ProConnect Tax Online

Getting Started Guide
Tax Year 2016

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System Requirements

This section discusses what requirements are needed to Prepare and E-file returns in Intuit ProConnect TaxOnline (PTO).

System Requirements

High-speed Internet connection

Broadband speed such as T1, Fiber Optic, DSL, or Cable (1.5 Mbps or greater) [Satellite/Dial Up Internet Connectivity Not Fully Supported]

Hardware & Software

Recommended Hardware
- Dual Core, 2.0 GHz or greater processor
- 2 GB RAM or greater
- 1024x768 screen resolution

Operating System
- Microsoft Windows XP, Windows Vista, Windows 7
- Mac OSX 10.6.8 or higher

Browser (We recommend Mozilla FireFox)
- Firefox v11 or higher (Windows/Mac)
- Apple Safari 5 or higher (Mac Only)
- Google Chrome 18 or higher (Windows/Mac)

Other Application (needed)
- Adobe Acrobat Reader (latest version)
- Adobe Flash 10.3 or higher
- Flex (Mac)

Administration

Multiple Users

There can be multiple users inside ProConnect TaxOnline. For details on adding users to the program please see Adding New/Multiple Users to the ProConnect TaxOnline.

Firm and Preparer Charges

Doing the installation setup you enter your Firm and Preparer information. If this information needs to be updated, please see Enter or Modify Firm or Preparer Information

Return Charges

The ability to see a list of all the Returns Charged For in the ProConnect TaxOnline Application will be available in the "Purchase" screen.

Converting Your Data Files

Intuit offers a Data Conversion from your existing tax program to ProConnect TaxOnline. For steps on converting to ProConnect TaxOnline, please see ProConnect TaxOnline Data Conversion Process.

The following competPTOrs/types of returns can be converted:

Converted Items	1040	1065	1120	1120S	1041
ATX	x	x	x	x	
CrossLink	x				
Drake	x	x	x	x	
Lacerte	x	x	x	x	x
ProSeries	x	x	x	x	
ProSystem fx	x	x	x	x	x
Tax Act	x				
TaxSlayer	x				
TaxWise	x	x	x	x	
TurboTax	x	x	x	x	
Ultra Tax	x	x	x	x	

E-file Requirements

ProConnect TaxOnline supports e-filing for 1040, 1065, 1120, 1120S, 1041 and 990 returns.

Regardless of tax product, there are basic IRS requirements you must meet to e-file – this section discusses those requirements as they relate to the Tax Online product. Please see the following sections.

Electronic Filing ID Number (EFIN)

In order to e-file, you are **required** to have an EFIN, which is a six-digit number assigned to you by the IRS that you must enter in the Tax Online product. For details about applying for an EFIN, visit:

- Registering with the IRS to Participate in Electronic Filing
- FAQs About Electronic Filing ID Numbers (EFIN)

Click Entering The EFIN for details about entering your EFIN.

Preparer Tax ID Number (PTIN)

For IRS tracking purposes, each paid preparer is also required to have a Preparer Tax ID Number (PTIN), an eight-digit number that begins with letter "P" (for example, P12345678). The PTIN is assigned by the IRS and must be entered in Tax Online so it will print on the tax return. For more information, go to IRS Preparer Tax ID Numbers.

Click Entering the PTIN for details about entering your PTIN.

Electronic Return Originator (ERO) PIN

The ERO is simply the authorized IRS e-file provider who submits, or transmits, the e-file return. When e-filing a tax return, the IRS requires the ERO to enter a PIN, which can be any five-digit number of the preparer's choice. For more details about ERO requirements, visit FAQs for Electronic Return Originators.

Click Entering the ERO PIN for details about entering your ERO.

Bank Product Information (Optional)

Tax Online offers bank products through "Refund Advantage," our third party partner. The program can process two categories for Refund Advantage: Electronic Refund Check (ERC) or Electronic Refund Deposit (ERD). Click here to enroll in Refund Advantage via their Web site, or enroll from within the program by going to the Account menu, then selecting Refund Transfer.

When the enrollment process is complete, you must make a few entries in Tax Online, and then you can use the tax program for Refund Advantage bank products.

Click Entering Bank Product Information for details about entering your bank product information.

THIRD-PARTY DESIGNEE PIN (OPTIONAL)

The Designee PIN is a five-digit number of the preparer's choice, which simply allows a preparer, friend, or family member to discuss the tax return with the IRS. Entering the PIN authorizes the IRS to contact the designee to answer any questions that may arise while the tax return is processed. For more information, refer to IRS Publication 17.

Click Entering the Designee PIN for details about entering your Designee PIN.

IDENTITY THEFT PROTECTION PIN (IF REQUIRED)

The Identity Theft Protection PIN is a six-digit number issued by the IRS to taxpayers who have been verified as an identity theft victim. This PIN is valid only for the current tax year. (The IRS will send a letter with a new PIN for a three-year period after the last validated theft incident). For more details, go to Identity Theft.

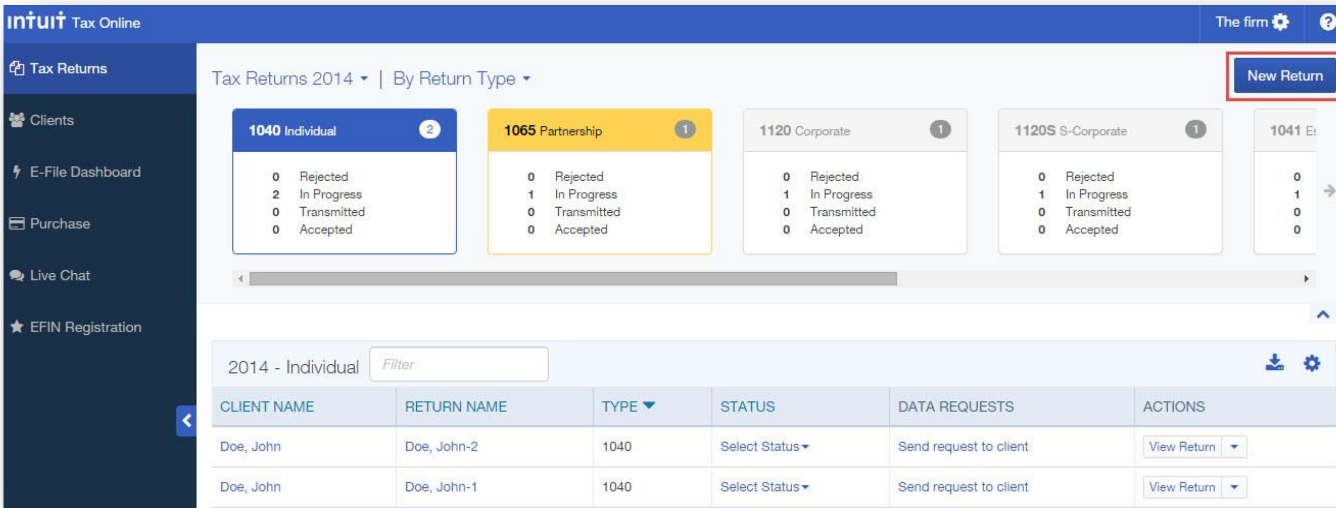
Click Entering Taxpayer's Identity Theft for details about entering your Identity Theft PIN. Beginning in 2015, this input will be located in the first input screen, the Client Information screen.

