

See What's New in MyTAXPrepOffice for TY2024

Date: 11/12/2024

Welcome to the powerful new Interview Mode in MyTAXPrepOffice, built to streamline tax prep for both new and experienced users. Discover how the Interview Home screen and progress timeline keep you on track, and see forms update in real-time—no waiting for summaries! Effortlessly switch between Interview and Forms Modes without losing your place and enjoy the flexibility of entering data at your pace. Perfect for anyone looking to enhance accuracy, speed, and ease in tax preparation!

Get ready to discover all the great new tools in MyTAXPrepOffice for Tax Year 2024.

MyTAXPrepOffice Enhancements

Introducing the New and Improved Interview Mode: A Seamless Experience for Tax Preparers

Our Interview Mode has been fully reimagined from the ground up, delivering a more intuitive, efficient, and client-friendly experience designed to make tax preparation faster and easier than ever.

Completing a Tax Return in Interview Mode

1) To Start a New Return Using Interview Mode

(a) Locate the **Recent Returns widget** displayed on the Dashboard and click on the **New Return** button.

Tax Year 2024 What's New

Recent Returns ↻ ⋮

SSN/EIN	TAXPAYER'S NAME	STATUS	TYPE	PHONE NU...
2024	Jeff Jones	In Process	1040	(307)414-1211
0011	Mathew Merry	In Process	1040	
0006	Howard Halloween	In Process	1040	
2024	George Williams	In Process	1040	(307)414-2345
2024	Bob Smith	In Process	1040	(307)414-1211

→ New Return
→ New Federal Extension
→ Return List

(b) The New Return screen will open that displays sections such as **Create Return for Existing Client** and **Create Return for New Client**.

New Return
Back To Dashboard

Create Return for Existing Client:

Select Client ▼

OR

Create Return for New Client:

Return Type 1040 - Individual ▼

SSN _ - _ - _

First Name

Last Name

Phone Number () - _ -

Email

Use custom return template Please Select ▼

Taxpayer does not have an ITIN. W7 is needed.

Interview Mode
Forms Mode

Tax Year 2024 What's New

To create a new return for an existing client, click the **Select Client** drop-down menu from the Create Return for Existing Client section.

Note: When you select this option the client's SSN/ITIN and first and last name will be automatically completed in the required fields.

(c) Enter the client's Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN).

(d) Enter the client's First Name.

(e) Enter the client's Last Name.

Note: A message will be displayed reminding you to obtain signatures from your client on the Consent to Disclose and Consent to Use forms. It is recommended that you obtain the signatures before the interview process. However, they can be captured later.

Note: Internal Revenue Code & 7216 requires signatures from your client on the [Consent to Disclose](#) and [Consent to Use](#) forms.

(f) Click on the Interview Mode button.

New Return

[Back To Dashboard](#)

Create Return for Existing Client:

Select Client

OR

Create Return for New Client:

Return Type: 1040 - Individual

SSN: 555-55-0015 Taxpayer does not have an ITIN. W7 is needed.

First Name: Tommy

Last Name: Tester

Phone Number: (307)414-1211

Email: sales@mytaxprepoffice.c

Use custom return template: Please Select

Interview Mode Forms Mode

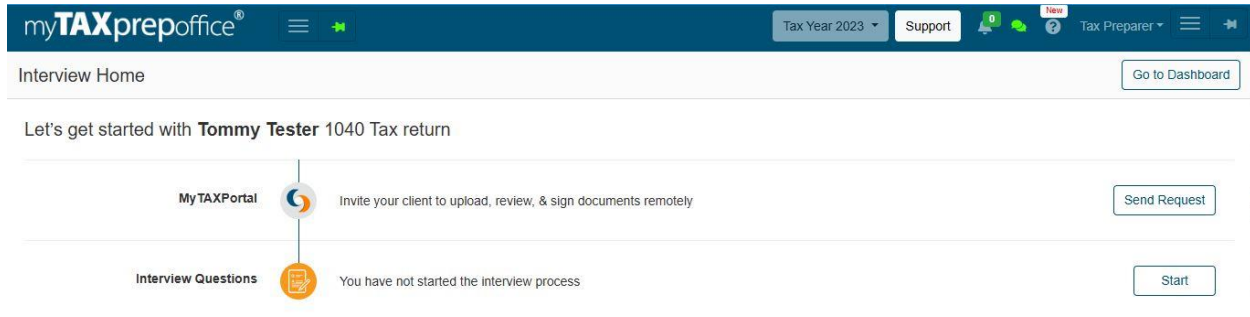
Note: Internal Revenue Code & 7216 requires signatures from your client on the [Consent to Disclose](#) and [Consent to Use](#) forms.

