T05 TaxSlayer Customer Portal

AARP Foundation Tax-Aide National Technology & Security Committee

Revised 11/10/2024

Quick Guide

This is a quick Instruction guide for the Tax-Payer to upload an electronic document from a phone or computer to the TaxSlayerPro customer portal.

1. Request an invitation to the portal from your tax preparer to upload a document.
2. To send an invite to the portal, the preparer must first start your return and enter your basic information including your SSN, name, age, address, phone number and email.
3. Click on the link you receive via email or text from **TaxSlayerPro.com**.
4. Create a username and password of your choice.
5. Enter your last name, phone number, email and last 4-digits of your social security number. All this information must match exactly what you gave to the preparer!
6. Click **Submit**.
7. Verify the account using your phone or email. You will receive a code to either your phone or email. Enter this code.
8. Save the file you want to upload to your device's internal storage. By default, files are downloaded to the **Download** or **Recent folder** on most devices.
   a. If the file is an email attachment, save the attachment to your internal storage.
   b. If the file is stored on a third party website such as a bank or brokerage website, login to that third party website and download the file to your internal storage.
9. From the customer portal **Welcome** home page, click on **My Files → Upload Documents.**
10. Click on the "**Drop Files Here to Upload Documents**" box. A file browser or Finder window should open.
11. Navigate to the file you downloaded (look in Download or Recent folder) and select it. The file should now upload to the portal.
12. From the portal **Welcome** page, click on **My Files** to view all the files you downloaded.
13. Tell your preparer that the file has been uploaded and ready to view. The preparer should now be able to view the file in your return as a Scanned Document.
14. (Option) Ask the preparer to print the document to add to your printed records.
15. (Option) If you have more documents to upload at a later time, you can login back to the portal using the same link that was sent to you in the email. Login to the portal by using the same username and password you entered the first time.

NOTE: For security reasons, do not send tax documents with personal information via email. Uploading documents to the customer portal is the only way authorized by AARP Tax-Aide to transmit electronic documents to the preparer.

Only use a private password-protected and encrypted WiFi network or use a Cellular Data Network to upload documents. DO NOT USE OPEN PUBLIC NETWORK!

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Summary

This document provides the procedure for Taxpayers who need to upload electronic documents from their phone to the Taxpayer Portal in Taxslayer, as well as instructions to the Counselor on how to:

- invite the Taxpayer to the Portal
- confirm the document has been loaded
- remove the document once the return has been signed

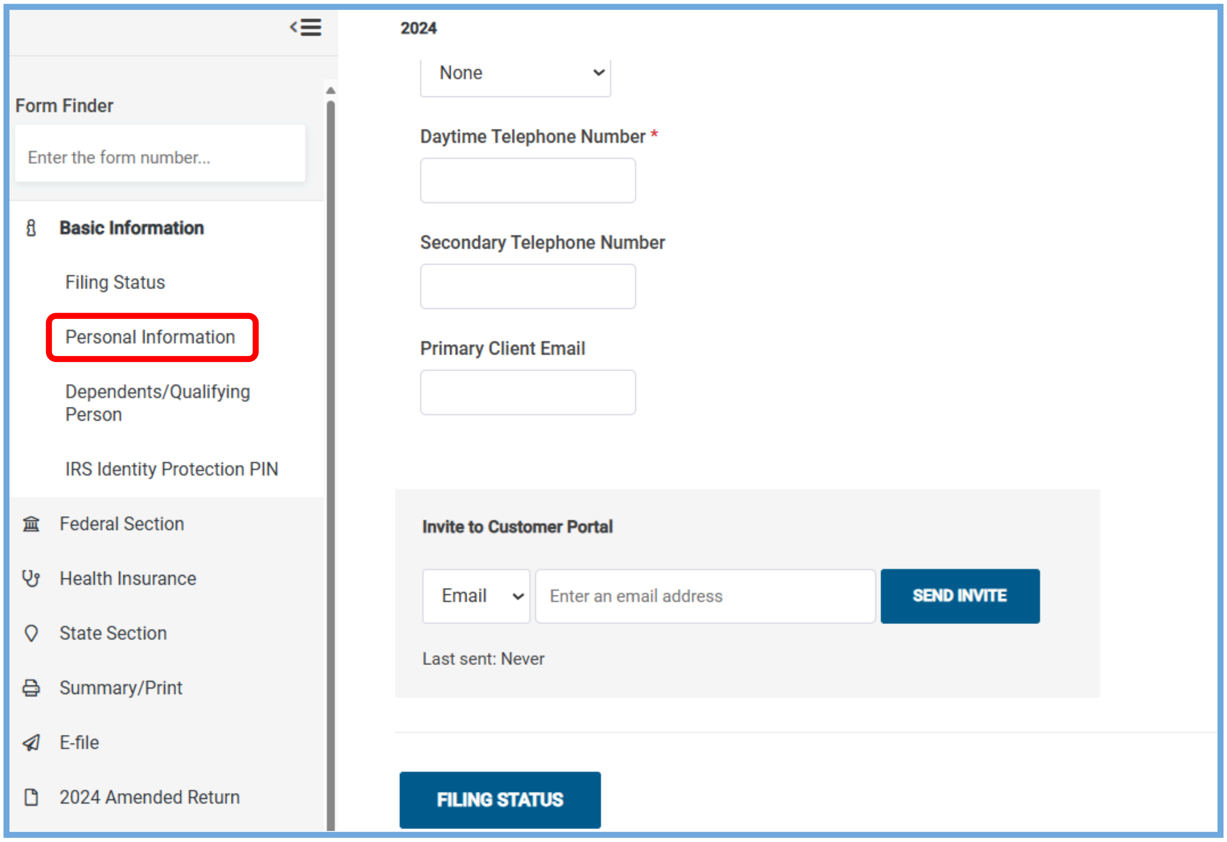
Prerequisites

The Taxpayer must have access to an email account on their cell phone!

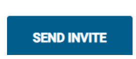
The Taxpayer cellphone must have internet access. However, we should discourage the Taxpayer from connecting their cellphone to an open unsecure public WiFi network to upload documents containing PII. Instead, they should connect the cellphone to a cellular data network which is more secure.

To be able to access the Customer Portal and Taxpayer uploaded documents, the **Customer Portal** and **Scanned Documents** checkboxes must be turned on in the Security Template. The **Delete Scanned Documents** checkbox can also be turned on.

