



Taxprolink

Web-based Tax Software

User Guide

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Getting Started:

Taxprolink is designed to Maximize Your Bottom Line by offering an efficient, affordable, and reliable professional tax software for any type of tax office. We offer comprehensive, user-friendly tax software for CPAs and Tax Professionals that is sure to increase revenue and efficiency to help grow your tax business!

Who We Are

Taxprolink, Inc. provides federal and state preparation and electronic filing for professional tax preparers, serving thousands of customers throughout the United States. Responsible for filing more than one million returns to date, Taxprolink, Inc. offers comprehensive tax services to meet the needs and demands of today's tax preparer.

Taxprolink, Inc. is based in Redford, MI

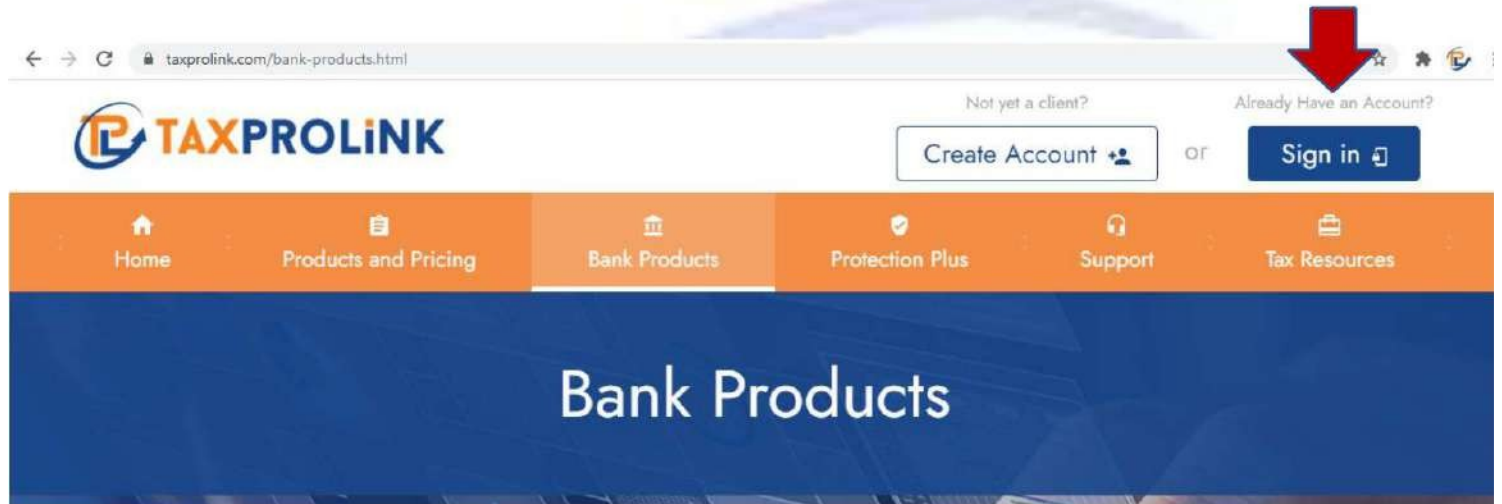
Using the Auto-Update Feature

The Taxprolink Live Updater is a feature that will automatically install any updates that are available to your Taxprolink web-based tax Software. Updates to the program are common throughout the tax season and are essential to ensure that TAXPROLINK always has the latest forms and instructions from the IRS.

Chapter One: Setting Up User Account

Click Sign in

www.taxprolink.com

A screenshot of the TaxProLink login form. The form is titled 'LOGIN INFORMATION' and contains two steps: Step 1: Login Information and Step 2: Code Verification. Step 1 includes fields for Account Name, Password, and Firm Name, along with a 'Forgot Password?' link. Step 2 includes a 'Your Code:' field displaying '50c31c' and an 'Enter the code:' field. A 'LOGIN' button is located at the bottom of the form.

Manage Your Filings from the Cloud

Let Your Team File from Anywhere

No more downloads, installations, updates, or servers. Access all tax tools from your browser.

Forgot Password option:

TAXPROLINK LOGIN INFORMATION

STEP 1: LOGIN INFORMATION
To continue with your account, please enter the Account Name and Password.

Account Name:

Password:

Firm Name:

Forgot Password?

STEP 2: CODE VERIFICATION
To ensure the security, we are asking you to type your code in the text box.

Your Code: 159479

Enter the code:

(This prevents automated login)

LOGIN

TAXPROLINK TaxYear: 2020

RESUMING YOUR PASSWORD INFORMATION

ENTER YOUR VALID REGISTERED INFORMATION

Account Name:

E-mail Address:

SAVE AND CONTINUE

PASSWORD INFORMATION

PASSWORD HINT

Your Password Hint is IGN

Reset Password **Exit**

Reset password link will send to your registered email address.

Note: Create a unique password within the standard. Taxprolink detects previous passwords and make sure totally different from the last 5 passwords you had before.

Creating Admin Preparer

From the <Setup Tab> select <Active Preparer>. Edit < Admin Preparer>

PREPARER INFORMATION

Active Preparers Disabled Preparers Add New Preparer Preparers Login Summary

SEARCH Preparer First Name LIKE

NO.	PREPARER NAME	PTIN/STIN	USER TYPE	EDIT	RESET PASSWORD
1	Flores, Victor (Admin Preparer)	59	CPA		

Enter:

- Preparer Information
- Contact Information
- PTIN #
- Preparer PIN signatures information

Adding a New Preparer/ Editing Preparer Privileges

Click <Add New Preparer> and input the Preparer Information.

USER INFORMATION

Preparer

Firm

Settings

Bank

Sign Pad

PREPARER INFORMATION SECURITY QUESTION LOGIN SECURITY

CREATE USER NAME

(User name must be 6 characters and Password must be at least 8 characters & no spaces)

Create User Name:

Password:

Confirm Password: (Retype your password)

Password Hint:

Create the preparer login information and set allowed privileges.

Enter the preparer information and determine their delete/modify privileges.

PREPARER/USER INFORMATION		PREPARER/USER INFORMATION	
Preparer First Name:	<input type="text"/>	Preparer SSN:	<input type="text"/> - <input type="text"/> - <input type="text"/> ?
Preparer Middle Initial:	<input type="text"/>	Preparer PTIN:	<input type="text"/> - <input type="text"/> ?
Preparer Last Name:	<input type="text"/>	Phone Number:	<input type="text"/> - <input type="text"/> ? (Area Code - Phone Number)
Preparer Type:	<input type="text"/>	E-Mail Address:	<input type="text"/>

PREPARER POWER OF ATTORNEY INFORMATION	
Preparer Designation:	<input type="text"/>
Preparer CAF Number:	<input type="text"/>
Preparer Jurisdiction:	<input type="text"/>

NOTE: Each registered tax preparer must have a valid PTIN to be entered as a preparer. Data entry PTIN is not needed

User Option

USER OPTIONS	USER PRIVILEGES
Do you want to list all the taxpayers to this user? <input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> Give Admin Access <input type="checkbox"/> Select All
Allow User to:	<input type="checkbox"/> Client
<input type="checkbox"/> Delete Client Records	<input type="checkbox"/> Efile
<input type="checkbox"/> Delete Firm Records	<input type="checkbox"/> Scheduler
<input type="checkbox"/> Modify Invoice Pricing	<input type="checkbox"/> Letters
<input type="checkbox"/> File Amended	<input type="checkbox"/> Bank
<input type="checkbox"/> Print Tax Forms	<input type="checkbox"/> Reports
<input type="checkbox"/> Disable View/Print Config	<input type="checkbox"/> Forms
<input type="checkbox"/> Email Tax Return	<input type="checkbox"/> Setup
<input type="checkbox"/> Access to change preparer in return	<input type="checkbox"/> Tools

CREATE NEW USER

Then click <Create New User>.

Note: Login page: www.taxprolink.com click Sign in

Enter the Account name and password you created and same Firm Name you use when logging into your account.

Updating Firm Information

We will prompt you now to input your Firm's Information.

Update the Firm's Information and click <Save Changes> when completed.

NOTE: Check the box if you are self-employed; this will eliminate the need for a Firm EIN.

EFIN Status Summary:

You need to validate your efin # by uploading the Application Summary Page in pdf file into your Taxprolink account. please log in to your e-services account. [Click Here https://la.www4.irs.gov/esrv/esam/pages/landingPage.xhtml](https://la.www4.irs.gov/esrv/esam/pages/landingPage.xhtml)

Firm	
Firm/Organization Legal Name:	ORGANIZATION NAME
Doing Business As (Trade/Company Name):	COMPANY NAME
Business Structure:	SOLE PROPRIETORSHIP
Business Address:	123 MAIN ST
Business Address City/State/Postal Code:	ANYTOWN
Mailing Address:	123 MAIN ST
Mailing Address City/State/Postal Code:	ANYTOWN
Application Suitability Required:	YES
Firm Suitability Status:	COMPLETED

Click <Print> to print as a PDF
 <Save as PDF> Save to Desktop

Copy the Tracking Number and paste it to Efin Validation Page and attach the save Application Summary from your desktop.
 Click <Upload and Save>

Important: In order to comply with IRS efforts to prevent fraud and identity theft you must provide a copy of your IRS e-file Application Summary from IRS e-Services, with a status of "Completed," to Taxprolink Software for verification.

You may submit your document to Taxprolink by one of the following methods:

Fax to Compliance at (855) 299-3299

Attach to the email and send to support@taxprolink.com

Updating Pricing Information

From the <Individual tab> select <Pricing>

This pricing setup will determine the fee's that you charge to your taxpayers. This setup is not required to start a tax return but must be setup in order to file a client tax return. We recommend this information be setup now. Select which pricing you will set first, then click <Save and Continue>.

The screenshot shows the 'PRICING' interface with a sidebar on the left containing menu items: Dashboard, Clients, Efile, Scheduler, Letters, Reports, Pricing (highlighted with a red box and a red arrow), and Tools. The main content area has tabs for 'FEDERAL', 'STATE', 'DISCOUNT', and 'ADDITIONAL CHARGES'. Under the 'FEDERAL' tab, there is a section titled 'PRICING OPTIONS FOR FEDERAL:' with three radio button options: 'Fixed Rate for all returns', 'Set price as Per Form', and 'Set price manually after every return'. The 'Set price manually after every return' option is selected. At the bottom right of this section are two buttons: 'SAVE FEDERAL PRICING' and 'Continue To : State Pricing'.

Determine your price setting and click <Save Federal Pricing>. Click <Continue to: State Pricing

Set pricing as a Fixed Rate for all returns, to Manually Set pricing within each return, or to set a Price as Per Form. The pricing can be edited at any time from this pricing tab.

Follow these steps for setting Federal Pricing, State Pricing, and any Discounts or Additional Charges for your pricing structure.

Importing Prior Year Clients

To import your prior year clients, navigate to Tools > **Import 2019 Client Data**. Choose Simple or Comprehensive import clients you wish to pull forward.



The screenshot shows the 'TOOLS' menu with several options: 'Import 2019 Clients', 'Estimator', 'Depreciation', 'MFJ Vs. MFS', and 'Messages'. A red arrow points to 'Import 2019 Clients'. Below the menu is a search bar with 'SSN' selected in the dropdown, a 'LIKE' dropdown, and a search input field. There are 'SEARCH' and 'SHOWALL' buttons. A 'Note' box explains the difference between 'Simple Import' and 'Comprehensive Import'. Below the note are radio buttons for 'Simple' (selected) and 'Comprehensive', and a green 'Import Selected Returns' button. The table below shows one client record: CLIENT, SRNIVAS, with SSN 25 [redacted] and Preparer Flores, Victor. A 'Simple Import' button is visible next to the record.