Note: The return is now saved in your Return List and can be accessed at any time.

Tax Year 2024 What's New

2) How the Interview Home Screen Displays Information

(a) The Interview Home screen will display sections such as **MyTAXPortal** and **Interview Questions**.



(b) Use the MyTAXPortal feature to invite your client to upload, review, and sign documents remotely. Simply click the **Send Request** button.

(c) To start entering your client's data (Source Documents), click the **Start** button.

Note: The Interview Home screen will automatically update with additional information when you enter client data and file the return.

3) Completing Client Information For a Return

(a) The Federal screen will open that displays sections such as Client Information, Income, Deduction & Adjustments, Tax and Non-Refundable Credits, Payments and Refundable Credits, Miscellaneous Forms, and Tax Summary.

Tax Year 2024 What's New

(b) To enter the basic information for your client, simply click the Start button on the Client Information section.

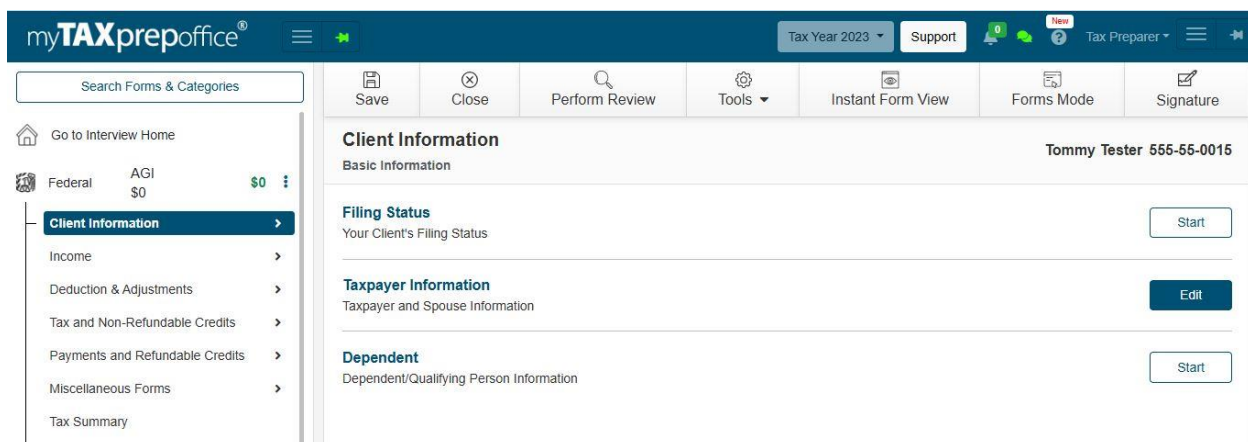
Tip: Use the Forms Navigator to view the current section of the tax return. Click the arrow icon next to the section in the Forms Navigator for more information about that section.

Tax Year 2024 What's New

	Federal	AGI	\$0	:
		\$0		
	Client Information			>
	Income			>
	Deduction & Adjustments			>
	Tax and Non-Refundable Credits			>
	Payments and Refundable Credits			>
	Miscellaneous Forms			>
	Tax Summary			

If you need to close the return, click **Save** and **Close** from the top menu bar in the Return Workspace.

(c) The Client Information screen will display the **Filing Status**, **Taxpayer Information**, and **Dependent** sections.



The screenshot shows the myTAXprepoffice interface. The top navigation bar includes 'Tax Year 2023', 'Support', and 'Tax Preparer'. The main menu on the left lists 'Client Information' as the active section. The main content area displays the following sections:

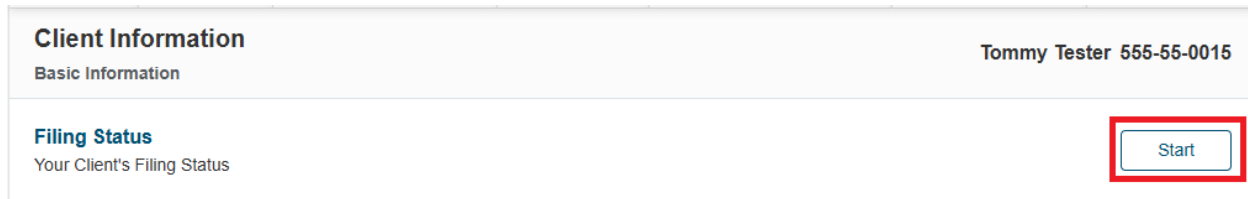
- Client Information** (Tommy Tester 555-55-0015)
- Basic Information**
- Filing Status** (Your Client's Filing Status) with a **Start** button.
- Taxpayer Information** (Taxpayer and Spouse Information) with an **Edit** button.
- Dependent** (Dependent/Qualifying Person Information) with a **Start** button.

