

Completing the e-File Section

e-File Process

When all the data has been entered, complete the e-file section. The return should not be filed (e-filed or as a paper return) until the e-file section has been completed. All required entries per section must be completed before saving and exiting the section. This is consistent with how the preparer navigates the entry pages in the return.

Return Type	Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites (Global Carryforward)
Tax Preparation and e-File Information	Request for Taxpayer Consent to Disclose Tax Return Information
State Return(s)	Request for Taxpayer Consent to Use Tax Return Information
Taxpayer Bank Account Information	State ID (Optional) (Shows only if there is a state return)
Third Party Designee Info	
Questions	

Federal Return Type

Select type of federal return. The drop down options for a balance due return differ from those for a return with a refund. Most states may require the federal return be e-filed before the state e-filed return can be electronically processed. Tax-Slayer will wait until the federal return is accepted and then transmit state returns.

Apply your State Refund. Select the Send State Only box if the state return is to be e-filed, but federal will not be filed.

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.

Refund summary

Send State Only

Federal Return Type

E-file: Direct Deposit ▾

Please Select

E-file: Paper Check

E-file: Direct Deposit

Paper Return with Direct Deposit

Paper Return

Federal and State Return Types with a Refund	
E-file: Paper Check	E-filed with refund check mailed to taxpayer
E-file: Direct Deposit	E-filed with direct deposit
Paper Return with Direct Deposit	Paper return with direct deposit
Paper Return	Paper return with check mailed to taxpayer
Federal and State Return Types with an Amount Owed	
Mail Payment	E-filed without direct debit
Direct Debit	E-file with direct debit
Paper Return	Paper return with check included

To apply a federal refund towards next year's taxes open Federal>Payments and Estimates>Apply Payments to Next Year's Taxes.

To apply state refund to next year's state taxes, go to State>Payments>Apply your State Refund.

Completing the e-File Section (continued)

State Return(s)

Enter type of state return

State Return(s)

Choose how you would like to file your state returns:

State	Refund/Due	Return Type
GA	Due: \$ 481.00	<div style="border: 1px solid black; padding: 2px;"> Not Selected Not Selected Paper Return E-file: Mail Payment E-file: Direct Debit </div>

By using a computer system and software to prepare and file electronically, I confirm the disclosure of all information pertaining to my use of the electronic transmission of this tax return to the Department, as applicable by law.

If the state return is marked as Paper and the federal return is e-filed, confirm this is the correct choice and not a mistake.

Taxpayer Bank Account Information

If direct deposit or direct debit is selected for either federal or state return, the Taxpayer Bank Account Information screen will appear.

In this section, the preparer inputs the bank routing and account number for direct deposit of refund or automatic withdrawal of balance due.

State Return Types with a Refund	
E-file: Paper Check	E-filed with refund check mailed to taxpayer
E-file: Direct Deposit	E-filed with direct deposit
Paper Return with Direct Deposit	Paper return with direct deposit
Paper Return	Paper return with check mailed to taxpayer
State Return Types with an Amount Owed	
Mail Payment	E-filed without direct debit
Direct Debit	E-file with direct debit
Paper Return	Paper return with check included

Note: This bank information MUST be accurate for your return to process correctly.

Name of Bank

Type of Account

Routing Transit Number

Confirm Routing Transit Number

Bank Account Number

Confirm Bank Account Number

Input the name of the bank as stated on the check (Optional).

Input both the routing and account number twice on this screen

Re-loadable Prepaid Bank Cards:

The taxpayer must provide the routing number and account number for the card so that it can be entered on the bank information screen.

Note: See Pointers for Direct Deposit of Refunds later in this tab.



Use written or electronic account information from the financial institution.

Completing the e-File Section (continued)



TaxSlayer Navigation: (Administrator) Configuration>Office Setup

Split Refund Option

<input type="checkbox"/>	Disable Third Party Designee Prefill
<input checked="" type="checkbox"/>	Offer 8888 ←
<input checked="" type="checkbox"/>	Display Summary using 1040 View
<input checked="" type="checkbox"/>	Hide Preparer Name on 1040 Print

When the taxpayer elects to direct deposit his or her refund into two or three accounts or to purchase saving bonds, you will need to answer additional questions in the e-file section.

First, someone with Administrator privileges must go to Configuration>Office Setup and mark the box for Offer 8888.

This will allow all preparers at that site to offer Form 8888, Allocation of Refund (Including Savings Bond Purchases). Form 8888 also supports double-entry of bank routing and account information.

Note: This bank information MUST be accurate for your return to process correctly.

You may split your refund in up to 3 accounts, paper check and purchase up to 3 savings bonds. The total deposits and savings bond purchases must equal your total refund of \$4,261.00

Bank Accounts

Enter bank account information where you would like your refund deposited.

Bank Account 1

Account Type	Bank Name	Deposit Amount	Split Refund
Checking ▾	<input type="text"/>	\$0.00	
Routing Number	Account Number		
<input type="text"/>	<input type="text"/>		
Confirm Rtn Number	Confirm Account Number		
<input type="text"/>	<input type="text"/>		

Paper Check Allocation

Allocate portion of the refund to be issued as a paper check.