Starting a Return

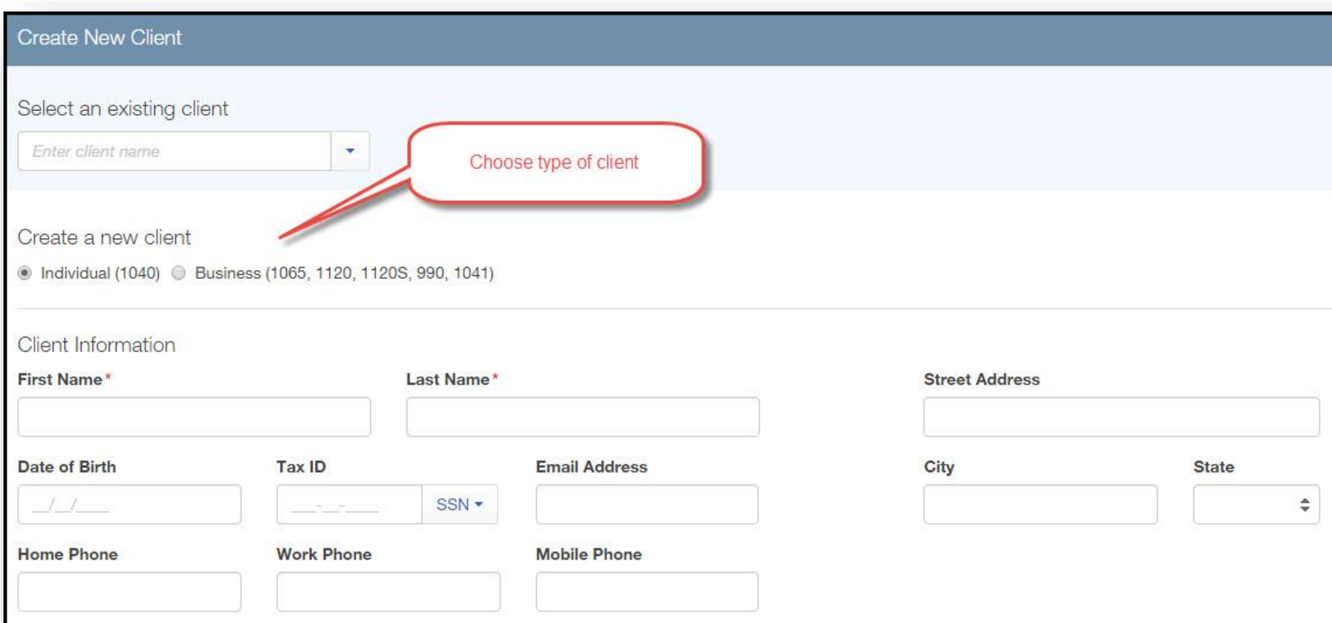
Adding Clients and Returns

In the ProConnect TaxOnline (PTO) program, there are two steps to create a tax return – "**Add New Client**" and "**Add New Return**."

- On the main client page, on the right hand side, click on "**New Return**."



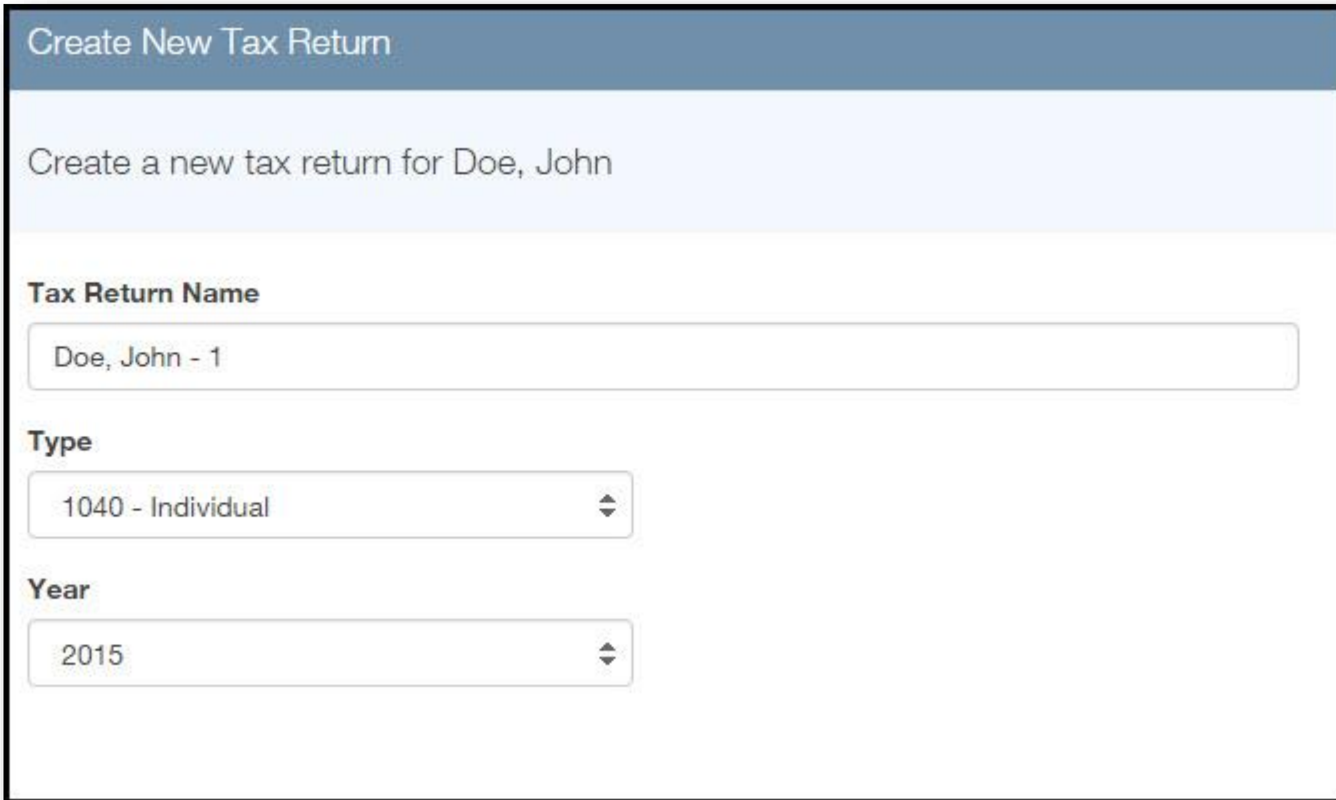
- Fill out the information for that client and the type of client this will be either an Individual or a Business client. At a bare minimum, enter the First and Last name for an Individual client; or Organization name for a Business entity.



