



VITA/TCE

TaxSlayer FSA Program

Click on the link that was sent to you.

TaxSlayer FSA displays the **Welcome** page:

Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- No income limitations
- No age limitations
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

Click the Continue button to create a new account or login with an existing account.

2. Click **Continue**.

TaxSlayer FSA displays the **Sign In** page:

Sign In

Need a TaxSlayer account? [Create account.](#)

Username

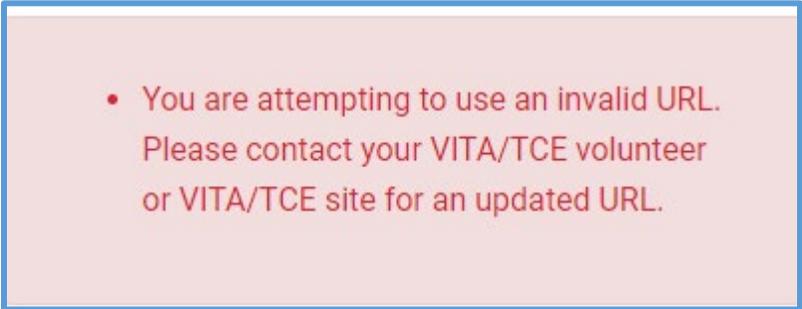
Password

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

By clicking Sign In, you agree to our [Privacy Policy](#) and [License Agreement](#).

Copyright © 2020 TaxSlayer

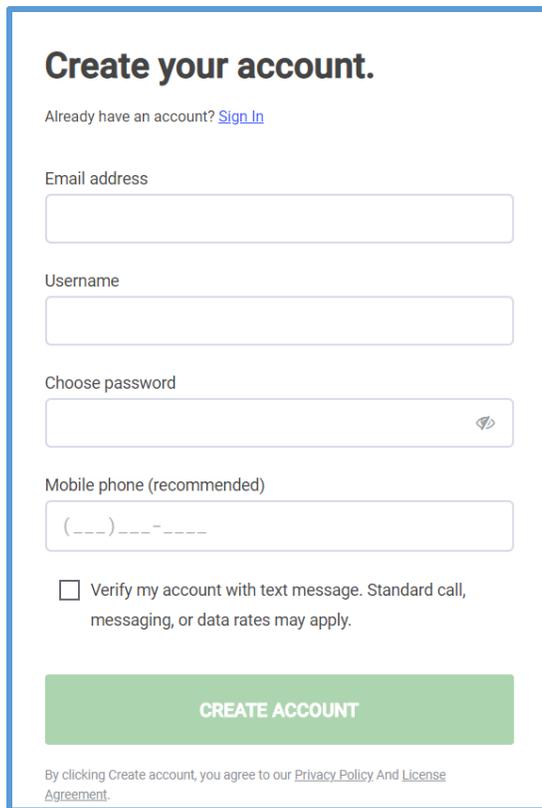
Note: If the taxpayer uses an invalid URL, TaxSlayer FSA displays the error message shown below. Do not allow the taxpayer to continue. Restart the taxpayer using the correct URL.



Tip: If the taxpayer already has a TaxSlayer account from a previous year and has not logged in yet during the current filing season, he or she can log in with the existing user name and password.

3. If the taxpayer does not have a TaxSlayer account, he or she should click **Create account**.

TaxSlayer FSA displays the **Create your account** page:



Create your account.

Already have an account? [Sign In](#)

Email address

Username

Choose password

Mobile phone (recommended)

Verify my account with text message. Standard call, messaging, or data rates may apply.

