

TAX PREPARER CHECKLIST

TaxSlayer:

- Log into [TaxSlayer](#), then click Select on the Start New 2025 Tax Return line.
- Enter Client's SSN or ITIN, confirm by typing again, and Select Start Return.
 - o Verify that all tax documents match the tax year and forms are signed by the taxpayer.
- Prior Year Data *returning clients ONLY*.
 - o TaxSlayer will ask "Do you want to create a new return using the information from last year?"
 - o Answer YES, and check what information applies to transfer over to this year's tax return.

Basic Information:

- Filing Status: Select a filing status. (Reference: Attached Decision Tree)
- Personal Information: Use SS Cards/ITIN and Form 13614-C to enter all fields correctly.
 - o Married Filing Separate (MFS): In order for return to be E-Filed, we need to know the spouse name and their Social Security Number/ITIN. If spouse information is not present, it MUST be a paper file return.
- Dependents/Qualifying Person: Determine dependency and enter SSN/ITIN information.
- IRS Identity Protection PIN: Enter IP PIN If present, use CURRENT YEAR PIN for ALL years filing.

Federal Section:

- Go through each section (Income, Deductions, Other Taxes, Payments & Estimates, and Miscellaneous Forms) and enter all applicable tax documents (W-2s, 1099's, etc.)
 - o Hint: – Deductions section, Credits menu, you will find Education, Childcare, and Mortgage Interest Credits.

Health Insurance:

- Answer the Marketplace Insurance question. If yes, enter answers on the next page, then add the numbers in the APTC section to match the bottom of the client's Form 1095-A.
 - o Form 1095-A MUST include everyone on the return, if not it's Out of Scope.

State Section:

- Hint: Don't forget to deduct retirement and add property taxes, when applicable.
 - o To deduct retirement click on Substractions from Income > Certain Pension Income is Excluded from New York taxable income.
 - o Taxable Pension received from New York State, Local, and Federal governments will be entered on the top line. Examples: Thrift Savings Plan (TSP), Office of Personnel Management (OPM), New York City/State Employees Retirement System, Board of Education, Para NY/NJ Port Authority.
 - o Private pension will be entered on the bottom line under other taxable pensions (not included above) received from the time you turned 59 ½ to the end of the tax year. Examples of private pensions: 1199SEIU, Fidelity, Chase.

Summary/Print:

- Tax Return Summary – DO NOT print the return yet. Click Continue.
- Warnings on Tax Return: Fix any errors on the tax return, if necessary. Click Continue.

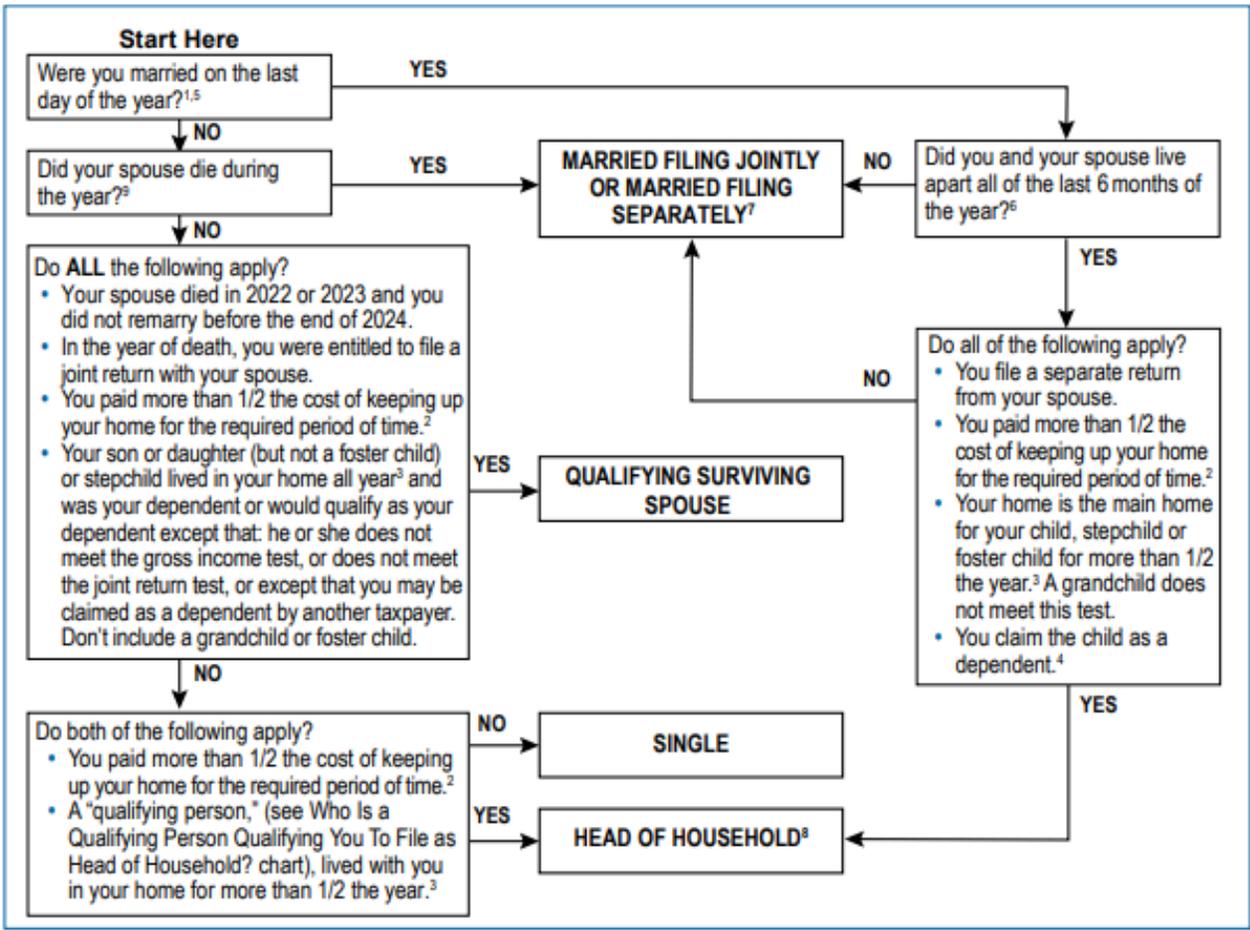
E-File:

