



VITA/TCE

TaxSlayer FSA Program

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# FSA Program

After completing this lesson, you should be able to:

1. Define the TaxSlayer FSA program.
2. Set up the TaxSlayer FSA program at your site.
3. Guide taxpayers to complete a return in TaxSlayer FSA.
4. List and describe the differences in TaxSlayer Pro Online and TaxSlayer FSA.
5. Deactivate a TaxSlayer FSA return if opened using the wrong URL.

## What is the FSA Program?

The TaxSlayer FSA Program is the Facilitated Self Assistance program. The FSA program allows taxpayers to self-prepare returns with assistance from a certified volunteer. VITA/TCE sites can order FSA three different ways for the 2021 Filing Season:

- **Fusion:** FSA has the same physical location as the traditional site. Clients can self-prepare their current Federal and state tax returns with a certified volunteer available to help with tax law questions. The FSA fusion product must be ordered at the same time as the traditional online or desktop TaxSlayer product.
- **Standalone:** FSA has a separate physical location. Clients can come in during posted hours to self-prepare their current Federal and state tax returns with a certified volunteer available to help with tax law questions.
- **Remote:** A volunteer can email the site's custom FSA URL to known individuals or place a link on a private website. Clients can self-prepare their current Federal and state tax returns with a certified volunteer available to help with tax law questions via phone, chat, or email. Remote sits cannot place the custom FSA URL on any public-facing website, social media or blog platform, or include the URL in any electronic newsletter or newspaper article or mass email.

The TaxSlayer Online FSA program works the same way for the taxpayer in all cases.

## Setting up FSA

TaxSlayer sends each participating FSA site a unique link that contains the site's SIDN. Read the email you receive from TaxSlayer carefully and ensure that the last characters of the URL correspond with your SIDN:

Please safeguard this URL and DO NOT make any modifications to it. If the last 8 numbers do not correspond with the URL assigned to your FSAFS order, please let us know so we can update our records and generate a new URL

We recommend making your URL the default homepage for each self-prep station at your site. Refresh the homepage after each use to ensure the next taxpayer is creating their account under the correct URL for your site.

The above URL will take the taxpayer directly to a VITA/TCE Kiosk landing page login page. They will click continue to create a user account.

**Tip:** TaxSlayer recommends making the FSA URL the default home page on the kiosk you will use for FSA.

You do not need any additional setup from TaxSlayer for FSA.

## Taxpayer Login Procedures

When a taxpayer needs to use FSA to complete the return, he or she will use the following steps:

1. Click the link for TaxSlayer FSA.

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

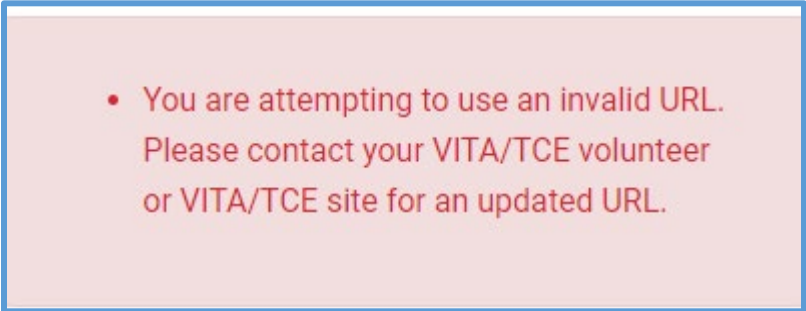
[Forgot Username](#) | [Forgot Password](#)