CREATE ACCOUNT

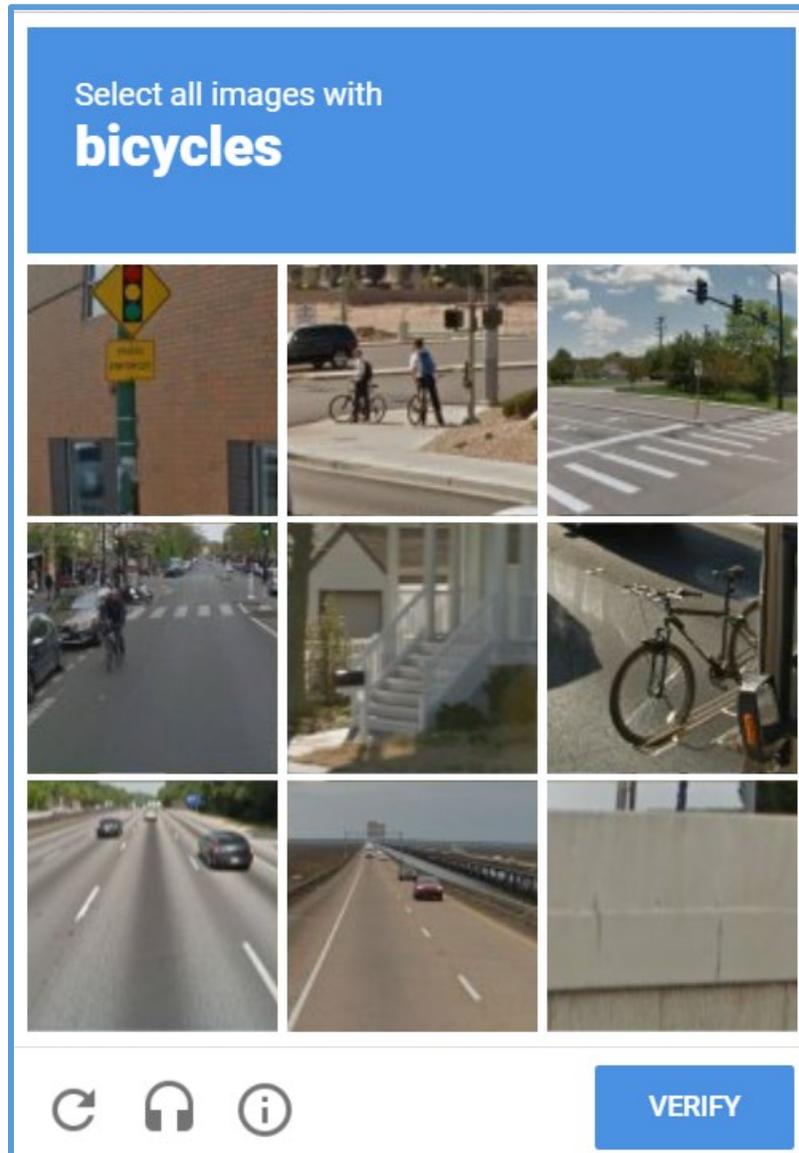
By clicking Create account, you agree to our [Privacy Policy](#) And [License Agreement](#).

4. Type an email address, user name, password, and cell phone number in the appropriate boxes.

Tip: TaxSlayer FSA uses the same password requirements as TaxSlayer Pro Online.

5. Click **CREATE ACCOUNT**.

TaxSlayer FSA displays the reCAPTCHA verification page:



6. Follow the instructions on the reCAPTCHA page.

7. Click **VERIFY**.

If the taxpayer entered a cell phone number on the **Create your account** page, TaxSlayer FSA displays the **Check your phone** page:

Check your phone

Enter the verification code we sent you to verify

We sent a code to:

[Blurred phone number]

Enter the 6-digit code

[Resend Verification Code](#)