Sign-up



In order for a taxpayer to access the TaxSlayer Customer Portal, they must be invited by the counselor. To do this the Counselor must:

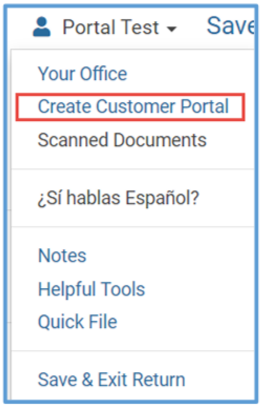
1. Start the return in TaxSlayer by entering the Taxpayers personal information.
2. At the bottom of the Personal information screen, the Counselor must select either email or phone and enter the Taxpayers email address or phone number. Note: The Taxpayer must have access to either the email account or text messages on their phone at the site.
3. The Counselor must then click on 

to send an email or text to the Taxpayer with a link to TaxSlayer customer Portal.

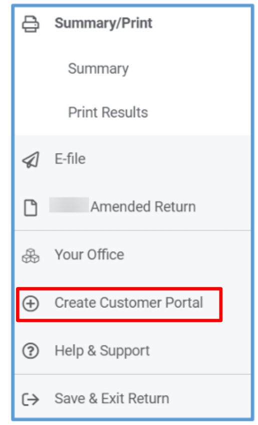
After all the Basic Information section has been completed, the Taxpreparer can also invite the Taxpayer to the portal in the middle of doing the return without return in to the Basic

Information section either by using the drop down menu next to the Taxpayer's name on the top left menu bar or by using navigation pane menu at the left of the screen.

Drop down menu next to TP's name

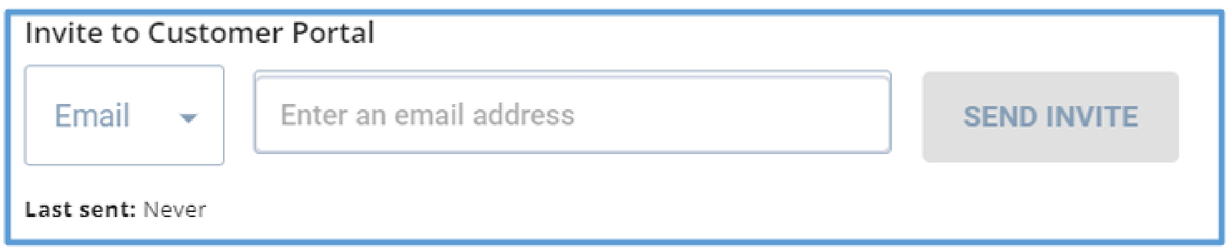


Left Navigation Pane



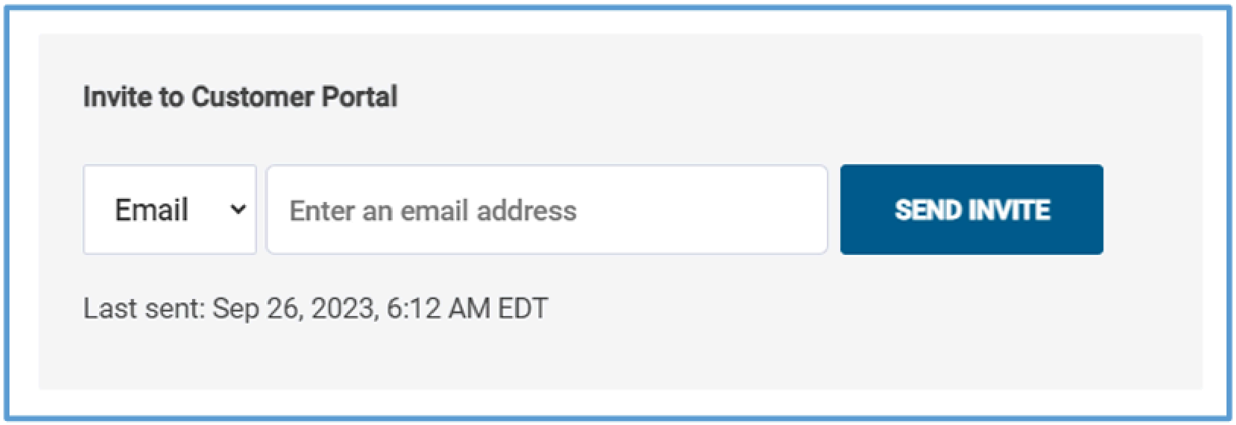
Note that these menus are not available until the Basic Information section is completed.

After selecting the **Create Customer Portal** menu, it will bring you to the **Invite to Customer Portal** window shown below.



Select either Email or Phone from the drop down menu and enter either the email address or the cellphone number of the taxpayer in the entry box, then click the SEND INVITE button and click CONTINUE. The Taxpayer will receive an invite either by phone or email.

Note that you can re-invite the Taxpayer to the portal. Just navigate back to the **Customer Portal** menu. The date you last invited the taxpayer will be displayed. By clicking on the **SEND INVITE** button again, a new email or text message will be sent to the Taxpayer.

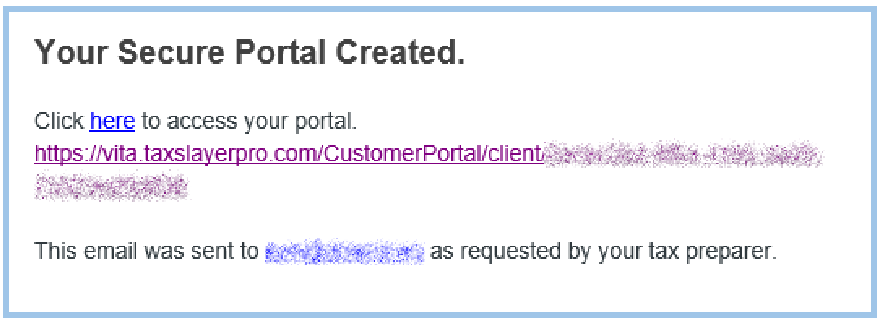


The following page can be printed and laminated and provided to the Taxpayers to assist them with accessing the Portal while at the site.