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

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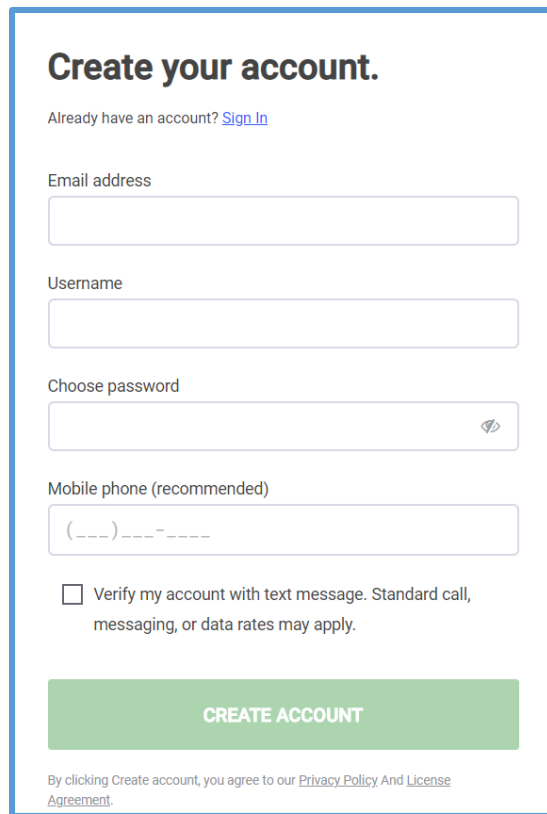
**Note:** If the taxpayer uses an invalid URL, TaxSlayer FSA displays the error message shown below. Do not allow the taxpayer to continue. Restart the taxpayer using the correct URL.



