

# SINGLE STOP'S TAX SLAYER GUIDE



## What is the Facilitated Self-Assisted Program – FSA?

The Facilitated Self-Assisted Program (FSA - also known as **SELF-PREP**) is an IRS-free alternative filing way. It Allows Partner Sites to empower tax filers (clients) in preparing and e-filing their returns while better understanding their taxes. In addition, having the FSA option available to taxpayers helps expand the Volunteer Income Tax Assistance (VITA) program. Finally, it allows certified volunteer tax guides to Coach and helps many taxpayers understand and file their taxes simultaneously.

## Clients Responsibilities?

- All taxpayers must have a valid Social Security number or ITIN.
- All Taxpayers must have a valid email address and basic computer skills.
- Taxpayers also need a valid mobile number for security verification purposes.
- Taxpayers must access their email accounts within 48 hours to receive IRS acknowledgment.
- Check your email for State acknowledgment.

## Process:

- A Link to the FSA Self-Prep Kiosk will be provided to each Taxpayer.

## Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

**Click the Continue button to create a new account or login with an existing account.**

CONTINUE

This service is free of charge for the current tax year federal and state preparation. Additional assistance is provided by contacting the referral site that provided the link

- If you, the taxpayer, are returning clients, please click **Continue** and use last year's credential to sign in.

 **TaxSlayer**

### Log In

Need a TaxSlayer account? [Create account.](#)

Username

Password

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

LOG IN

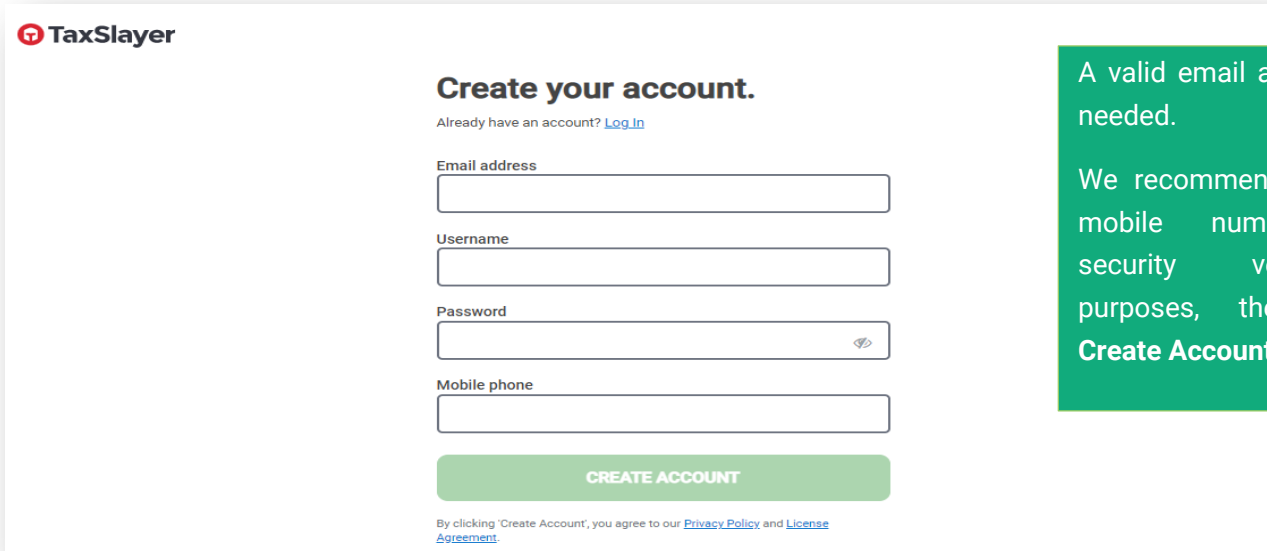
By clicking 'Log In', you agree to our [Privacy Policy](#) and [License Agreement](#).

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Language:

All NEW USERS need a valid email address to create a new account.

- Click on **Create Account** and fill out the registration page.



**TaxSlayer**

### Create your account.

Already have an account? [Log In](#)

Email address

Username

Password

Mobile phone

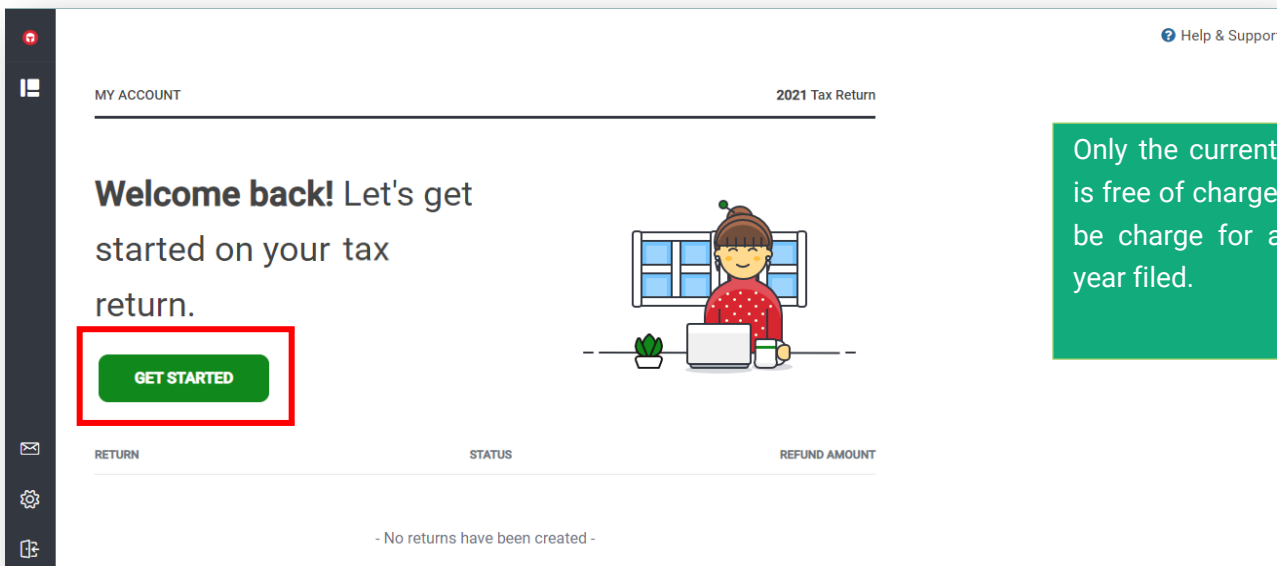
**CREATE ACCOUNT**

By clicking "Create Account", you agree to our [Privacy Policy](#) and [License Agreement](#).

A valid email address is needed.

We recommend a valid mobile number for security verification purposes, then click **Create Account**.