Note: The Taxpayer Information button will be displayed as **Edit** instead of **Start** because it automatically carried the client's SSN/ITIN and First and Last name from the New Return screen.

4) How to Select the Filing Status

Tax Year 2024 What's New

(a) Click on the **Start** button in the **Filing Status** section.



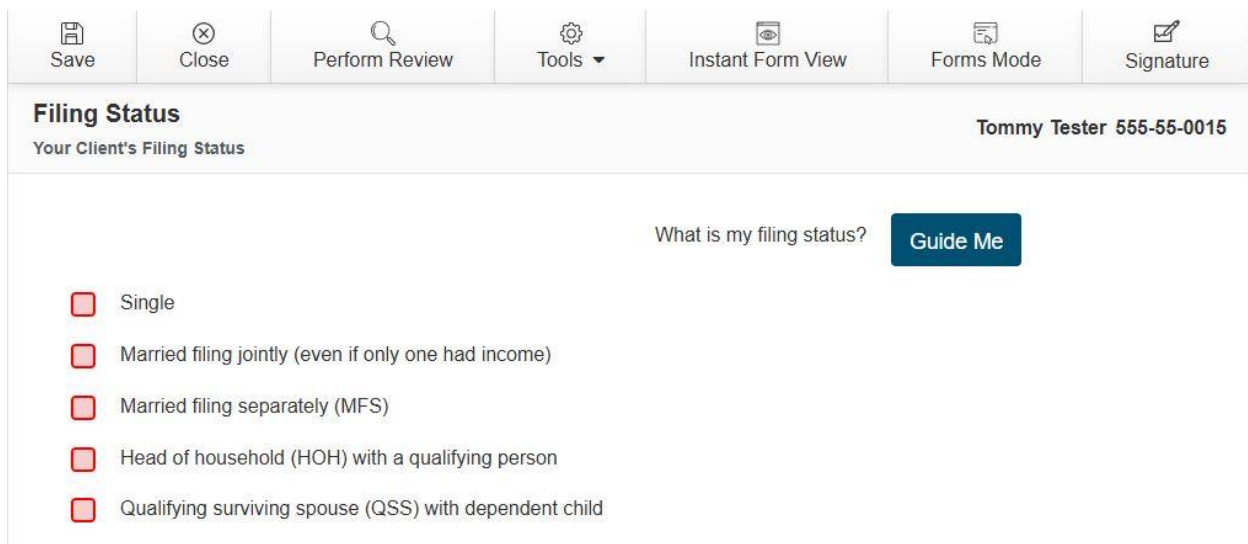
Client Information Tommy Tester 555-55-0015

Basic Information

Filing Status Start

Your Client's Filing Status

(b) The Filing Status screen will open and display a Guide Me button that will redirect you to the IRS' Interactive Tax Assistant (ITA) if you need help determining your client's filing status for tax purposes.



Save Close Perform Review Tools Instant Form View Forms Mode Signature

Filing Status Tommy Tester 555-55-0015

Your Client's Filing Status

What is my filing status? [Guide Me](#)

- Single
- Married filing jointly (even if only one had income)
- Married filing separately (MFS)
- Head of household (HOH) with a qualifying person
- Qualifying surviving spouse (QSS) with dependent child

(c) Click on the applicable Filing Status checkbox. Then, click the Continue button.

Tax Year 2024 What's New

Filing Status

Your Client's Filing Status

Tommy Tester 555-55-0015

What is my filing status?

[Guide Me](#)

- Single
- Married filing jointly (even if only one had income)
- Married filing separately (MFS)
- Head of household (HOH) with a qualifying person
- Qualifying surviving spouse (QSS) with dependent child

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[Continue →](#)

5) How to Enter Taxpayer Information

(a) The **Taxpayer Information** screen will open and display required fields in red. This is where you will enter the IP PIN, ID information, Prior Year AGI, Prior Year Refund, and Address. It is recommended that you read each field/question carefully. Complete all required and applicable fields for your client. Then click the **Continue** button.

Tax Year 2024 What's New

Taxpayer Information

Taxpayer and Spouse Information

Tommy Tester 555-55-0015

Taxpayer

Taxpayer does not have an ITIN. Form W-7 is needed.

