

Filing Season 2023 TaxSlayer Pro[®] Closeout/Backup Procedures

for SPEC Partners

TaxSlayer Pro[®] Online

For post filing season security, all users other than administrator, should be made **inactive**. This will ensure no returns are being prepared off-season when the site is closed or **prior to the site opening the next filing season**.

TaxSlayer Online Closeout Procedures:

1. Do not delete or inactivate any returns if **carryforward tax return** data is wanted for the next filing season
2. The TaxSlayer server will secure all data and make return carryforward data available for filing season 2024
3. From the **Preparer Setup** in the **Configuration Menu**, the site administrator or any user with a security template that has **Add/Edit Preparers** permissions has the ability to quickly activate or inactivate a preparer
4. Select the volunteer preparers you wish to inactivate while the site is closed
5. The "**Flip Active Status**" will inactivate all users including the ADMIN at once
6. Ensure the ADMIN user is still active, prior to logging off

NOTE: Sites are strongly encouraged to make all preparers except the ADMIN (the contact name on the software order) inactive before the site closes.

For additional guidance, follow the procedures outlined on the VITA/TCE Blog or in the Pro Online User Guide for making preparers Active/Inactive.

TaxSlayer Pro[®] Desktop/Contingency Plan

For VITA/TCE sites using the TaxSlayer Desktop product, they must back up their data before the end of the filing season to ensure the carryforward tax return data is available filing season 2024. In addition, this can be used for any site running the TaxSlayer Desktop product to create a disaster recovery backup.

To complete this task, you will need a removable storage device, such as a flash drive or portable hard drive, for each computer you wish to backup. Each device should have sufficient free space to store the entire TaxSlayer folder on the drive.

NOTE: CD/DVD **cannot** be used; the storage device must connect via USB.

The following steps can check TaxSlayer folder, file size:

1. Open the File Explorer
2. Double click on the C: drive (or drive where the software was loaded)
3. Find the TaxSlayer folder and select it
4. Right click on the TaxSlayer folder and a menu will appear
5. Click on Properties
6. This will show you the size of the TaxSlayer folder

Perform these steps with each Workstation to move files to the Transmitting Computer:

1. Make certain that no returns are open in TaxSlayer on any computer
2. Insert the storage device into a USB slot
3. Make note of which drive is assigned to the storage device
4. Start TaxSlayer and login the 2022 TaxSlayer Program
5. Open the Utilities Menu – option 8
6. Open the Program Backup Utility – option 5
7. Make sure the Backup button is selected
8. In the Target Drive drop down list select the drive assigned to your storage device
9. Click the Start button
10. When the backup is complete, the message “Backup Complete” will be displayed
11. If any other message is displayed, repeat steps 1-10 until the “Backup Complete” message is displayed

From the Transmitting Computer:

1. Upload all files from each workstation to the main transmitting computer
2. Make certain that no returns are open in TaxSlayer on any computer, especially if you are using a server connection at your site
3. Insert the storage device into a **USB** slot
4. Make note of which drive is assigned to the storage device
5. Start TaxSlayer and login the 2022 TaxSlayer program
6. Open the Utilities Menu – option 8
7. Open the Program Backup Utility – option 5
8. Make sure the Backup button is selected

9. In the Target Drive drop down list select the drive assigned to your storage device
10. Click the Start button
11. When the backup is complete, the message “Backup Complete” will be displayed
12. If any other message is displayed, repeat steps 1-10 until the “Backup Complete” message is displayed
13. The USB device with taxpayer data must be secured and encrypted to prevent data loss per Quality Site Requirement #10, Security; partners and IRS certified volunteers must protect physical and electronic data gathered for tax return preparation both during and after the filing season

Removing/Uninstalling TaxSlayer Pro®:

1. Open task manager
2. Click on the Services tab
3. Right-click on "TaxProgram2022" and select "Stop"
4. Open your Control Panel
5. Locate Programs and Features
6. Select Uninstall a Program
7. Select your 2022 TaxSlayer Pro®
8. Click Uninstall
9. Navigate to the drive where the TaxSlayer program was installed and delete the TaxSlayer folder

Secondary Backup Drive:

If you used the secondary backup drive, make sure you delete all information on the secondary backup drive and empty your recycle bin.

IRS Computer Depot Laptops:

Follow the procedures in Publication 4473, IRS Computer Loan Program - Welcome Package, for additional guidance on “Laptop – Data Deletion”. Whether using TaxSlayer Desktop software or other software providers, it is imperative to use the “disk wipe” procedures outlined Publication 4473 prior to returning laptops to the Computer Depot. In addition, sites who save taxpayer information such as lists containing PII (Personally Identifiable Information) etc. on the hard drive, are not exempt and are required to disk wipe before returning laptops to the Depot.