

T03 Setup Guide for TaxSlayer Pro Online (TSO)

AARP Foundation Tax-Aide National Technology & Security Committee

Revised 11/20/2022

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Summary

The NTSC Setup Guide is a step-by-step outline for configuring TaxSlayer Pro Online. This “living” document may be updated to reflect changes to the procedures described. This document can be found in the Portal Library, by going to the Tax-Aide: Technology (blue folder) folder and selecting the Software subfolder– be sure you use the latest edition as indicated by the date in the bottom left corner. The TSO User Guide provides instructions for VITA sites; this NTSC Guide provides instructions for AARP Foundation Tax-Aide sites.

Regularly refer to the VITA/TCE Blog for recent TSO updates and changes;
<https://vitablog.taxslayerpro.com>.

Activating Sites for TY2022

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TaxSlayer will send their activating email(s) in December, or January using the information provided in the software order sent to the IRS. The current tax year program (TY2022) will not become active until mid-January, when the state income tax forms are also installed. TSO prior year programs (TY2019, TY2020 and TY2021) are active as soon as the initial emails are executed – remember, all TSO returns are ‘real returns’ (use the Practice Lab for training).

Activating a Returning Site

Returning sites/users will be able to use the same login active username(s) from the prior year.

All sites from filing season 2022 (TY2021) will receive an email letting them know their filing season 2023 (TY2022) software is available. It will not have a link to activate the site because the site is already active.

TaxSlayer will deactivate a returning site if a software order for tax year 2022 is not received by 12/31/2022. Once the order is received, TaxSlayer will re-activate the site.

If a returning site has a different contact name on the software order, the new contact person will need to contact TaxSlayer Customer support. Call 1-800-421-6346 or send an email to support@vita.taxslayerpro.com with the site EFIN, Site Name, and new Site Administrator name, phone and email address. TaxSlayer will generate an email with a link to provide administrative rights to the new site contact.

Activating a New Site

New sites will receive two emails with activation links. It is imperative that the activation be completed once the email link has been accessed. Failure to do so will lock the process and TaxSlayer support will need to be contacted.

The **User Activation Code** email confirms the contact information for the primary contact and permits an ‘alternate contact’ to be named. In addition, it confirms the site’s physical address (labeled as the “mailing address”) and the “shipping” address, which will be used to send materials from TaxSlayer to the site contact. The ERO verification code, which will be needed during configuration, is located in the “Account History” section of the screen which appears after the User Activation is completed. The **Site Activation Notification** email contains a link to the “Preparer Personal Information” page that registers the Admin name, password and activates the Site identified in the email. The site’s Site Identification number (SIDN), beginning with an “S”, and the Tax-Aide PIN of ‘98765’ must be entered before the page is saved. The person who completes the Site Activation instructions is automatically the Administrator for the site, which will include the ability to prepare tax returns (note that this person is the only user who will not have a Security Template assigned to them).

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These same instructions appear in the “Activating your Pro Online Site” file on the left side of the Practice Lab’s Welcome page and in the VITA/TCE Blogs “Pro Online: Office Identifier”.

Configuring TSO for a Site

The NTSC Setup Guide is a step-by-step outline for configuring your TSO program. TSO contains 4 tax years (current and 3 prior); all are configured at the same time and all Settings apply equally to each year’s program. TY 2022 tax returns cannot be created in TSO production sites until sometime in late January - this will be announced on the TSO Blog. All training returns must be prepared using the Practice Lab. Configurations will carry forward from year to year.

The **Administrator (Admin)**, or a user with whom the Administrator has shared his or her authority via a Security Template, must configure the site’s TSO program by completing 9 of the available 12 items on the configuration menu. After it has been activated, TSO pre-enters some information based on the IRS order. This will become clearer as the following outline is used.

Log in to TSO, and then complete steps 1 through 9 as described below. It is important to follow the sequence shown. Note that certain Configuration Menu items are not required for Tax-Aide and have been skipped below. These items are Consent Forms, Custom Credit, and Office IP Whitelist.

No entries should be made in any of these items.

Please follow these steps in the order they are presented.

You may notice some options have been pre-set to comply with new IRS requests.