SSN / ITIN

555-55-0015

First Name

Tommy

Middle initial

Last Name

Tester

Suffix

Date of Birth

Age

0

Occupation

Allow SMS Alerts

Cell Phone Number

(307)414-1211

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Continue →

Tip: When you enter the Zip -Code, MyTAXPrepOffice will automatically enter the City and State. It will also assign the state as the Full-Year Resident state.

US Address

Street Address

123456 Main St

Zip-Code

82001

City

Cheyenne

State

WY

(b) Answer the additional required **Taxpayer Information** questions (Digital assets and Form 1095-A) that are displayed on the screen and click the **Continue** button.

Tax Year 2024 What's New

Taxpayer Information

Taxpayer and Spouse Information

Tommy Tester 555-55-0015

- Print Form 1040-SR U.S. Tax Return for Seniors
- Print Spanish version of the form(s) if available

Puerto Rico Income

If you are excluding Puerto Rico income, enter the amount here

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

- Yes
- No

Information about Special Processing

Select Special Processing if applicable

Details regarding Health Insurance Marketplace Statement

Did the taxpayer or spouse receive Form 1095-A?

- Yes
- No

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Continue →

(c) You will be asked if you are claiming dependents or qualifying individuals on your client's tax return. Select the **Yes** or **No** checkbox and click the **Continue** button.

Dependent

Dependent Informat...

Tom

[Whom may I claim as a d](#)

Would you like to claim any dependents or qualifying individuals on your tax return?

Yes

No

[← Back](#)

6) How to Enter Income

(a) Once the **Client Information** is entered, the **Filing Status** and **Taxpayer Information** buttons will be displayed with an **Edit** button.

Client Information

Basic Information

Tom

Filing Status

Your Client's Filing Status

Taxpayer Information

Taxpayer and Spouse Information

Dependent

Dependent/Qualifying Person Information

(b) Click the **Continue** button to enter your client's **Income**.

Tax Year 2024 What's New

Client Information

Tommy Tester 555-55-0015

Basic Information

Filing Status

Your Client's Filing Status

Edit

Taxpayer Information

Taxpayer and Spouse Information

Edit

Dependent

Dependent/Qualifying Person Information

Start

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Continue →

(c) The **Income** screen will display the **Form W-2, Form 1099-NEC, Form 1099-INT, Form 1099-R, 1040 SS and RR Worksheet, Form SSA-1099, Form 1099-DIV, Form 1099-G, Form 1099-MISC, Form 1099-K, Form 1099-B, and Form W-2G** sections.

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Tax Year 2023 | Support | Tax Preparer

Search Forms & Categories

Save | Close | Perform Review | Tools | Instant Form View | Forms Mode | Signature

Go to Interview Home

Federal AGI \$0

- Client Information
- Income**
- Deduction & Adjustments
- Tax and Non-Refundable Credits
- Payments and Refundable Credits
- Miscellaneous Forms
- Tax Summary

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Income

Tommy Tester 555-55-0015

Income

- Form W-2**
Wage and Tax Statement [Start]
- Form 1099-NEC**
Nonemployee Compensation [Start]
- Form 1099-INT**
Interest Income [Start]
- Form 1099-R**
Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. [Start]
- 1040 SS and RR Wkst**
Social Security and Rail Road Tier 1 Benefits Wkst [Start]
- Form SSA-1099**
Social Security Benefit Statement [Start]
- Form 1099-DIV**
Dividends and Distributions [Start]
- Form 1099-G**
Certain Government Payments [Start]
- Form 1099-MISC**
Miscellaneous Income [Start]

← Back | Continue →

Tax Year 2024 What's New

(d) To enter **Form W-2** information for your client, simply click the **Start** button.

Income

Income

Tommy Tester 555-55-0015

Form W-2

Wage and Tax Statement

Start

(e) The **Form W-2** screen will be displayed. Please enter the **Employer information** and click the **Continue** button.

The screenshot shows the myTAXprepoffice interface for entering Form W-2 information. The top navigation bar includes 'Tax Year 2023', 'Support', and 'Tax Preparer'. The main header displays 'Form W-2 Wage and Tax Statement' for 'Tommy Tester 555-55-0015'. The form is divided into two columns: 'Employer information' and 'Employee information'. The 'Employer information' section includes fields for 'Employer identification number', 'Employer's name', and 'Control number'. The 'Employee information' section includes fields for 'Employee's SSN', 'Employees First name and initial / Recipients name', and a checkbox for 'Check here to change the below Address'. Below these are sections for 'Employer Address' and 'Employee Address', each with a 'Street (US Address)' field. At the bottom right, there are 'Back' and 'Continue' buttons.