- Once completed with the client information, click on “**Save and Create Return**” in the lower right-hand corner. The return will automatically begin.

Based on the type of client that you have entered, once you have added the client; then the return information will start. The first screen will allow you to choose:

- Return Name
- Return Type
- Return Year



CLIENT CHECKLIST AND THE INTUIT LINK PROGRAM

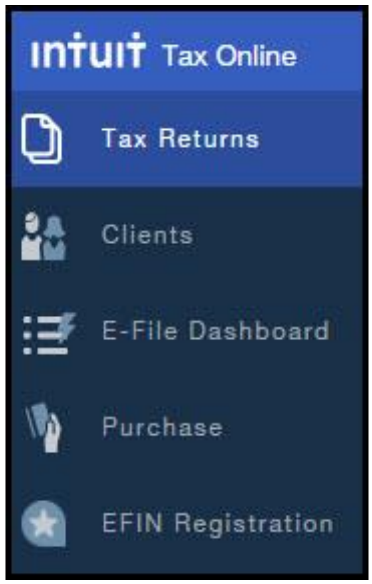
Once finished, click the "**Save and Continue**" button. You will then be taken to the Client Checklist screen where you can setup questions for the checklist to send to the client to obtain information for the current year tax return. You can also choose to close the Client Checklist and begin entering return data. To go back to the Client Checklist screen at any time, click the "**Data Request**" button in the top right corner of the program screen once you have a return open. More information on the Client Checklist integration with the Intuit Link program can be found at [How does Intuit Link Integrate with ProConnect TaxOnline (PTO)?]

NAVIGATING THE PRODUCT

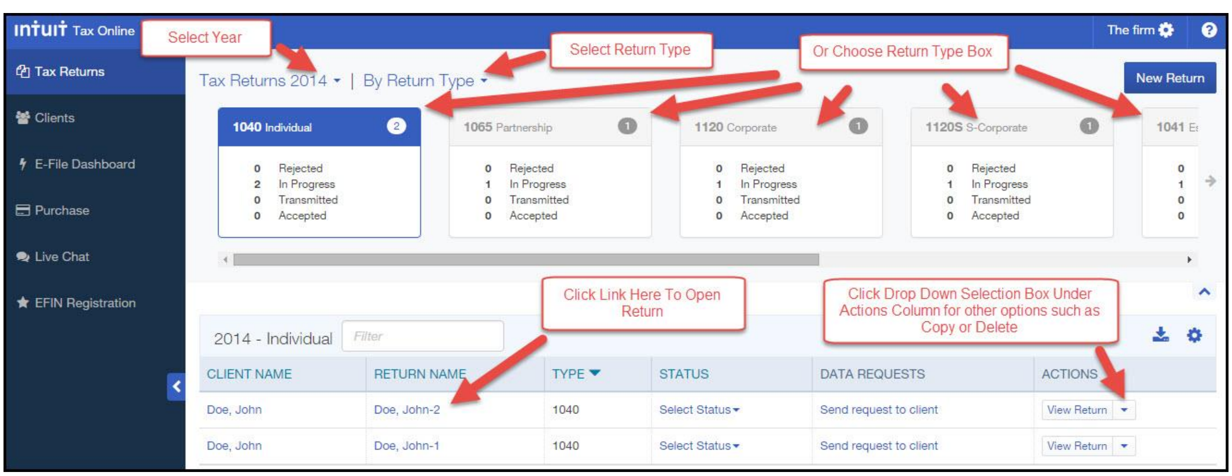
The ProConnect TaxOnline (PTO) program has three distinct areas: the ***Tax Returns list, Client list*** *and the* ***Return Workspace area****.*

CLIENT SELECTION LIST

The Client Selection List area is the main landing page when you first open the program. You will notice a main menu on the list that allows you to select:

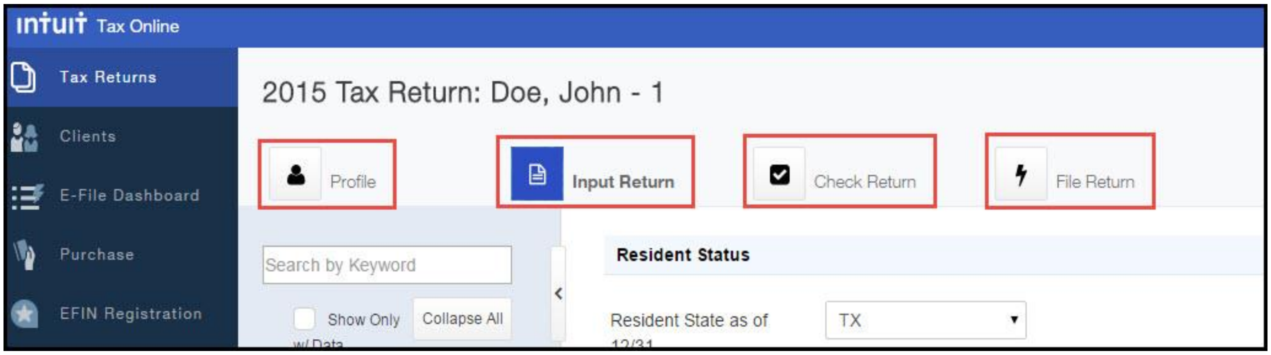


Let's start with selecting "**Tax Returns**". After selecting "**Tax Returns**", you will see a list of clients with returns. You can then choose to filter the list of returns displayed. Choosing "**Clients**" will show client information only.