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Step 1. Office Setup

1. On the “Welcome” page, click on the “Configuration” line.
2. On the “Configuration Menu” page, click on the “**Office Setup**” line.
 - a. The Office Setup will have several fields pre-filled with information from the order submitted to the IRS. Review each pre-filled item for accuracy and change if necessary. Advise the Tax-Aide volunteer who placed the IRS order of any changes made.
 - b. Leave “Selected Bank” empty (that is, do not use the drop-down).
 - c. Leave “Sales Tax Percentage” blank. This is used for paid preparers to calculate their fees and has no effect on the prepared tax return.
 - d. The SIDN box should be prefilled with the site SIDN.
 - e. Set the “Date to show on printed returns” as the “Current Date”.
 - f. Set “Signatures on Form 8879” to “ERO Name Only” by selecting that answer from the drop-down box.
 - g. Leave “Cover Page Settings” set at “No Cover Page”.
 - h. Check (to enable) “Disable Third Party Designee Prefill”.
 - i. Confirm the Offer 8888 checkbox is checked.
 - j. Check (to enable) “Display Summary using 1040 View”.
 - k. Check (to enable) “Hide Preparer Name on 1040 Print”.
 - l. Do not check the following:
 - Always print Schedule A (unless you wish to always print)
 - Force Verification of IP Address
 - Default State Return Type to be Sent Through Bank
 - Require Email Address Entry of e-file Page
 - Default Tax Returns to Spanish
 - m. Check (to enable) “Require Return Tag(s) for Saving Returns” if you want this feature.
 - n. Enter 100 as value for the Maximum number of clients to display on the client list. (Note default value is 999)
 - o. Scroll down to “Office Address” review and edit if necessary. If no address is shown, click on “ADD” then complete the type of address (drop down box), the address and click “Continue”. **This entry is required.**
 - p. Scroll down to “Office Phones”. Review and edit if necessary. If no entry appears, click on “ADD”, choose the type of phone (drop down box) and complete the form. Click “Continue”. **This entry is required.**
 - q. Click “Continue”, which returns you to the Configuration Menu.

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Step 2. ERO Setup

The ERO acronym when used by TSO refers to the site itself, not to the Tax-Aide volunteer who transmits returns.

1. On the “Configuration Menu” page, click on the “ERO Setup” line.
2. Click “Edit” to review the ERO Setup page.
3. The CustomerID, ERO Name, Office Identifier, and EFIN should be pre-filled from the order submitted to the IRS.
4. The ERO Name is the name of the site as shown on the software order and should agree with the site name shown on the Portal (check to be sure). Review for accuracy and change, if necessary.
5. EIN field - Leave blank
6. Verify the EFIN again – the EFIN must be correct for TSO to properly operate.
7. If no information is pre-filled, contact the Tax-Aide volunteer who submitted the order to the IRS for the correct entries.
8. Leave the Self-Employed check box blank.
9. Ensure the “Default” and the “Active” boxes are checked.
10. To correct the pre-filled information, click “ADD” following the “ERO Addresses” caption.
11. Enter the information requested, including the “Address Type” (drop down box), then click “Continue”.
12. Click “ADD” following the “ERO Phones” caption.
13. Enter the “Type” of phone (drop down box), the phone number, and then click “Continue”.
14. The “ERO(s) Menu” page appears. Review. If correct, click on “Return”.

Note: While “Preparer Setup” is the next item listed on the Configuration Menu, the Security Templates must be completed first so they can be used in the Preparer Setup.