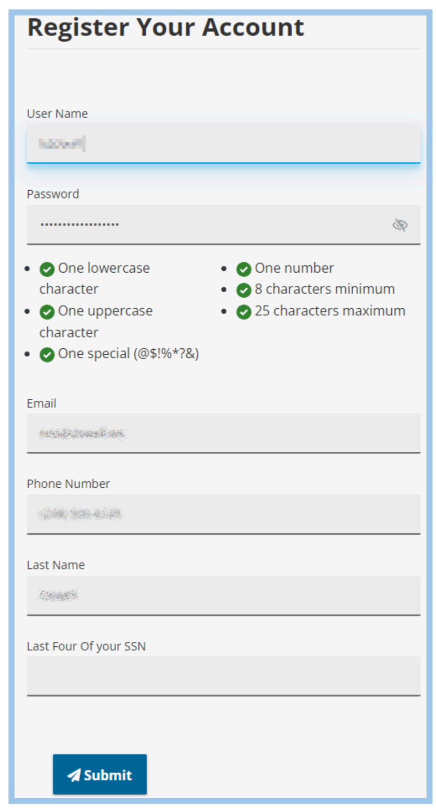
The Portal allows you to upload electronic documents into your tax return so that the counselors can view and/or print them for use in preparing your tax return.

Email Received

You have received an email with an invite to the portal. The email is coming **From: TaxStatusNow.com <support@e.vita.taxslayerpro.com>.** Please click on "**here**" or the link within the email to access the portal

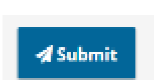


Information Requested



Next you must enter the following:

- The account username you wish to use.
- A password for the account.
- Email Address - must be the same one you received the invite o000n.
- Phone Number - must be the same one you are using to retrieve the email.
- Your Last Name - must be the last name of the primary person on the tax return.
- Must be the Last 4 of the primary person's social security number.

Click 

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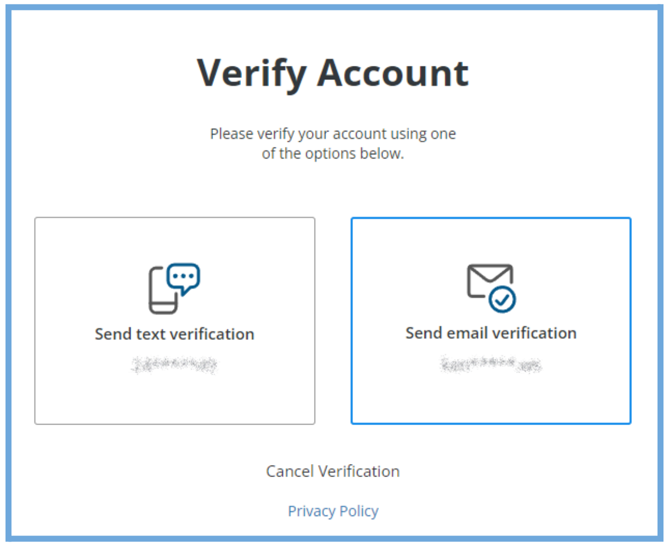
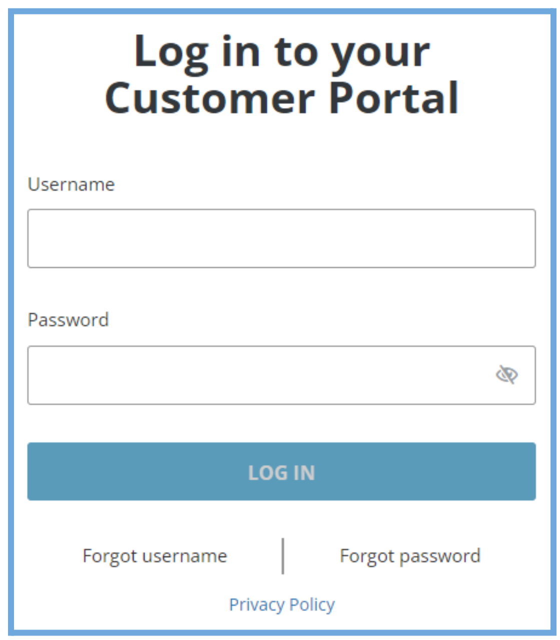


Verify Account

Next you must select a verification method. A text or email will be sent and a screen will appear where you must enter the code.