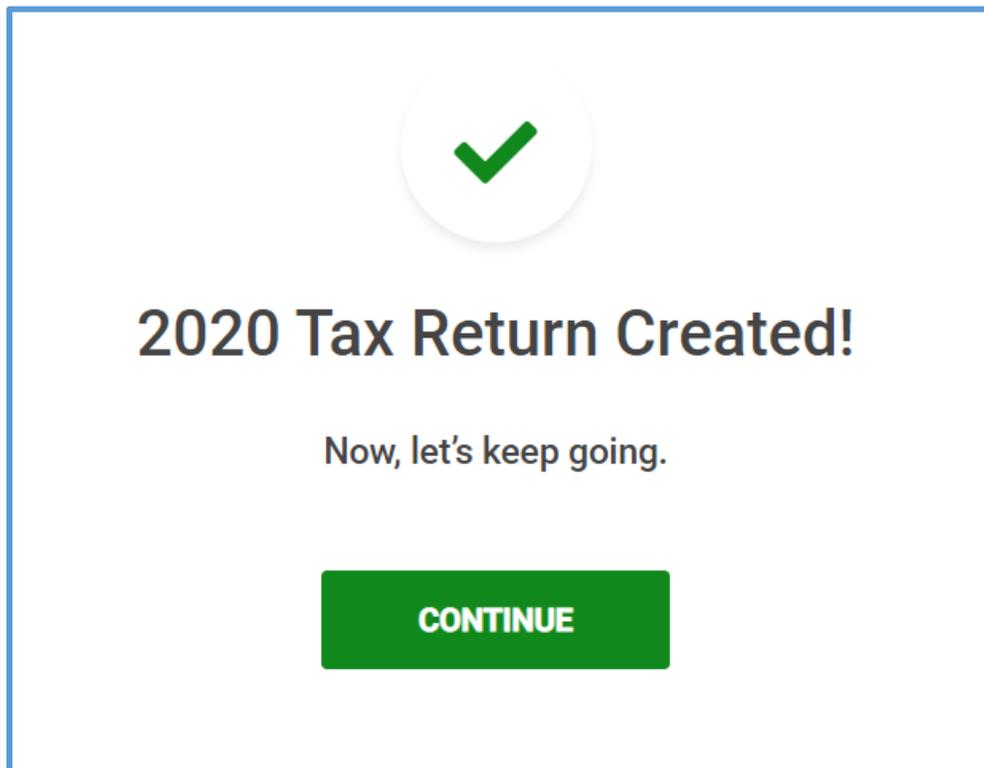
[Skip](#) **VERIFY**

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8. Type the 6-digit code from the text into the appropriate box.
9. Click **VERIFY**.

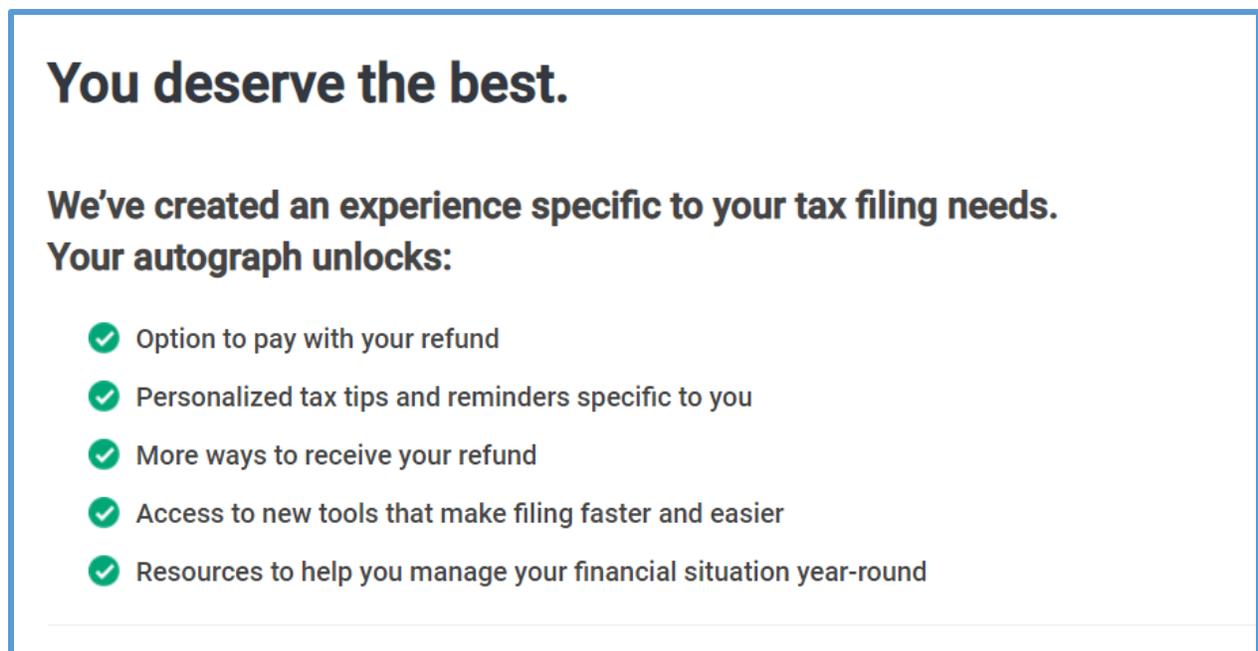
Tip: The taxpayer can verify the code by email if he or she did not add a cell phone number when creating the account.