(f) The **Form W-2** screen will be displayed. Please enter the **Wage and Tax Information** and click the **Continue** button.

Tax Year 2024 What's New

Form W-2
Wage and Tax Statement

Tommy Tester 555-55-0015

1 Wages, tips, other compensation

Check here if you want to enter Line 3 (SS wages) and Line 5 (Medicare wages) manually.

3 Social security wages

0

7 Social security tips

10 Dependent care benefits

2 Federal income tax withheld

5 Medicare wages and tips

0

8 Allocated tips

11 Non qualified plans

	Code	Amount	
12a	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;">▼</div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
12b	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;">▼</div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
12c	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;">▼</div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
12d	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;">▼</div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	

If Form W-2 has more than 4 codes in Box 12, please refer to the article below:

<https://app.mytaxprepoffice.com/manage/support/article/1.0/242>

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Continue →

(g) The **Form W-2** screen will be displayed. Please enter the **State Information** by clicking the **Start** button. Select the checkboxes from the **Other Information, if Applicable** section, if needed. Then click the **Continue** button.

Tax Year 2024 What's New

Form W-2
Wage and Tax Statement

Tommy Tester 555-55-0015

State Information

Check here if you want to enter Line 16 wages manually.

State Information Start

Other Information, if Applicable

Box 12: Enter code and amount Codes D, E, F, G, H, P, Q, R, S, T and Box 10 transfer to the EIC worksheet automatically Other nontaxable earned income, which may be listed in Box 14, such as 125 cafeteria plans, check the box next to each amount listed that should be counted for EIC purposes

This is a railroad W-2

Select the Form on which you want to transfer this value (Statutory employees):

Check here only if this W-2 is ministerial income and Schedule SE will be used

Check if this W-2 Income is Military Income

Unreported Tip Income

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Continue →

Tip: The **Forms Navigator** displays your client's **AGI** and **Refund or Balance Due**.

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Search Forms & Categories

Go to Interview Home

	Federal	AGI \$45,000	\$329
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(h) The **Form W-2** summary screen will be displayed. Click the **+Add New** button to add additional W-2s to your client's tax return. Click the **Pencil** icon to edit the existing Form W-2. Click the **Trash** icon to delete the existing Form W-2. Click **Continue** to proceed.

Tax Year 2024 What's New

Save	Close	Perform Review	Tools	Instant Form View	Forms Mode	Signature
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Form W-2 Tommy Tester 555-55-0015
Wage and Tax Statement

Employee	Employer	EIN	Wages	Federal Withheld	+ Add New
✓ Taxpayer	ABC PARTY CO	12-7891011	\$45,000.00	\$3,850.00	
			\$45,000.00	\$3,850.00	

(i) The **Income** screen will be displayed again. It will now display the total income you entered on **Form W-2** for your client and the button will be updated from **Start** to **Edit**. Click **Continue** to proceed.

myTAXprep office® Tax Year 2023 Support Tax Preparer

Search Forms & Categories

Go to Interview Home

Federal AGI \$45,000 \$329

Client Information

Income

Deduction & Adjustments

Tax and Non-Refundable Credits

Payments and Refundable Credits

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Save Close Perform Review Tools Instant Form View Forms Mode Signature

Income Tommy Tester 555-55-0015

Income

Form W-2 Wage and Tax Statement **\$45,000.00**

Form 1099-NEC Nonemployee Compensation

Form 1099-INT Interest Income

Form 1099-R Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

1040 SS and RR Wkst Social Security and Rail Road Tier 1 Benefits Wkst

Form SSA-1099 Social Security Benefit Statement

Form 1099-DIV Dividends and Distributions

Form 1099-G Certain Government Payments

Form 1099-MISC Miscellaneous income

(j) The second **Income** screen will be displayed where you can to add a **Schedule B, Schedule C, Schedule D, Schedule E, or Less Common Income (Alimony, Foreign employer compensation, etc.)**, if applicable, to your client's tax return. Click **Continue** to proceed.

Tax Year 2024 What's New

Income	Tommy Tester 555-55-0015
Income	
Schedule B Interest and Ordinary Dividends	Start
Schedule C Profit or Loss from Business	Start
Schedule D Capital Gains and Losses	Start
Schedule E Supplemental Income and Loss	Start
Less Common Income Alimony, Foreign employer compensation, etc	Start
	← Back Continue →

7) Deductions & Adjustments Tab

(a) The **Adjustments** screen will open that displays sections such as **1040 Educator Expense Worksheet**, **Form 1099-SA**, **Form 8889**, **Penalty on early withdrawal of savings**, **Schedule 1, Part II: Alimony Paid**, **1040 IRA Worksheet**, **Form 8606**, **Form 1098-E**, **Schedule 1, Line 24 Other Adjustments**, and **Form 1098**. Click **Continue** to proceed.