**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:

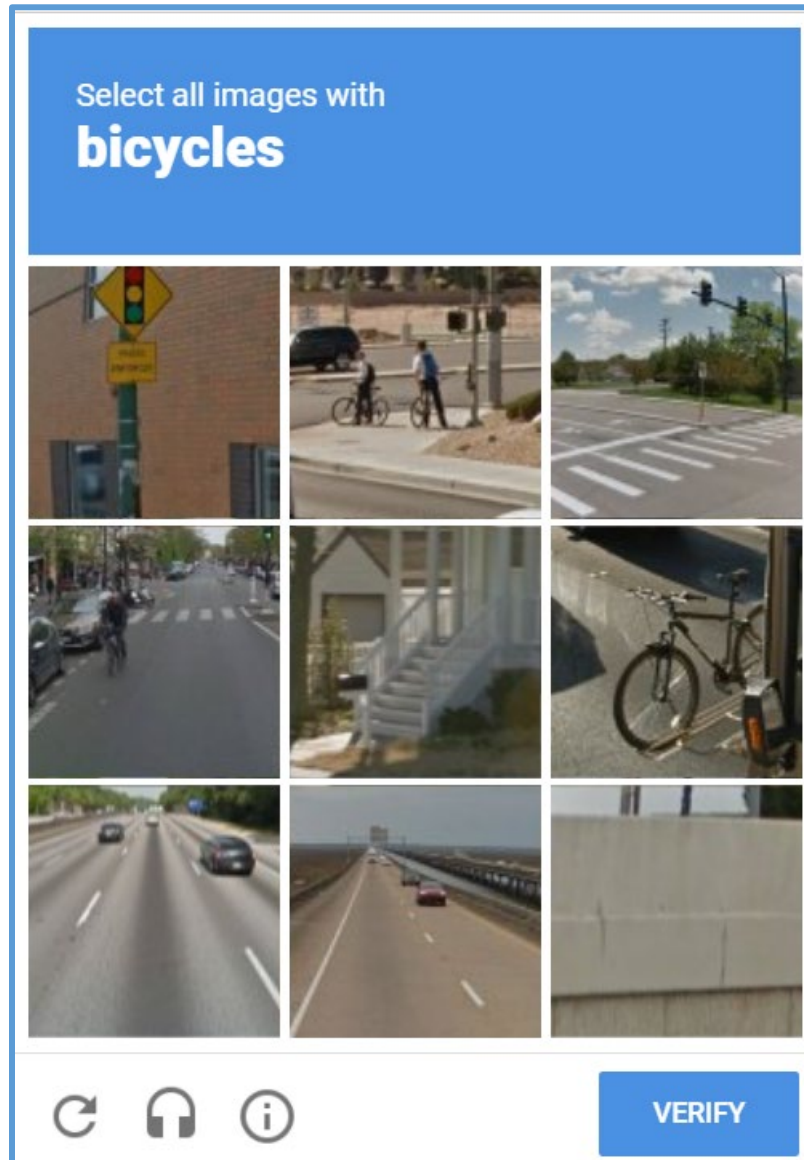
A screenshot of the "Create your account" page. The page has a white background and a blue border. At the top, it says "Create your account." in bold. Below that, it asks "Already have an account?" with a blue link "Sign In". There are four input fields: "Email address", "Username", "Choose password" (with a password strength icon), and "Mobile phone (recommended)" (with a placeholder "(---) --- - ----"). Below the mobile phone field is a checkbox for "Verify my account with text message. Standard call, messaging, or data rates may apply." At the bottom is a green button labeled "CREATE ACCOUNT". At the very bottom, there is a small line of text: "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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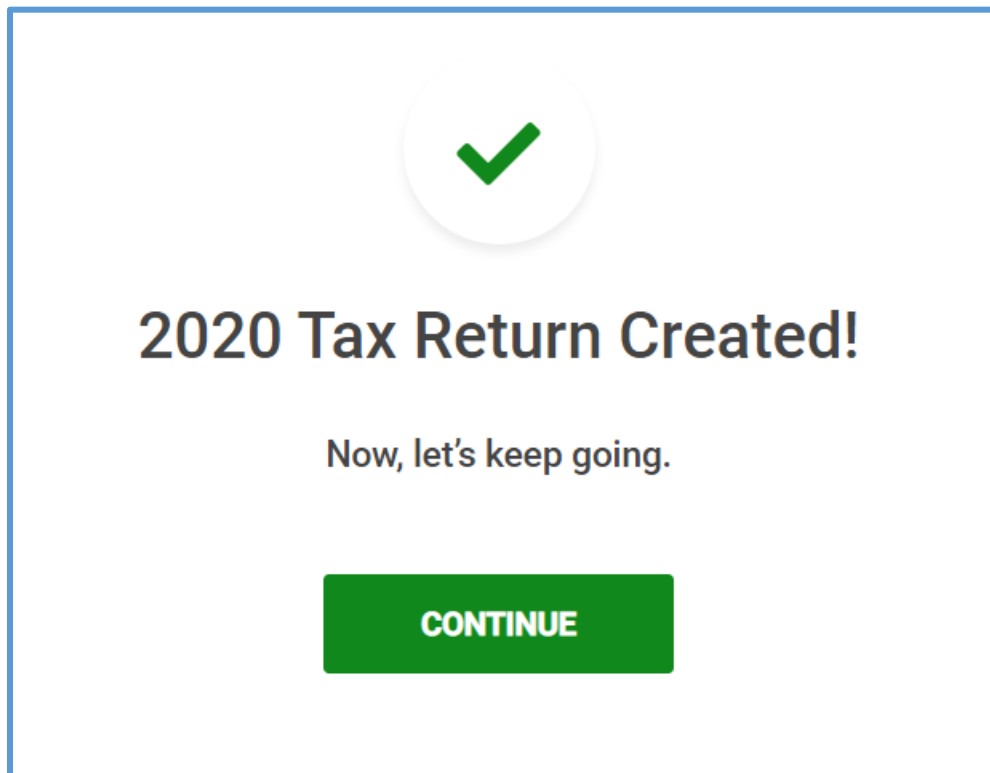
8. Type the 6-digit code from the text into the appropriate box.

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.