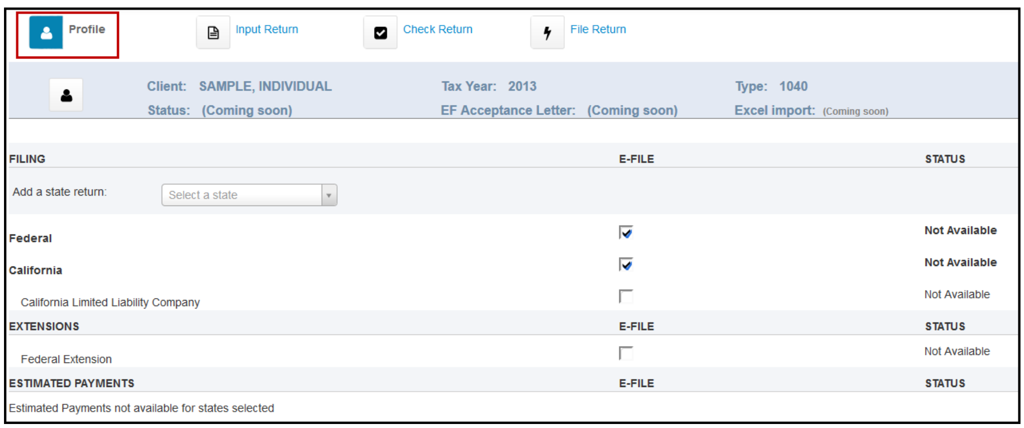
Workspace Area

Once you open a return, you'll notice four buttons, or workspaces, listed at the top.



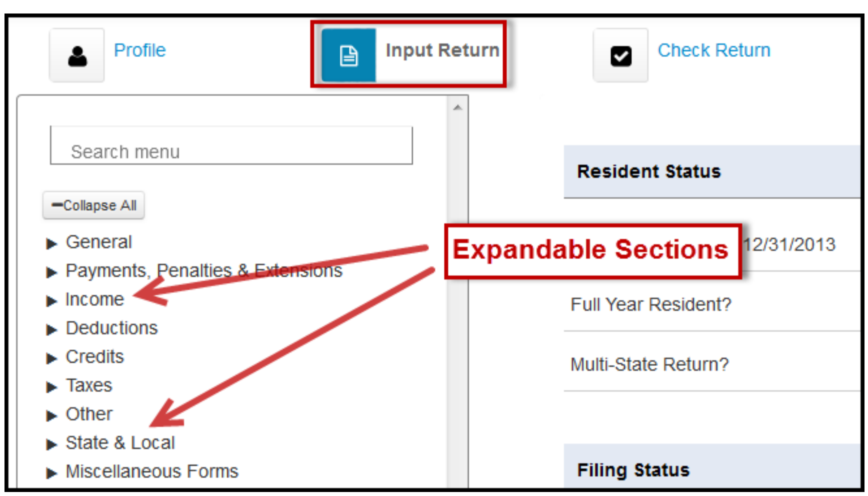
Profile

The Profile is the workspace used it indicate what returns you will electronic filing as well as the e-file statuses and client return notes.

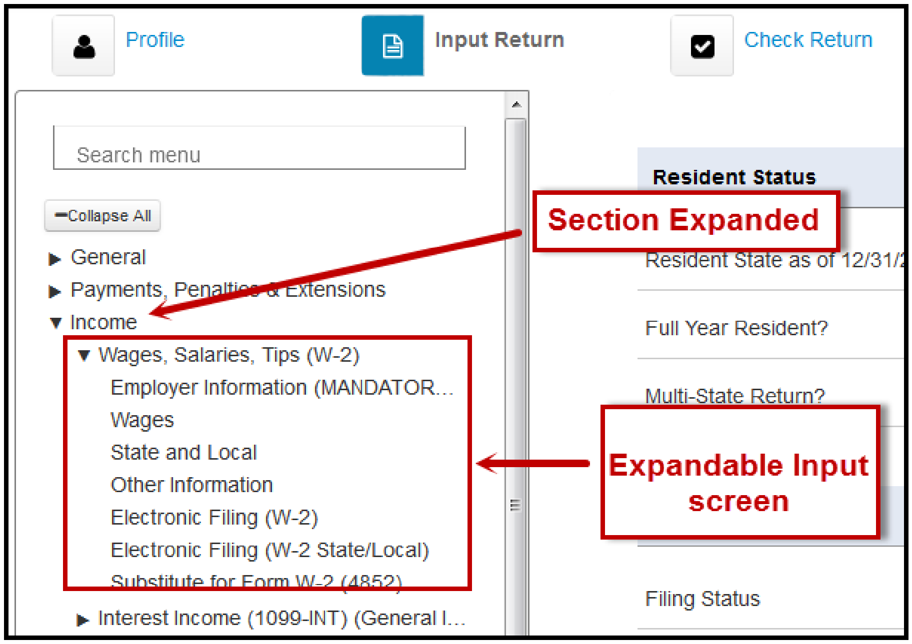


Input Return

This is the workspace that you will make all the entries for the tax return. In the left-hand navigation pane are the different sections that can be expanded to reveal the input screens corresponding to that section.

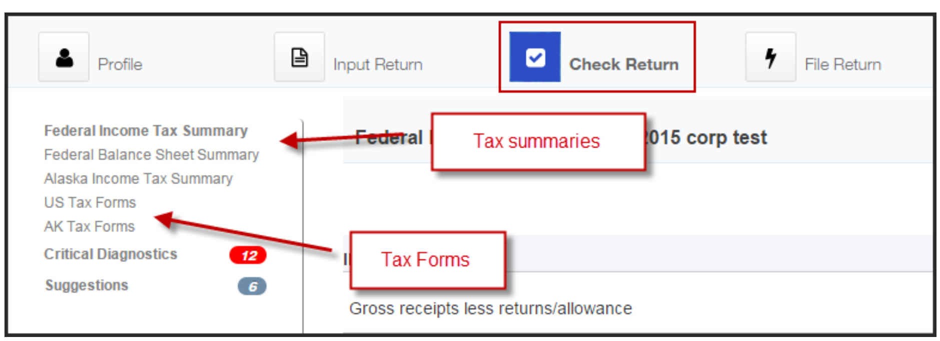


Once a section is expanded, select an input screen to make entries for the return. Note that the input screens may also be expanded.