TaxSlayer FSA displays the **Tax Return Created** page:



10. Click **CONTINUE**.

TaxSlayer FSA displays the **You deserve the best** page with information about the process:



11. Read the information on the page and click **CONTINUE**.

TaxSlayer FSA displays the **Let's get this out of the way** page:

Let's get this out of the way.

Review the legal info below, give us your autograph, and you'll be on your way to a faster, easier tax filing experience – created with you in mind.

Sign by typing your name and the date in the boxes below

Use of Information

Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of Tax Return Information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your Tax Return Information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

We use the information you provide (discussed above) to complete services and products you request. That is, we may use your information to show you additional products (if applicable) such as options to pay for tax preparation services (e.g. Refund Transfer), various ways to receive a refund disbursement, personalized tax tips, and other relevant products and services based upon your Tax Return Information. These offers may come from us or a third-party service provider. As permitted by law,

PRINT

Full Name *

12. Read the information on the page and type your full name and today's date in the appropriate boxes.

13. If you are filing a return with your spouse, select the **I am filing with my spouse** check box and have your spouse type the appropriate information.

14. Click **CONTINUE**.

Preparing the Return

After the taxpayer logs in to the return, he or she can begin preparing the return. To prepare the return, use the following steps:

1. Do one of the following:
 - a. If you have a PDF of the previous year's return, upload it to import personal information.
 - b. Click **Skip**.
2. Type or verify your personal information.

Personal Information

Taxpayer's Information

Primary taxpayer first name MI

Last name Suffix (Jr, Sr, etc.)

SSN *The IRS requires your Social Security Number for e-filing.**
 - -

Date of Birth
MM DD YYYY

Occupation

TaxSlayer FSA guides the taxpayer through personal and dependent information just like TaxSlayer Pro Online. When the personal and dependent information is completed, TaxSlayer Pro Online displays the **Know which forms you need?** page:

Know which forms you need?

Search for them with Quick File, and we'll take you directly to them.