- Once you have access to the home page, click **Get Started** to start the current year's tax return. (2022)



**MY ACCOUNT** 2021 Tax Return

## Welcome back! Let's get started on your tax return.

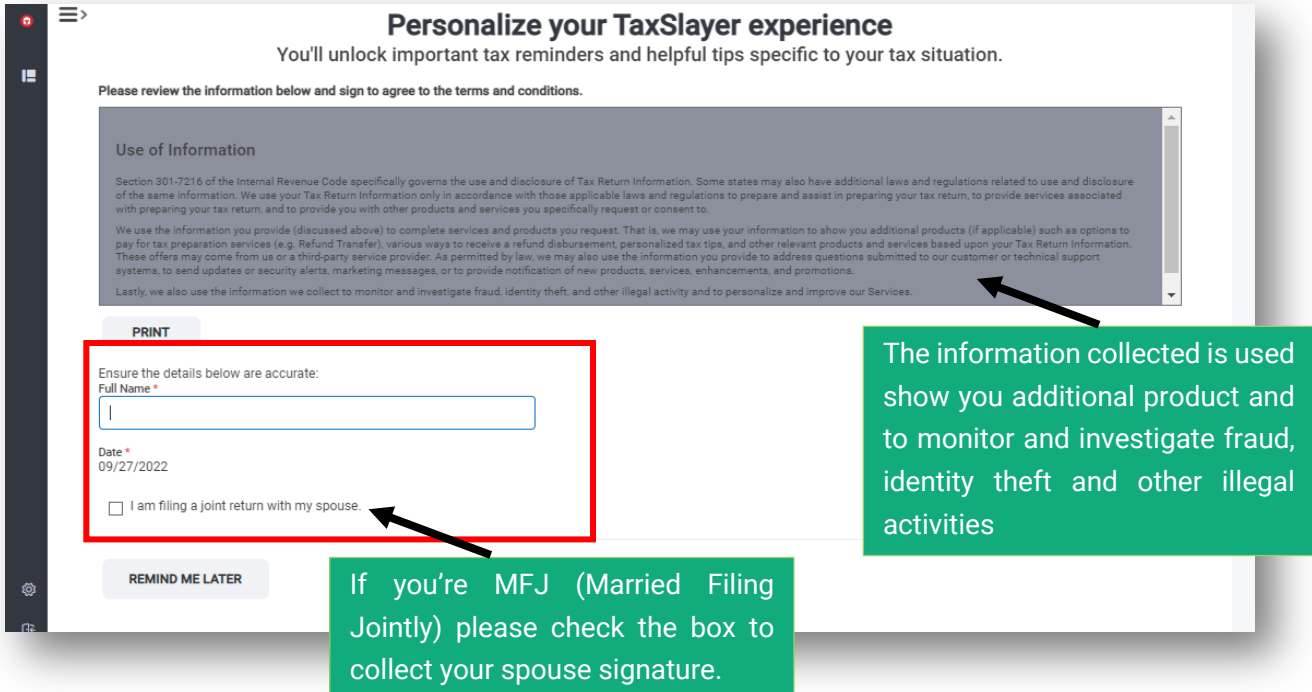
**GET STARTED**



RETURN	STATUS	REFUND AMOUNT
- No returns have been created -		

Only the current tax year is free of charge. You will be charge for any other year filed.

- Review and sign to agree to the terms and condition of the software then click **Continue**



**Personalize your TaxSlayer experience**  
You'll unlock important tax reminders and helpful tips specific to your tax situation.

Please review the information below and sign to agree to the terms and conditions.

**Use of Information**

Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of Tax Return Information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your Tax Return Information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

We use the information you provide (discussed above) to complete services and products you request. That is, we may use your information to show you additional products (if applicable) such as options to pay for tax preparation services (e.g. Refund Transfer), various ways to receive a refund disbursement, personalized tax tips, and other relevant products and services based upon your Tax Return Information. These offers may come from us or a third-party service provider. As permitted by law, we may also use the information you provide to address questions submitted to our customer or technical support systems, to send updates or security alerts, marketing messages, or to provide notification of new products, services, enhancements, and promotions.

Lastly, we also use the information we collect to monitor and investigate fraud, identity theft, and other illegal activity and to personalize and improve our Services.

**PRINT**

Ensure the details below are accurate:

Full Name \*

Date \*

09/27/2022

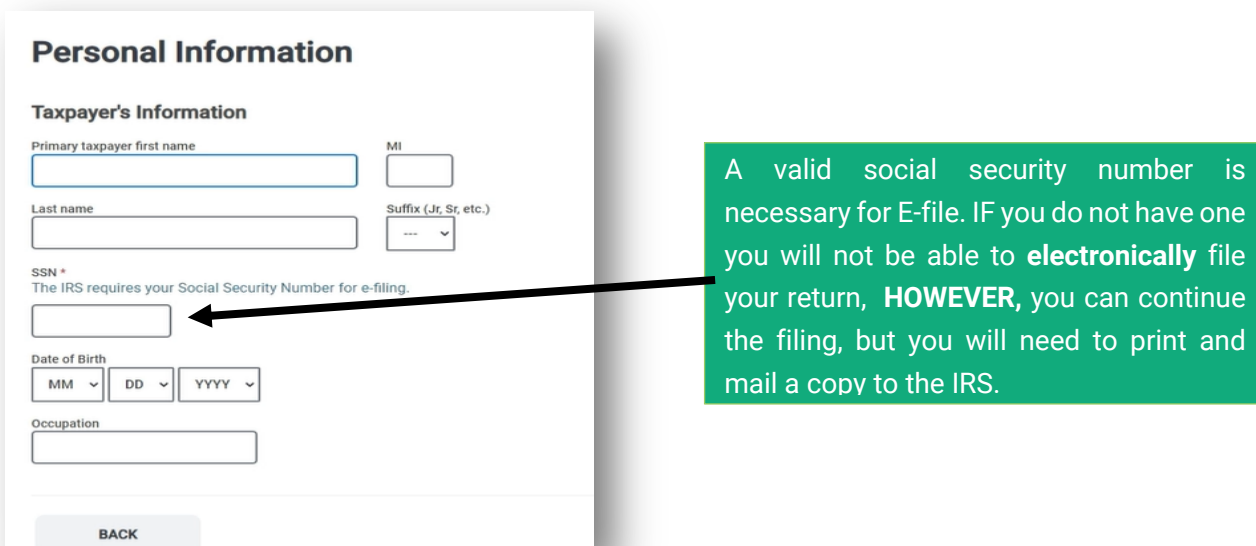
☐ I am filing a joint return with my spouse.

**REMIND ME LATER**

If you're MFJ (Married Filing Jointly) please check the box to collect your spouse signature.

The information collected is used show you additional product and to monitor and investigate fraud, identity theft and other illegal activities

- Fill out your personal information then click **Continue**



**Personal Information**

**Taxpayer's Information**

Primary taxpayer first name

MI

Last name

Suffix (Jr, Sr, etc.)