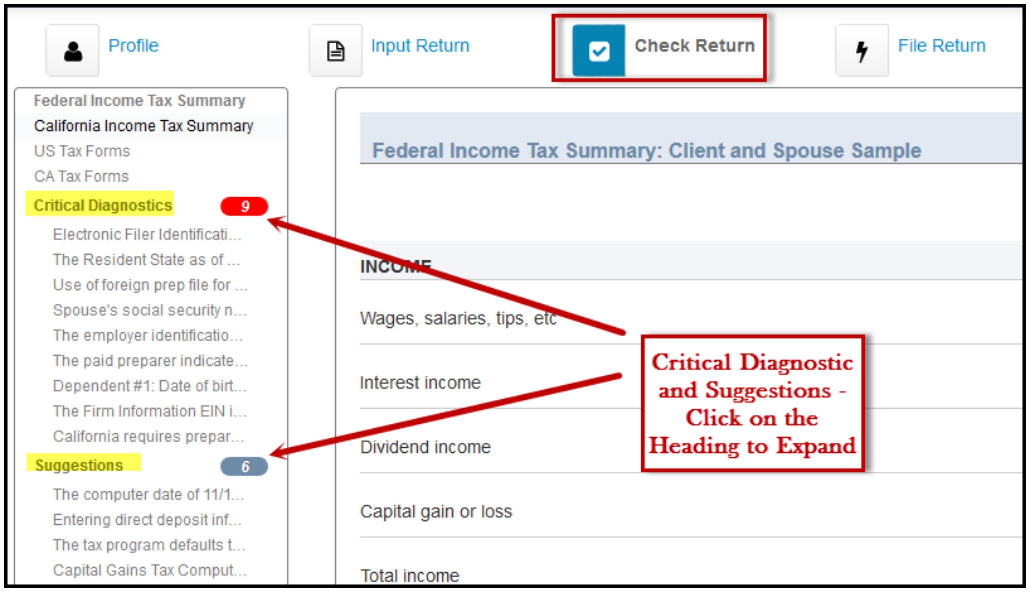


Check Return

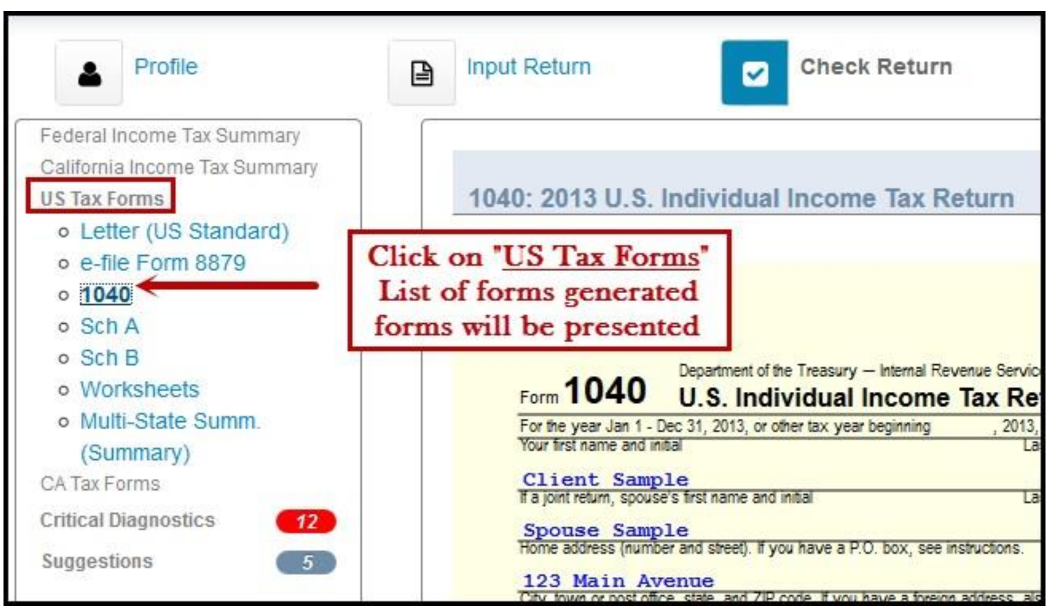
The Check Return space displays the forms, diagnostics and suggestions for the tax return. The program defaults to the tax summary.



On the left hand column are “Critical Diagnostics” and “Suggestions”. This is how you can check for errors on the return. “Critical Diagnostics” that mention e-file must be cleared to be able to e-file. “Suggestions” will not stop an E-file but should be reviewed.



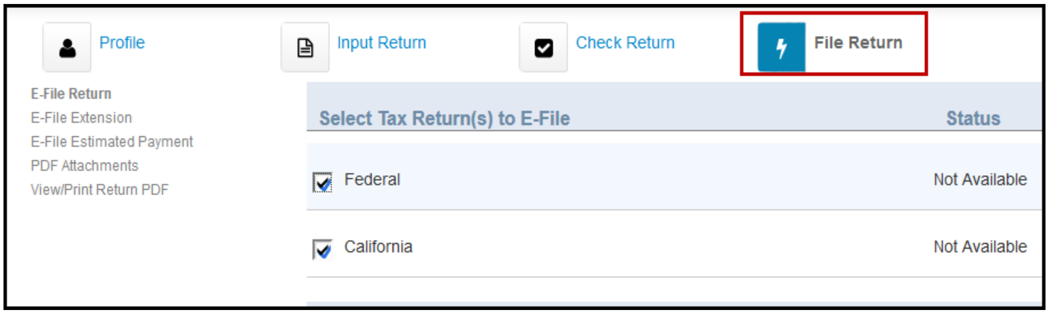
Select “**US Tax Forms**” or any state “**Tax Forms**” to view the forms generated with the return. The applicable tax return forms will appear for your review.



File Return

Printing and E-filing of the return is done from the File Return button.

Viewing, Printing, and Saving Tax Returns (PDF)



In the ProConnect TaxOnline (PTO) program, you can view, print, or save a PDF copy of the tax return. Viewing the return can be performed by clicking the **Check Return** Button and/or the **File Return** Button. Printing and saving a PDF copy of the return can only be done from the **File Return** screen after the return has been purchased.

Viewing Tax Returns

To view a return from the **Check Return** screen:

1. Click on the **Check Return** button from within the tax return.
2. On the left column, select the jurisdiction (federal or state).
3. This expands the column out and shows the generated tax forms for this return. Click on the form you would like to view.