- Return Details – Select Federal/State Return Type: E-file or Paper Return with refund or payment option.
 - o Enter the taxpayer's email and leave this PIN alone.
 - o Skip Optional Questions
- Fee Summary – Verify all fees are set to \$0
- Bank Account – Enter Direct Deposit information.
 - o If the client wishes to split their refund, you must fill out Form 8888
- Optional: Enter taxpayers State ID/License information
- Taxpayer Consent – The Accept option needs to be selected for both consents.
 - o Enter The taxpayer/spouse's Primary PIN (Last 5 digits of SSN or zip code of their mailing address) and Date.
- Custom Questions – Enter ALL answers from the Form 13614-C and Supplemental Intake.

Submission Page – DO NOT PRINT RETURN.

- This page displays refunds/balances due to federal and state returns.
 - o DO NOT disclose any refund/owe amounts to the taxpayer.
- Select all appropriate Return Status Tag(s) for the tax return.
- Checkmark the tax return READY FOR REVIEW.
- Save and Exit Return.

If notes are needed for the Quality Reviewer, locate the client in Client Search from the Main Page and click the Note icon (Flag). 



Filing Status – Interview Tips

Step	Probe or Ask the taxpayer:	Action
1	Were you married on December 31 of the tax year? ⁶ You are considered unmarried if, on the last day of the year, you were legally separated from your spouse under a divorce or separate maintenance decree. State law governs whether you are married or legally separated under a divorce or separate maintenance decree. Individuals who have entered into a registered domestic partnership, civil union, or other similar relationship that is not called a marriage under state (or foreign) law are not considered married. A taxpayer is married regardless of where the spouse lives.	If YES , go to Step 2. If NO , go to Step 4.
2	Do you and your spouse wish to file a joint return?	If YES , your filing status is married filing jointly . If NO , go to Step 3 ² .
3	Do all the following apply? <ul style="list-style-type: none"> • You file a separate return from your spouse • You paid more than half the cost of keeping up your home for the required period of time.¹ • Your spouse didn't live in your home during the last 6 months of the tax year³ • Your home was the main home of your child, stepchild, or foster child for more than half the year (a grandchild doesn't meet this test). For rules applying to birth, death or temporary absence during the year, see Publication 17 • You claim an exemption for the child (unless the noncustodial parent claims the child under rules for divorced or separated parents or parents who live apart) 	If YES , STOP. You are considered unmarried and your filing status is head of household ⁷ . If NO , STOP. Your filing status is married filing separately ⁵ .
4	Did your spouse die in 2022 or 2023?	If YES , go to Step 5. If NO , go to Step 6.
5	Do all the following apply? <ul style="list-style-type: none"> • You were entitled to file a joint return with your spouse for the year your spouse died • You didn't remarry before the end of this tax year • You have a child or stepchild who lived with you all year, except for temporary absences or other limited exceptions, and who is your dependent or who would qualify as your dependent except that he or she does not meet the gross income test, does not meet the joint return test, or except that you may be claimed as a dependent by another taxpayer. Don't include a grandchild or foster child. • You paid more than half the cost of keeping up the home for the required period of time.¹ 	If YES , STOP. Your filing status is qualifying surviving spouse . If NO , go to Step 6.
6	Do both of the following apply? <ul style="list-style-type: none"> • You paid more than 1/2 the cost of keeping up your home for the required period of time.¹ • A "qualifying person," (see Who Is a Qualifying Person Qualifying You To File as Head of Household? chart on the next page), lived with you in your home for more than 1/2 the year. If the qualifying person is your dependent parent, your dependent parent doesn't have to live with you.⁴ 	YES – Head of Household ⁷ NO – Single