SSN \*

The IRS requires your Social Security Number for e-filing.

Date of Birth

MM DD YYYY

Occupation

**BACK**

A valid social security number is necessary for E-file. IF you do not have one you will not be able to electronically file your return, HOWEVER, you can continue the filing, but you will need to print and mail a copy to the IRS.

## Personal Information

### What's your mailing address?

Country

United States of America ▼

Address (street number & name)

Apartment (provide apartment number only)

ZIP code

 - 

City, town, or post office

State

- Please Select - ▼

Residency Status

- Please Select - ▼

☐ I have a stateside military address.

Select your state residency status. Whether you are a full time, part-time or resident of another state. This information will be used on your state return.

- Select Additional information that applies to you then click **Continue**

## Additional Information

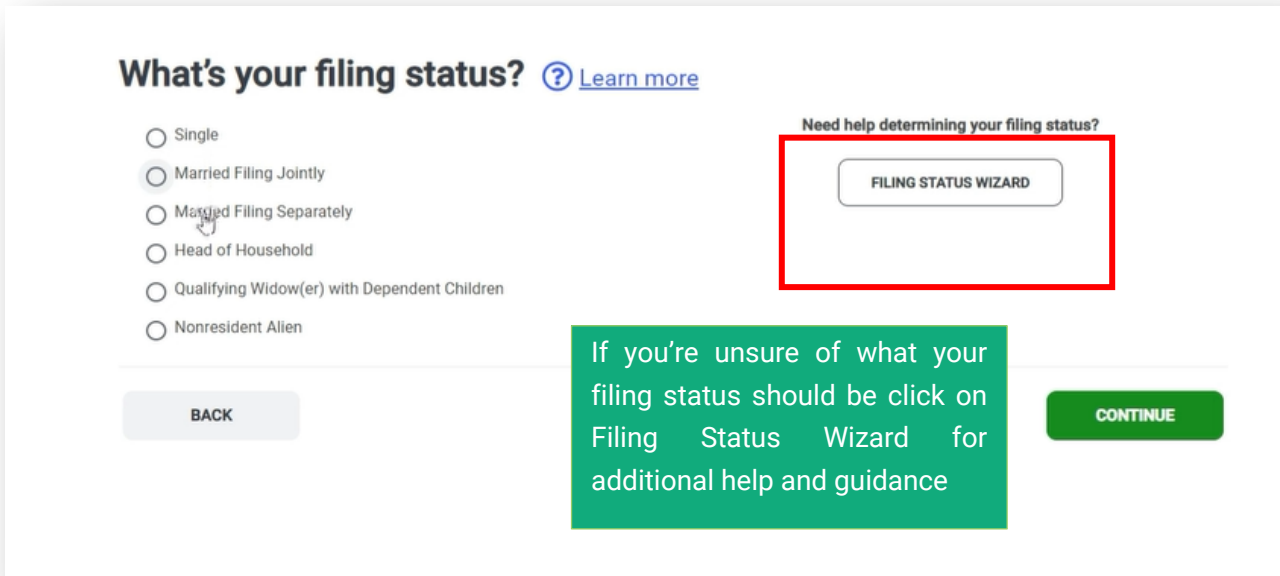
### Taxpayer's Information

Check any of these that apply to you:

- ☐ Single can be claimed as a dependent on someone else's return. [? Learn more](#)
- ☐ Single was over age 18 and a full-time student at an eligible educational institution. [? Learn more](#)
- ☐ Single is blind.
- ☐ Single is deceased.
- ☐ Single wishes to contribute \$3 to the Presidential Election Campaign Fund.
- ☐ Single served in a combat zone during the current tax year. [? Learn more](#)
- ☐ Single wishes to elect to use their 2019 earned income to figure their 2021 earned income credit and/or child tax credit.
- ☐ Single was affected by a natural disaster during the current tax year.
- ☐ Single received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during the current tax year.
- ☐ Single prefers to receive written communications from the IRS in a language other than English.
- ☐ Single prefers to receive written communications from the IRS in an accessible format.

Please read the information carefully to determine if any or more applies to you before clicking continue.

- Select your **Filing Status** then click **Continue**



**What's your filing status?** [? Learn more](#)

☐ Single

☐ Married Filing Jointly

☐ Married Filing Separately

☐ Head of Household

☐ Qualifying Widow(er) with Dependent Children

☐ Nonresident Alien

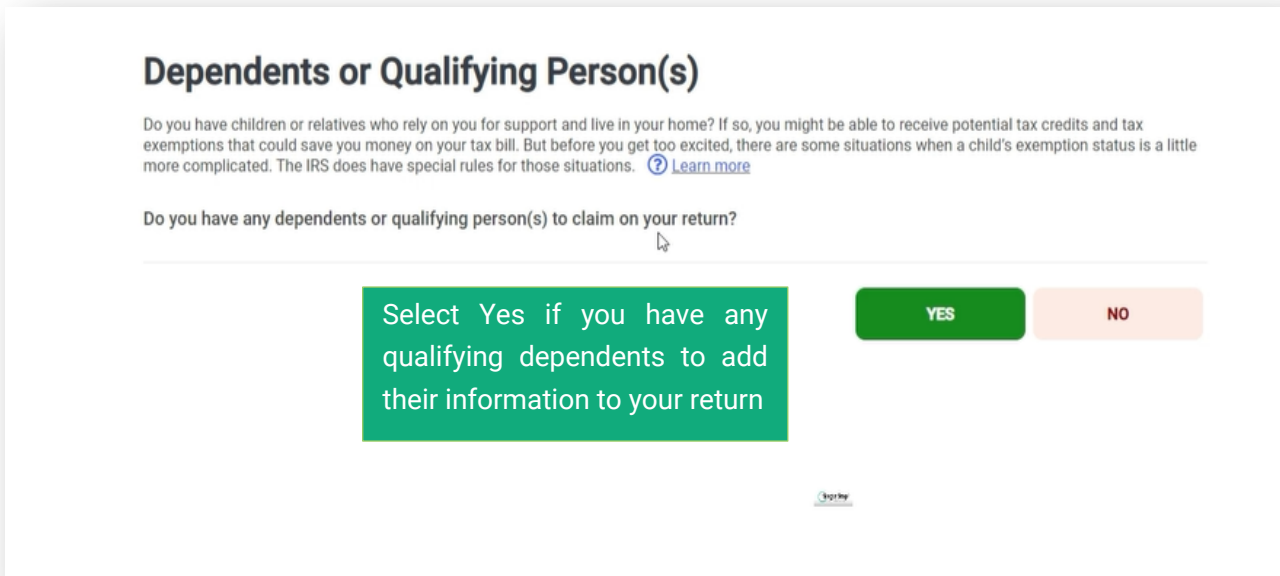
**Need help determining your filing status?**