Do you want to use Quick File? *

Yes

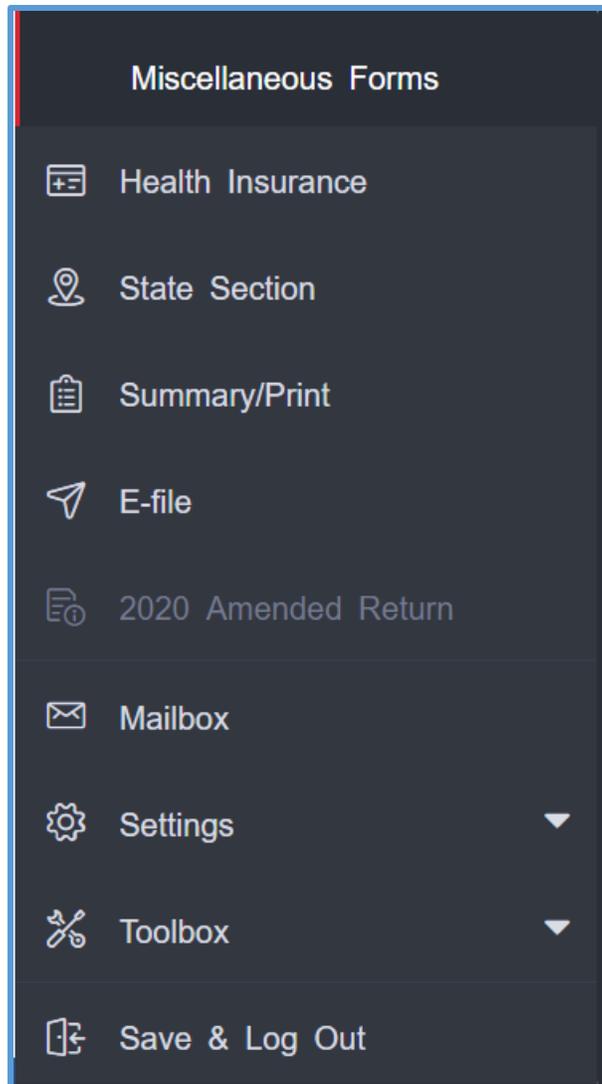
No

3. Select **Yes** to use Quick File or **No** to skip loading forms.
4. Click **CONTINUE**.
5. If you selected that you want to use Quick File, select the forms you need in the return.

TaxSlayer FSA allows the taxpayer to choose either **Guide Me** or **Enter Myself** just as in TaxSlayer Pro Online. The taxpayer can prepare the return using either method.

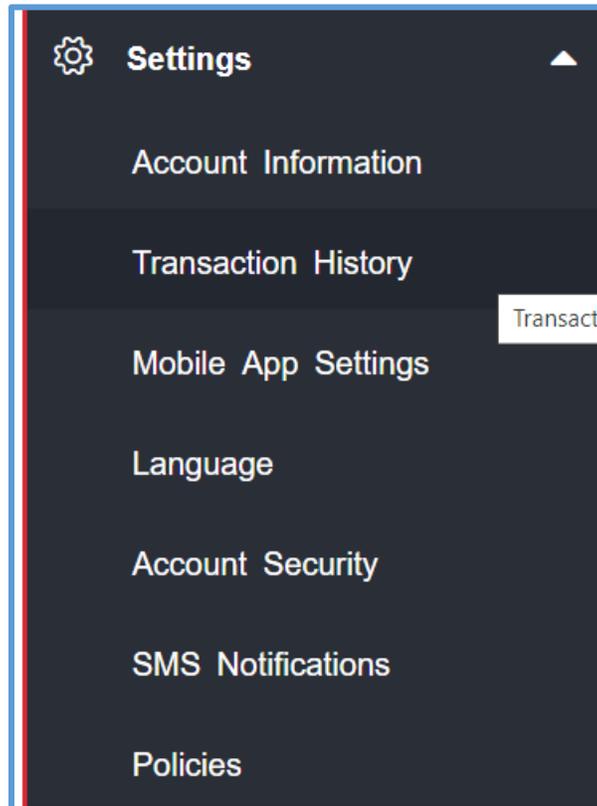
Preparing the Return in Spanish

If the taxpayer needs to prepare the return using Spanish, you can change the language using the following steps from the left navigation panel:



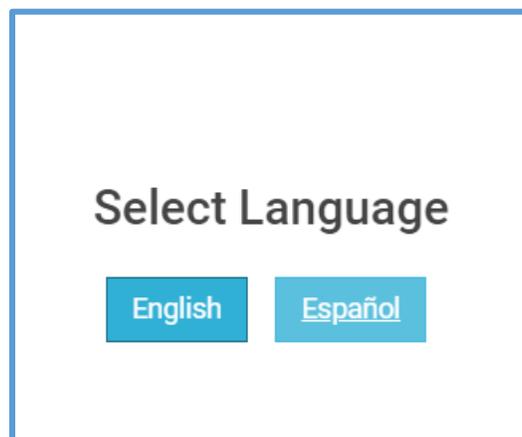
1. Click **Settings** to expand the section.