TOOLS

Import 2019 Clients Estimator Depreciation MFJ Vs. MFS Messages

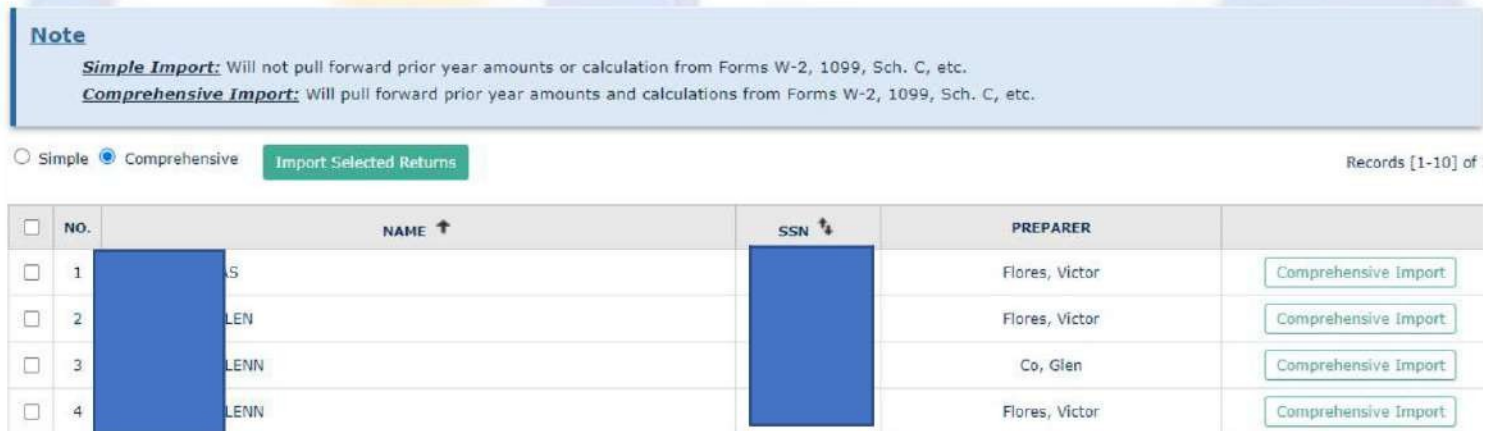
SEARCH SSN LIKE [] SEARCH SHOWALL

Note
Simple Import: Will not pull forward prior year amounts or calculation from Forms W-2, 1099, Sch. C, etc.
Comprehensive Import: Will pull forward prior year amounts and calculations from Forms W-2, 1099, Sch. C, etc.

Simple Comprehensive **Import Selected Returns** Records [1-10] of 3

<input type="checkbox"/>	NO.	NAME ↑	SSN ↓	PREPARER	
<input type="checkbox"/>	1	CLIENT, SRNIVAS	25 [redacted]	Flores, Victor	Simple Import

Select the clients you wish to Import and click <Import Selected Returns> or click <Simple Import / Comprehensive import > to import single returns



The screenshot shows the 'Import 2019 Clients' page with 'Comprehensive' selected. The 'Import Selected Returns' button is green. The table below shows four client records, all with 'Comprehensive Import' buttons. The first two records have 'Flores, Victor' as the preparer, while the last two have 'Co, Glen'.

Note
Simple Import: Will not pull forward prior year amounts or calculation from Forms W-2, 1099, Sch. C, etc.
Comprehensive Import: Will pull forward prior year amounts and calculations from Forms W-2, 1099, Sch. C, etc.

Simple Comprehensive **Import Selected Returns** Records [1-10] of 3

<input type="checkbox"/>	NO.	NAME ↑	SSN ↓	PREPARER	
<input type="checkbox"/>	1	[redacted] S	[redacted]	Flores, Victor	Comprehensive Import
<input type="checkbox"/>	2	[redacted] LEN	[redacted]	Flores, Victor	Comprehensive Import
<input type="checkbox"/>	3	[redacted] LENN	[redacted]	Co, Glen	Comprehensive Import
<input type="checkbox"/>	4	[redacted] LENN	[redacted]	Flores, Victor	Comprehensive Import

Setting up the Individual Return Entry Mode

From the <Setup> Tab, Click <Settings> <Preparer Level Settings

PREPARER/CLIENT LEVEL FIRM LEVEL W7 AGENT

Account Name	SHOWING PREPARER CONFIGURATION FOR THE ACCOUNT NAME TAXPROLINKTEST
TAXPROLINKTEST [ADMIN]	PREPARER LEVEL SETTINGS PREPARER SETTINGS <input type="checkbox"/> Block File Prior Year <input type="checkbox"/> Exclude per form fee on Invoice <input type="checkbox"/> Default Payment Option to Banking <input type="checkbox"/> Show Blank Invoice <input type="checkbox"/> Do not Show Entry Mode Dialog <input type="checkbox"/> Do not Allow Delete of DM Docs <input type="checkbox"/> Default all returns to 1040-SR for taxpayers aged 65 or older SSN Settings : NONE ▼ Return Entry Mode <input checked="" type="radio"/> Default Direct Input <input type="radio"/> Default Interview Input
BOYDTEST [D/E]	
JASMINECLASS	
QADEERCLASS	
NICOLECLASS	
PRIYANKA	
KENYETTACLASS	
MORNICCECLASS	
HICHEMCLASS	
NAKISHACLASS	

SAVE CHANGES Continue To

The software, by default its preparer to the chosen entry mode when creating new return for Individual. Click<**Save Changes**>

NOTE: Do this to every sub-preparers

Chapter Two: Preparing a Tax Return

Creating a New Return

To create a new return, click the <Clients> Tab and select <New Return>.

The screenshot shows the 'CLIENTS' dashboard. On the left is a sidebar with 'Dashboard', 'New Return', 'Clients', and 'Scheduler'. The 'New Return' tab is highlighted with a red box and a red arrow pointing to it. The 'Clients' tab is also highlighted with a red box and a red arrow pointing to it. The main area contains a search bar with 'SSN' selected, a 'LIKE' dropdown, and 'SEARCH' and 'SHOWALL' buttons. Below is a 'RETURN STAGES' dropdown set to 'ALL STAGES'. A table titled 'Clients [1-10] of 34' is displayed with columns: S.No, Primary Name, SSN, Filing Status, Day Time Phone Number, Primary Email, Address1, State, and Return Status. The first row shows: 1, AHMED, YUNUS, 122-44-5555, SINGLE, (333)333-3333, VICTOR@TAXPROLINK.COM, 123 HIKK, MI.

Input the Primary Taxpayer SSN (Double entry required).

Click <Save and Continue>

CREATE NEW RETURN

ENTER YOUR SSN

Taxpayer SSN

 - -

Apply W-7

Reenter SSN

 - -

SELECT THE RETURN TYPE

- FORM 1040** - U.S. Individual Income Tax Return
- FORM 1040X** - Amended U.S. Individual Income Tax Return
- FORM 1040NR** - U.S. Nonresident Alien Income Tax Return
- FORM 1040SS** - U.S. Self-Employment Tax Return (Including the Additional Child Tax Credit for Bona Fide Residents of Puerto Rico)

SAVE AND CONTINUE

You will also select the return "Type" to be completed.

The next input page will prompt the Primary Taxpayer's Personal and Address Information.

Interview Mode: Understanding Layout and Input Options

The online interview provides navigation tabs that run across the top of the tax return.

1 - Navigation Tabs: Once all Primary Information is entered, these tabs and sub-tabs can be used to navigate the software to specific pages.

2 - Additional Information: Each page provides guided links, examples, and glossary items to assist you in determining information within that page.

3 - Saving your Entries: To ensure the client information is saved, you must click **<Save & Continue Return>** on each input page.

4 View / Print: To view or Print Tax forms

5 Form Search: To search tax forms and add



Using Navigation Tabs

When navigating the software, to access a certain form by using your navigation tabs, mouse-over the primary tab and sub-tabs to make the form selection.

Example: To navigate to the W-2 entry page using the navigation tabs, Click the **<INCOME>** Tab, Click **<SHOW MORE>** Click **<START>** to add Wages, Salaries, Tips, and select W-2 from the sub-menu. The software will bring you directly to the W-2 page.

Simply choose to **<Start>** next to the needed item to input information for that form.

When done with all forms for this section, click <Done with Section>.

Form 1099-B



Other Income

Forms 1096A, 1099C, 1099SC, W-2-G, 2S56, 1042-5

Show More



Done with Income Summary

Starting a State Return – Interview Mode

Using the Interview Input

To navigate the Interview Input of an Individual 1040 return, simply complete the requested information screen and click **<Save & Continue Return>**. Taxprolink Interview Input will guide you through the Federal Return before prompting you to create any State Return.

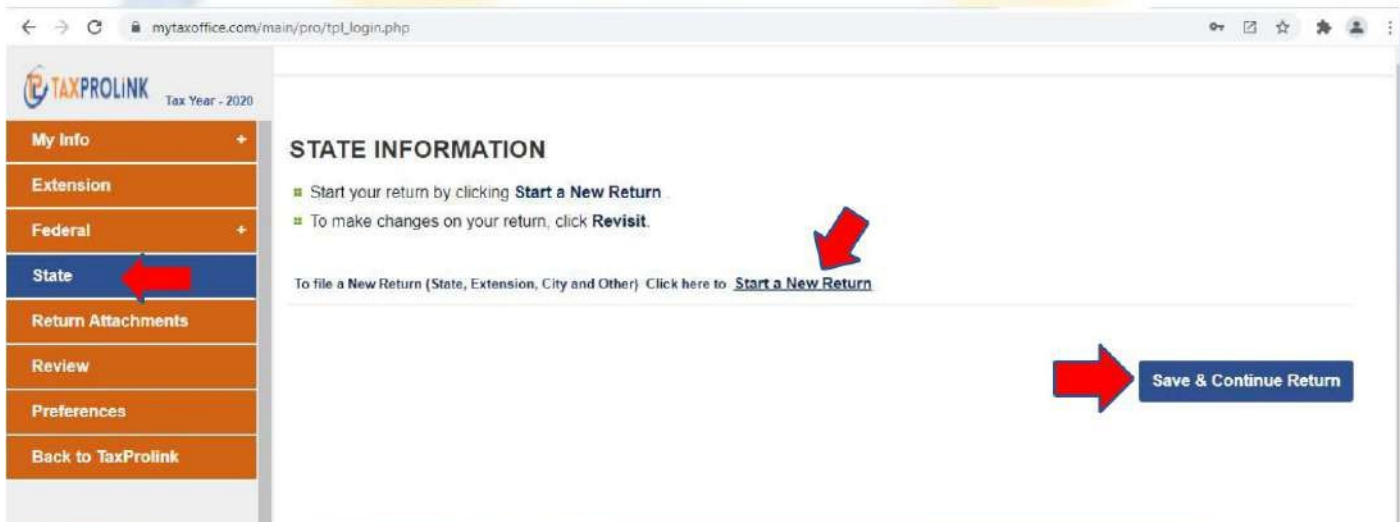
To start a New State Return, either navigate through the Federal input pages or click on the **<State>** Tab.

The software will pull any state that is affected by income or resident entries.

To start the listed state, click **<Start>** next to that state.

To file another state return not listed on this page, click **<Start a New State Return>**.

Filing a state return is not required. If no state will be filed, click **<Save & Continue Return>** and **<Agree>** to not file the state.



NOTE: Navigation/Input options for State are the same the Federal return.

Adding Additional States

Once a state return is completed, the software will navigate back to the State Information page allowing you to start a new state return. Click the link **<Start a New State Return>**. After all states are completed, **<Save & Continue Return>**.

TAXPROLINK Tax Year - 2020

- My Info +
- Extension
- Federal +
- State**
- Return Attachments
- Review
- Preferences
- Back to TaxProlink

STATE INFORMATION

- Start your return by clicking **Start a New Return**.
- To make changes on your return, click **Revisit**.

ARIZONA


Filing State Tax Return
 ▶ You have filed your AZ return as a Full-Year Resident
 ▶ You are due a refund of \$100.

Prepared Revisit Delete

GEORGIA

Filing State Tax Return
 ▶ You have filed your GA return as a Full-Year Resident
 ▶ You owe the amount of \$4287.

Prepared Revisit Delete

To file another Return (State, Extension, City and Other) Click here to [Start a New Return](#) 

Save & Continue Return

REVISIT: To edit or make changes on the state return

NOTE: Any changes made to the Federal inputs after a state has been completed will require the state to be edited.

Reviewing Forms for a Federal and/or State Return

After reviewing the Tax Summary Tab for Federal and State, click to **<Save & Continue Return>**. The software will display all PDF Forms for the return to review and/or print.

The screenshot shows the TAXPROLINK web interface for the 2020 tax year. The browser address bar displays `mytaxoffice.com/main/pro/tpL_login.php`. The page header includes the TAXPROLINK logo, the text "Tax Year - 2020", and a "Tax Due \$36" indicator. Navigation buttons for "View / Print", "Form Search", and "Useful Information" are present. A yellow banner contains the instruction: "Click here to View/Print All Forms, or select the forms to View/Print/Download in one file." Below this, there are tabs for "FEDERAL", "STATE", and "RETURN ATTACHMENTS". The "FEDERAL" tab is active, showing two columns: "FORMS AND SCHEDULES" and "STATEMENTS & WORKSHEETS".