**FILING STATUS WIZARD**

**BACK** **CONTINUE**

If you're unsure of what your filing status should be click on Filing Status Wizard for additional help and guidance

- Select if you have any dependents or qualifying person to claim on your return



**Dependents or Qualifying Person(s)**

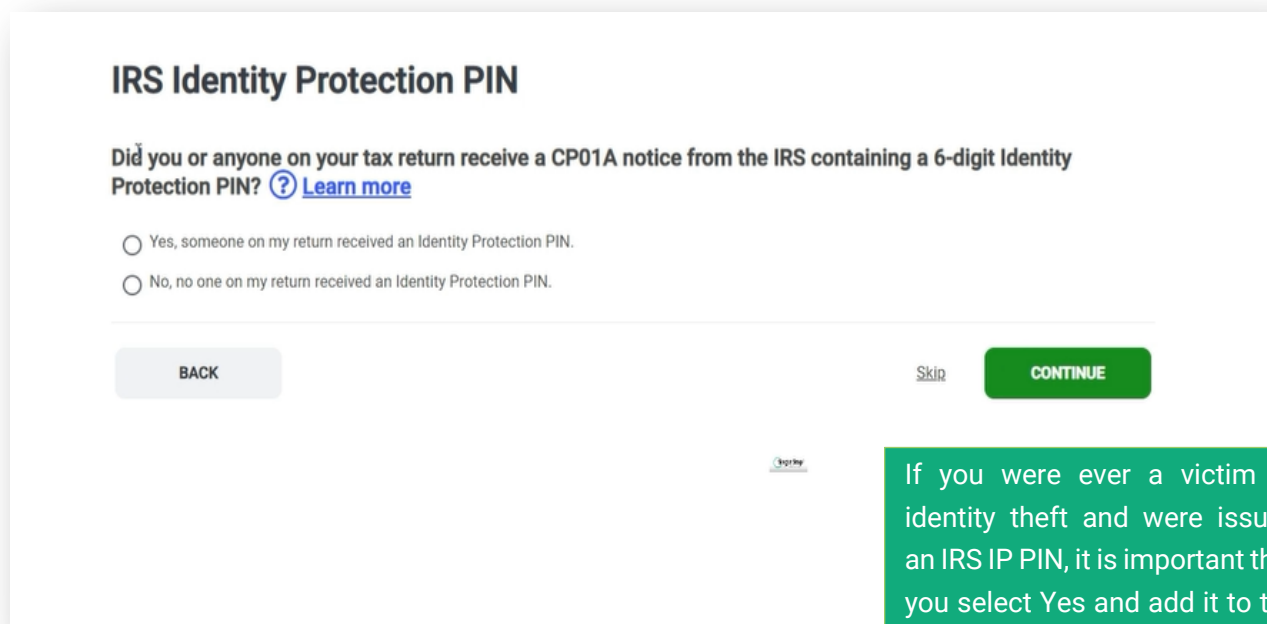
Do you have children or relatives who rely on you for support and live in your home? If so, you might be able to receive potential tax credits and tax exemptions that could save you money on your tax bill. But before you get too excited, there are some situations when a child's exemption status is a little more complicated. The IRS does have special rules for those situations. [? Learn more](#)

Do you have any dependents or qualifying person(s) to claim on your return?

**Select Yes if you have any qualifying dependents to add their information to your return**

**YES** **NO**

- IRS Identity Protection PIN



**IRS Identity Protection PIN**

Did you or anyone on your tax return receive a CP01A notice from the IRS containing a 6-digit Identity Protection PIN? [? Learn more](#)

☐ Yes, someone on my return received an Identity Protection PIN.

☐ No, no one on my return received an Identity Protection PIN.

[BACK](#) [Skip](#) [CONTINUE](#)

If you were ever a victim of identity theft and were issued an IRS IP PIN, it is important that you select Yes and add it to the software for security purposes.

Once you've filled out all the basic information, filing status and residency status, the software will ask you to add your tax information based on the tax forms you received from your employer(s), bank etc.

Some income forms you could encounter:

- W-2 Wages and salary
- 1099-NEC Non-Employment Compensation
- 1099-Int Interest Income
- 1099-G Unemployment compensation
- 1099-R Distribution from Pension and Certain IRA



- You can add your forms using Quick File


2021 | American Pledge

Help & Support

RETURN SUMMARY  
Federal \$0

### Add your forms quickly with Quick File

If you know which forms you need, easily search and add them to your tax return.



If you know the name of the tax form you have click Continue and type the name in the search box. If now select **"I don't know which forms I need"**

BACK

**I don't know which forms I need**

CONTINUE

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- Or you can elect for the software to guide you by answering questions related to your tax situation


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Help & Support

RETURN SUMMARY  
Federal \$0


### Let's look at the money you earned

Now that we've got your basic information covered, it's time to get down to business. Let's start with the money you earned in 2021! How would you like to enter your income?



**I want to be guided**

I want to be guided by answering questions about my tax situation



**Select my forms**

I want to select my forms from a list and enter the information myself

If you did not have any income for the tax year, select **"Skip Income"** to move on to the next section.

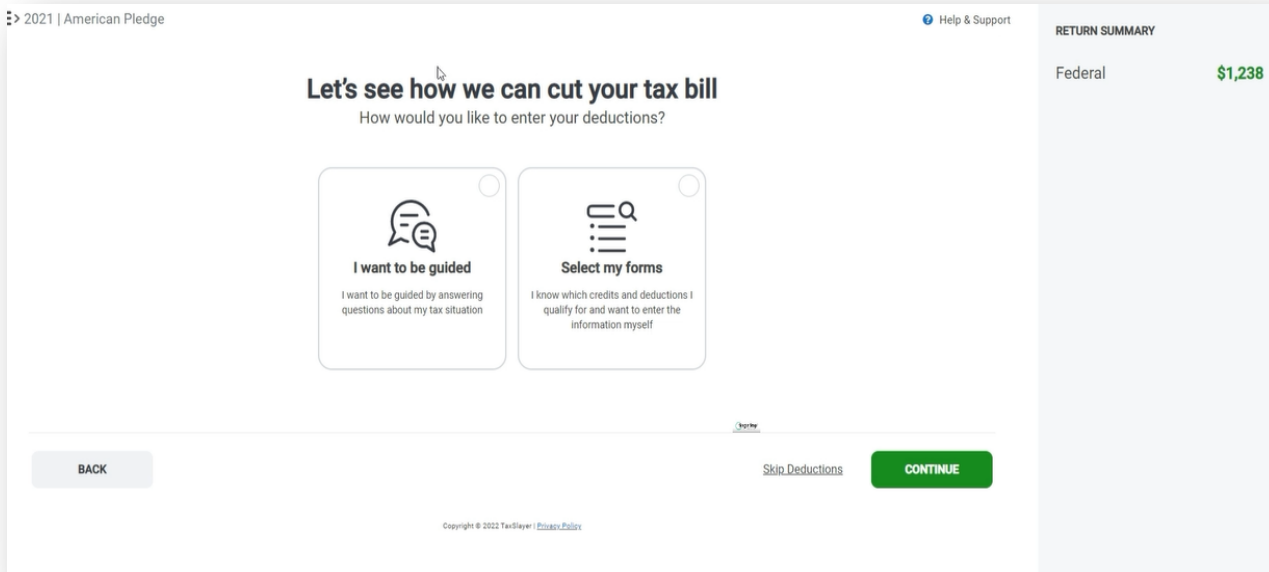
BACK

**Skip Income**

CONTINUE

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After adding your income, the software will guide you to the deduction page where you will also have the option to either add your forms or let the software guide you.



