

ADDING, EDITING AND DELETING TAXSLAYER STICKY NOTES

TaxSlayer has capability for adding notes to the tax return similar to yellow sticky pad notes. These notes can be useful for documenting taxpayer verbally supplied information and assumptions that are important in calculating refundable credits and/or penalty exemptions. The sticky notes carry from year to year unless deleted. As such, if the notes are intended to be helpful in a future year, the tax year when the note is created should be incorporated into the text. The notes will be displayed in the taxpayer's file copy.

Examples of taxpayer supplied information that would be useful for future years include (a) how many years a student has claimed the American Opportunity Education credit (b) due diligence steps taken by the counselor where taxpayer documentation was not brought in (c) due diligence answers to questions such as taxpayer state of residency/part year residency, dependents/spouse cash income where refundable credits are impacted, (d) reasons TP went away, etc.

Adding a Sticky Note in TaxSlayer:

1. After creating a tax return and adding the Basic information, the taxpayers name will appear at the top right hand side of the screen. Clicking on the name will cause a drop down menu to appear that includes a subtitle "Notes".
2. Clicking on the subtitle "Notes" will enable a sticky note to be added to the return.
3. Give the note a short title and then add text to the note. Include the year that the note was created in the text if you do not intend to delete the note when you reach the E-file section of the TaxSlayer menu. Be aware that the note is likely to be read/interpreted/edited or deleted by another counselor at a later date.

Deleting a Sticky Note in TaxSlayer:

After saving and exiting the return, the sticky note can be deleted or edited using the following procedure:

1. Perform a Client Search for the taxpayer that has a TaxSlayer sticky note attached.
2. Look for a blue flag in the "Status" column in the row containing the Taxpayer's name. Click on the blue flag.
3. Click on the "Note" Title and scroll down to the bottom of the note text. Click on the Red "Delete" button to delete the note.