENT	ATTACHMENTS (12)
2020: Setting up Site Information	392.6KB
2020: Setting up Security Templ...	370.3KB
2020: Adding Preparers	599.5KB
2020: Working with Custom Qu...	317.1KB
2020: Configure Printing	328.0KB
2020: Managing Returns	807.3KB

# ■ TSO Guides

## ❑ Site Set Up Guide

<https://www.brainshark.com/1/player/taxslayer?pi=zI7zEldFEzQubez0&r3f1=&fb=0>

## ❑ Security Templates — do this before adding preparers

<https://www.brainshark.com/1/player/taxslayer?pi=zGrz63Q4fzQubez0&r3f1=&fb=0>

## ❑ Adding Preparers

<https://www.brainshark.com/1/player/taxslayer?pi=zHxz6LYcYzQubez0&r3f1=&fb=0>

## ❑ Custom Questions

<https://www.brainshark.com/1/player/taxslayer?pi=zHozcEVEKzQubez0&r3f1=&fb=0>

## ❑ Log In & Password Reset

<https://www.brainshark.com/1/player/taxslayer?pi=zI1znEe2PzQubez0&r3f1=&fb=0>

# ■ TSO Warning

## What's your filing status?

- Single
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

FILING STATUS WIZARD

— DO NOT USE the Filing Status Wizard

# ■ Questions?

Questions...

Comments...

Needs