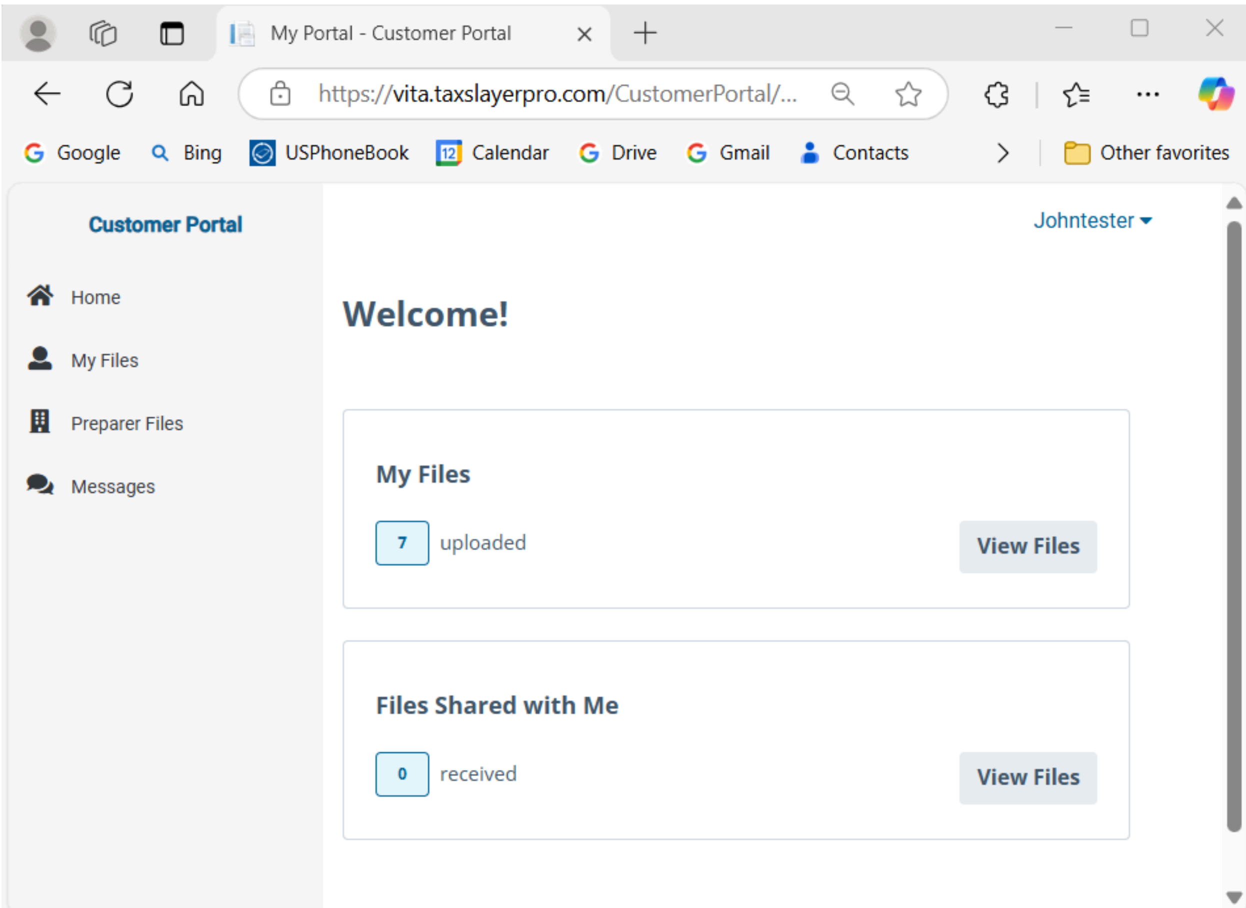
Return to Login Again

https://vita.taxslayerpro.com/CustomerPortal/Account/Login

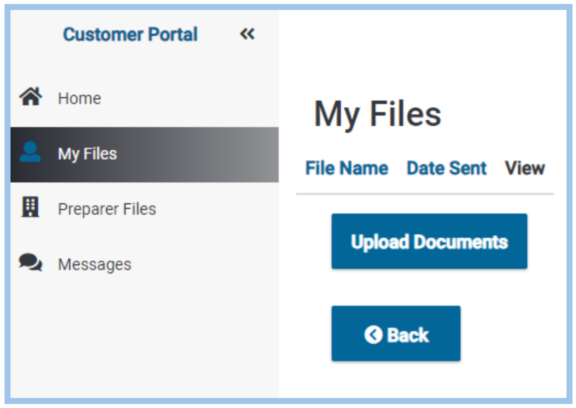
If you are not yet logged in or want to return to the customer portal, you need to re-enter your username and password and click **LOG IN**.

Upload Documents

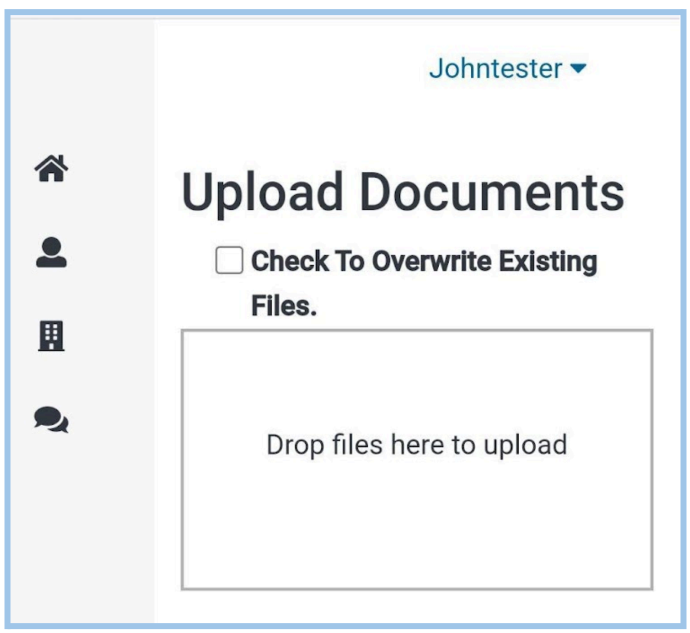
On the home Welcome page, click on the **View File** button.



Click on the **Upload Documents** button in the **My Files** menu.



This brings the Upload Document page:



The files that you want to upload have to be saved first on your local device (Mobile, tablet or computer).

- If the file is an attachment to an email, find the email, then save the attachment to your internal device.
- If the file is available online, in a bank or brokerage account for instance, login to that account, locate the file and download it to your internal device.

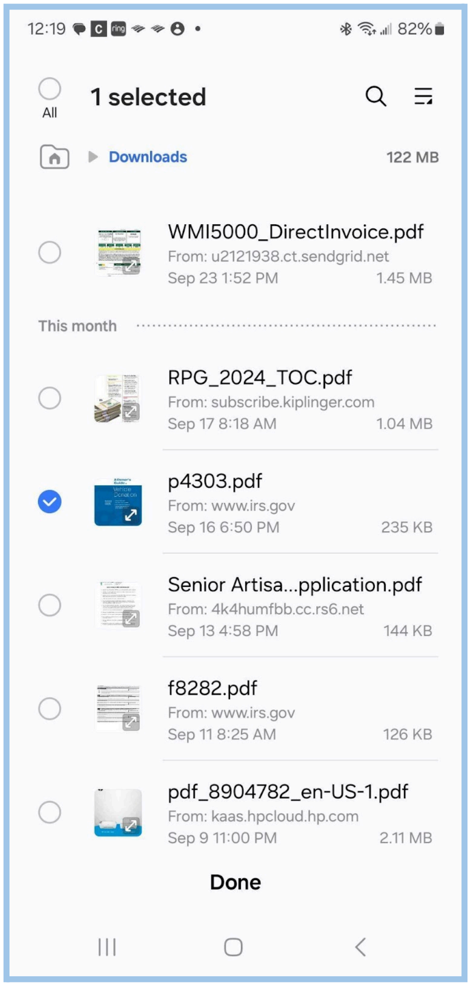
The exact details of how to save a file to your local internal device memory may depend on the type of device you are using, and where the file is stored.

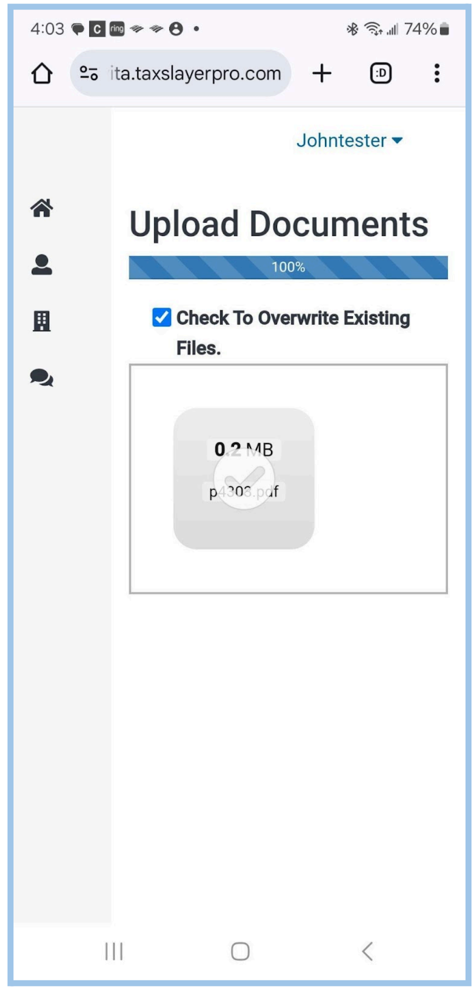
- On an Android device, the downloaded file or the save email attachment is stored to the **Internal Storage>Download** folder by default.
- On an iOS device, the downloaded file or the saved email attachment is stored to the **Recents/Recently Used** folder by default.