Tax Year 2024 What's New

myTAXprepoffice® Tax Year 2023 Support Tax Preparer

Search Forms & Categories

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Go to Interview Home

Federal AGI \$45,000 \$329

- Client Information
- Income
- Deduction & Adjustments**
- Tax and Non-Refundable Credits
- Payments and Refundable Credits
- Miscellaneous Forms
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Adjustments

Educator expenses, Alimony paid, Penal...

Tommy Tester 555-55-0015

- 1040 Educator Expense Wkst**
Qualified Educator Expenses Report unreimbursed business expenses [Start](#)
- Form 1099-SA**
Report HSA contributions (not included on your W-2) and distributions [Start](#)
- Form 8889**
Health Savings Accounts [Start](#)
- Penalty on early withdrawal of savings**
Penalty on early withdrawal of savings Usually reported to you on Form 1099-INT and/or 1099-OID [Start](#)
- Sch 1 Part II: Alimony Paid**
Alimony Paid Divorces finalized before January 1, 2019 [Start](#)
- 1040 IRA Wkst**
Traditional IRA Contributions, Claim a deduction based on your contributions [Start](#)
- Form 8606**
Report the basis of traditional and Roth IRAs, conversions, nondeductible contributions, and Roth IRA distributions [Start](#)
- Form 1098-E**
Student Loan Interest Statement [Start](#)
- Sch 1 Line 24 Other Adjustments**
Jury duty pay, personal property rental expenses, certain attorney fees, etc. [Start](#)

[← Back](#) [Continue →](#)

(b) The **Deductions** screen will open that displays sections such as **Standard Deduction, Itemized Deductions, Compare Deductions, and Form 8880**. Click **Continue** to proceed.

myTAXprepoffice® Tax Year 2023 Support Tax Preparer

Search Forms & Categories

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Go to Interview Home

Federal AGI \$45,000 \$329

- Client Information
- Income
- Deduction & Adjustments**
- Tax and Non-Refundable Credits
- Payments and Refundable Credits
- Miscellaneous Forms
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Deductions

Standard Deduction, Itemized Deduction...