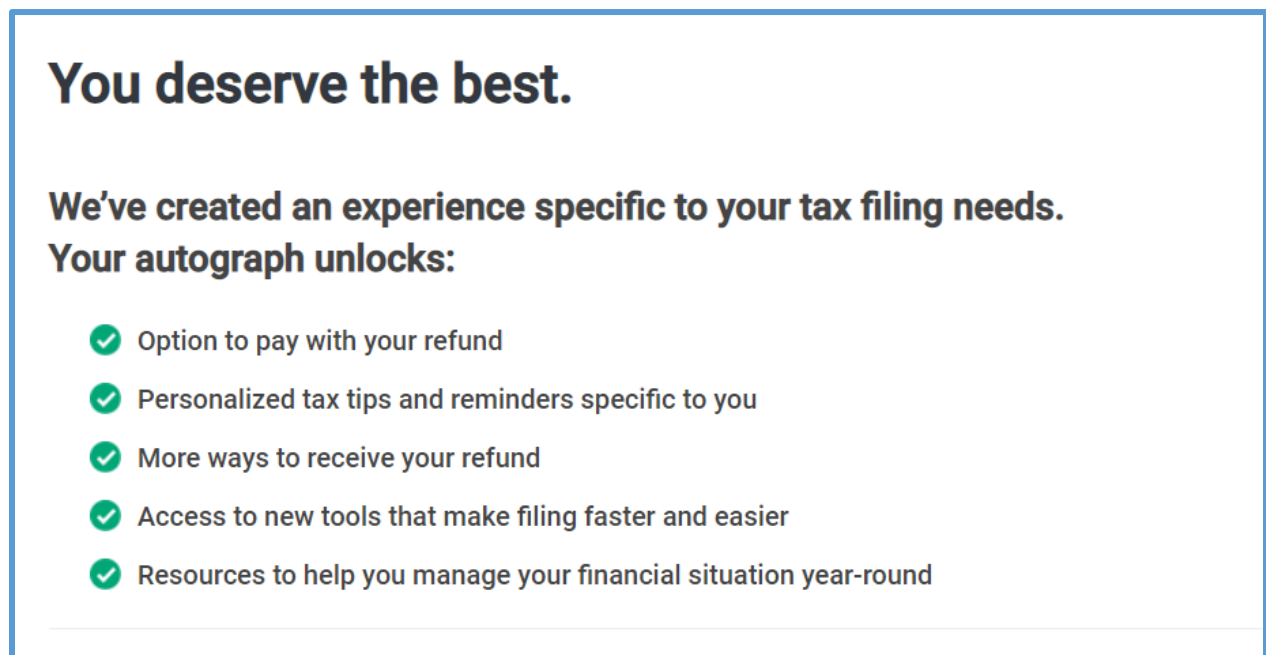


TaxSlayer FSA displays the **Tax Return Created** page:



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
<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 50%; height: 25px;" type="text"/>
Last name	Suffix (Jr, Sr, etc.)
<input style="width: 95%; height: 25px;" type="text"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="---"/>
<small>SSN <i>The IRS requires your Social Security Number for e-filing.*</i></small>	
<input style="width: 30%; height: 25px;" type="text"/> - <input style="width: 30%; height: 25px;" type="text"/> - <input style="width: 30%; height: 25px;" type="text"/>	
Date of Birth	
<input style="width: 30%; height: 25px;" type="text" value="MM"/> <input style="width: 30%; height: 25px;" type="text" value="DD"/> <input style="width: 30%; height: 25px;" type="text" value="YYYY"/>	
Occupation	
<input style="width: 95%; height: 25px;" type="text"/>	