Acceptable file formats include PDF and JPEG files. The maximum file size is 5 MB per file. Total of all files is 25 MB.

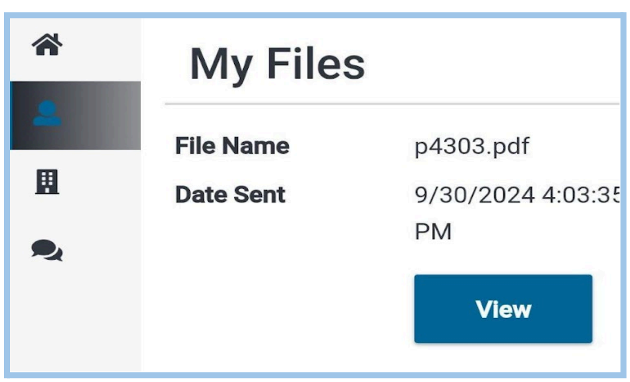
Go back to the Customer Portal page and click on the box labeled "**Drop files here to upload**". What happens next depends on the type of device you are using.

1. **Windows Computer** - The file browser opens and you can navigate to the folder that contains your file, then select your file to upload it.
2. **Apple Computer** - The Finder window opens. Click on Recents or Downloads to find your file. Select the file to upload it.
3. **Android Phone** – An app selection pops up. Select **Media picker** or **My Files** to navigate the internal storage device memory and find the file you want to upload. Select the file to upload. (Note that you can also select the **Camera** app to take a photo of a paper document and the system will automatically upload your photo to the portal.)
4. **iPhone or iPad** – A mini-menu pops up. **Choose Files** and select **Recents** (for saved or downloaded documents on the iPhone) or **Recently Used** (for saved or downloaded documents on an iPad) to find the file you want to upload. **Select** then **Open** the file to upload.





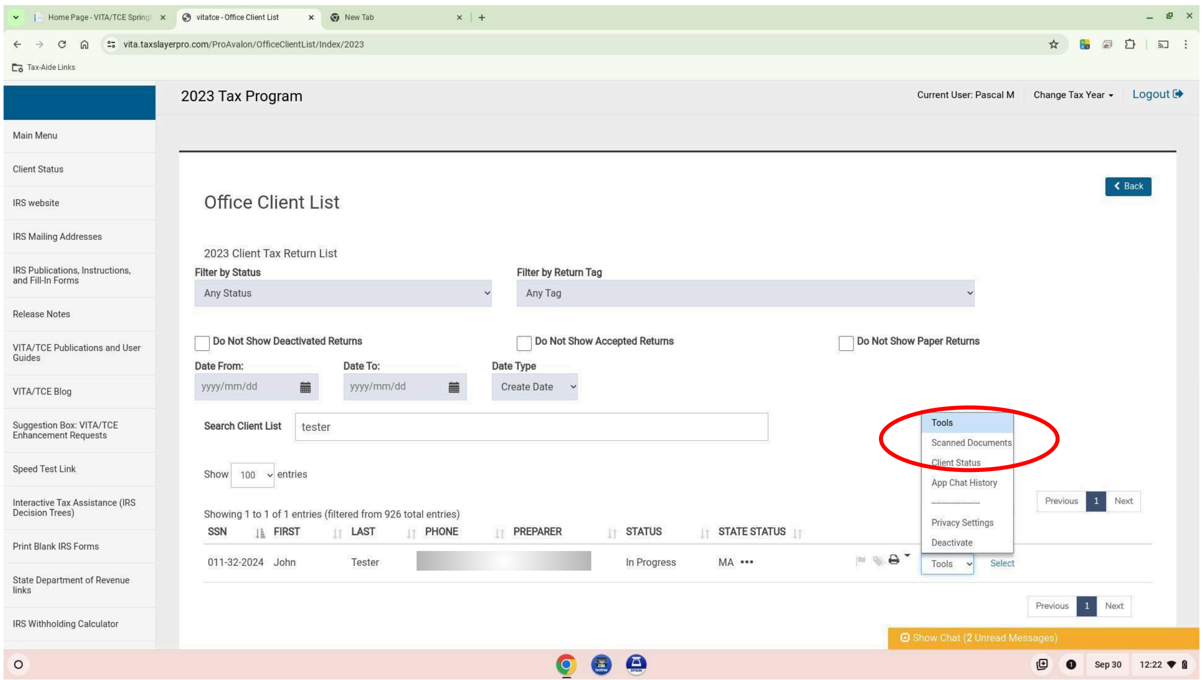
If you go back to the **My Files** menu in the customer portal, it should now show all the files that you have uploaded on the portal.