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Step 3. Security Templates

1. On the “Configuration Menu” page, scroll down to “**Security Templates**” and click on that line.
2. The Security Template defines a volunteer’s ability to use TSO. Only one template can be assigned to a volunteer (it can be changed at any time) and the same template applies to all four-tax years. TSO provides some predefined “Security Templates” that cannot be edited, copied or deleted. They are ADMINISTRATOR(TS), SUPERUSER, PREPARER CURRENT YEAR, PREPARER ALL YEARS, SETUP MANAGER, INTERVIEWER, REVIEWER, and EFILE MANAGER.
3. **Assigned to Tax-Aide volunteers.** In their place, Admin-created custom Security Templates should be assigned to counselors. The creation of these custom Security Templates is described below. Relational Group Administrators can create these suggested templates and have them sent to their subscriber sites so the subscriber sites will not have to create the templates themselves.
4. Admin-created custom-defined Security Templates are added to the existing list of TSO predefined and Relational Group Administrator predefined Security Templates. It is recommended that the following three custom templates be created for the site: Novice, Experienced and Assistant Admin.
5. To add a Security Template, click the “Add” button.
6. On the “Add a Security Template” page, enter the name of the template you are creating (e.g., “Novice”). As you add your own templates, please use conventional upper and lower case for names to make it easy to distinguish yours from TSOs.
7. Check the box next to each privilege that you want users to have when assigned this template. All available privileges may have been checked by default; if this is the case, you should check the box next to “Check/Uncheck All” so everything is unchecked, and then check the specific privileges you want to grant via this template.
8. The following table shows the NTSC recommended privileges. Check means you should check the box for that privilege.

Privilege	Novice	Experienced	Asst. Admin
Access Current Year Client List	CHECK	CHECK	CHECK
Access Office			
Access Previous Years Client List		CHECK	CHECK
Add and Configure SecurityTemplates			CHECK

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Add or Edit Custom Credits			
Add or Edit Office IP Whitelist			
Add or Edit Print Sets			CHECK
Add or Edit Tags			CHECK
Add/Edit Fees in Office Configuration			
Add/Edit Preparers			CHECK
Allow Ability to Clear Signatures			CHECK
Allow entry into Accepted returns			
Assign Preparer's Security Template			CHECK
Cannot Change Return Status back to In Progress	CHECK	CHECK	
Change Consent Forms			
Change Questions and Available Answers			CHECK
Change Return Preparer			CHECK
Change Tax Profiles			CHECK
Configuration			CHECK
Create Tax Return	CHECK	CHECK	CHECK
Customer Portal			
Deactivate Return			CHECK
Delete Return Notes			CHECK
Delete Scanned Documents			
Dismiss/Restore Main Menu Notifications			
Display Imperfect Return			

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Do Not Force Return Review			
Edit and Customize reporting display			CHECK
Edit Calculated Preparer Fee			
Edit E-file Fee			
Edit ERO Setup			
Edit Maximum Preparer Fee			
Edit Minimum Preparer Fee			
Edit Office Setup			
Hide Accepted Returns from Limited Users			CHECK
Import Desktop Returns			
Mark Return Complete			CHECK
Mark Return for Review	CHECK	CHECK	CHECK
Override Return Maximum Preparer Fee			
Override Return Minimum Preparer Fee			
Password Protect Return			
Print Returns		CHECK	CHECK
Review Returns and Mark Review Decision		CHECK	CHECK
Scanned Documents			
Send Return to IRS			CHECK
View Client Status	CHECK	CHECK	CHECK
View Full SSN	CHECK	CHECK	CHECK
View Refund Status		CHECK	CHECK
View Reports			CHECK
View/Edit Existing Returns	CHECK	CHECK	CHECK

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Step 4. Preparer Setup

1. On the “Configuration Menu” page, click “Select” “**Preparer Setup**” by clicking anywhere on that line.
2. The “Preparer(s) Menu” appears; click on “Add Preparer.”
3. Enter First Name, and First Initial of Last Name in the appropriate box
4. The Default PIN number should contain 98765.
5. Ignore the 2848 CAF number
6. PTIN OR SIDN - Click on “pull from office” unless this Preparer will be working at an AdHoc Site, then key in the AdHoc SIDN.
7. Check the “Can view own returns only?” box if you want this preparer to be restricted to viewing only the returns they have prepared.
8. **DO NOT** check the “Required to use Guide?” box. Doing so limits the preparer to using the Guide Me method of tax preparation for every return – a very slow process.
9. If preparing tax returns in New York, check the “Prepares NY Returns?” box. Enter “09” in the NYTPRIN box and select “Volunteer Tax Preparer” from the drop-down box in the second pop-up box for “NYPRIN exempt”.
10. Scroll down to the “Login Account” section. Enter the preparers email address that can be used to advise the user of their forgotten username or password and to provide the Multi- Factor Authentication (MFA) code for logging in.
11. Check the box “**Allow multiple accounts to use this email address.** This will provide the preparer greater flexibility in preparing taxes at multiple sites.
12. Enter the preparer’s cell phone number if they have one. This is the second option the user will have for receiving the Multi-Factor Authentication code when it is required to log in to TSO.
13. Check the box “**Allow multiple accounts to use this Cell Number.** This will provide the preparer greater flexibility in preparing taxes at multiple sites.
14. Scroll down and enter the “Username” for the preparer. **This must be different from the name used for the Practice Lab, and must be different from all other user names nationally.**
 - a. The name may contain letters, numbers and/or special characters. It must be between 6 and 30 characters long. A suggested format is the last 4 numbers