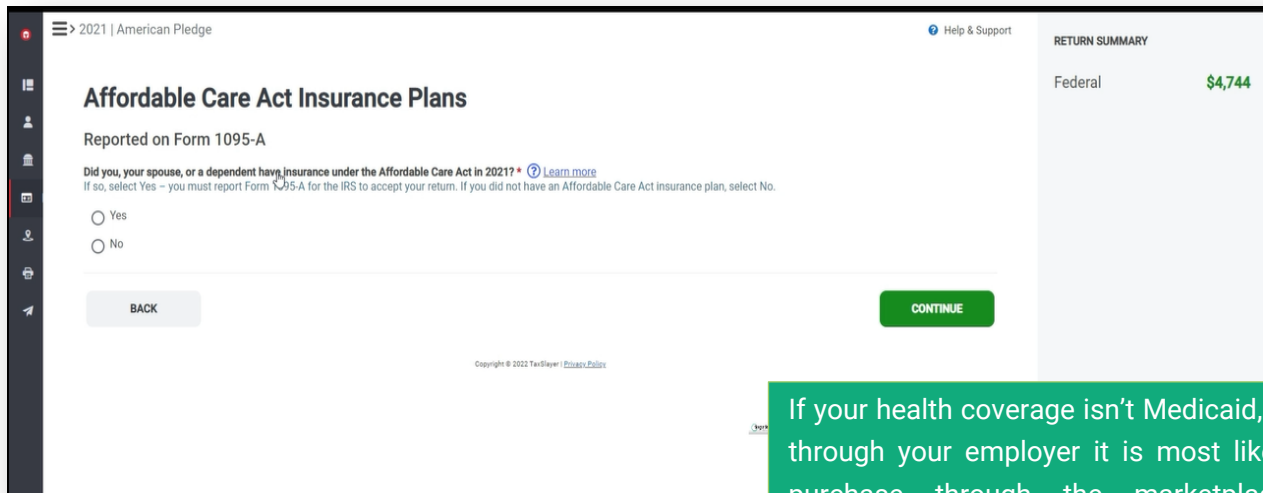
The screenshot shows a web interface for tax preparation. At the top left, it says "2021 | American Pledge". At the top right, there is a "Help & Support" link. The main heading is "Let's see how we can cut your tax bill" with a subtext "How would you like to enter your deductions?". Below this are two options: "I want to be guided" (with a speech bubble icon) and "Select my forms" (with a document icon). The "I want to be guided" option has a description: "I want to be guided by answering questions about my tax situation". The "Select my forms" option has a description: "I know which credits and deductions I qualify for and want to enter the information myself". At the bottom left is a "BACK" button. At the bottom right is a "CONTINUE" button. In the center bottom, there is a link "Skip Deductions". On the right side, there is a "RETURN SUMMARY" section showing "Federal" with a value of "\$1,238". At the very bottom, there is a copyright notice: "Copyright © 2022 TaxSlayer | Privacy Policy".

Forms that will help you cut your tax bill:

- 1098-T tuition statement
- Child and dependent care expenses
- Form 1098 Mortgage Interest
- Charitable Contributions
- Form 1098-E Student Loan Interest Statement
- Educator Expenses (if you are a teacher)

## Add your Health coverage status

- Did you purchase health coverage through the marketplace

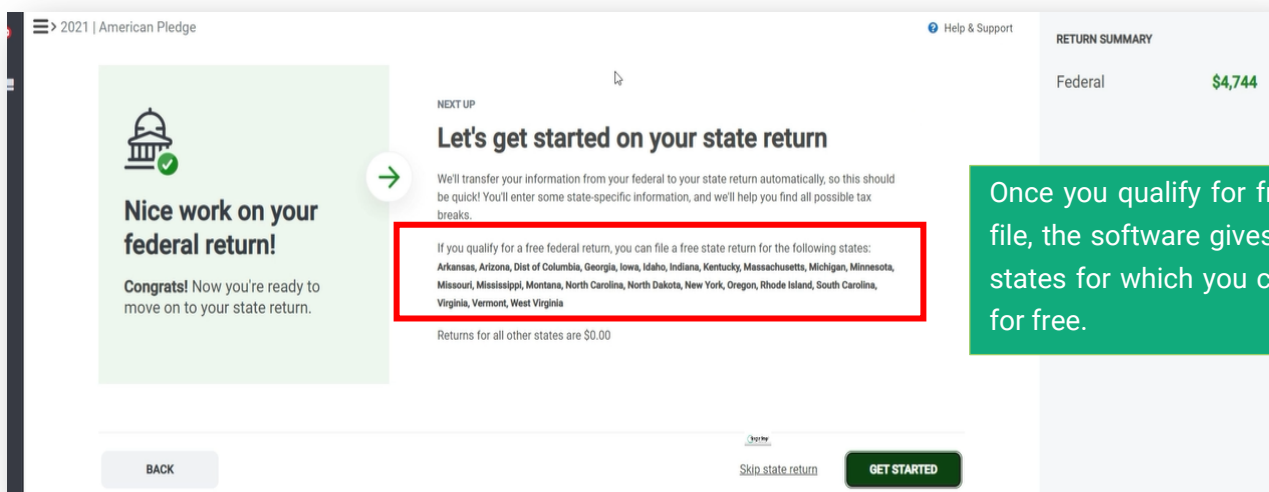


If your health coverage isn't Medicaid, or through your employer it is most likely purchase through the marketplace. Information from **form 1095-A** must be included on your return.

Health coverage is the last part of your federal return.