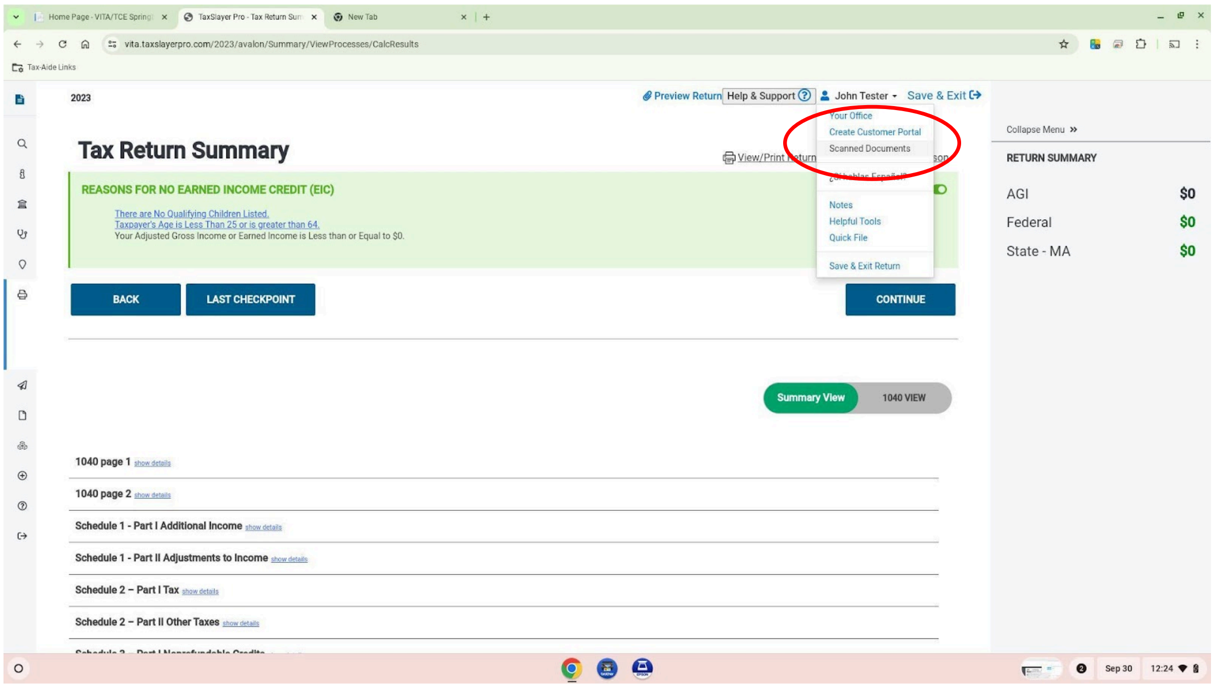
TaxSlayer View in Scanned Documents

The documents that the taxpayer uploaded can be viewed by the preparer in TaxSlayer. There are 2 ways to access those documents:

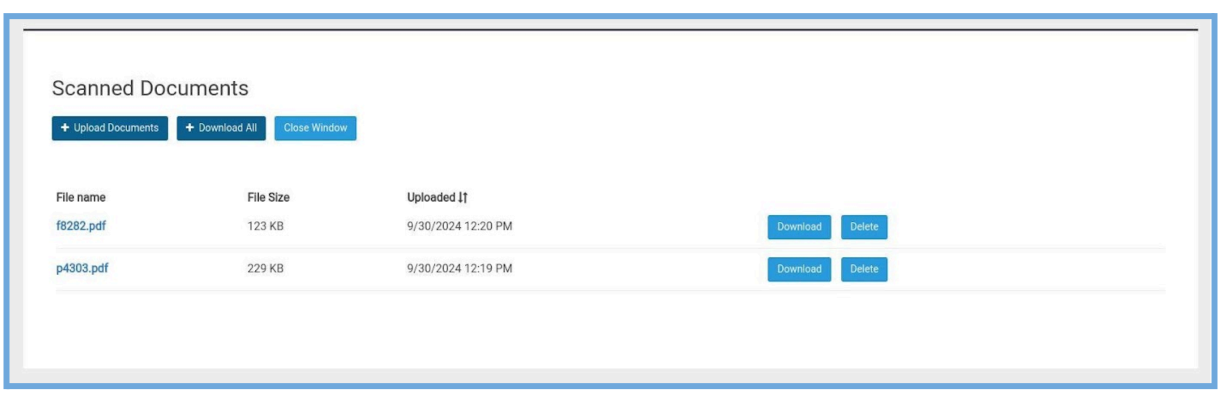
1. Outside the Return, in the **Client List** screen. Locate the TaxPayer's return, select **Scanned Document** in the **Tools** Drop down menu.



2. Inside the Return, select **Scanned Documents** in the TaxPayer's drop down menu at the top right.

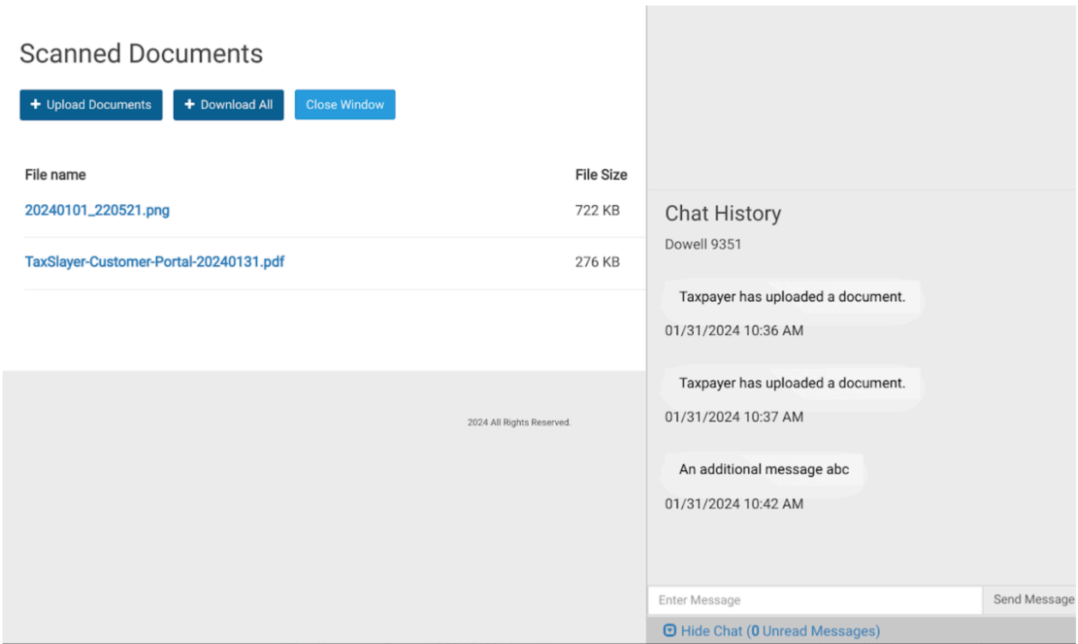


However you choose to access the **Scanned Documents** menu, you need to make sure that two checkboxes are selected in your preparer's Security Template (Scanned Documents and Delete Scanned Documents). If these 2 checkboxes are not selected, you won't be able to see the **Scanned Documents** option. If you don't see the **Scanned Documents** option in the menu, talk to your TaxSlayer administrator and ask them to check these 2 boxes in your Security Template.