TaxSlayer FSA displays the **Settings** options:



2. Click **Language**.

TaxSlayer Pro Online displays the **Select Language** pop-up window:



3. Click **Español** to change the language to Spanish.

TaxSlayer FSA displays Spanish on-screen and in IRS-available forms:

Ingresos

W-2 *(Formulario mas comun)* ?
Sueldos y Salarios

1099-DIV, INT, OID ?
Interés y Dividendos

1099-MISC ?
Ingresos Misceláneos

Differences in TaxSlayer Pro Online and TaxSlayer FSA

When the taxpayer works through FSA, you will see some differences in the two programs.

[Summary/Print Page](#)

TaxSlayer FSA displays only the Summary View display on the **Summary/Print** page. Taxpayers cannot view the 1040 View.

Tax Return Summary



Total Income	\$25,000.00	▼
Adjusted Gross Income	\$25,000.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$1,120.00	▼

The taxpayer can click a heading to expand the section:

Total Income	\$25,000.00 ▾
Wages, salaries, tips, etc.	\$25,000.00
Taxable interest	\$0.00
Tax-exempt interest	\$0.00
Ordinary dividends	\$0.00
Qualified dividends	\$0.00

Click the line to navigate to that section in the return.

E-file

With TaxSlayer FSA, the taxpayer e-files his or her own return. TaxSlayer FSA asks for the taxpayer's prior year AGI:

Testing, for IRS Acceptance, we need the Adjusted Gross Income (AGI) from your tax return.

Do you have access to your 2018 tax return?

Yes, I have my 2018 tax return with me.
 No, I cannot locate my 2018 tax return.
 No, I didn't file a 2018 tax return.

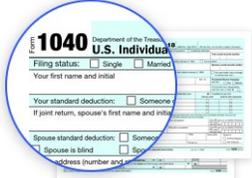
If the taxpayer does not have access to the previous year's return, TaxSlayer FSA defaults the prior year AGI to \$0 and continues with e-file.

If the taxpayer does have the previous year's AGI, TaxSlayer FSA walks the taxpayer through entering the information from that return:

Testing, which tax return did you file last year?

Look for the number in the top-left corner of your federal return.

1040
 1040NR
 1040X



Tell us what's on line 7 of your 2018 form 1040

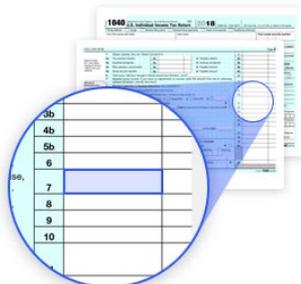
< Form type: 1040 

2018 Adjusted Gross Income

Round to the closest dollar if your AGI has cents

Note: Your 2018 AGI can only be found on last year's tax return. It isn't on your W-2 or any other form. The IRS will compare the number you enter to the AGI they have on file for you. If the number you enter is incorrect, your e-file will be rejected.

Your AGI is listed on **line 7** of your 2018 form **1040**.



Taxpayer PIN

With TaxSlayer FSA, the taxpayer creates his or her own PIN to e-file the return. The taxpayer can use any 5-digit number for the PIN.

Create your PIN.

Create a 5-digit PIN for this year's tax return. Next year, we will automatically populate this for you.

Taxpayer's 5-digit PIN

State Information

Some states request the taxpayer's ID information. If so, TaxSlayer FSA walks the taxpayer through entering the information.

Identifying Information

[Does not have Identification](#) [I do not wish to provide](#)

ID Type *

Issuer *

ID Number *

Issue Date *

No Expiration Date

Expiration Date *

Security Check

As a last step before e-filing the return, TaxSlayer FSA asks the taxpayer to submit a security check, as shown below:

Almost done!

The IRS requires us to verify you're a human, which helps keep your information and money safe and sound.