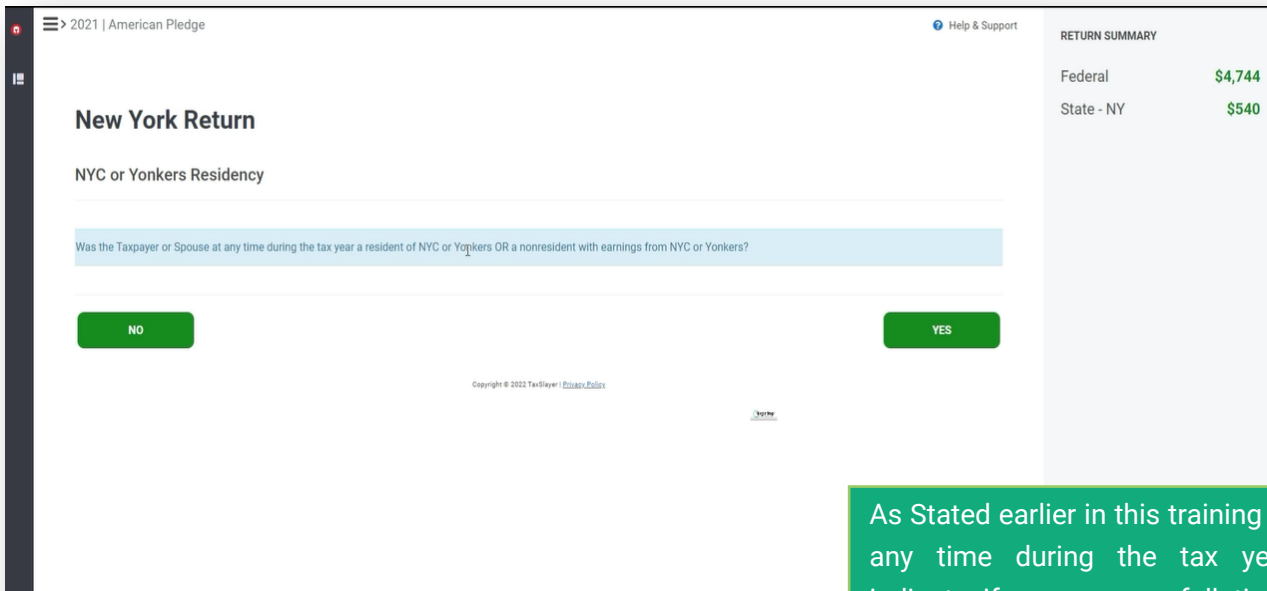
Next, the software will ask you questions regarding your state tax return. The Software will transfer information from your federal to your state return automatically; you will only need to enter state-specific information

- Click **Get Started** to start your state return.



Once you qualify for free federal e-file, the software gives you a list of states for which you can also e-file for free.

- Verify your **State Residency Status**
- Below are examples of what New York State prompts look like. **However, all states will follow a similar model.**



The screenshot shows a web interface for a New York State tax return. The main heading is "New York Return". Below it is the section "NYC or Yonkers Residency". A light blue box contains the question: "Was the Taxpayer or Spouse at any time during the tax year a resident of NYC or Yonkers OR a nonresident with earnings from NYC or Yonkers?". Below this question are two green buttons: "NO" on the left and "YES" on the right. In the top right corner, there is a "RETURN SUMMARY" table. The table has two rows: "Federal" with a value of "\$4,744" and "State - NY" with a value of "\$540". At the top left of the interface, there is a navigation bar with a hamburger menu icon and the text "2021 | American Pledge". At the top right, there is a "Help & Support" link. At the bottom center, there is a small copyright notice: "Copyright © 2022 TaxSaver | [Privacy Policy](#)".

RETURN SUMMARY	
Federal	\$4,744
State - NY	\$540

As Stated earlier in this training at any time during the tax year indicate if you were a full time, part-time of your state.

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Help &amp; Support

## RETURN SUMMARY

Federal	<b>\$4,744</b>
State - NY	<b>\$540</b>

## New York Return

### New York City And Yonkers Residents

Part I

Are you a Full Year Resident of Yonkers?

☐ Yes  
☒ No

For 2021, were you a Full Year Resident of New York City?

☒ Yes  
☐ No

Enter the number of months you lived in New York City.

*If less than 12, you must complete **PART II**, Form IT-360.1 below.*

Did the Taxpayer and/or Spouse maintain quarters in New York City?

☐ Yes

Indicate if you were a resident of Yonkers or NYC and the number of month you resided there.

- Confirm your **School District** and **County**, then click **Continue**

≡ &gt; 2021 | American Pledge

Help &amp; Support

## RETURN SUMMARY

Federal	<b>\$4,744</b>
State - NY	<b>\$540</b>

## New York Return

Please select the County in which you reside

You have the option to manually enter in your 3-digit School District Number OR you can select your school district from the list.

Enter your 3-digit School District Number

Please select your School District

Click on this link for list of county and school district for the state of NY

[https://www.tax.ny.gov/pit/file/school\\_district](https://www.tax.ny.gov/pit/file/school_district)

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- Finish your Tax return

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## Congratulations! You have completed your standard New York state return!

Would you like to add any of the following items or any additional items not listed below to your New York state return?

Resident of NYC or Yonkers

Lived or worked in another state(s)

Claiming a renters credit

Received active duty combat pay on W2

Worked in Yonkers

Paid for long-term care benefits

City of NY employee


NO YES

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Select No if none of the following items applies to you, then click Exit State return

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## Tax Return Summary



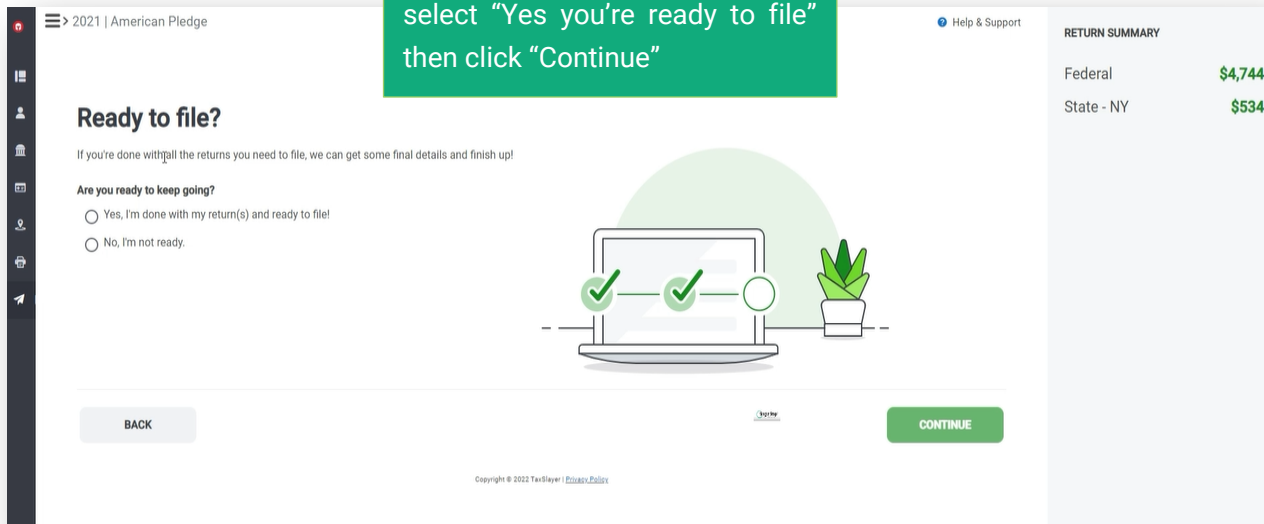
Total Income	
Adjusted Gross Income	
Tax and Credits	
Total Tax	\$0.00
Payments	\$4,744.00
Refund	\$4,744.00
New York Refund	\$534.00