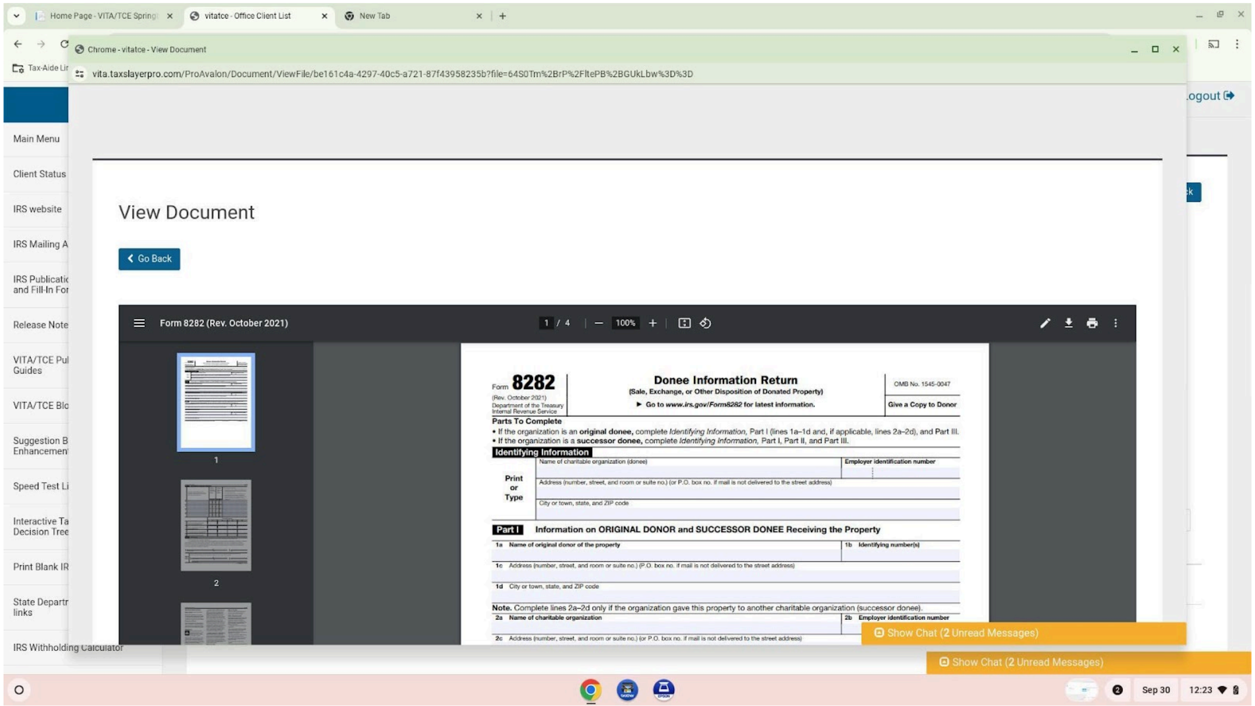


From the **Scanned Documents** menu, you can select a document to view it, or you can also delete the document or download it to your Chromebook. *Taxpayer documents should however not be stored on Chromebooks for more than 24 hours!* Never email TP documents.

Note that you can also click on the **Show Chat** button on the bottom right to view the Chat history with the TaxPayer.



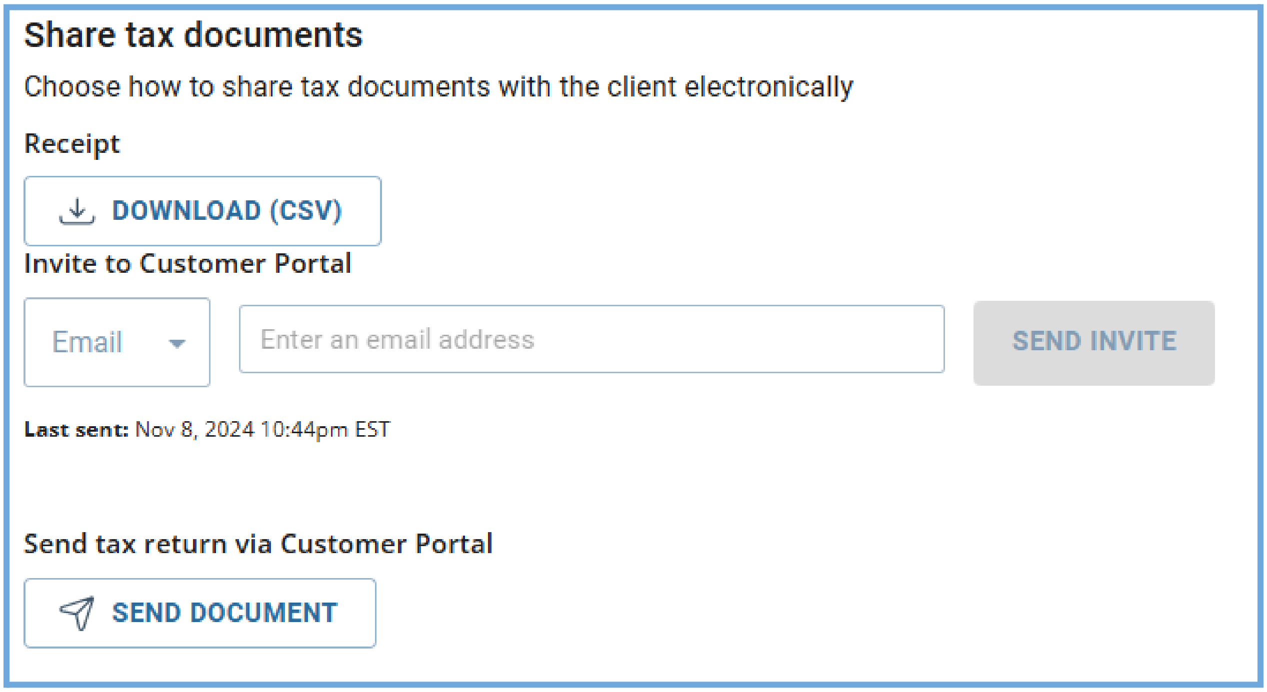
If you select an uploaded/scanned document, you can view and navigate through the document on this separate window while continuing the TaxPayer return from the other window.