FORMS AND SCHEDULES	STATEMENTS & WORKSHEETS
<ul style="list-style-type: none">10402210 PAGE 11040VForm 6879	<ul style="list-style-type: none">Child Tax Crd-WkshRecovery Rebate Credit2210 PAGE 3 - Worksheet2210 PAGE 4 - Worksheet

A "Save & Continue Return" button is located in the bottom right corner of the interface.

NOTE: Pop-up blocker must be disabled and Adobe Reader installed to view forms.

Completing a Return

By saving from the State Return Tab, the final page of the return inputs is to mark the return as Complete.

mytaxoffice.com/main/pro/tpl_login.php

TAXPROLINK Tax Year - 2020

TAXPROLINK, INC - COMPLETE RETURN

Mark this return as completed and ready for efile

TaxProLink, Inc - COMPLETE RETURN

Are you ready to Mark the Return as Completed?

Yes No

FILE RETURN

File this return as ?

Paper File Electronically

REVIEW RETURN

Are you ready to Mark the Return as reviewed?

Yes No

Previous Page

Save & Continue Return

Indicate that 'Yes' the return is Complete. Then indicate how you are filing the return (**Paper File or Electronically**), and that you have reviewed the forms.

Click **<Save & Continue Return>**.

Starting a Return – Direct Mode

Adding Personal Information

Once the return has been selected, you will be prompted to enter all Personal Information.

Adding Additional Forms

To add any additional forms, use the Forms Tree from the left column and select the form you would like to add. You can also add forms from the links within the 1040 Screens.

The screenshot displays the tax software interface. At the top, there are tabs for 'Federal', 'MA', 'MI', and '+'. Below this is a 'Form Search' section with a search bar and two tabs: 'All Forms' and 'Filed Forms'. The 'All Forms' tab is active, showing a list of forms. A red arrow points to '1040 & Sch#1' in this list. Below the list is a 'Federal Tax Summary' section with the following data:

Federal Tax Summary	
Total Income	\$ 16,405
Adjustments	\$ 0
Deduction	\$ 12,400

The main screen is titled 'U.S. Individual Income Tax Return & Additional Income and Adjustments to Income' and 'Form 1040 U.S. Individual Income Tax Return'. It features a 'Reset Screen' button. The main content area shows a list of income items with associated amounts and links to related forms. A red arrow points to 'Schedule D' in the list.

Line	Description	Amount	Related Forms
1	Wages, salaries, tips, etc	\$ 35,000.00	All Related Forms
2a	Tax-exempt interest	\$ 0.00	
b	Taxable interest	\$ 0.00	Schedule B, 1099 Int, 1099 OID, 1099SF
3a	Qualified dividends	\$ 0.00	
b	Ordinary dividends	\$ 0.00	1099 DIV
4a	IRA distributions	\$ 0.00	
b	Taxable amount	\$ 0.00	1099 R
5a	Pensions and annuities	\$ 0.00	
b	Taxable amount	\$ 0.00	1099 R
6a	Social security benefits	\$ 0.00	
b	Taxable amount	\$ 0.00	SSA 1099
7	Capital gain or (loss)	\$ 0.00	Schedule D
8	Other income from Schedule 1, line 9	\$ -18,595.00	
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	\$ 16,405.00	
10	Adjustments to income:		
a	From Schedule 1, line 22	\$ 0.00	
b	Enter Charitable contributions if you take the standard deduction.	\$ 0.00	
c	Add lines 10a and 10b. These are your total adjustments to income	\$ 0.00	

Work Pad

The Work Pad allows for itemization of a specific field that is auto-calculated by the software. The Work Pad will display with the Federal Forms when ready to print.

NOTE: Double-click on the Work Pad icon to open the Work Pad Screen.

Gross Receipts or Sales pulled from 1099-NEC [1099 NE-C](#) \$ 0.00
 Gross merchant card and third party network receipts from Form 1099-K [1099 K](#) \$ 0.00
 Total Gross Receipts/Sales \$ 10500.00
 2 Returns and allowances \$ 0.00
 6 Other income, including federal and state gasoline or fuel tax credit or refund \$ 0.00
Other Income Summary \$ 0.00

Part II - Expenses

8 Advertising	\$ 5000.00	18 Office expense	\$ 0.00
9 Car and Truck Expenses Form 4562	\$ 0.00	19 Pension and profit-share	\$ 0.00
10 Commissions and fees	\$ 0.00	20 Rent or lease	\$ 0.00
11 Contract labor	\$ 0.00	a Rental- Vehicles,machinery	\$ 0.00
12 Depletion	\$ 0.00	b Other Business Property	\$ 0.00
13 Depreciation and section 179 expense deduction (not included in Part III) Form 4562	\$ 0.00	21 Repairs and maintenance	\$ 5000.00
14 Employee benefit programs (other than on line 40)	\$ 0.00	22 Supplies (not included in Part III)	\$ 0.00

Advertising

	Description	Amount (\$)
1	TV	500
2	RADIO	250
3	NEWSPAPER	150
4		

Total Amount \$ 900.00

Delete All **Delete** **Save**

Instructions [1099-PATR](#), Taxable Distributions Received From Cooperatives

Forms

- Schedule EIC(SP)
- Schedule 8812(SP)
- Form 8853 Primary
- Form 8879(SP)
- Workpad**
- YOY Comparison
- Federal Worksheets

Override Feature

The Override Feature allows for overriding of a calculated field. To enable this feature, click on the Override button and enter the value

Other Income, including federal and state gasoline or fuel tax credit or refund

Other Income Summary \$ 0.00

Part II - Expenses

8 Advertising	\$ 900.00	18 Office expense	\$ 0.00
9 Car and Truck Expenses Form 4562	\$ 0.00	19 Pension and profit-share	\$ 0.00
10 Commissions and fees	\$ 0.00	20 Rent or lease	\$ 0.00
11 Contract labor	\$ 0.00	a Rental- Vehicles,machinery	\$ 0.00

Form schedule C

Car and Truck Expenses

Current Value	Override Value
\$ 0	\$ 1500

Check here if you want to use current value.

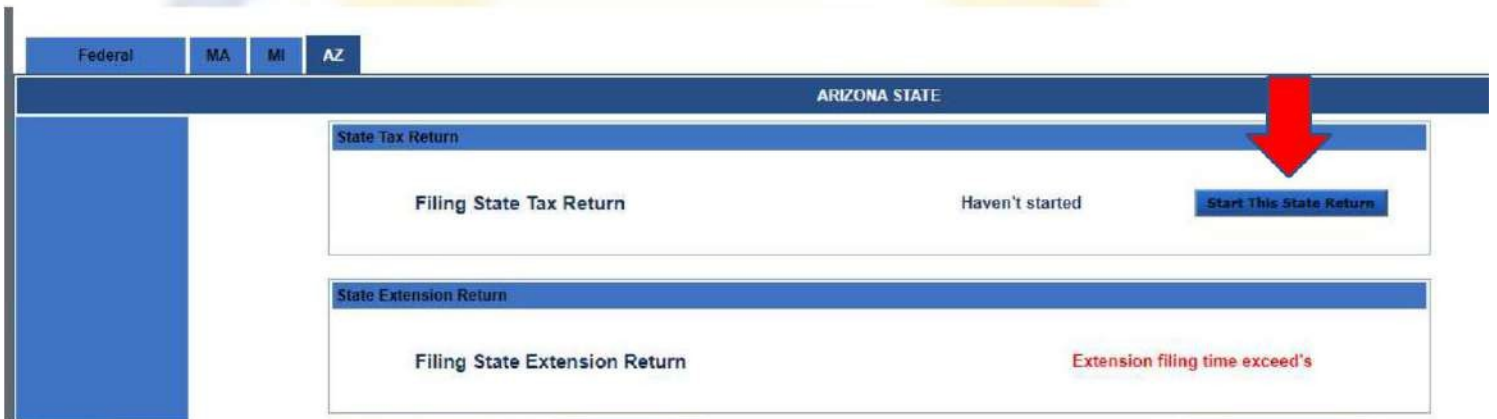
Save

Starting a State Return – Direct Mode

To start a New State Return, select the State Tab to the left.



Then click on the State you wish to complete



Click Revisit to Edit or make changes



All State Returns have the same layout and are linked from the Forms Tree or within the return.

Federal AZ MA MI +

Form Search

Arizona State General Information Reset Screen

Resident / Part-Year / Nonresident Information

Full Year Resident
 Part-Year Resident
 Full-Year Nonresident

Miscellaneous

Last Name(s) Used in Prior Years if different from name(s) used in current year

Save

Allocating Between Multiple States

To allocate information between multiple states, click the at < [Allocate your Federal Income & Adjustments to MI State >>](#) at the top of the State Tab.

Federal AZ HI IL MI NY VA +

Form Search

Michigan State General Information Reset Screen

Resident / Part-Year / Nonresident Information

[Allocate your Federal Income & Adjustments to MI State >>](#)

TAXPROLINK Allocate Your Federal Income and Adjustments to State

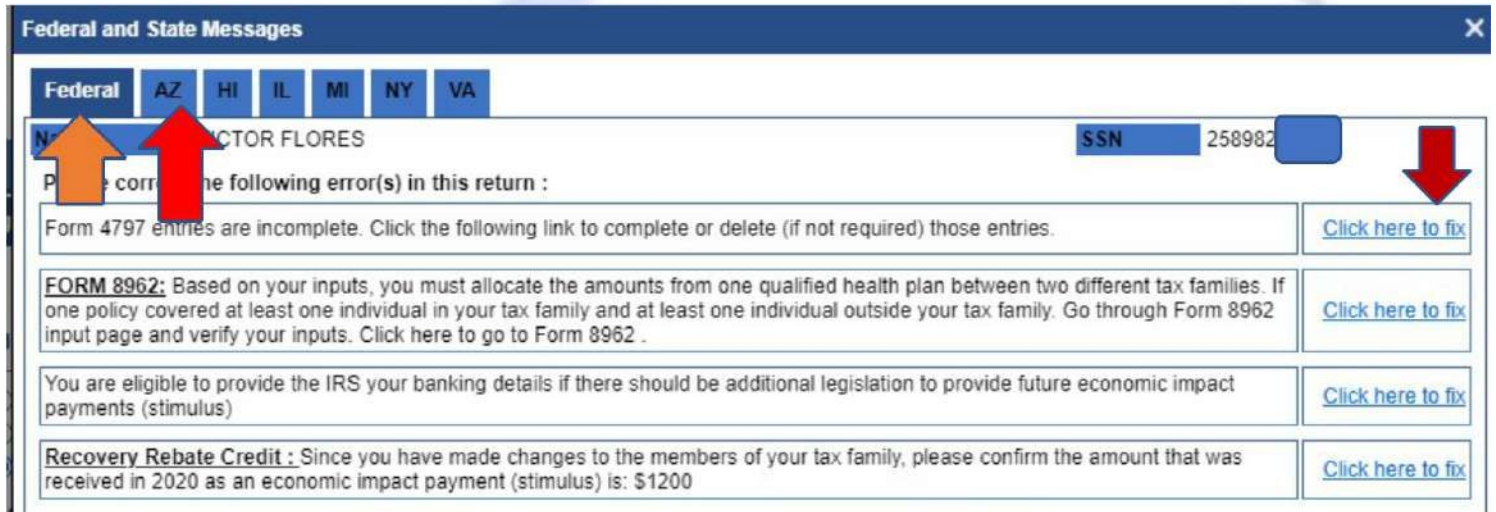
Type of Income	Primary		Spouse		Federal Income	MICHIGAN STATE	
	Calculated Value	Adjust Calculated Value	Calculated Value	Adjust Calculated Value		Calculated Value	Adjust Calculated Value
Wages, salaries, tips, etc.	\$49001	+	\$0	+	\$49001	\$34000	+
Taxable Interest	\$0	+	\$0	+	\$0	\$0	+
Ordinary Dividends	\$787	+	\$0	+	\$787	\$0	+
Taxable refunds, credits, or offsets of state and local income taxes	\$0	+	\$0	+	\$0	\$0	+
Alimony received	\$0	+	\$0	+	\$0	\$0	+
Business income or loss	\$7208	+	\$0	+	\$7208	\$7208	+
Capital gain or loss	\$25087	+	\$0	+	\$25087	\$21200	+
Other gain or loss	\$0	+	\$0	+	\$0	\$0	+
Taxable Amount for IRA Distributions	\$0	+	\$0	+	\$0	\$0	+
Taxable amount for pensions and annuities	\$33323	+	\$0	+	\$33323	\$0	+
Rent real estate, royalties, partnerships, S corporations, trusts, etc.	\$4091	+	\$0	+	\$4091	\$76	+
Farm Income or Loss	\$0	+	\$0	+	\$0	\$0	+
Unemployment Compensation	\$0	+	\$0	+	\$0	\$0	+
Taxable amount for Social Security benefits	\$1700	+	\$0	+	\$1700	\$0	+
Other income	\$3400	+	\$0	+	\$3400	\$0	+
Scholarship and fellowship grants	\$0	+	\$0	+	\$0	\$0	+
Interest on obligations of other states	\$0	+	\$0	+	\$0	\$0	+
Alimony Paid	\$0	+	\$0	+	\$0	\$0	+
IRA Deduction	\$0	+	\$0	+	\$0	\$0	+
Student Loan Interest Deduction	\$0	+	\$0	+	\$0	\$0	+
Tuition and Fees Deduction	\$0	+	\$0	+	\$0	\$0	+
Domestic Production Activities Deduction	\$0	+	\$0	+	\$0	\$0	+
Other Adjustments	\$0	+	\$0	+	\$0	\$0	+
Charitable Contribution	\$0	+	\$0	+	\$0	\$0	+

Save

Running a Return Diagnostic and Completing a Return



Verify: Running a return Diagnostics for Federal and State Returns



Click here to fix. It's a link where lead you to the form to double check or fix the data entry.