PRINT VIEW RETURN

RETURN SUMMARY	
Federal	\$4,744
State - NY	\$534

The software will provide a summary of your tax return with your federal and state refund amount

Once all information is entered, select "Yes you're ready to file" then click "Continue"



2021 | American Pledge

## Ready to file?

If you're done with all the returns you need to file, we can get some final details and finish up!

**Are you ready to keep going?**

☐ Yes, I'm done with my return(s) and ready to file!

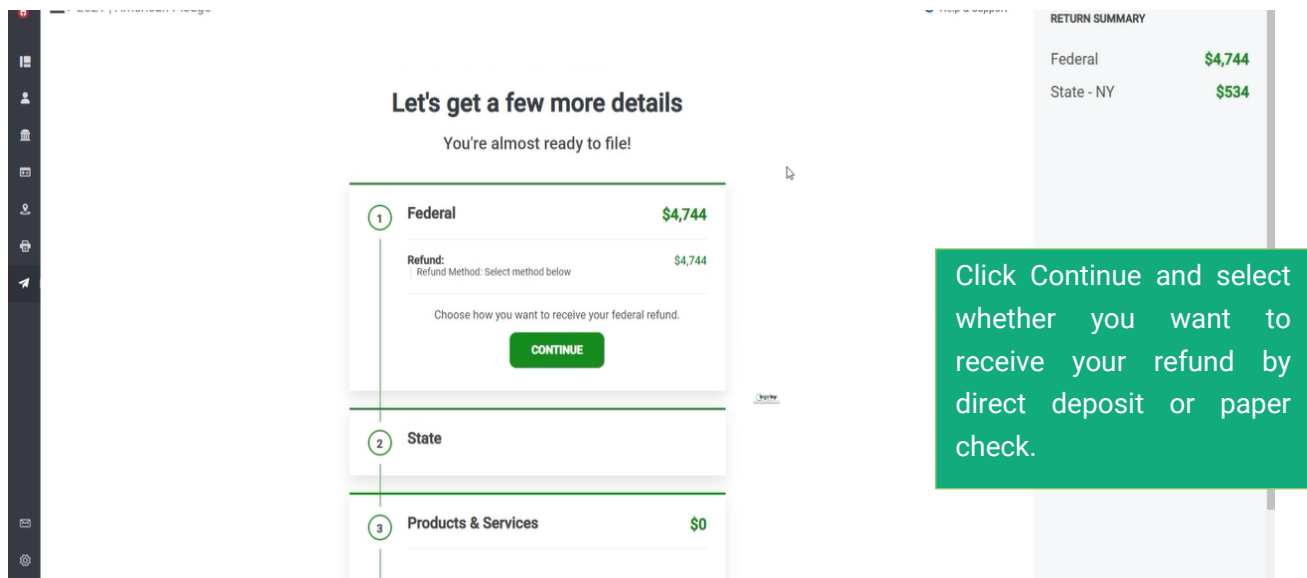
☐ No, I'm not ready.

BACK CONTINUE

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RETURN SUMMARY	
Federal	\$4,744
State - NY	\$534

- Select Federal and State refund method



## Let's get a few more details

You're almost ready to file!

1 Federal \$4,744

Refund: \$4,744

Refund Method: Select method below

Choose how you want to receive your federal refund.

CONTINUE

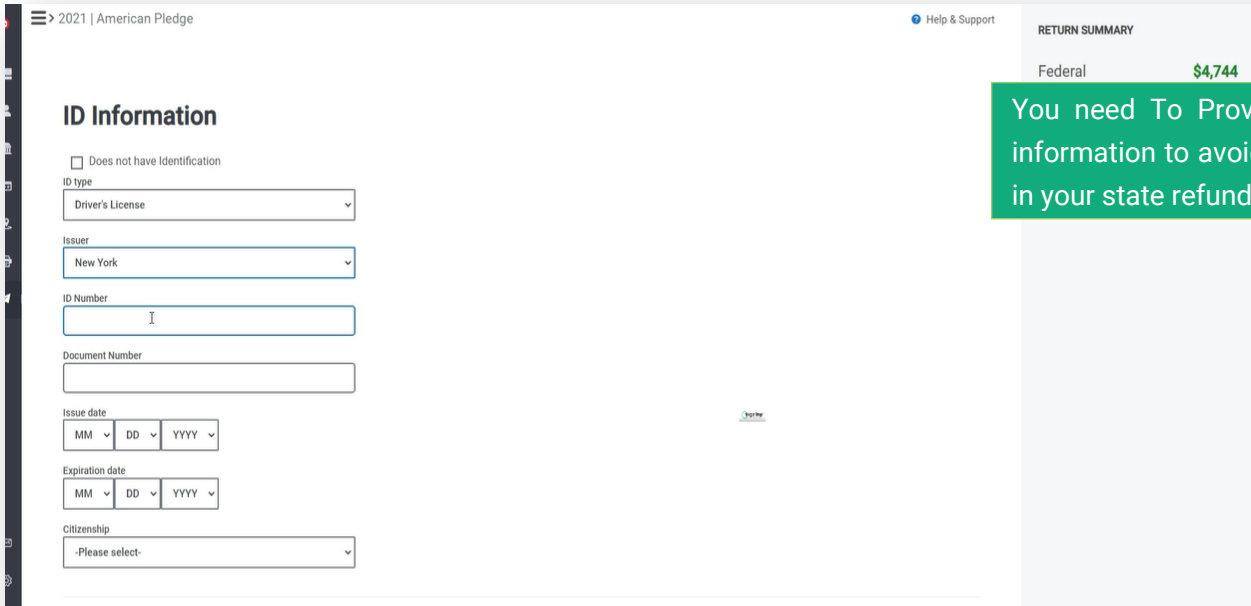
2 State

3 Products & Services \$0

Click Continue and select whether you want to receive your refund by direct deposit or paper check.