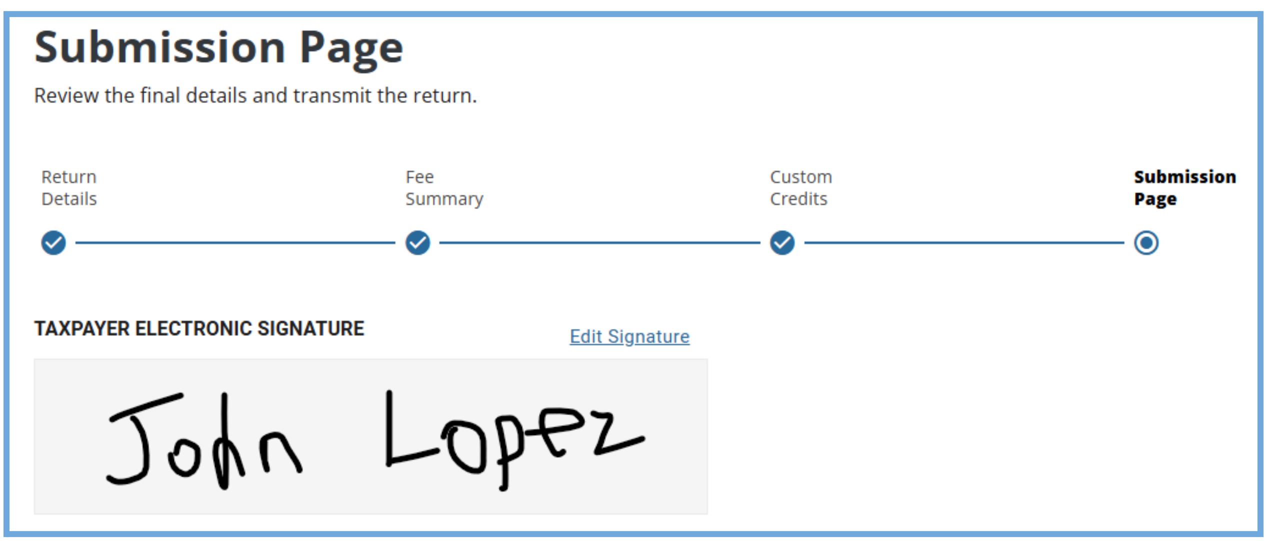
Note that all uploaded/scanned documents are kept in the TOS cloud throughout the current tax season. In November, they are purged.

Sharing tax return with the Taxpayer

The Taxpreparer can share the tax return with the taxpayer in TSO. In the **EFile** section of the return, navigate to the **Submission** page. At the bottom of the page, click on the **Send Document** button.

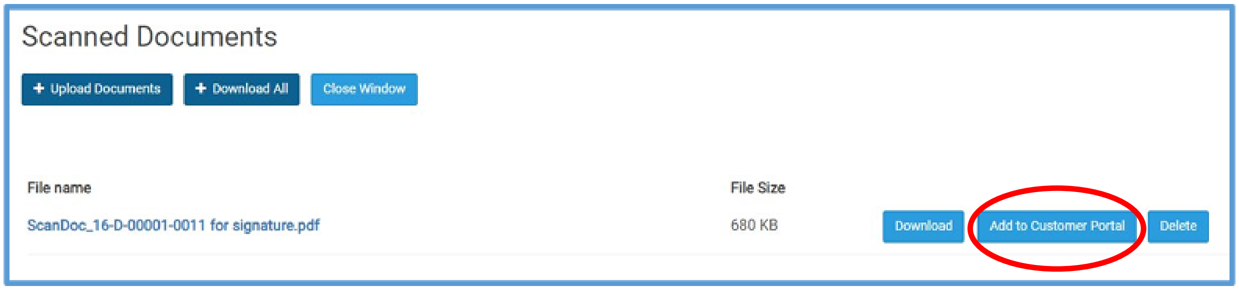


The tax return is now sent to the TSO customer portal where the Taxpayer can view the return and electronically sign it. Once the taxpayer signs the document, TSO displays the signature in the **Electronic Signature** section of the **EFile Submission page** and uses it for necessary signatures on Form 1040, Form 8879, applicable consents, and state documents:



Sharing other documents with the Taxpayer

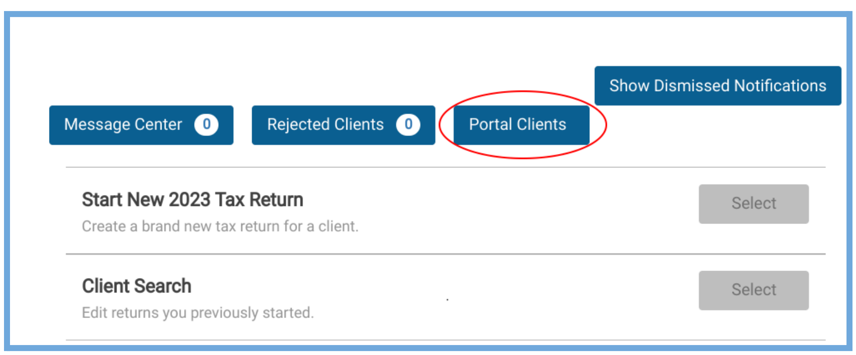
The Taxpreparer can share other documents with the Taxpayer on the customer portal.



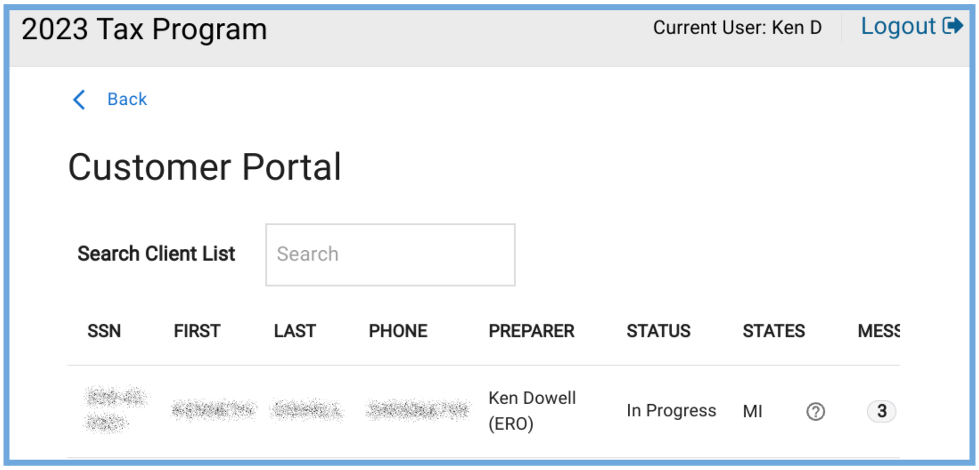
Click on the **Add to Customer Portal** button next to any document, and the Taxpayer will be able to see this document on the portal, under the **Files Shared with Me** section. This is the method you can use to send electronically prior year returns to the Taxpayer. (Note that the Taxpayer cannot electronically sign these documents. They can only electronically sign the current year return electronically).

Management tools in Production TSO

From the main TSO window, click on the **Portal Clients** button.



This gives you a list of TaxPayers for whom you have created a customer portal.



Revision History

Version #	Date	Initials	Comments
1	10/26/2024	KD, AH, PM	Initial Release
2	11/10/2024	PM	Add a note to use cellular data network, Add Customer Portal Check box, Add Customer Portal menu, Add share return and documents with TP.