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

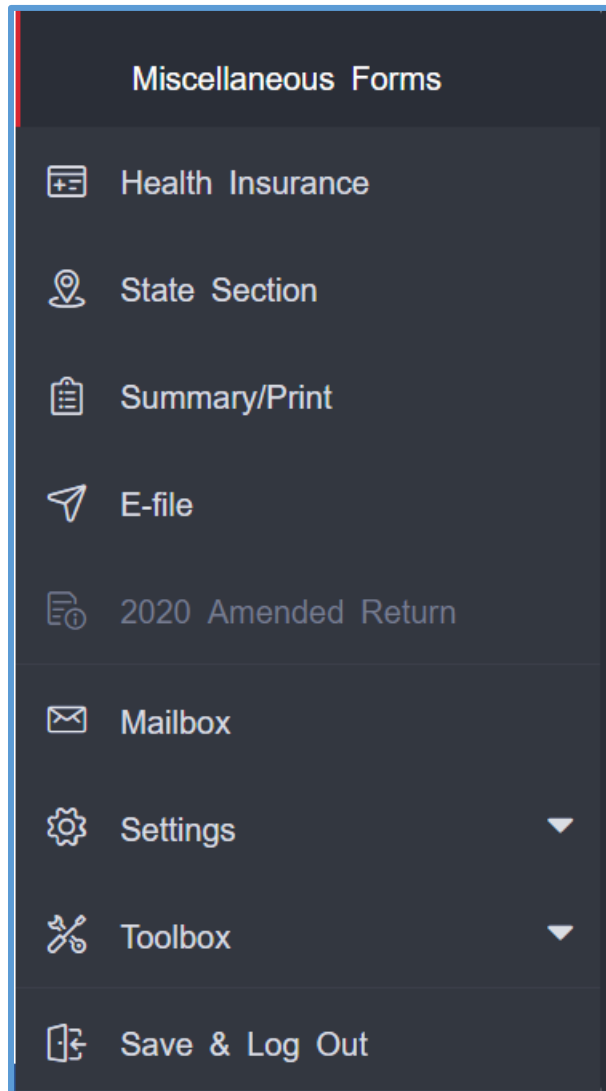
No

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.

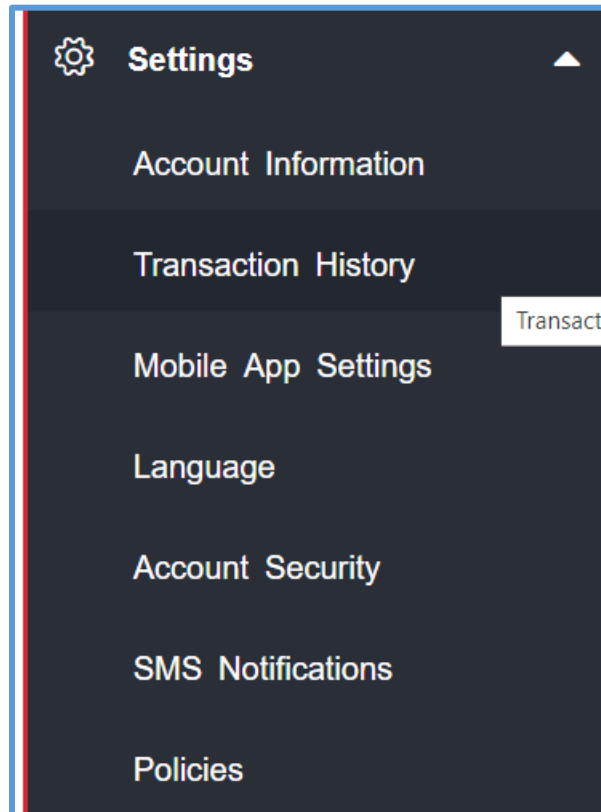
## Preparing the Return in Spanish

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



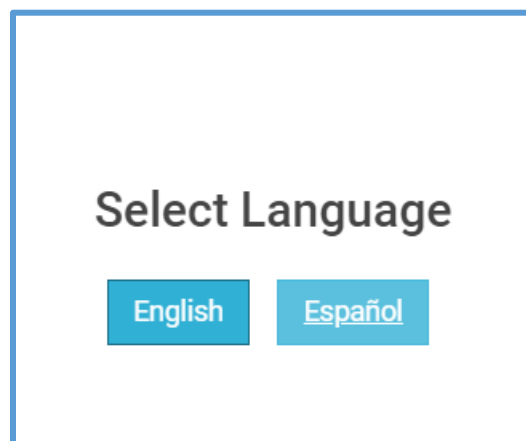
1. Click **Settings** to expand the section.

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

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

---

**1099-DIV, INT, OID** ?  
Interés y Dividendos

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**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



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

The taxpayer can click a heading to expand the section:

<b>Total Income</b>	\$25,000.00 ▾
<a href="#">Wages, salaries, tips, etc.</a>	\$25,000.00
<a href="#">Taxable interest</a>	\$0.00
<a href="#">Tax-exempt interest</a>	\$0.00
<a href="#">Ordinary dividends</a>	\$0.00
<a href="#">Qualified dividends</a>	\$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.**

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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.