Once you have completed the return, click the <COMPLETE> button at the top of any page to start the Diagnostic Process



The final page of the return inputs is to mark the return as Complete.


Once the diagnostic has completed, you will have the option to <COMPLETE> the return. Click <Save & Close> or < Save & Redirect to Manage returns>

During the tax return inputs, the final page of the interview allows you to make this selection

TaxProlink, Inc - COMPLETE RETURN

Complete Return


Are you ready to Mark the Return as Completed?

Yes 

No

Review Return

Are you ready to Mark the Return as reviewed?

Yes 

No

File Return

File this return as ?

Paper File

Electronically

Save & Redirect to Manage Returns **Save & Close**

Note: You cannot efile without doing this.

Proceed to Manage Return page and Click Start Payment to create an invoice

Understanding the Direct Input Layout

When using the Direct Input option, you will notice that any forms generated will be located in the lower right corner, all Instructions for the specific return will show in the right-hand column and a Refund Meter in the lower left corner. The Forms Tree has all available forms to the left.

- Form Search:** To search a certain forms and schedules
- ALL Forms:** Forms available in the software
- Filed Forms:** Form added and to be transmitted to the IRS

Form Search

Personal Information

Primary Taxpayer Information

First Name: YUNUS Initial: Initial Last Name: AHMED Suffix: Suffix

SSN or ITIN: 122445555 Apply W-7

Date of Birth (MM-DD-YYYY): 01 / 01 / 1988

Occupation: STUDENT

Identity Protection Pin (IPIN):

(Note: If you received an IPIN from the IRS, enter it in the space above. If you did not receive an IPIN, leave this box blank. The IPIN is 6 digits long, and is not the same as a self-select pin. This pin is primarily for individuals who have been victims of identity theft or those who have specifically requested one.)

Disabled (MM) Blind Deceased Student Part or Full Time (MM)

U.S. Armed Forces Surviving Spouse Presidential Campaign

Someone can claim you as a dependent Valid SSN for EIC / Employment Qualifying child of another person for EIC

Affordable Care Act (ACA) - Question

Bank Information

Account Type: Checking Savings

Routing Number: _____

Re-Type Routing Number: _____

Account Number: _____

Re-Type Account Number: _____

Note: We do not allow refund deposits to accounts outside the U.S

Check here to use this banking information in your state refund

Note: If you owe for your state return, you will need to re-enter the banking information

Federal Tax Summary

Total Income	\$ 18,405
Adjustments	\$ 0
Deduction	\$ 12,400
QBI Deduction	\$ 0
Taxable Income	\$ 4,005
Total Tax	\$ 403
Tax Credits	\$ 403
Net Tax	\$ 0
Total Payments	\$ 9,224
Refund	\$ 9,224

Forms

- Form 1040-SP
- 1040 Schedule 1(SP)
- Form 8995
- Schedule C - MECAN
- Schedule E PG2
- Schedule EIC(SP)
- Schedule 8312(SP)
- Form 8853-Primary

Auto generated tax refund and owed amount.

Additional Features – Direct Input



Verify: Running a Diagnostic

Complete: To mark the return completed and Reviewed

Override: See any line of overridden calculation from Federal and State forms.

Work Pad: Form entry where the work pad created

View/Print: To view and print tax forms (Customer's copy, preparer's copy and filing's copy)

Note: Set the preparer's note as reminder

Assets: Depreciation details for the current and future years

DM Docs: Document Manager where you can save docs received from your clients.

YOY: Year On Year Comparison

MFJ/MFS: Comparison of taxes between Married filing joint and married filing separately status.

Attachment: Where you can attach PDF files to be efiled in Federal and State returns.

Signature: A build-in signature pad in the software where your client can use you a Mouse, Stylus or an external signature pad like Topaz siglite. See Sign Pad supported devices in the **SetUp < Sign pad>**

Understanding the Client Manager

The Client Manager will be used to:

- Access any existing client return
- Edit and complete an existing client return
- Viewing client forms
- Marking a return as paid
- Amending a return already filed through the software
- File Prior Year return

From the <Clients> Tab, select <Manage Return>.

AccountID: LORPX45014AT
Last visited : 06-16-2021 14:22:13
TaxYear: 2020 || Login prior year

View Messages | Support | Remote Support | Quick Account Setup

INDIVIDUAL BUSINESS SETUP

CLIENTS

New Return Manage Returns Amended List PaperFiled List Completed List Incomplete List Unpaid Invoices Paid Clients Prior Year Return MyTaxOffice Clients EIP (Stimulus)

FIND/SEARCH SSN LIKE SEARCH

RETURN STAGES ALL STAGES

Hide Client List Sort By Last Name

S.No	Primary Name	SSN	Filing Status	Day Time Phone Number	Primary Email	Address1	State	Return Status
------	--------------	-----	---------------	-----------------------	---------------	----------	-------	---------------

Search for a client by using the <Search> Box, or select to <Show All> client returns.

Once the client return information is searched, to access the Client Manager, double click the return to manage

MANAGE RETURNS

PREPARER NAME Victor Flores

CREATED PREPARING REVIEWING TRANSMITTING COMPLETED

Edit ViewPrint View Input Delete PW Protect Appointments Letters Notes Signature MyTaxOffice

PERSONAL INFO	CONTACT INFORMATION	INCOME SUMMARY	OTHERS
Primary Name: YUNUS AHMED Primary SSN: 122-**-**** Primary DOB: 01-01-1988 Dependents: 3 Exemptions: 4 Reference ID: NTU1NTAXNTM5MQ	Address: 123 HIKK, HAMTRAMCK, MI, 48212 Phone Number: HOME - (333) 333-3333 Resident State: MI E-mail: VICTOR@TAXPROLINK.COM	Total Income: \$16405 AGI: \$16405 Deduction: \$12400 Taxable Income: \$4005 Total Credits: \$403 Total Tax: \$0 Total Payments: \$9224	<input type="radio"/> Mark Return Incomplete <input type="radio"/> Mark Return Complete <input type="radio"/> Electronic File <input type="radio"/> Paper File File Prior Year Return Mark Return Reviewed

FEDERAL, STATE, EXTENSION DETAILS

FEDERAL - 1040	Refund - \$9224 Not yet Completed.
MA	Neither OWE TAX nor DUE A REFUND MASSACHUSETTS return not yet completed.
MI - FULL YEAR RESIDENT	Refund - \$327 MICHIGAN is eligible for e-file.

[File Another State Return](#)

Client Manager Tabs:

Personal Details

Primary Taxpayer
Name SSN
Date of Birth

Return Details

Edit/Complete Return
File Amended Return
Delete Return
File another State
View/Print Forms

File prior year return

Edit Federal to the state
information Bank Product Status

Payment Details

Select how the taxpayer will pay for your service

History Details

Displays history of payment and e-file for the return

Preparer Notes

Edit, review, make notes on the tax return

Return Status

Display of the current status of the tax return

Schedule Appointment

View/Print Letters for this tax return

MyTaxOffice

- An Online Portal for Taxpayer
- The taxpayer can view/print tax forms Remotely sign tax forms.
- Upload tax-related documents such as W2s, driver's license, social security cards, and much more
- Send messages to the preparer and the preparer can respond, in real-time!
- Works on any Web and Mobile browsers in any devices.

Editing an Existing Return

To edit an existing return that is already within your database, click on the <Client Manager> Tab, select <Manage Return> then once you have searched for this client, select <Manage> to the right of the client information.

Navigate to the <Return Details> Tab.

Click <Edit/Complete Return>.

AccountID: LORPX45014AT
Last visited : 06-16-2021 14:22:13
TaxYear: 2020 | [Login prior year](#)

View Messages Remote Support Quick Account Setup

Support INDIVIDUAL BUSINESS SETUP

MANAGE RETURNS

CREATED PREPARING REVIEWING TRANSMITTING COMPLETED

Edit View/Print View Input Delete PW Protect Appointments Letters Notes Signature MyTaxOffice DM Docs

PERSONAL INFO CONTACT INFORMATION INCOME SUMMARY OTHERS

Deleting a Tax Return

To Delete a Tax Return, from the Client Manager > Return Details Tab, click on the option to <Delete Return>.

NOTE: In order to have the ability to delete a tax return, the return must be marked <Incomplete>, not be marked as paid, and not transmitted at ANY time.

Amending an Accepted Return

Amending a previously Accepted Return filed through the software can be done by going to the Client Manager Tab > Manage Return. After searching for the client, choose Manage on the right of the client data.

Navigate to the Return Details Tab and select your link to <File Amended Return>.

Edit View/Print View Input Delete PW Protect Appointments Letters Notes Signature MyTaxOffice DM Docs

PERSONAL INFO CONTACT INFORMATION INCOME SUMMARY OTHERS

Mark Return Incomplete
Mark Return Complete
Electronic File
Paper File

[Return Status](#)
[Send Accepted Letter](#)
[File Prior Year Return](#)
[File Amended Return](#)
[View Input](#)

FEDERAL, STATE, EXTENSION DETAILS

FEDERAL, STATE, EXTENSION DETAILS	
FEDERAL - 1040	Refund - \$1439 e-file has been Accepted.
MD - FULL YEAR RESIDENT	Refund - \$322 MARYLAND has been Accepted.

where is my refund?
Edit More Forms

Viewing and Printing a Tax Return

To view or print forms for a client already in your database, go to your Client Manager Tab > Manage Return; once you have pulled up the client details, double click.