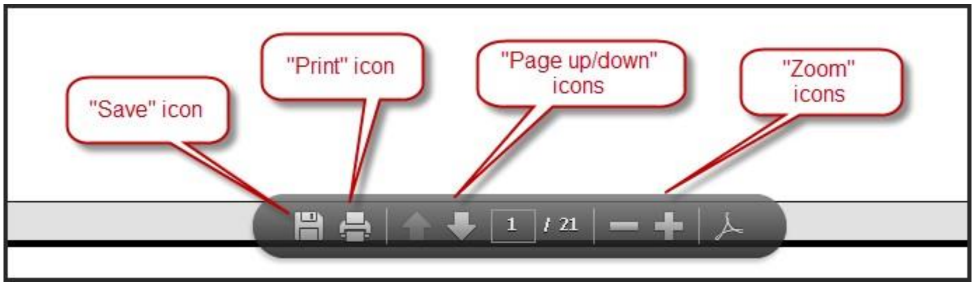
To view a return from the **File Return** screen:

1. Select the **File Return** button.
2. Click **View/Print Return PDF** on the left navigation panel
3. A PDF of the entire return will open in a separate window.
4. The federal and all states included will be in the PDF copy.
5. Partial Printing of the return is also available by clicking the **Partial Print** link.

Saving and Printing Tax Returns

Saving and/or printing a tax return can only be done from the File Return workspace.

1. Select the **File Return** button.
2. Click **View/Print Return PDF** on the left navigation panel
3. A PDF will open in a separate window.
4. Once the PDF opens move cursor towards the bottom center of the PDF.
5. A gray floating toolbar appears where you can click the save icon or the print icon.



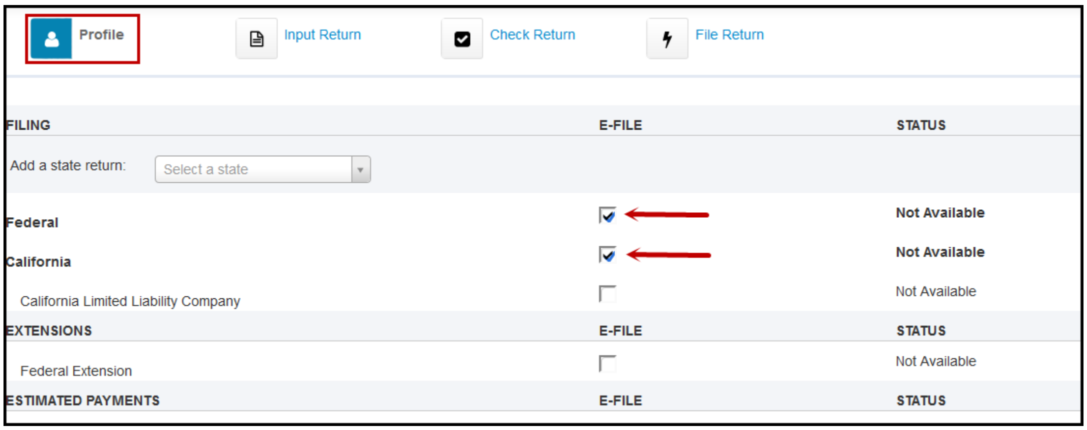
NOTE: The above instructions are predicated on the tax return already being paid for, either through a bundle purchase or a "pay-per-return" single purchase. If not, a message will appear within the program prompting you to make a purchase. You can make a purchase at any time by clicking the "Purchase" link on the left side of the program screen.

For more information on viewing/printing a return, see the PTO knowledgebase article [Printing a Return or Saving it as a PDF File in ProConnect TaxOnline](#).

E-Filing Tax Returns

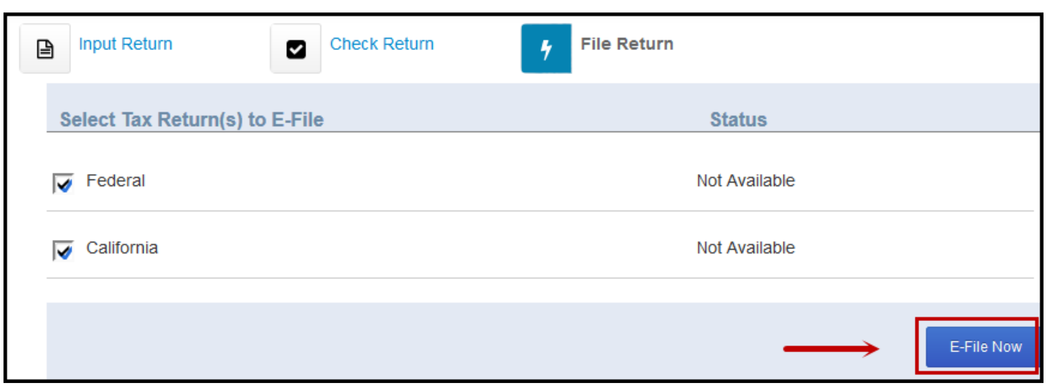
E-file Your Tax Return

ProConnect TaxOnline automatically defaults to e-file for the federal return and any state added at the Client information screen for electronic filing. The filing type can be changed to paper file if the tax return is not going to be e-filed. To change the filing status; click the **Profile** button and uncheck the "E-File" button(s) next to the federal and/or applicable states. Once the tax return has been completed and is ready to be e-filed go to the **File Return** button. Click the following link, E-filing A Tax Return for detailed instructions on how to e-file from within the program.



E-file Transmission Status

The e-file status within the tax online program informs you of the status of your tax return after it has been electronically transmitted. The e-file transmission status for a tax return can be viewed at the File Return button for that tax return that was transmitted. Click e-file Status for detailed information on transmitting, checking and printing your e-file status for Federal and State. This information is also available in the **E-File Dashboard** listed on the left side of the program screen.



E-file Your Extension

ProConnect TaxOnline automatically sets up federal returns and certain states that have been added at the Client Information screen for electronic filing of the extensions. Click E-filing Extension for detailed instructions on how to e-file within the tax program for business and individual returns.

Bank Products

ProConnect TaxOnline offers "Pay By Return" using the Refund Advantage bank product. ProConnect TaxOnline does not provide enrollment for Refund Advantage. In order to use this bank product enrollment and acceptance by Refund Advantage is required. Please click Refund Advantage to connect to their home page. After enrollment, for detail instructions on how to enter the bank information on your individual tax return click Pay By Return in PTO.