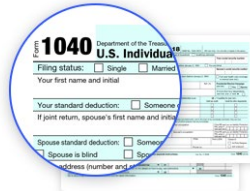


If the taxpayer does have the previous year's AGI, TaxSlayer FSA walks the taxpayer through entering the information from that return:

### 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

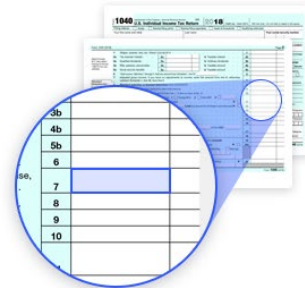
#### 2018 Adjusted Gross Income

0

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
----------------	---------	---	---------	---	--------

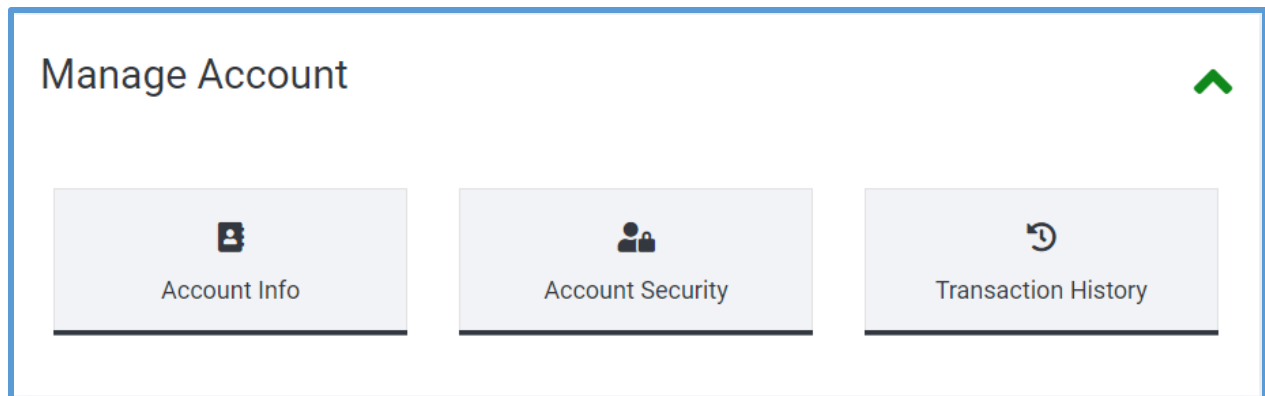
**CONTINUE 2020 RETURN >**

Prior Years 

Manage Account 

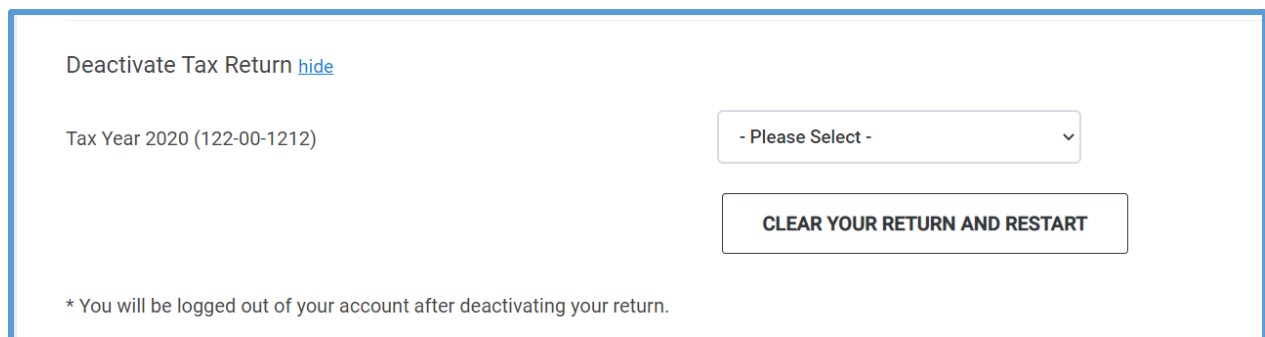
2. Click the **Manage Account** heading to expand the section.

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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