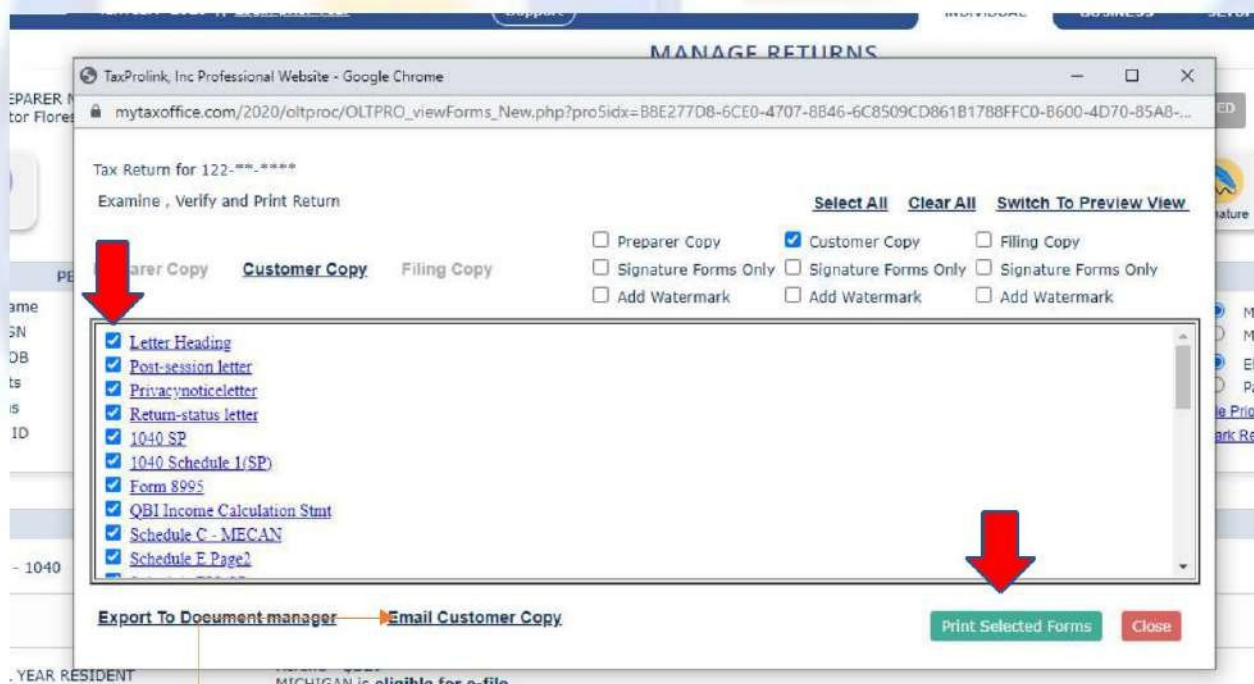
Navigate to the <Return Details Tab> and click to <View/Print Forms>.



Displayed will be all forms and schedules related to the tax return to view and/or print.

Print All Option – Will print all forms, schedules, worksheets, letters, and bank documents for the Client, Preparer, and Filing copy.

OR Check the needed boxes to print multiple forms and click <Print Selected Forms>.



Email

Customer Copy: To send customer's copy to email with password protect.

The form will display in PDF Format for viewing, printing or saving.

NOTE: Pop-Up's MUST be enabled to view forms.

Chapter Three: E-File Management

E-File Preparation

To e-file a tax return, the return must be <Marked Complete> and selected for <Electronic File>

The screenshot shows a software interface with five navigation icons at the top: Letters (document icon), Notes (notepad icon), Signature (handwriting icon), MyTaxOffice (tax office icon), and DM Docs (document icon). Below these are two panels. The left panel, titled 'INCOME SUMMARY', contains a table with the following data:

INCOME SUMMARY	
ome	\$105306
	\$103504
1	\$18650
ncome	\$80114
dits	\$3495
	\$12584
ments	\$15525

The right panel, titled 'OTHERS', contains a list of radio button options: 'Mark Return Incomplete', 'Mark Return Complete', 'Electronic File', and 'Paper File'. A red arrow points from the 'INCOME SUMMARY' table to the 'OTHERS' panel, and another red arrow points to the 'Electronic File' option.

Making a Payment for a Return

After completing a return and before electronically filing the return, you must indicate how the taxpayer will pay for the return by clicking the link <Start Payment/Edit Payment/Make Payment>

[File Another State Return](#)

The screenshot shows the 'PAYMENT AND EFILE DETAILS' section of the software interface. It contains a table with the following rows and buttons:

PAYMENT AND EFILE DETAILS		
CLIENT PAYMENT	Pricing Options Federal : Manually after every return State : Manually after every return	Start Payment
E-FILE		Ready to E-File
EXTENSION		Transmit Extension
STATE-Other Return		Transmit

A red arrow points to the 'Start Payment' button.

If necessary, enter the < Manual Rate> or verify the calculated charges. You can <Modify> Federal or State Charges. When finished, click < ADD New Invoice>

RETURN PAYMENT

Note : Use "Add New Invoice" option to start new invoice for charging fees for the Service related to return preparation including state, and amended returns.

ADD NEW INVOICE

NET COST PAYMENT

\$500

Total amount for both Federal & State

\$1000

MODIFY CHARGES

Account Summary

Total filing amount

\$1000

Total Additional Charges

Federal - \$200
State - \$0

\$200

Total Discounts

Federal - \$0
State - \$0

(\$0)

Preparer Fee's (Amount to be Paid)

\$1200

Payment Option

Payment For

Fed Only State Only Federal & State

Payment Mode

Non Banking Banking

Amount to be Paid

\$ 1200

Back to Manage Returns

CONTINUE

Modify Charges: Option where you can give discounts or to add charges

Non- banking: Clients pay cash/credit card or checks

Banking: Clients pay you from their refund using the Bank Product partners

CLIENT PAYMENT DETAILS

PAYMENT OPTION

Do you like to make payment now? Yes, Make Payment Now No, Invoice Only

Payment Mode CASH CHECK MONEY ORDER CREDIT CARD

Enter the amount paid

Do You Want to mark this invoice as completed? Yes No

DO YOU WANT TO EFILE THIS RETURN NOW? YES NO

[Back to Client Manager](#)

[Back to Payment Details](#)

[SAVE AND CONTINUE](#)

Select which Payment Type and whether to Make Payment Now or Invoice Only

Then select Yes to E-File this return now.

Note: Mark the invoice as completed in order to efile the tax return

Selecting Transmission Type

Next, select how to transmit the returns.

Taxprolink offers the option to file in the following methods: Federal with State; Federal-Only; or State-Only. After selecting the type of transmission, click the button **<Transmit Now>**

TRANSMIT RETURNS

EFILE TRANSMISSION

FEDERAL EFILE

1040

STATE PIGGYBACK EFILE

- v

STATE-ONLY E-FILE

AZ

GA

TRANSMIT NOW **ADD TO QUEUE**

NOTE: Selecting the option **< Add to QUEUE >** will move the specific return to the location E-File **> Ready to Transmit.**

Getting E-File Acknowledgements

E-File Acknowledgement from Client Manage

To get E-File Acknowledgements, there are two options available. The first is from within the < Client Manager> Click the link to <Return Status > to see the latest status of the tax return.

INCOME SUMMARY			LINKS	
RD	Total Income	\$24251	<input type="radio"/>	Mark Return Incomplete
	AGI	\$24251	<input checked="" type="radio"/>	Mark Return Complete
	Deduction	\$12400	<input type="radio"/>	Electronic File
	Taxable Income	\$11851	<input type="radio"/>	Paper File
3387	Total Credits	\$789		Return Status
	Total Tax	\$439		Send Accepted Letter
LOUD.COM	Total Payments	\$2393		File Prior Year Return
				Change Preparer
				File Amended Return
				View Input

The window that opens will have the latest Return Status.

Tax Return Status - FEDERAL

Click the below link to change your state information given in federal. This includes state withheld in W-2, W-2G, 1099R, CSA-1099-R/CSF-1099-R, Unemployment compensation, 1099INT, 1099DIV, 1099OID, 1099B, 1099MISC, 1099NEC and 1099K.

[CLICK HERE TO EDIT STATE INFORMATION IN FEDERAL](#)

REMINDER FROM THE IRS:

If you need health coverage, visit www.HealthCare.gov to learn about health insurance options that are available for you and your family, how to purchase health insurance, and how you might qualify to get financial assistance with the cost of insurance.

Original Amended Return Summary		
Transmission Status	ACCEPTED	View Forms
You Are Due A Refund	\$1954	More Details
Banking Information	DIRECT DEPOSIT	More Details
Refund Status	CURRENT YEAR	Where is my refund?
Estimated Tax (1040 ES)	NOT COMPLETED	File 1040 ES
Amended Return		

Federal/State	Status	Submission ID	Comment	Refund or (Owe)	
FEDERAL	Federal e-file return has been accepted.	04867220	iled Form - 1040	\$1954	where is my refund?
STATE MA	MASSACHUSETTS e-file has been accepted.	04867220	ULL YEAR RESIDENT	(\$975)	Edit/Complete Return More details State forms

[File Another State Return](#)

[CLICK HERE TO EDIT STATE INFORMATION IN FEDERAL](#)

Click the below link to change your state information given in federal. This includes state withheld in W-2, W-2G, 1099R, CSA-1099-R/CSF-1099-R, Unemployment compensation, 1099INT, 1099DIV, 1099OID, 1099B, 1099MISC, 1099NEC and 1099K.

Get E-File Status from E-File Tab

Click < EFILE >

The screenshot shows the TaxProLink EFILE interface. At the top, there's a navigation bar with 'TAXPROLINK' logo, account information (AccountID: LORPX45014AT, Last visited: 06-17-2021 10:09:43, TaxYear: 2020), and buttons for 'View Messages', 'Support', 'Remote Support', and 'Quick Account Setup'. Below this are tabs for 'INDIVIDUAL', 'BUSINESS', and 'SETUP'. The main area is titled 'EFILE' and contains several tabs: 'Returns', 'Extension', 'Bank', 'Completed Paid & Not Efiled', 'IRS MissingData Alerts', and 'Efile Errors'. Below these are filter buttons for 'RETURN STATUS' (Queue for Transmit, Queued, Accepted, Rejected, Transmitted, Unfiled) and a 'ShowAll' button. A search bar is present with 'D / SEARCH' and 'SEARCH' buttons. The interface also shows 'Showing Queue for Transmit Clients' and 'No Results Found'.

Queued for Transmit – A tax return that has been set to queue and can transmit for batches

Queued Return – A tax return that has been sent to Taxprolink but not yet sent to the IRS.

Accepted Return – A tax return that has been Accepted by the IRS.

Rejected Return – A tax return that has been rejected by the IRS.

Transmitted Return – A tax return that has been sent to the IRS and is awaiting an

acknowledgement Unfiled Return – A tax return that hasn't finished or not filed to the IRS

Extension Tab:

Extension returns

Bank Tab:

Bank Product returns

Rejected Returns

To view Rejected Returns, navigate to E-File

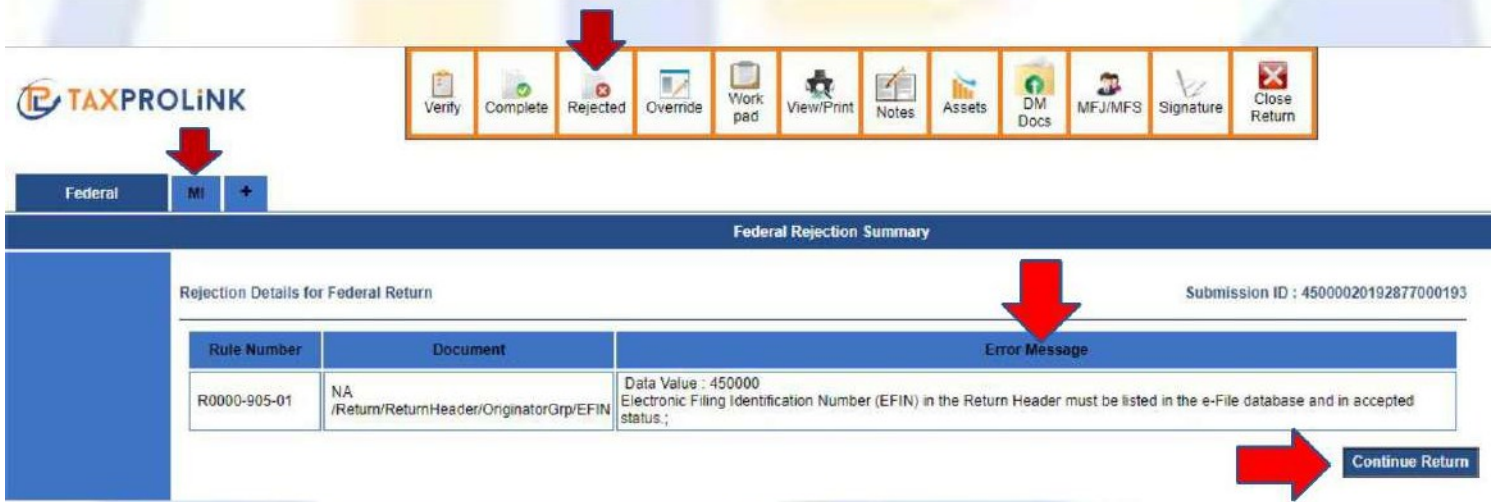
click the button <View Status>  to view the rejection message



The screenshot shows the EFILE interface with the 'Rejected' status filter selected. A table titled 'Showing Rejected Clients' lists the following data:

S.NO.	NAME ↑	SSN ↓	STATUS		
1	BLAH, VICTOR	258-**-*****	FED MI		
2	CHESTER, HILTON	259-**-*****	FED MI		
3	FRANCOIS, PHILIUS	258-**-*****	FED MI		
4	FLORES, VICTOR	293-**-*****	FED AL - PAPERFILED MI		

A window will show with the details of the Rejection from the IRS and State.



