E-FILING PROCESS

I.   Reconcile Clients

A. Using Client Sign- in Sheet/Appointment Sheet and E-file Sheet make sure all clients are accounted for. (Missing info, paper return, does not want to file).

B. Go to TaxSlayer Site coordinator login

C. Go to Client search

1. Enter current date in "Date From" and "Date To"
2. In "Date Type" drop down and select "Modified date". This will give you all the returns done that day, (Started and returning clients)
3. Check to make sure that all returns to be **Transmitted** are marked "Complete". Make sure any "In progress" or "Paper" returns are properly tagged and have "Notes" why they are paper or still in progress. Date the note in the subject line. Put author's name or initials in the body of the note.
4. When all returns to be e-filed are properly marked complete continue to the next step for submitting E-files.

II.   Submitting E-files

A. Log in with the site coordinator username (Note: Usernames and passwords were sent to Site Coordinators in separate e-mails.

B. On the **Welcome** page, click **Select** on the **Transmissions** line:

TaxSlayer Pro Online will then display the Transmissions page, listing all returns that have been marked Complete

C. On the **Transmissions** page:

1. Select the **check box(es)** for the returns to be transmitted.
2. Then click **Transmit selected return(s) to IRS**
3. Note: Accounting Aid Society's Main Office will handle all rejected returns, except those from the VITA ACE and Virtual VITA programs.

TaxSlayer Pro Online will then display the Tax Return Transmissions page, indicating the number of returns transmitted.

D. Transmissions page indicating number of returns transmitted:

1. Click **Back** to return to the site's homepage

III. The taxpayer's status will change from **Complete** to **Transmitted** after the return has been submitted.

IV. Sending State Returns

A. TaxSlayer creates and sends the Federal and State return(s) to the TaxSlayer Processing Center at the same time unless you select to send the state as Send State Only.

TaxSlayer holds the state(s) at the Processing Center until the IRS accepts the Federal return.

If the IRS rejects the Federal return, TaxSlayer discards the state E-file.

When you correct and resend the federal e-file, TaxSlayer Pro Online also creates and sends a new state e-file. This helps prevent state rejects and the need to amend state returns. (Make sure that the State E-file does get sent when you resend the Federal E-file)