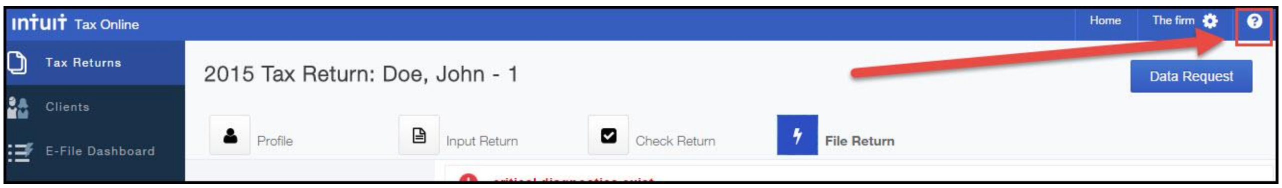
E-file Dashboard (Status Tracker)

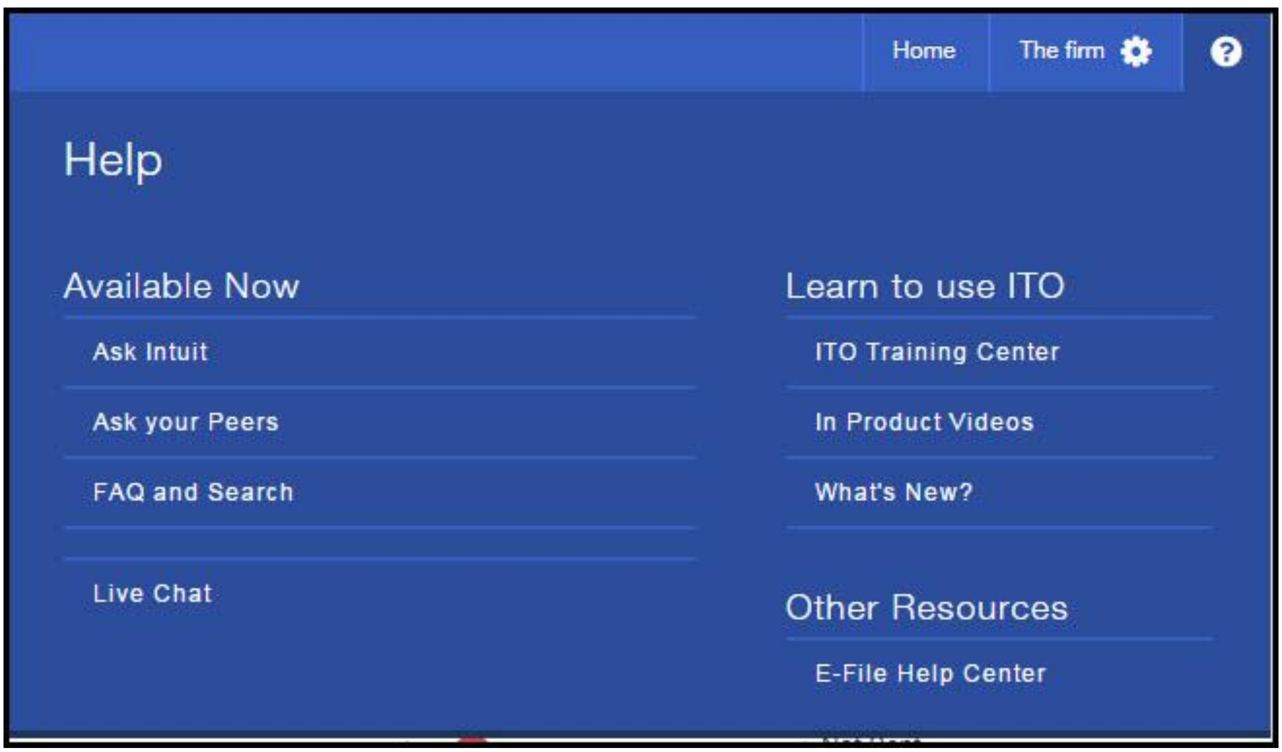
The e-file dashboard provides a comprehensive picture at a glance of e-filed information for the firm. The dashboard contains essential information which allows preparers to keep track of which returns have been submitted. To access the dashboard click the E-file Dashboard link on the left side of the program screen.

GETTING HELP

ASK INTUIT

The ProConnect TaxOnline Help is under the  menu at the top-right corner of the program screen. The "Ask Intuit" to access the support site for ProConnect TaxOnline. There you can search for information and view the most frequently asked questions and chat support is also available.





HOW DO I SEARCH FOR INFORMATION ON THE SUPPORT SITE FOR ProConnect TAX ONLINE?

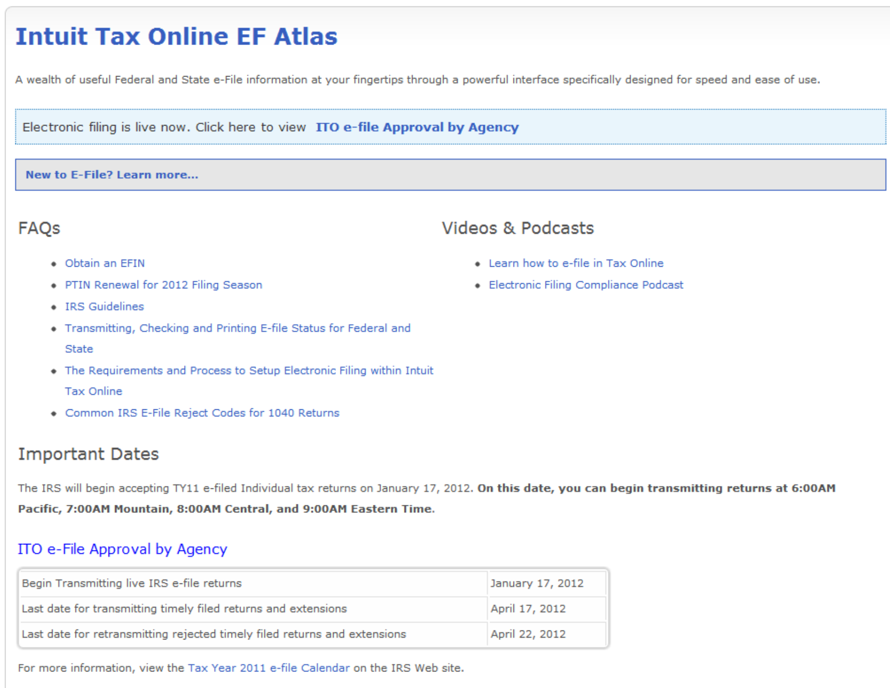
Type the information that you wish to search for and then click the "Search" button.

WHAT RESOURCES ARE AVAILABLE ON THE SUPPORT SITE FOR PROCONNECT TAX ONLINE?