The screenshot shows the 'Federal Rejection Summary' window. A toolbar at the top includes icons for Verify, Complete, Rejected, Override, Work pad, View/Print, Notes, Assets, DM Docs, MFJ/MFS, Signature, and Close Return. The 'Rejected' icon is highlighted. Below the toolbar, the 'Federal' and 'MI' tabs are visible. The main content area displays 'Rejection Details for Federal Return' with a 'Submission ID : 45000020192877000193'. A table shows the following rejection details:

Rule Number	Document	Error Message
R0000-905-01	NA /Return/ReturnHeader/OriginatorGrp/EFIN	Data Value : 450000 Electronic Filing Identification Number (EFIN) in the Return Header must be listed in the e-File database and in accepted status ;

A 'Continue Return' button is located at the bottom right of the window.

After viewing the Rejection, click <Continue Return>

Click State tab to view the rejection message from the state

Checking the rejection per return from the Manage return <Click Clients> Manage Returns, double click Clients Name to manage.

The screenshot shows a toolbar with buttons: Edit, View/Print, View Input, Delete, PW Protect, Appointments, Letters, Notes, Signature, MyTaxOffice, and DM Docs. Below are four panels: PERSONAL INFO, CONTACT INFORMATION, INCOME SUMMARY, and OTHERS. The 'FEDERAL, STATE, EXTENSION DETAILS' panel shows rejection messages for Federal and NY returns. A red arrow labeled '1' points to the 'Edit' button in the toolbar. Another red arrow labeled '2' points to the 'Edit' button in the 'FEDERAL, STATE, EXTENSION DETAILS' panel.

Edit 1. Click Edit if both Federal and states are rejected to view the rejection message.

Rejection: Interview Mode

The screenshot shows the 'EFILE REJECTION CODE SUMMARY' page. At the top, it displays 'Refund \$2,720'. Below is a list of instructions for handling the rejection. The 'IRS - EFILE REJECTION CODE SUMMARY' section shows an 'ERROR - 1' with the following details:

IRS - EFILE REJECTION CODE SUMMARY	
ERROR - 1	
S.No	1
Rule Number	R0000-503-02
Document ID	NA
Error Message	723 [Redacted]
Spouse SSN and Spouse Name Control in the return must match the e-File database.	

A red arrow points to the 'Error Message' field.

Rejection: Direct Mode

TAXPROLINK

Verify Complete **Rejected** Override Work pad View/Print Notes Assets DM Docs YOY MFJ/MFS Attachment Signature Close Return

Federal IL +

Federal Rejection Summary

Rejection Details for Federal Return Submission ID : 582900

Rule Number	Document	Error Message
IND-517-01	IRS1040 /Return/ReturnData/IRS1040[1]/DependentDetail[1]/DependentSSN	Data Value : 327 A Dependent SSN in the return must not be the same as the Primary or Spouse SSN on another return where 'PrimaryClaimAsDependentInd' or 'SpouseClaimAsDependentInd' is not checked ;

Continue Return

Click Continue Return to fix it.

Edit 2. Federal was accepted and State was rejected:

Click edit if state rejected only to view the state rejection

FEDERAL, STATE, EXTENSION DETAILS

FEDERAL - 1040	Refund - \$885 e-file has been	2
NY - FULL YEAR RESIDENT	Refund - \$275 NEW YORK has been Rejected.	Edit More Forms

[File Another State Return](#)

On Interview Rejection returns

STATE SUMMARY

NEW YORK STATE SUMMARY

NY State Return		1	2
Transmission Status	FED-REJECT	Error Info	Edit Return
Resident Status	FULL-YEAR RESIDENT		
Refund/Owe	OWE - \$142	More Details	
Payment Method	PAY WITH A CHECK	Address	

FILE NEW RETURN
[TO START ANOTHER RETURN \(STATE, EXTENSION, CITY AND OTHER\) FOR THIS ACCOUNT, CLICK HERE](#)

Error Info: to view the rejection message

Edit return: Click <Edit return> Click <Preferences> to view the rejection message and fix.

STATE REJECTION SUMMARY

State Rejection Summary

NEW YORK STATE - EFILE REJECTION CODE SUMMARY

S.No

ERROR DESCRIPTION

Previous

Save & Continue Return

My Info +

Extension

Federal +

State

Return Attachments

Review

Preferences ←

Back to TaxProLink

PREFERENCES

Rejected Information

DM Docs

Return Attachments

IRS - EFILE REJECTION CODE SUMMARY

S.No	DOCUMENT ID	XPATH	ERROR MESSAGE
1	NA	/Return/ReturnHeader/Files/SpouseSSN	DataValue [REDACTED] Spouse SSN and Spouse Name Control in the return must match the e-File database.

NEW YORK STATE - EFILE REJECTION CODE SUMMARY

PRINT THIS PAGE

Resubmitting a Rejected Return – Client Manager

After the Rejected Return has been corrected, the return can be resubmitted from the Client Manager and clicking on the Rejected Return. Then click '**Transmit Now**'

[File Another State Return](#)

PAYMENT AND EFILE DETAILS

CLIENT PAYMENT \$600 Paid with CASH [Edit Payment](#)

E-FILE Your Return is Ready for Efile **Transmit Now**

EXTENSION [Transmit Extension](#)

STATE-Other Return [Transmit](#)

Mark the return before retransmit.

During the tax return inputs, the final page of the interview allows you to make this selection


Direct Input:

Click **<Complete>** to mark the return Completed and Reviewed

TaxProlink, Inc - COMPLETE RETURN

Complete Return


Are you ready to Mark the Return as Completed?

Yes 

No

Review Return

Are you ready to Mark the Return as reviewed?

Yes 

No

File Return

File this return as ?

Paper File

Electronically

Save & Redirect to Manage Returns **Save & Close**

Interview Mode:


Click **< Review>** Save and continue to **< TAXPROLINK, INC - COMPLETE RETURN>**

TAXPROLINK, INC - COMPLETE RETURN

Mark this return as completed and ready for efile

TaxProlink, Inc - COMPLETE RETURN

Are you ready to Mark the Return as Completed?

Yes 

No

FILE RETURN


File this return as ?

Paper File

Electronically

REVIEW RETURN

Are you ready to Mark the Return as reviewed?

Yes 

No

Removing a Return from Queue status

To remove a return from Queue, click <Efile> Click <Queued>

The screenshot shows the EFILE interface. At the top, there are navigation tabs: Returns, Extension, Bank, Completed Paid & Not Efiled, IRS MissingData Alerts, and Efile Errors. A red arrow points to the 'Completed Paid & Not Efiled' tab. Below this is a 'RETURN STATUS' filter bar with buttons for Queue for Transmit, Queued, Accepted, Rejected, Transmitted, and Unfiled. A red arrow points to the 'Queued' button. Below the filter bar is a search section with a 'FIND / SEARCH' button, a dropdown for 'SSN', a dropdown for 'LIKE', and a 'SEARCH' button. Below the search section is a message: 'Showing Queue for Transmit Clients' and 'No Results Found'. Below this is a table with columns: S.NO., NAME, SSN, and STATUS. The first row shows '1', 'PAL', '587-***-****', and 'FED AZ GA'. A red arrow points to a minus sign icon in the STATUS column. Below the table is the 'E-FILE STATUS - QUEUED RETURN' form. The form has two sections: 'FEDERAL E-FILE' with a checkbox for '1040' and 'STATE-ONLY E-FILE' with checkboxes for 'AZ' and 'GA'. A red box with white text says 'No Need to check the boxes for Federal and States'. At the bottom right of the form is a 'SAVE AND CONT' button with a red arrow pointing to it.

Click < Save and Continue>

You will now have the option to Remove From Queue for Editing or Retransmission at a later date.

Leave the transmissions UNCHECKED to indicate the removal of these returns and click <Save and Continue>

Chapter Four: Using the Taxprolink Features

Scheduler

The Scheduler is a feature that allows you to manage your existing or prospective customer's appointment schedule. Daily reports are available as well as customizable work hours and meeting durations

The screenshot shows the 'SCHEDULER' interface. On the left is a navigation menu with icons for Dashboard, Clients, Efile, Scheduler (highlighted with a red arrow), Letters, Reports, and Pricing. The main area has tabs for Scheduler, Reports, and Settings. Below these are tabs for NEW CLIENT, RETURNING CLIENT, and EXISTING CLIENT. The 'APPOINTMENT SCHEDULER' section contains a form with fields for Date (6/17/2021), Time (8:00 AM), Duration (15 min), SSN, Preparer (Victor Flores), Name, E-Mail, Phone, Purpose, and Comments. A 'MAKE APPOINTMENT' button is at the bottom right. Below the form is a section titled 'APPOINTMENTS ON - 06/17/2021' with a calendar view showing 'No Appointments Found on 06/17/2021'.

Letters

Creating Custom Letters To create a Custom Letter, go to the Setup Tab > Settings > Create Custom Letter.

The screenshot shows the 'LETTERS' interface. On the left is a navigation menu with icons for Dashboard, Clients, Efile, and Scheduler. The main area has tabs for Letters, Client Organizer, Mailing Lables, and Settings (highlighted with a red arrow). Below these is a 'LETTER TYPE' dropdown menu with a list of options: PreSessionLetter, PreSessionLetter, SchedulingLetter, PrivacyNoticeLetter, InvoiceLetter, ReturnStatusLetter, PostSessionLetter, PaperFilingLetter, EstimationLetter, and COVER LETTER. To the right is a 'SEARCH' section with a dropdown menu set to 'SSN' (highlighted with a red arrow) and a 'LIKE' dropdown. Below this is a table with columns for S.NO., LETTER NAME, SSN, and CRE.

S.NO.	LETTER NAME	SSN	CRE
1		122-**-****	

To create a Custom Letter, name the letter and enter the information to generate the letter. There are Custom Fields that can be auto-inserted into the letter by clicking the preferred field and clicking the button >>. Once the letter is complete, click <Save Letter>

Letter Name:

Letter Type: PRE-SESSION LETTER ▼

Bold **Italic** **Underline** Times New Roman ▼ 11 ▼

LETTER - MESSAGE

Dear Mr. and Mrs. Taxpayer,

Income tax time is just around the corner. The enclosed organizer has been prepared to assist you in gathering information for your [:TAXYEAR:] tax return. Please review the entire organizer and answer all questions that apply to you.

Once you have gathered all the required information, please call our office at [:BSTART:][:PREPHONE:] [:BEND:]to schedule an appointment to have your taxes prepared.

Please bring the organizer and all supporting documents, including Forms W-2 and 1099, to your tax preparation appointment. We appreciate your trust in our business.

Please feel free to contact us if you have any questions or need additional information.

Sincerely,

[:BSTART:][:SIGNNAME:][:BEND:]
[:BSTART:][:SIGNPHONE:][:BEND:]

DEFAULT LABELS

- TAXPAYER NAME
- TAXPAYER SSN
- TAXPAYER ADDRESS
- TAXPAYER CITY STATE ZIP
- TAXPAYER PHONE
- TAXPAYER EMAIL
- SPOUSE NAME
- SPOUSE SSN
- PREPARER NAME
- PREPARER SSN
- PREPARER PHONE
- PREPARER E-MAIL
- FIRM NAME
- FIRM ADDRESS
- FIRM CITY STATE ZIP
- FIRM PHONE
- FIRM E-MAIL
- CURRENT DATE
- TAXYEAR
- APPOINTMENT TIME

[Back To Settings](#)

[SAVE LETTER](#)

Client Organizer

To access the Client Organizer, click <Letters > Client Organizer.

TAXPROLINK, INC CLIENT ORGANIZER

LETTERS **CLIENT ORGANIZER** MAILING LABELS SETTINGS

NEW CLIENT ORGANIZER **EXISTING CLIENT ORGANIZER** PRIOR YEAR CLIENT ORGANIZER

SEARCH SSN ▼ LIKE ▼ SEARCH SHOWALL

[ADD NEW CLIENT](#) [PRINT BLANK ORGANIZER](#)

S.NO.	NAME	SSN		
1	QU <input type="text"/>	258- <input type="text"/>	EDIT	Print Organizer

MFJ vs. MFS Comparison Chart

The MFJ vs. MFS Comparison Chart can be accessed by going to Tools > MFJ vs. MFS Comparison Chart.