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of the SIDN, followed by the preparer's full last name. If necessary, the preparer's first initial to distinguish similar names.

- b. A preparer who works at more than one site must have a distinct username for each site. This is easily accomplished if the naming convention previously mentioned is used.
15. Enter a "Password" for the preparer containing a mixture of upper-case letters, lower case letters, special characters and numbers totaling at least eight characters in length. This will be used by the preparer for their first log in, when the program will request that they immediately change their password; therefore, the Admin may enter the same password for each preparer added to the site.
16. The "Active" box will be automatically checked for new preparers. Should the preparer leave the Tax-Aide program, this box must be unchecked (so that it is empty) to remove the user's access to the TSO program. The preparer is either active for all four tax years in TSO (current and prior 3 tax years) or is inactive for all of the tax years. A preparer can be granted access to only current tax year using the TSO supplied Security Template "PREPARER CURRENT YEAR".
17. Select one "Security Template" to assign this preparer from the drop-down menu. The drop-down will list both predefined and custom-defined Security Templates. You can change the preparer's assigned template at any time. Picking a template from the drop-down menu, then clicking "Show Definitions" (beside the drop-down box) will show which privileges are included in that template.
18. If present, skip past (do not click on) "Electronically Sign". If checked, this feature will place the preparer signature on the printed tax return, which is not desired.
19. Review the entries. If correct, click "Continue".
20. Repeat '1' through '19', above, for each new Tax-Aide volunteer that will access TaxSlayer Pro Online. All active users are listed in the 'Username Report', which may be helpful in identifying which users have been created.
21. When the last new preparer has been added, review the Preparer(s) Menu. If correct, click "Return".

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Step 5. Print Sets

TaxSlayer Pro Online contains several print sets that are available to the preparer during the print return process. Review these before printing tax returns so you know what forms and how many copies of each form are printed when each print set is selected. In most cases, preparers should use one of the print sets assigned by TaxSlayer. TaxSlayer Pro assigns print sets based on collaboration with the IRS.

The preparer can choose from the following print sets when printing the return from the Submission page. These print sets cannot be modified:

- One Copy – Federal and State
- Two Copies – Federal and State
- Three Copies – Federal and State
- One Copy – Federal Only
- One Copy – 1040 Only
- One Copy – State Only
- One Copy – Form 8879 Only
- Print Invoice
- TAXPAYER COPY PRINT (TaxSlayer assigned)
- PAPER FILE COPY (TaxSlayer assigned)
- QUALITY REVIEW (TaxSlayer assigned)
- Any print set created at the site
- Any print set assigned from a Group Level

The preparer can choose from the following print sets when printing a return from the Client List. These print sets cannot be modified:

- TAXPAYER COPY PRINT (TaxSlayer assigned)
- PAPER FILE COPY (TaxSlayer assigned)
- QUALITY REVIEW (TaxSlayer assigned)
- Any print set created at the site
- Any print set assigned from a Group Level

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View TSO/Group Level Print Sets

To view the contents of a print set that was assigned by TSO or a Relational Group Administrator, do the following:

1. From the “Welcome” page, click on the “Configuration” line.
2. On the “Configuration Menu” landing page, click on the “Print Sets” line to view a list of available print sets.
3. To view a print set, click “View” for the print set to show the contents.
4. You cannot edit these print sets.