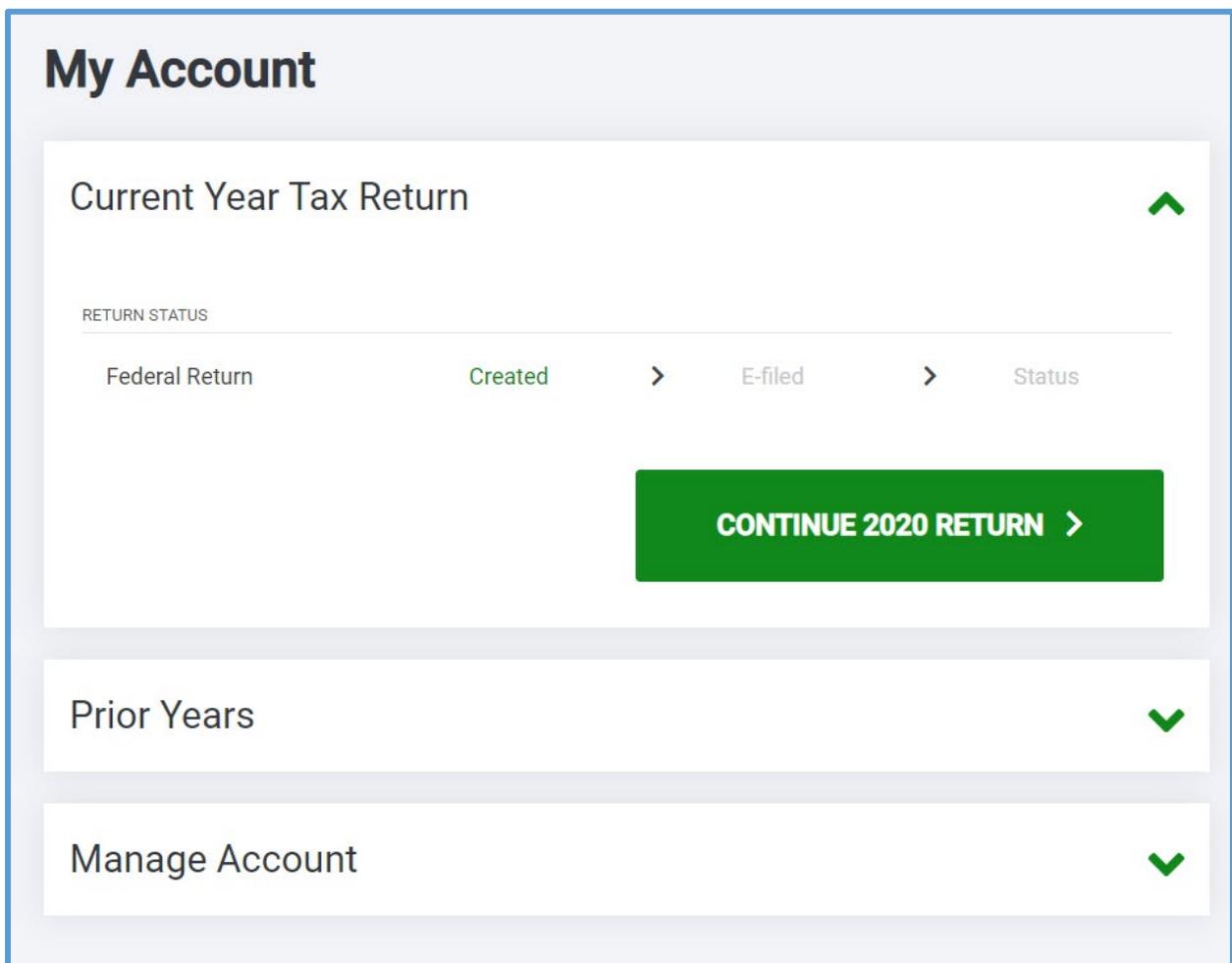
Enter the code shown above into the box below:

Payment

Taxpayers do not need to pay when preparing a return though TaxSlayer FSA. If TaxSlayer asks the client to pay, the taxpayer did not start from the appropriate TaxSlayer FSA URL. He or she will need to deactivate the return and start from the correct TaxSlayer FSA URL provided by your site. If the taxpayer needs to deactivate the return, direct the client to use the following steps:

1. Click **My Account** in the left navigation panel.

TaxSlayer FSA displays the **My Account** page:



My Account

Current Year Tax Return 

RETURN STATUS

Federal Return	Created	>	E-filed	>	Status
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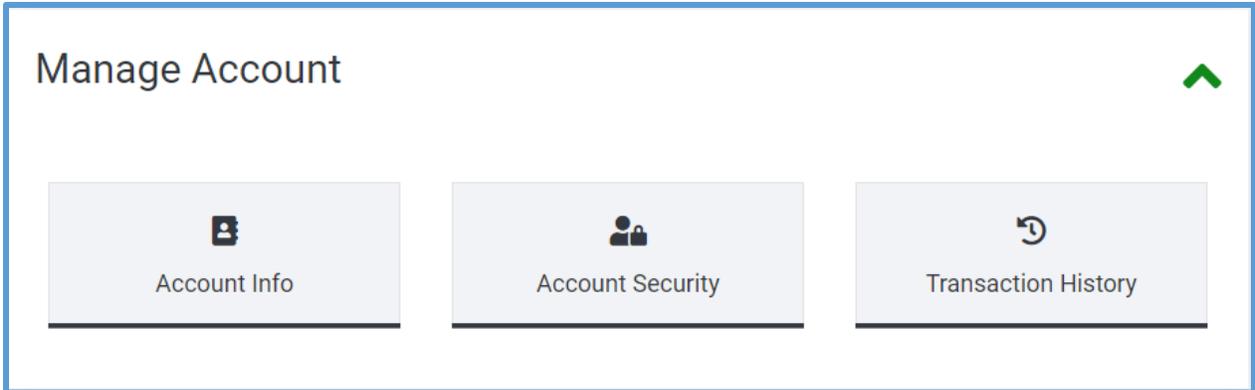
CONTINUE 2020 RETURN >

Prior Years 

Manage Account 

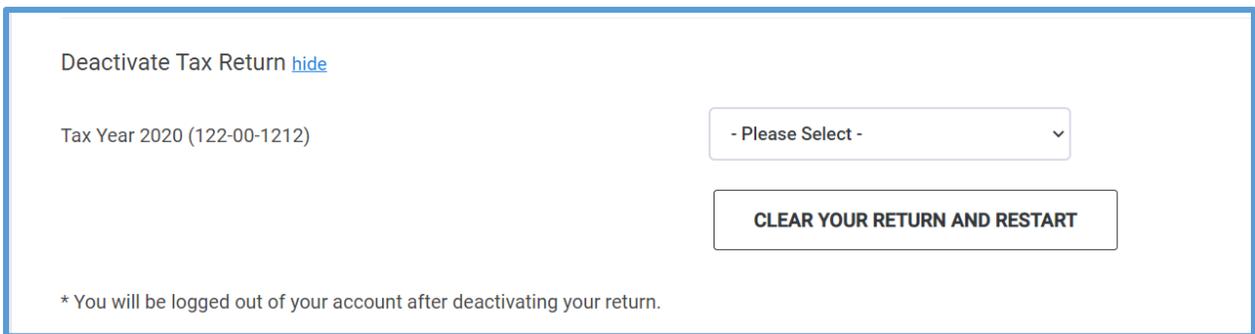
2. Click the **Manage Account** heading to expand the section.

TaxSlayer FSA displays the **Manage Account** options:



3. Click **Transaction History**.

TaxSlayer FSA displays the **Transaction History** page:



4. Select the appropriate option from the **Tax Year 2020** drop-down list.

5. Click **CLEAR YOUR RETURN AND RESTART**.

TaxSlayer FSA clears the return and logs the taxpayer out of the FSA program.

6. Ensure that the taxpayer uses the correct URL and restart the return using the same credentials used earlier.

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