TOOLS

Import 2019 Clients Estimator Depreciation **MFJ Vs. MFS** Messages

SEARCH SSN LIKE SEARCH SHOWALL Records [1-11] of 11

S.NO	NAME	SSN	PHONE	EMAIL	
1	ARAC	286-**-****	248-7167	@TAXPROLINK.COM	COMPARE
2	BEAV	258-**-****	248-864		COMPARE
3	CAYA	698-**-****	248-864	MAIL.COM	COMPARE
4	CO, V	565-**-****	248-864	PROLINK.COM	COMPARE
5	LONG	111-**-****	701-734567		COMPARE

Depreciation:

To create Depreciation schedule

Depreciation Summary: listing of returns on 4562 entries (Depreciation details)

Import 2019 Clients Estimator **Depreciation** MFJ Vs. MFS Messages

DEPRECIATION SCHEDULE **DEPRECIATION SUMMARY**

PROPERTY DETAILS

Select the year when the business was started

Description of property

Select date placed in service (MM/DD/YYYY)

Cost or other basis

Elected cost

SELECT PROPERTY TYPE

Select Property Type

- Listed property
- MACRS
- ACRS
- Section 168(f)(1) election
- Other
- None

if other, specify the property type

Reports:

Standard Report: Client Returns

Next, click on the drop down menu for the Category of Report you wish to generate. Then specify how to sort the Report by selecting from the Based On drop down menu. Once the report has been selected, click the button **<Click View & Print Report>** . After the report has been generated, the options of Printing, Exporting to Excel, or Previewing are available.

The screenshot shows the 'STANDARD REPORT' configuration page. At the top, there are three icons: 'Standard Report', 'Office Revenue Report', and 'Custom Report'. Below these is a header with 'CLIENT RETURNS' and 'EFILE'. The main section is titled 'STANDARD REPORT' and contains the following fields:

- Category: All Reports (dropdown menu)
- Name of Report: Address and Email List (dropdown menu)
- CUSTOM section with radio buttons for:
 - Return result: All (selected), Refund, Balance Due, Zero Due
 - Review: Both (selected), Reviewed, Not Reviewed
 - Sort By: SSN/EIN (selected), Taxpayer Name, Zip code
- INCLUDE DATE RANGE:
- VIEW & PRINT REPORT button

E-File Data Report

To access the E-File Data Report, navigate to Reports > E-File

Office Revenue Report

To access the Office Revenue Report, navigate to Reports > Office Revenue Report.

Custom Report

The screenshot shows the 'SELECT REPORT COLUMNS' configuration page. It features two columns of report fields and a central set of control buttons.

- Available Columns:** FIRST NAME, LAST NAME, AGE, BIRTHDATE, W2 WAGES, W2 FED W/H, W2 SS WAGES, W2 SS W/H
- Selected Report Columns:** SSN/EIN, FULL NAME, FORM TYPE, PHONE NUMBER, EMAIL
- Control Buttons:** Add >>, << Remove, Remove All, Set Default
- Action Buttons:** VIEW & PRINT REPORT, SAVE REPORT

Text Messaging

Now Taxprolink has feature to send and receive messages from your tax office individual clients.

Data Entry Screen

Taxpayer opts into receiving text message alerts from this tax office.

Direct Input

Personal Information

E-mail Address: [Redacted]
Daytime Phone Number: CELL 2487167999
 Taxpayer opts into receiving text message alerts from this tax office.
Enter Another Contact Number: [Redacted]

Interview Input

Contact Information

My Info: Personal, Contact Info, Taxpayer Info, Filing Status, Additional Info, Document Info

CONTACT INFORMATION

Please provide your email address and phone number below. This information will only be used should we need to contact you regarding your tax return.
Be assured, your personal information will never be shared or sold.

E-mail address: [Redacted]
Phone number: 248-716-7999 CELL
 Taxpayer opts into receiving text message alerts from this tax office.

To activate your sub-preparer's text messages feature to their account:

Click **<SETUP>** **<SETTINGS>** **PREPARER/CLIENT LEVEL**

Choose one of your tax preparer's Account Name and Check Allow Text Messages to allow your employees use the text messages feature to communicate with clients.

The screenshot shows the 'ACCOUNT SETUP' page for a preparer. The 'PREPARER LEVEL SETTINGS' section is active, displaying various configuration options. A callout box highlights the 'Allow Text Messages' checkbox, which is checked. Other options include 'Include Detailed Invoice', 'Block Business Tab', and 'Allow Text Messages'.

Allow Text Messages

Include Detailed Invoice
 Block Business Tab
 Allow Text Messages

Chapter Five: Fee- Collect Options

Processing a Bank Product Return

For Fee-Collect options, Taxprolink offers many partners. In order to access this payment option from within the tax return, you must have the return Marked Complete and selected for Electronic Filing. Then click < **Start Payment / Edit Payment / Make Payment**>

Choose < **BANKING**> Click <**Continue**>

Preparer Fee's (Amount to be Paid) \$600

Payment Option

Payment For Fed Only State Only Federal & State

Payment Mode Non Banking Banking

Amount to be Paid \$ 600

Back to Manage Returns CONTINUE

NOTE: You must REGISTER AND BE APPROVED by an Taxprolink Bank Partner before this option will be available.

TAXPROLINK AccountID: Last visited: 1/14/2018 19:05:42 TaxYear: 2018 | Log out prior year. View Messages Quick Account Setup

INDIVIDUAL BUSINESS SETUP

CLIENT PAYMENT DETAILS

BANKING - EPS PAYMENT

Is Taxpayer Applying for the Taxpayer Advance Product?

Advance Only

Advance With Refund Transfer (RT)

Refund Transfer (RT) Only

You have chosen to apply for a EPS Advance Loan in the amount indicated by checking one of the boxes below and select the proper loan amount value you eligible in advance loan:

Easy Advance Amount	Finance Charge	Bank APR(%)	Description
<input checked="" type="radio"/> \$2057.75	\$0	0%	25% of Expected Tax Refund with 0 Finance charge
<input type="radio"/> \$4115.5	\$97.42	36%	50% of Expected Tax Refund with \$97.42 Finance charge
<input type="radio"/> \$6000	\$142.03	36%	75% of Expected Tax Refund with \$142.03 Finance charge

Is Taxpayer Applying for the PreAck Advance?

No

Yes

EPS-Disbursement Options

CHECK

E1 CARD

DIRECT DEPOSIT

SRT (State Refund Transfer)

Advance Disbursement

CHECK

E1 CARD

MILITARY QUESTIONS

After clicking on the tab of your Bank Partner, you will have the option to select any and all products offered by that Bank Partner. Complete the required information.

PreAck: Advance loan program offers from January 2 to the day of the IRS starts accepting returns.

Disbursement:

Checks: Bank will send a black check to print the taxpayer's advance loans and refund transfer in your office.

Cards: Bank send cards for taxpayer's doesn't have a banking information

Direct Deposit: Banking information must be entered in the tax return before choosing this option.

SRT (State Refund Transfer) – A state refund transfer. If federal doesn't payment your fees. The amount will be taken from the state refund.

The screens that follow will guide you through generating the necessary documents and provide all disclosure documents before allowing e-filing of the tax return.

Bank Product Partners

Bank Products allow the taxpayer to pay the ERO fee's out of the refund and receive the refund disbursement after all fees have been deducted. All Taxprolink Bank Product Partners can be found at <https://www.taxprolink.com/bank-products.html>

Chapter Six: Business Returns

mytaxoffice.com/main/pro/tpl_login.php

AccountID: LORPX45014AT
Last visited : 06-17-2021 15:04:47
TaxYear: 2020 | Login prior year

View Messages

Remote Support Quick Account Setup

Support

INDIVIDUAL BUSINESS SETUP

DASHBOARD

MESSAGE BOARD

IMPORTANT: Phishing Scheme Mimics Software Providers. Learn More

Returns

1120S - 3

Ready to Efile

1120S - 1

1120S Federal Efile Summary

1120S State Efile Summary

QUEUE ACCEPTED REJECTED TRANSMITTED

QUEUE ACCEPTED REJECTED TRANSMITTED

Dashboard Clients Efile Forms Pricing Tools

Clients:

AccountID: LORPX45014AT
Last visited : 06-17-2021 15:04:47
TaxYear: 2020 | Login prior year

View Messages

Remote Support Quick Account Setup

Support

INDIVIDUAL BUSINESS SETUP

CLIENTS

1120S 1120 1065 1041 990 720 706 2290 709 5500 8849

Find/Search

EIN

LIKE

SEARCH SHOWALL

RECREATE NEW RETURN

Hide Client List

Records [1-3] of 3

Dashboard Clients

Business Forms Available:

- 1120s:** U.S. Income Tax Return for an S Corporation
- 1120:** U.S. Corporation Income Tax Return
- 1065:** U.S. Return of Partnership Income
- 1041:** U.S. Income Tax Return for Estates and Trusts
- 990:** Return of Organization Exempt from Income Tax
- 720:** Quarterly Federal Excise Tax Return
- 706:** United States Estate (and Generation-Skipping Transfer)
- 290:** Heavy Highway Vehicle Use Tax Return
- 709:** United States Gift (and Generation-Skipping Transfer)
- 710:** 5500: Annual Return/Report of Employee Benefit Plan
- 8849:** Claim for Refund of Excise Taxes

Creating a Business Return

Click <Clients> Choose <Business Forms> Click <Create New Return>

Dashboard

CLIENTS

1120S 1120 1065 1041 990 720 706 2290 709 5500 8849

Find/Search EIN LIKE SEARCH SHOWALL

CREATE NEW RETURN Hide Client List Records [1-3] of 3

S.NO	S CORPORATION NAME	EIN	RETURN STATUS	RETURN CREATED DATE	LAST EDITED DATE AND TIME	PREPARER
------	--------------------	-----	---------------	---------------------	---------------------------	----------

CLIENT RETURN

ENTER YOUR EIN

Employer Identification Number -

SELECT THE RETURN TYPE

- FORM 1120S** - U.S. Income Tax Return for an S Corporation
- FORM 1120S** - Amended U.S. Income Tax Return for an S Corporation

PREPARER NAME

Select Preparer Name

SAVE AND CONTINUE

Form Search

All Forms | **Filed Forms**

- General Information
- 1120S Page 1
- 1120S Page 2
- 1120S Page 3 SCH K Pag
- 1120S Page 3 SCH K Pag
- 1120S Page 3 SCH K Pag
- 1120S Page 4
- Schedule B1
- Worksheet C
- Schedule D
- Received K-1 from a Fiduc
- Received K-1 from Aothe
- Received K-1 from a Partn

Corporate General Information Form 1120S

[Reset Screen](#)

Name:

Care of Name:

Check here if Foreign Address

Room or Suite No:

Address 1:

Address 2:

City:

State:

ZIP code:

Calendar Year Indicator

Tax Year Beginning (MM-DD-YYYY): / /

Tax Year Ending (MM-DD-YYYY): / /

Phone Number:

Form Search: To look a form name or form number.

All Forms:
Business Forms Available

Filed Forms:
Forms added and to be efiled to the IRS

Complete tab:
Once you have completed the return, click the <Complete> button at the top of any page to start the Diagnostic Process.

Override:
The Override summary to see which forms and line calculations have been overridden.

Work Pad:
The Work Pad summary where you can see the tax forms and schedules have been overridden.

DM Docs:
Document Manager where you can save documents received from the taxpayer.