Create your own Custom Print Set

To create your own custom print set, do the following:

1. From the “Welcome” page, click on the “Configuration” line.
2. On the “Configuration Menu” landing page, click on the “Print Sets” line to reach the “Print Sets” landing page.
3. Click on “Add Print Set.”
4. Type a name for your print set in the “Print Set Name” box. This name should be unique to your site.
5. Change the number of copies for each form you want to include in the print set. **TIP:** You can type a form name in the “Search forms” box to search for that form, or filter by federal or state forms.
6. If you want to add multiple forms at the same time, click “Set Range” to show the “Set Print Count by Range” window.
7. Verify the numbers in the “Beginning Range” and “Ending Range” boxes. These numbers correspond to the number of the form as shown in the first column of the Print Setup landing page. You can view the number assigned to each form or schedule to change the range. If you want to change the number of copies of all forms for this print set, leave the range as it is.
8. Type the correct number in the “Print Count” box.
9. Click “Submit” to save your selections.
10. The new number of copies in the print set are shown on the screen.
11. Click “Save” when you are finished making changes.
12. To set a print set as the default set for all returns printed from the Client List and/or Submission page, click “Set As Default” on the line for that print set.
13. To edit or delete a print set you created, click “Edit” or “Delete.”
14. When you are finished adding print sets, click “Back” to return to the

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“Configuration Menu” landing page.

Set the Default Print Set from the Relational Group Level

Relational Group Administrators can set the default print set to any print set they create and then can set it as the default print set so the subscriber sites will not have to create the print sets themselves.

To set the default print set at the Relational Group Level, do the following:

1. Login to TaxSlayer Pro Online with the assigned Group Level login to reach the “Group Menu” screen.
2. Click “Select” on the “Group Configuration line to show the “Configuration Menu.”
3. Click “Select” on the “Print Set Templates” line.
4. On the “Print Set Templates” page, click “Assign” on the line for the print set you want to assign as the default print set.
5. Select the “Set Assigned as Default Print Set “check box.
6. In the “Offices” section, click the check box for all applicable sites that you want to assign the print set as the default.
7. Click “Continue.”

Note: Sites cannot modify the assigned print set, but they can change their default print set.

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Step 6. Question Templates

TaxSlayer Pro Online provides predefined questions that preparers can use to capture data during the return preparation process. You can add more questions but cannot edit or delete these questions. Answers must be chosen from a drop-down list of predefined answers. Questions 1-9 are provided for the IRS and TA01-TA11 for AARP Foundation Tax-Aide.

Question	Required
1. Would you say you can carry on a conversation in English, both understanding and speaking?	No
2. Would you say you can read a newspaper or book in English?	No
3. Do you or any member of your household have a disability?	No
4. Are you or your spouse a Veteran from the US Armed Force?	No
5. Your Race?	No
6. Your Spouse's race?	No
7. Your ethnicity?	No
8. Your spouse's ethnicity?	No
9. Was the taxpayer physically present during the entire return preparation and quality review process?	No
TA01. What is your current gender identity?	Yes
⋮	
TA08. How much did the taxpayer deposit in savings accounts today?	Yes
TA09. To what type of account did the taxpayer direct their savings?	Yes
TA10. Do you rent or own your home?	Yes
TA11. What is the status of Form 8879?	Yes

Save < Back

To create new questions:

1. From the “Welcome” page, click on the “Configuration” line.
2. On the “Configuration Menu” landing page, click on the “Custom Questions” line.
3. Click the “Add Questions” box.
4. On the “Add Question” page, type in the custom question, no longer than 100 characters. Select the Tax Year that this question pertains to.
5. If you want the preparer to be required to answer the question, check the “Is Required” box below the new question.
6. Click the “Add” beside “Available Answers” to create a drop-down menu of available answers to the custom question. There are no limits on the number of answers, but each answer must be shorter than 100 characters. As each answer is created, click “Add” to continue entering answers.

