

## TS-01 TaxSlayer (TY2015 Practice Lab) Tips

1. Suggest keeping a link to the Practice Lab handy: <https://vita.taxslayerpro.com/IRSTraining/>
  2. In the Practice Lab, trainers cannot look at your returns without your username and password.
  3. To move quickly from one return to another, click on the taxpayer name at the top left & choose Your Office. This takes you to the Welcome page where you can do a Client Search. Returns can be quickly found by taxpayer name or SSN with Client Search (no need to press ENTER)
  4. When you choose Summary/Print on the left side and see the 1040, you can click on any blue right column amount to take you to the source of the amount. Nothing similar can be done for state returns.
  5. TS has promised "view form" (without any links) to see what's on completed Schedules A,B,C, etc. Until then and for other forms (other than the 1040), choose Summary/Print on the left, Preview the Return, and Print Your 2015/2016 Tax Return. This will give you a pdf of the return.
  6. Most of a tax return begins with the Federal Section (or the 1040 summary page). When the Federal Section is open, there are 5 shortcut links at the top (just below the refunds): Income, Deductions, Other Taxes, Payments & Estimates, and Miscellaneous Forms. On the left side are 9 shortcut links: Basic Info, Federal section, Health Insurance, State Section, Summary/Print, e-File, 2015 Amended Returns, Save, and Scanned Documents.
  7. Changes in a form/wkt/screen are not saved until you click Continue at the bottom of the page!
  8. You may need to click Continue multiple time before the Federal Refund / NJ Refund Amount are updated – watch for the spinning arrows.
  9. "Enter the Form Number" at the upper left (under the taxpayer's name) can be used find a federal (but not state) form. Type the form number in the box and see if the form shows.
  10. "Enter the Form Number" can also be used to find the TS entry place for a topic (such as capital gains, IRA, medical, mortgage, education, energy, sales tax, cancellation, etc.), as well as a form number.
  11. When unsure where in TaxSlayer to enter something, check the [TaxPrep4Free look up Tool](#) for help.
  12. In lieu of the nonexistent HELP feature in TS, we can SEARCH the [TaxSlayer Manual on TP4F](#).
  13. Direct deposit info is not given until the e-File process has been started.
  14. State estimated payments are under Federal / Payments & Estimates / State
  15. Changing the Filing Status will delete any existing State return (a warning is given)
  16. Changing the TP address under Basic Information \ Personal Information does NOT change the TP/SP address info on any existing forms (e.g. W-2, 1099-R, etc.)
  17. See the TaxSlayer Issues document (link on [TaxSlayer Resources page](#)) for known NJ issues
- (Originally extracted from North Carolina QuickGuide document)