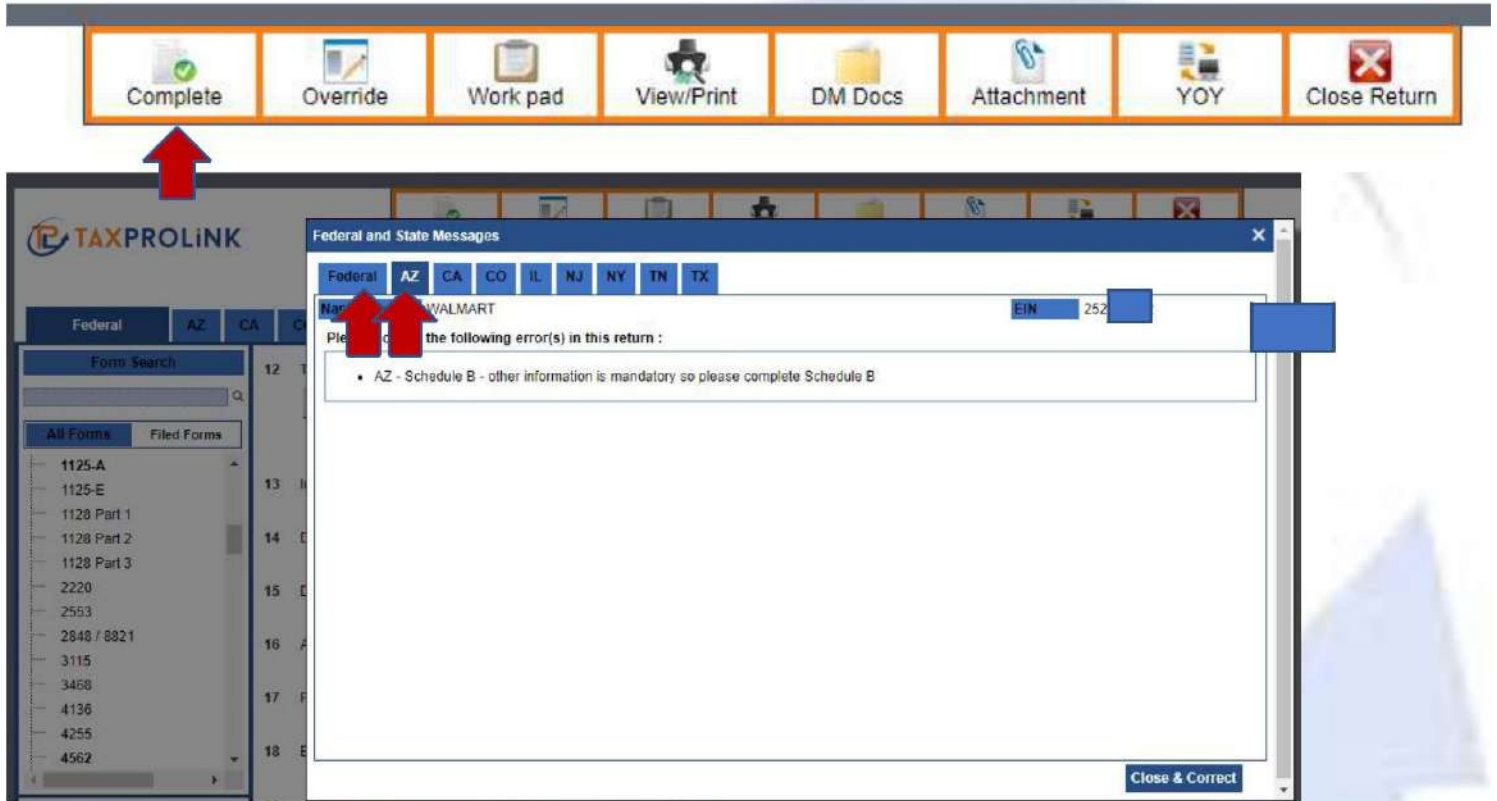
Attachment:
Pdf attachment to be sent to the IRS.

YOY
Year On Year Comparison

Completing a business return:

Running a Return Diagnostic and Completing a Return

Once you have completed the return, click the **<Complete>** button at the top of any page to start the Diagnostic Process



Click **<Federal>** and **<State>** to see the errors in the return.

If there are any issues with the return, a display box will show with any errors that must be corrected before the return can be **<Marked Complete>** You should either **<Click here to fix>** (if available) or **<Close & Correct errors>**



To bypass the error if not applicable in the tax return

Click <Ignore & Continue>

NOTE: You have the option however it is NOT RECOMMENDED

The screenshot shows a window titled "Federal and State Messages" with a close button (X) in the top right corner. Below the title bar are tabs for "Federal", "AZ", "IL", "LA", "MI", "NY", and "TN". The "Federal" tab is selected. The window displays the following information:

- Name: TAXPROLINK TEST
- EIN: 38 [redacted]
- Please correct the following error(s) in this return :
 - BASED ON ERC. (Upload following attachment(s) (if applicable)).
- * For Form 1065

At the bottom of the window, there are two buttons: "Ignore & Continue" on the left and "Close & Correct" on the right. A large red arrow points down from the error message area towards the "Ignore & Continue" button.

Once the diagnostic has completed, you will have the option to <Complete and Review> the return. Click <Save & Close> or <Save & Redirect to Manage Return>

The screenshot shows a window titled "TaxProlink, Inc - COMPLETE RETURN" with a close button (X) in the top right corner. The window contains the following sections:

- Complete Return**: Are you ready to Mark the Return as Completed?
 - Yes
 - No
- Review Return**: Are you ready to Mark the Return as reviewed?
 - Yes
 - No
- File Return**: File this return as ?
 - Paper File
 - Electronically

At the bottom of the window, there are two buttons: "Save & Redirect to Manage Returns" on the left and "Save & Close" on the right. Red arrows point to the "Yes" radio buttons in the "Complete Return" and "Review Return" sections, and another red arrow points down from the "File Return" section towards the "Save & Redirect to Manage Returns" button.

Making a Payment for a Return

Manage Return – Payment Details

Click < Client Payment> Click <Add New Invoice>

Invoice created:

Edit / Modify Charges: To change the pricing amount

Make Payment: To mark the invoice completed and efile

The screenshot displays the 'CLIENT PAYMENT DETAILS' section of a tax software interface. On the left is a vertical navigation menu with icons for Efile, Forms, Pricing, and Tools. The main content area is divided into several sections:

- STATE IN:** A table showing 'TENNESSEE state is ready for e-file.' and 'AZ - EXT Ready for efile'.
- PAYMENT DETAILS:** A section with a red arrow pointing to the 'Client Payment' link.
- E-FILE:** A section with a blue bar.
- EXTENSION:** A section with a 'Transmit Now' link.
- CITY TAX:** A section with a 'Transmit' link.
- TRACKING SYSTEM:** A table showing time spent and dates for return creation, completion, and review.

Below this is the 'CLIENT PAYMENT DETAILS' form, which includes:

- PAYMENT OPTION:** Radio buttons for 'Yes, Make Payment Now' (selected) and 'No, Invoice Only'.
- Payment Mode:** Radio buttons for 'CASH' (selected), 'CHECK', 'MONEY ORDER', and 'CREDIT CARD'.
- Enter the amount paid:** A text box containing '\$ 500' with a red arrow pointing to it.
- Do You Want to mark this invoice as completed?:** Radio buttons for 'Yes' (selected) and 'No'.

At the bottom, there are two buttons: 'BACK TO CLIENT MANAGER' and 'BACK TO PAYMENT DETAILS'. Below these is a red heading: 'DO YOU WANT TO EFILE THIS RETURN NOW?' with radio buttons for 'YES' (selected) and 'NO'. A red arrow points to the 'YES' button. To the right is a 'SAVE AND CONTINUE' button with a red arrow pointing to it.

Efile Transmission:

Check the box to Federal E-File or check to file the State-Only E-File

If filing Federal and State together, verify the state that will Piggyback (E-file with) Federal.

Click <**Transmit Now**> and this tax return will be Queued for Transmission to the IRS.

AccountID: LORPX45014AT
 Last visited : 06-17-2021 15:04:47
 TaxYear: 2020 || [Login prior year](#)

View Messages | Support | Remote Support | Quick Account Setup

INDIVIDUAL | BUSINESS | SETUP

EFILE TRANSMISSION

FEDERAL EFILE
 1065

STATE PIGGYBACK EFILE
 -

STATE-ONLY E-FILE
 LA
 MI
 NY
 TN

DIRECT STATE EFILE
 IL

TRANSMIT NOW | **ADD TO QUEUE**

DO YOU WANT TO TRANSMIT EXTENSION NOW? YES NO

Note: Once the invoice is complete the Ready to E-file is available to click

PAYMENT AND EFILE		
PAYMENT DETAILS	E-FILE	RETURN HISTORY (M)
Client Payment	Ready to E-File	Date & Time
EXTENSION	CITY TAX	06-17-2021 17:32 PM
Transmit Now	Transmit	06-17-2021 17:32 PM
TRACKING SYSTEM		06-17-2021 17:32 PM
Time Spent	7hours 37minutes 16seconds	06-17-2021 17:17 PM
Return Created Date	Jan 2 2021 3:09PM	
Return completed Date	Jun 17 2021 5:32PM	
Reviewed Date	Jan 2 2021 3:08PM	

Efile Tab:

To check the status of business tax returns

Choose business return in the dropdown menu

The screenshot displays the TAXPROLINK EFILE interface. At the top, the account information includes AccountID: LORPX45014AT, Last visited: 06-17-2021 15:04:47, and TaxYear: 2020. Navigation options include 'View Messages', 'Support', 'Remote Support', 'Quick Account Setup', and 'Switch to Classic View'. The main navigation tabs are 'INDIVIDUAL', 'BUSINESS', and 'SETUP'. The 'Returns' tab is selected, and a red arrow points to the '1120S' dropdown menu in the 'PRODUCT TYPE' section. Other filters include 'SHOW', 'Queue for Transmit', 'Queued', 'Accepted', 'Rejected', 'Transmitted', 'Unfiled', and 'ShowAll'. A search bar is present with 'EIN' as the search criteria and a 'SEARCH' button. The search results section shows 'Showing 1120S - QueueforTransmit' and 'Clients [1-0] of 0'. The search result area displays 'SEARCH RESULT' and 'No Results Found'.

Tools:

To import prior year business returns to the current tax year.

Choose the business form from the dropdown menu and click <Import Data>

AccountID: LORPX45014AT
Last visited : 06-17-2021 15:04:47
TaxYear: 2020 | Login other year

Remote Support Quick Account Setup
Support INDIVIDUAL BUSINESS SETUP TAXPROLINKTEST

TOOLS - IMPORT 2019 CLIENTS

PRODUCT TYPE: 1120

Find/Search: EIN LIKE SEARCH

S.NO.	NAME ↑	EIN ↓	PREPARER
1	GLENCO LLC		Flores, Victor

Records [1-1] of 1

IMPORT DATA

Note: Once you import from 2019 to 2020, the import data is no longer available in the 2019 import tool. In order to reimport, please delete the return from 2020 database. Once you delete it in 2020, it should be available for import tool 2019TY.

To delete a tax return. Click <Mark the return Incomplete> Click <Delete tab>

Notes DM Docs

OTHERS

- Mark Return Incomplete
- Mark Return Complete
- Electronic File
- Paper File

1065 MANAGE RETURNS

Edit View/Print Delete PW Protect

Updating Pricing Information

The Pricing Information can be updated here. This will be the fee's that you charge to your taxpayers and while it is not required that you setup this information now, it is recommended.

Dashboard
Clients
Efile
Forms
Pricing

PRICING

1120S 1120 1065 1041 990 720 706 2290 709 5500 8849

FEDERAL STATE DISCOUNT ADDITIONAL CHARGES

PRICING OPTIONS FOR FEDERAL:

Fixed Rate for all returns Set price as Per Form Set price manually after every return

SAVE FEDERAL PRICING CONTINUE TO : STATE PRICING

Choose your pricing option for every return:

- Fixed rate for all returns
- Set Price as Per Form
- Set price manually after every return

Chapter Seven: Glossary

Accepted Return – A tax return that has been Accepted by the IRS.

Forms Tree – The forms tree is the list of all available forms within the Direct Input preparation screen.

Queued Return – A tax return that has been sent to Taxprolink but not yet sent to the IRS.

Piggyback State – A state return that will transmit along with the Federal Return.

Rejected Return – A tax return that has been rejected by the IRS.

Transmitted Return – A tax return that has been sent to the IRS and is awaiting an acknowledgement

Disabled Account – Account is disabled due to accessing from outside USA. Tax preparers may use a VPN and set to US server to access the software.

EIN DB – EIN auto-save on the database, will auto populate the employer's information when key in the ein in the tax return.

IP Security - Restricting staff's logins in a specific location.



Taxprolink Support Timing Schedules Jan 2 – May 31

Monday –Friday 9 am - 11 pm EST

Saturday 10 am - 6 pm EST

Sunday 12pm – 6pm EST

June 1 – December 31

Monday – Friday 9am -9pm EST

Saturday 10 am - 6 pm EST

Sunday - Closed

Support: (800) 746-8901

Text Line: 248-864-2275 / 248-716-7999

25200 Five Mile Road

Redford Charter Township MI 48239

support@taxprolink.com