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Step 7. Reports

TaxSlayer Pro Online contains the following three reports that provide a detailed listing of the information gathered from the questions and answers at the site level. You can use to analyze the data captured with the custom questions The reports are the following:

- Question Statistics
- Return Questions with Consent Indicator Report
- Return Questions

To select the order in which reports will be display:

1. On the “Configurations Menu”, click on the line “Report Customization”.
2. In the box below “Report Type” type in the name of the report that you would like to appear at the top of your list of reports.
3. As you start to type, a list of reports will be displayed for you to select from. You can also place your cursor in the box and press the down arrow. Continue to add reports until all of your desired reports are shown.
4. Once you have selected all of your desired reports, you can sort them by clicking on the name of the report and moving the report either up or down the list.
5. If you have selected a report that you later decide you do not want, click the “X” at the far- right end of the line.
6. Click Save when finished, and then Back.

Step 8. Tags

TSO has no predefined Tags. You can add your own tags using this function. You can also require that a Tag be selected on the Submission Page of the return. (See Step 1. Office Setup) Tags are carried forward from prior years.

To create your own return tags:

1. On the “Configuration Menu”, click on the “**Tags**” line.
2. To create a new Tag, enter the Tag name into the “Add New Tag” box (for example, “Mobile Site”, then click “Add” at the end of the line. The new tag will appear on the page.
3. Repeat ‘2’, above, to add more tags.
4. Tags may be moved up and down the list by a “click & drag” in the gray box above the tag.
5. When finished, click “Back” to return to the Configuration Menu page.

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Step 9. Taxpayer Profile (optional)

The “Taxpayer Profiles” page displays two TSO predefined profiles, a “Basic” profile, which is empty, and the “Master Profile” which is defined by the IRS. It also contains Relational Group Administrator defined profiles. TSO predefined profiles and Relational Group Administrator defined profiles cannot be edited, copied or deleted by the Site Administrator.

To set up your own profiles:

1. On the “Configurations Menu”, click on the “**Taxpayer Profile**” line.
2. The Taxpayer Profile is a return preparation shortcut for Federal returns only; there are no Taxpayer Profiles for State returns. A selected profile presents the identified forms to the preparer after completing the taxpayer personal information. Profiles can be created for specific tax years; the Taxpayer Profiles will remain associated with those tax years in future years.
3. The Taxpayer Profile must be selected before the return is started and cannot be changed once the return is started.
4. Create new Admin-defined custom profiles by clicking on “Add” (beside Add Taxpayer Profile).
5. Enter the profile name in the “Profile Name” box, enter a description in the “Description” box and select the tax year from the drop-down box beside “Tax Year”. The Description will be shown for each new return; therefore, it is suggested that the forms chosen for the profile be included in the Description.
6. In the “Tax Form (Look Up) Check box, enter the first form to be included. When found, highlight the form and click on it – it will appear in the “Selected Tax Forms” list just below.
7. Enter the next form in the “Tax Form (Look Up) Check box, highlight it and click it. Continue until all of the desired forms appear in the “Selected Tax Forms” list. There is no limit to the number of forms that may be included.
8. To arrange the order of presentation to the preparer, drag each form to the appropriate location. Click “Save”.
9. Review the “Taxpayer Profile” page, including the description and tax year. Admin-defined profiles can be edited or deleted by clicking the “Edit” box or “Delete” box which appear at the end of the line. Beware: If an MSA edits or deletes a profile, it will change the subscriber’s profile as well.
10. When finished click “Back” to return to the Configuration Menu page.

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Step 10. Relational Group Administration Information

Due to the implementation of Relational Groups, no Multi-Site Administrators will be used in Tax-Aide starting with TY 2019.

Each Tax-Aide site will be assigned to a Relational Group. Every site within a Relational Group will belong to the same split-state, and each split-state may have more than one Relational Group. Each split-state will have two designated Administrators to administer all the Relational Groups in that split-state. A Relational Group Administrator can send customized print sets, security templates, and taxpayer profiles to the sites in the Relational Group, similar to the Multi-Site Administrator functionality that was previously used.

As you set up your site, you may see some of these items already installed. It is your option to use them or ignore them and create your own. They cannot be edited or copied.

Revision History

Version #	Date	Initials	Comments
1	7/15/2022	SM	Initial Release
	8/1/2022	JB	NTSC Reorganization/Standardization
2	11/20/2022	SM JB	Updated Security Template settings for Admin Asst, added TY to Custom Questions, Corrected links, added TOC, formatted in Google Docs, added CurrentDate Apps Script