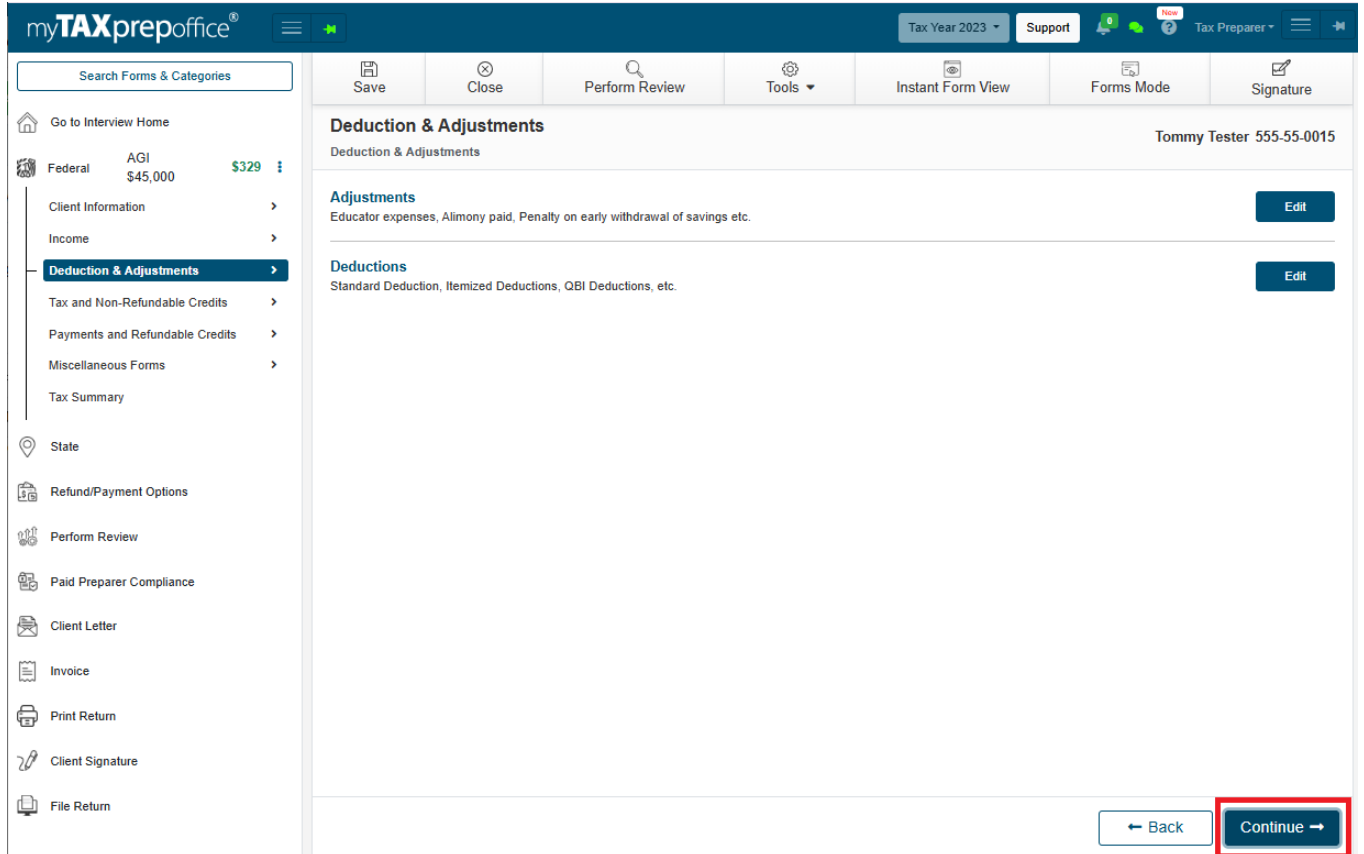
Tommy Tester 555-55-0015

- Standard Deduction**
Standard Deduction Calculated amount based on filing status [Start](#)
- Itemized Deductions**
Charitable contributions, mortgage interest, property taxes, etc. [Start](#)
- Compare Deductions**
Choose to Itemize or Take the Standard Deduction [Start](#)
- Form 8880**
Credit for Qualified Retirement Savings Contributions [Start](#)

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Tax Year 2024 What's New

- (c) The **Deductions & Adjustment** screen will open and display two sections
 - **Adjustments** and **Deductions**. Click **Continue** to proceed.



The screenshot displays the myTAXprepoffice interface for the 'Deduction & Adjustments' screen. The top navigation bar includes 'Tax Year 2023', 'Support', and 'Tax Preparer'. The sidebar on the left lists various navigation options, with 'Deduction & Adjustments' currently selected. The main content area shows the title 'Deduction & Adjustments' for 'Tommy Tester 555-55-0015'. Below this, there are two sections: 'Adjustments' (Educator expenses, Alimony paid, Penalty on early withdrawal of savings etc.) and 'Deductions' (Standard Deduction, Itemized Deductions, QBI Deductions, etc.). Each section has an 'Edit' button. At the bottom right, there are 'Back' and 'Continue' buttons, with the 'Continue' button highlighted by a red box.

8) Tax and Non-Refundable Credits Tab

- (a) The **Non-Refundable Credits** screen will open that displays sections **CTC/ODC, Form 2441, Form 1098-T, Form 8863** and **Other**. Click **Continue** to proceed.

Tax Year 2024 What's New

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Tax Year 2023 Support

Search Forms & Categories

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Go to Interview Home

Federal AGI \$45,000 \$329

- Client Information
- Income
- Deduction & Adjustments
- Tax and Non-Refundable Credits**
- Payments and Refundable Credits
- Miscellaneous Forms
- Tax Summary

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Non-Refundable Credits

Child and Dependent Care Credit, Child T... Tommy Tester 555-55-0015

- CTC/ODC**
Child Tax Credit and Credit for Other Dependents [Start](#)
- Form 2441**
Child and Dependent Care Credit [Start](#)
- Form 1098-T**
Tuition Statement [Start](#)
- Form 8863**
Part III Student and Educational Institution Information [Start](#)
- Other**
Other nonrefundable credit [Start](#)

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(b) The **Tax** screen will open that displays sections **Form 1095-A**, **Form 8962**, **Schedule SE**, **Form 5329**, **Repayment of First Time Homebuyer Credit**, and **Other Taxes**. Click **Continue** to proceed.

Tax Year 2024 What's New

The screenshot shows the myTAXprep office software interface. The top navigation bar includes the logo, a search bar, and buttons for 'Save', 'Close', 'Perform Review', 'Tools', 'Instant Form View', 'Forms Mode', and 'Signature'. The main content area is titled 'Tax' and displays a list of tax forms with 'Start' buttons:

- Form 1095-A**: Health Insurance Marketplace Statement
- Form 8962**: Premium Tax Credit
- Schedule SE**: Self-Employment Tax
- Form 5329**: Tax on Early Distributions from IRA's
- Repayment of First Time Homebuyer Credit**: Repayment of First Time Homebuyer Credit
- Other Taxes**: Other Additional Taxes

At the bottom right, there are two buttons: 'Back' and 'Continue'. The 'Continue' button is highlighted with a red border.