RETURN SUMMARY	
Federal	\$4,744
State - NY	\$534

- Provide Your NYS ID information



2021 | American Pledge

Help & Support

**RETURN SUMMARY**

Federal **\$4,744**

**ID Information**

☐ Does not have Identification

ID type  
Driver's License

Issuer  
New York

ID Number

Document Number

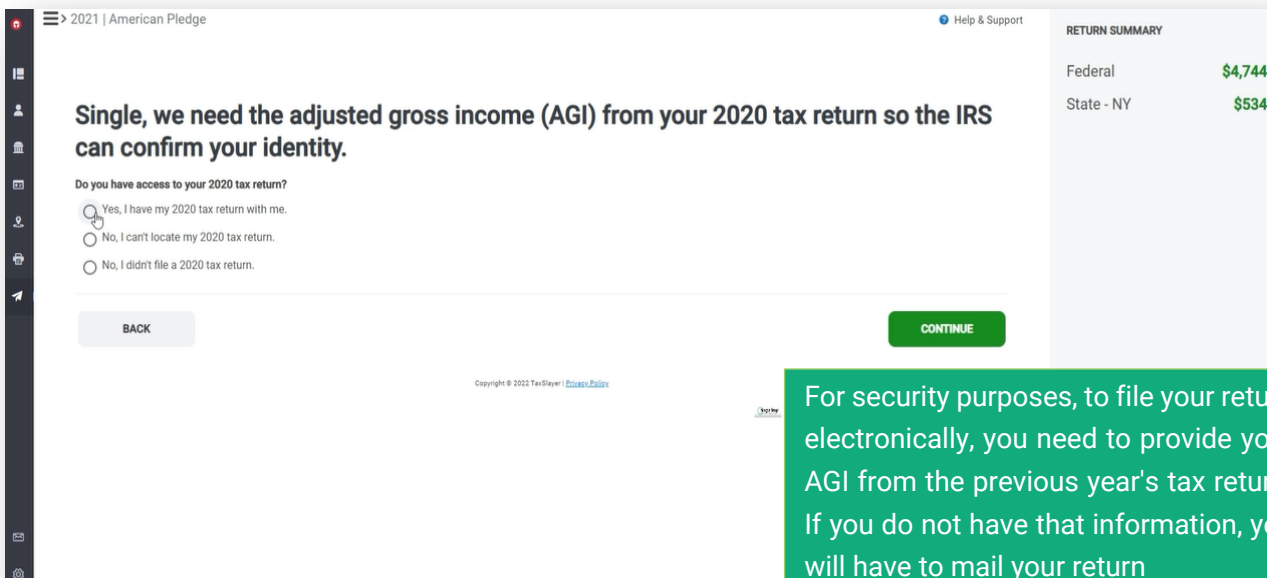
Issue date  
MM DD YYYY

Expiration date  
MM DD YYYY

Citizenship  
-Please select-

You need To Provide you ID information to avoid any delay in your state refund.

- Confirm your previous tax year AGI



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Help & Support

**RETURN SUMMARY**

Federal **\$4,744**

State - NY **\$534**

**Single, we need the adjusted gross income (AGI) from your 2020 tax return so the IRS can confirm your identity.**

Do you have access to your 2020 tax return?

☒ Yes, I have my 2020 tax return with me.

☐ No, I can't locate my 2020 tax return.

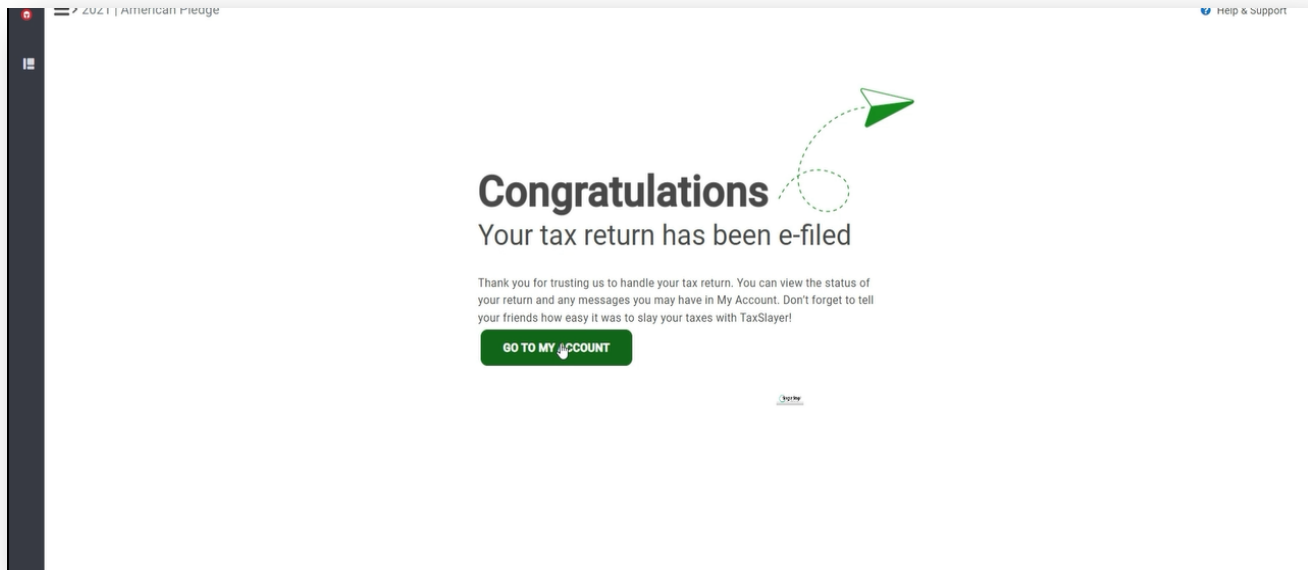
☐ No, I didn't file a 2020 tax return.

BACK CONTINUE

For security purposes, to file your return electronically, you need to provide your AGI from the previous year's tax return. If you do not have that information, you will have to mail your return



- Click E-file



**All Communication and notification will take place via email, so make sure you keep an eye on your email for any notifications.**

**PLEASE NOTE: SINGLE STOP USA DOES NOT HAVE ACCESS TO THE CLIENT'S TAX RETURN. HOWEVER, CLIENTS CAN ACCESS THEIR TAX RETURNS AT ANY TIME USING THE SAME WEBSITE AND THE SAME LOGIN INFORMATION CLIENT CREATED. ALL COMMUNICATION FROM THE IRS AND NYS REGARDING ACCEPTANCE/REJECTION IS SENT VIA EMAIL. CHECK YOUR EMAIL PERIODICALLY UNTIL YOU RECEIVE AN EMAIL STATING THAT THE IRS ACCEPTED YOUR RETURN. YOU CAN USE THE INFORMATION ABOVE TO CHECK THE STATUS OF YOUR REFUND.**