Several videos and knowledge base articles that can be accessed to learn more about program related information. Also available are links to chat, the online community, EF Atlas, and a link for sending feedback for ProConnect TaxOnline.

EF ATLAS / E-FILE HELP CENTER

The e-help center is a repository of information regarding electronic filing; delayed acknowledgements; which states have approved ProConnect TaxOnline for e-filing; critical IRS information and alerts; what are the timely filing dates for e-filed returns; and state mandate information. The e-help center is continually updated with the latest information regarding electronic filing and changes which have occurred. The E- Help Center can be accessed to explore the wealth of information that is available by clicking [ProConnect TaxOnline EF Atlas].



Intuit Tax Online EF Atlas

A wealth of useful Federal and State e-File information at your fingertips through a powerful interface specifically designed for speed and ease of use.

Electronic filing is live now. Click here to view **ITO e-file Approval by Agency**

New to E-File? Learn more...

FAQs

- Obtain an EFIN
- PTIN Renewal for 2012 Filing Season
- IRS Guidelines
- Transmitting, Checking and Printing E-file Status for Federal and State
- The Requirements and Process to Setup Electronic Filing within Intuit Tax Online
- Common IRS E-File Reject Codes for 1040 Returns

Videos & Podcasts

- Learn how to e-file in Tax Online
- Electronic Filing Compliance Podcast

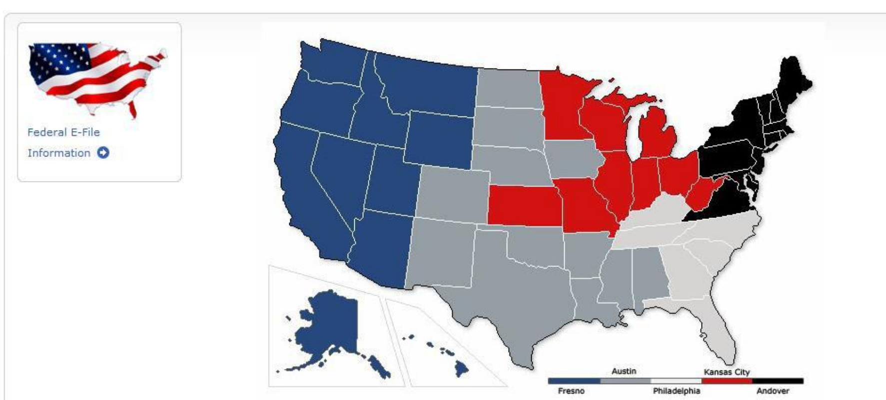
Important Dates

The IRS will begin accepting TY11 e-filed Individual tax returns on January 17, 2012. **On this date, you can begin transmitting returns at 6:00AM Pacific, 7:00AM Mountain, 8:00AM Central, and 9:00AM Eastern Time.**

ITO e-File Approval by Agency

Begin Transmitting live IRS e-file returns	January 17, 2012
Last date for transmitting timely filed returns and extensions	April 17, 2012
Last date for retransmitting rejected timely filed returns and extensions	April 22, 2012

For more information, view the Tax Year 2011 e-file Calendar on the IRS Web site.



Accessing Intuit Tax Online EF Atlas

Within the program, click the Help menu  at the top of the screen and then select "e-file Help Center". You can also access ProConnect TaxOnline EF Atlas by going to the ProConnect TaxOnline support site by clicking ProConnect TaxOnline EF Atlas.

On the right side of the screen, select the link for "EF Atlas" under E-file Resources.

Information available on EF Atlas (EF Help Center)

ProConnect Tax Online EF Atlas is a repository of information regarding electronic filing, including delayed acknowledgements, lists of supported states, critical IRS information and alerts, dates for e-filing, and state mandates. There is also a lot of self-help information such as FAQs and videos.

The E-Help Center is continually updated with all the latest information regarding electronic filing. Click ProConnect TaxOnline EF Atlas to access the E-Help Center.

Using ProConnect Tax Online Community

The purpose of the ProConnect Tax Online Community is to be the one destination where you can connect with other tax professionals about the ProConnect Tax Online product and topics relating to the professional community. The Community is a reference and gathering place to share and exchange ideas, ask questions, and provide solutions to one another, share tips and advice, and act as peer support.

Using the Community

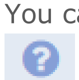
You may access any of the Community Forums and other content on the site. To participate in Forums and Discussions, however, you must be a registered member of the Community and have agreed to the terms of use identified in the Terms of Service.

Registering As a Member of the Community

Go to https://accountants-community.intuit.com/topics/18-intuit-tax-online and from there you have the option to search posts/questions. To post your own you will need to sign in or register. Click the "Sign In" link at the top right corner of the page to start that process.

If you needed to create your account, you will receive an email with more information regarding the Community and will be able to log in. To log in to the Community, click the "Sign In" link at the top right corner of the screen. Enter the User ID and password that you provided during the sign up process.

Accessing the Community

You can access the Community within ProConnect Tax Online by clicking  Help menu at the top of the screen and then select the link for "**Ask Your Peers**." You may also access the community at https://accountants-community.intuit.com/topics/18-intuit-tax-online

Posting a Question

Enter your question in the box with the text, "Search the community." Enter any other applicable information as requested and hit the Enter key on your keyboard or click the magnifying glass icon to begin the search.

Answering a Question

Click on the question that you wish to answer. The screen will then display the full question. Click the "Contribute an answer" button. Enter the appropriate reply and then click the "Answer" button. Your reply will appear at the bottom of the question.

Changing Your Profile

Click your user image in the top right corner of the page and select "Profile Settings". After you have made the desired changes, click "Save".

Managing The Community

All Forums are "hosted" by Intuit to ensure a high-quality, clean environment for the exchange of ideas, information and experiences. Hosts manage the Forums and Discussions and are responsible for maintaining the Forums by keeping discussions on tract and assisting new participants.

Note: Hosts may move a post to a more relevant discussion, edit or delete a discussion to organize the message board more effectively. Hosts may also edit or remove an individual message if it violates the Legal Agreement. Continued violation of the Legal Agreement may result in the loss of Community participation privileges.

User responsibility

All messages on the Community should be appropriate, friendly, informative and respectful. For further information please see the Terms of Use.

Making Contributions

Intuit believes that collectively the professional community is smarter and more powerful than any one individual or group of experts. By contributing, others will see value in what you contributed which will prompt them to contribute themselves. Communities thrive when lots of people contribute and start to feed off each other. While it may seem like you are contributing without any return initially, as the community grows you'll see a powerful return from all the great contributions from your peers.