Purchase Savings Bonds

You can purchase up to 3 savings bonds with the remainder of your refund.

Bond amounts must be in \$ 50 increments

Bank Accounts

Enter bank account information where you would like your refund deposited.

Bank Account 1

Account Type	Bank Name	Deposit Amount	Split Refund
Checking ▾	<input type="text"/>	\$0.00	
Routing Number	Account Number		
<input type="text"/>	<input type="text"/>		
Confirm Rtn Number	Confirm Account Number		
<input type="text"/>	<input type="text"/>		

Bank Account 2

Account Type	Bank Name	Deposit Amount
Checking ▾	<input type="text"/>	\$0.00
Routing Number	Account Number	
<input type="text"/>	<input type="text"/>	
Confirm Rtn Number	Confirm Account Number	
<input type="text"/>	<input type="text"/>	

Note: TreasuryDirect® Account

Taxpayers can request a deposit of their refund (or part of it) to a TreasuryDirect® online account to buy U.S. Treasury marketable securities and savings bonds. For more information, go to Treasury Direct (https://www.treasurydirect.gov/indiv/research/faq/faq_irstaxfeature.htm)

Note: The taxpayer's name must be on the account in order for a refund to be deposited.

Completing the e-File Section (continued)

Purchase Savings Bonds

From Split Refund Screen, savings bonds can be purchased.

Purchase Savings Bonds

You can purchase up to 3 savings bonds with the remainder of your refund.

Bond amounts must be in \$ 50 increments

Purchase A Bond I do not want to purchase this bond

Amount to be used for bond purchase for yourself

Purchase another bond for yourself or someone else I do not want to purchase this bond

Bond Amount

Enter the owner's name (First then Last) for the bond registration

If you would like to add a co-owner or beneficiary, enter the name here (First then Last)

Is Beneficiary?

Note: U.S. Series I Savings Bonds Taxpayers can request that their refund (or part of it) be used to buy up to \$5,000 in series I savings bonds. Taxpayers can buy bonds electronically by direct deposit into their TreasuryDirect® account. Or, if they don't have a TreasuryDirect® account, they can buy paper savings bonds.

Third Party Designee Info

This information is optional but must be filled out completely if you choose to include it.

First Name

Designee Last Name

Designee Phone
() -

Designee Pin

Third party designee info can be completed if the taxpayer wishes, but the designee is never the volunteer preparer.

Global Carryforward

Consent Status

I / we, the Taxpayer have read the above information. By typing in my / our taxpayer PIN(s) and checking this input, I / we hereby **GRANT** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites" as stated above.

I / we, the Taxpayer have read the above information. By checking this input, I / we hereby **DENY** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites" as stated above.

Primary PIN (enter 5 numbers)

Primary PIN Date

Secondary PIN (enter 5 numbers)

Secondary PIN Date

Grant = Next year, the taxpayer's data will carry forward to any VITA/TCE site using TaxSlayer.

Deny = Next year, the taxpayer's data will carry forward only to the VITA/TCE site that prepared the return.

Note: Paper Form 15080, Consent to Disclose Tax Return Information to VITA/TCE Tax Return Preparation Sites, is not needed if the taxpayer denies the Global Carryforward of return data to all sites, enters his/her own PIN into TaxSlayer, or if the site uses another tax preparation software.

Completing the e-File Section (continued)

Questions

Answer national and local questions

1. Would you say you can carry on a conversation in English, both understanding and speaking?	Please Select ▾
2. Would you say you can read a newspaper or book in English?	Please Select ▾
3. Do you or any member of your household have a disability?	Please Select ▾
4. Are you or your spouse a Veteran from the US Armed Force?	Please Select ▾
5. Your Race?	Please Select ▾
6. Your Spouse's race?	Please Select ▾
7. Your ethnicity?	Please Select ▾
8. Your spouse's ethnicity?	Please Select ▾
9. Was the taxpayer physically present during the entire return preparation and quality review process?	Please Select ▾

Use these fields for information that is helpful to your site. For example, these fields could be used to enter the preparer's name and/or new versus returning taxpayers. These fields are used by the military to report rank, grade, enlisted/retired, etc.

After the end of the tax season a custom report can be created.

State ID (Optional)

Some states require a drivers license or additional taxpayer identification in order to e-file the return. This screen will appear only if there is a state return.

You may provide your state issued id or drivers license in the section below. This information is optional but may assist the state in verifying your identity and processing your return.

Taxpayer ID Information

Type
Please Select ▾

Number
[Text Field]

Issue Date
mm/dd/yyyy

Expiration Date
mm/dd/yyyy

No Expiration date

Issue State
Please Select ▾

NY Document ID
[Text Field]

If the issue state is NY, this field is required. Please enter only the first three characters of the NY Document number on the Driver's License/State ID

Select driver's license or ID, license number, date issued, date expires and issuing state.

If taxpayer's license has expired, select None Available. See state requirement and work around if applicable.