

Administering TaxSlayer

1. Login to your production account
 - a. Username: first initial + last name + first 5 characters of site name
 - b. Password: what you used
 - c. Then change to your password including UPPER CASE, lower case, number, special character if requested
 - d. Security Code: first 5 characters of site name
 - clove
 - frank
 - fumcs
 - heald
 - napas
 - sthel
 - oakmo
 - petal
 - rohne
 - rinco
 - sprin
 - sebas
 - sonom
 - winds
2. Configuration > Select
3. Preparer Setup > Select
 - a. To edit an existing preparer, click Edit
 - i. Shows username, not editable
 - ii. Other fields are editable
 - iii. Security Template: choose "LC ERO" or "Experienced"
 - b. To add a preparer, click "+ Add"
 - i. SSN: leave blank
 - ii. Complete fields: First Name, Last Name
 - iii. Click "pull from office" to populate SIDN
 - iv. If counselor (not ERO or LC), check "Can view own returns only"
 - v. Complete fields:
 1. Email address, cell phone number,
 2. username (first initial + last name + first 5 characters of site name)
 3. Password: recommend current year AARP laptop password
 4. Security template: "ERO LC" or "Experienced"
 - vi. Click Continue
 - vii. Now edit the preparer you just added, and check the boxes to allow multiple use of email and cellphone.
 - viii. For QR Initials, select "Question Templates"
 1. Question TA1: Edit

2. + Add answer. Enter two initials
 3. Save
4. Print Sets > Select
 - a. View existing print sets
 - i. If you want D10 changed, contact Bill Dornbush
 - b. Add print set
 - i. Name
 - ii. Select forms – includes all states
 1. Select federal forms
 2. Filter By State and select CA forms
 - iii. Save
5. Other configuration: Contact Bill Dornbush, bill@dornbush.net, 707-888-2799