**TAXSLAYER INSTRUCTIONS**

**General TaxSlayer Rules**

1. Always click **Continue!**
2. Always click **Enter Myself** rather than Guide Me.
3. To enter specific information about the taxpayer, go to the **search box** on the left hand side, and enter the source document. For example: W-2, 1099-R. Make sure you carefully **match** the form name!

Note: You can only search for federal forms, but not state forms. State issues have instruction on the **Volunteer Coordinator Sheet** applies to each situation.

**STEPS**

1. Today, we will use 2374 for XXXX on every tax return. On Saturday you can simply use the client’s real social security number.
2. When you go to VH1432, TaxSlayer should be running
3. To begin a new return - Select Start New Return
4. Select Start Return with No Profile
5. Enter social security number twice
6. Enter filing status
7. If the taxpayer is from Kirksville
   1. Select County: Adair
   2. School District Kirksville
   3. Continue
8. On Personal Information Sheet,
   1. Enter name, birthdate, occupation
   2. Answer the questions carefully. For the list of asked questions on the page, if they choose to donate $3 to President Election Funds, and it will not change their refund.
   3. Scroll down and completer other information
   4. After finishing the page, click Continue
9. If the client has dependents:
   1. Answer “Yes” for the question “Do you have any Dependents or Qualifying Person(s) to claim on your return?”
   2. Fill out the information form
   3. Continue
   4. Add a new dependent, if applies
10. Go to Health Insurance section, answer the questions (There are a lot of them.)
11. To enter specific information about the taxpayer, go to the search box on the left hand side, and enter the source document. For example: W-2, 1099-R. Make sure you carefully match the form name!

**INTERNATIONAL STUDENTS**

1. To begin a new return - Select Start New Return
2. Select Start Return with No Profile
3. Enter social security number twice
4. Enter filing status – **Nonresident Alien**

Note: Any student staying in U.S. after the first five years will be considered a resident alien (the same filing status as an U.S. resident). If a student arrived in the U.S. for the first time on December 31st, 2013, then the year 2013 is considered her first year as a nonresident alien.

1. If the taxpayer is from Kirksville
   1. Select County: Adair
   2. School District Kirksville
   3. Continue
2. On Personal Information Sheet,
   1. Enter name, birthdate, occupation
   2. Answer the questions carefully. For the list of asked questions on the page, if they choose to donate $3 to President Election Funds, and it will not change their refund.
   3. Scroll down and completer other information
   4. After finishing the page, click Continue
3. On **1040NR Schedule OI**
4. Begin General Information
   1. Type of 1040NR Entity - **Individual**
   2. Type of U.S. Visa – **nonimmigrant visa** if F-1 or J-1
   3. If the taxpayer has filed a U.S. Income tax return for a prior year, check the box and enter the **2016** for Last Year Filed and **1040NR** for Form Filed.
   4. After filling the rest of the form, click **Continue**
5. Begin Dates Entered and Left the U.S.
   1. Add **Schedule OI Travel Dates**

Note: If the students have entrances or departures during the tax year, enter those dates. If they don’t, use Jan 1st and/or Dec 31st of the tax year as the entrance or departure date.

* 1. Click **Continue**

1. If the client is entitled to salary exclusion (check Thursday training page XX), begin Income Exempt from Tax
   1. Add **Schedule OI Exempt Income**
   2. Fill in the **country**
   3. Fill in the correct **treaty article** – Check table for treaty article.
   4. Some countries have a limitation on how many months a salary exemption can be taken. If the client has never filed a U.S. tax return before, then it would be **0**.
   5. Amount of salary exclusion from the chart **but only up to W-2 income**.
2. If the client has dependents:
   1. Answer “Yes” for the question “Do you have any Dependents or Qualifying Person(s) to claim on your return?”
   2. Fill out the information form
   3. Continue
3. Go to Health Insurance section, answer the questions (There are a lot of them.)
4. To enter specific information about the taxpayer, go to the search box on the left hand side, and enter the source document. For example: W-2, 1099-R. Make sure you carefully match the form name!
5. If the taxpayer has taxable scholarship and his/her country has treaty with U.S. regarding the tax on scholarship, go to **Federal Section:** **Deduction, Adjustments, Scholarship and Fellowship Excluded**
   1. Enter the amount of the taxable scholarship or the cap on treaty, whichever is smaller.
   2. Click Continue
6. Clients from **India** will receive the standard deduction. Call a reviewer.
7. When entering W-2s, check to make sure that FICA taxes were not withheld. **Remember if you see FICA taxes withheld on W-2s for International students, call reviewers for assistance.**