(c) The **Tax and Non-Refundable Credits** screen will open and display two sections - **Non-Refundable Credits**, and **Tax**. Click **Continue** to proceed.

Tax Year 2024 What's New

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Tax Year 2023 - Support

Search Forms & Categories

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Go to Interview Home

Federal AGI \$45,000 \$329

Client Information >

Income >

Deduction & Adjustments >

Tax and Non-Refundable Credits >

Payments and Refundable Credits >

Miscellaneous Forms >

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File Return

Tax and Non-Refundable Credits Tommy Tester 555-55-0015

Non-Refundable Credits
Child and Dependent Care Credit, Child Tax Credit and Credit for Other Dependents, etc. Edit

Tax
Self-Employment Tax, Premium Tax Credit, Other Additional Taxes, etc. Edit

← Back Continue →

9) Payments and Refundable Credits Tab

(a) The **Payments and Refundable Credits** screen will open that displays sections **EIC, ACTC, Form 8867, Form 8862, Payments, and Other payments or refundable credits**. Click **Continue** to proceed.

Tax Year 2024 What's New

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Tax Year 2023 - Support Tax Preparer -

Search Forms & Categories

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Go to Interview Home

Federal AGI \$45,000 \$329

Client Information >

Income >

Deduction & Adjustments >

Tax and Non-Refundable Credits >

Payments and Refundable Credits >

Miscellaneous Forms >

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Payments and Refundable Credits

Tommy Tester 555-55-0015

EIC
Earned Income Credit

ACTC
Additional Child Tax Credit

Form 8867
Paid Preparer's Due Diligence Checklist

Form 8862
Information To Claim Earned Income Credit After Disallowance

Payments
Amount Paid with Extension, Federal Estimated Tax Payments, etc.

Other payments or refundable credits
Other payments or refundable credits

10) Miscellaneous Forms

(a) The **Miscellaneous Forms** screen will open that displays the section **Form 8948**. Click **Continue** to proceed.

Tax Year 2024 What's New

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Search Forms & Categories

Go to Interview Home

Federal AGI \$45,000 \$329

- Client Information
- Income
- Deduction & Adjustments
- Tax and Non-Refundable Credits
- Payments and Refundable Credits
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Invoice

Print Return

Client Signature

File Return

Miscellaneous Forms

Miscellaneous Forms Tommy Tester 555-55-0015

Form 8948
Preparer Explanation for Not Filing Electronically

Start

← Back Continue →

11) Tax Summary

(a) The **Tax Summary** screen will open that displays the **Federal tax summary** for your client. Review it and click **Continue** to proceed.

Tax Year 2024 What's New

myTAXprepoffice®
Tax Year 2023 | Support | Tax Preparer

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- [Payments and Refundable Credits](#)
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Save
Close
Perform Review
Tools
Instant Form View
Forms Mode
Signature

Tax Summary

Tommy Tester 555-55-0015

Income	Credits	Tax
Total Income	\$45,000.00	CTC & Credit for Other Dependents \$0.00
Other Income	\$0.00	Child & Dependent Care Credit \$0.00
Total Adjustment	\$0.00	Earned Income Credit (EIC) \$0.00
Adjusted Gross Income (AGI)	\$45,000.00	Additional Child Tax Credit \$0.00
Itemized / Standard Deduction	\$13,850.00	Education Credits \$0.00
Taxable Income	\$31,150.00	Other Credits \$0.00
Refund / Balance Due		Total Credits \$0.00
Refund	\$329	

Tax	Payment
Tax	\$3,521.00
Other Taxes	\$0.00
Total Tax	\$3,521.00
Payment	
Income Tax Withheld	\$3,850.00
Estimated Tax Payments	\$0.00
Other Payments	\$0.00
Estimated Tax Penalty	\$0.00

← Back
Continue →

12) State

(a) The **State** screen will open that displays the current state for your client.

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State Return Tommy Tester 555-55-0015

Interview mode only supports Full Year Resident. To Add State for Part-Year Resident and Non-Resident please use Forms Mode.

State	Return Type	Refund/Balance Due	+ Add New
No Rows To Show			

← Back | **Continue →**

Note: When you entered the Zip-Code, MyTAXPrepOffice automatically assigned the state as the Full-Year Resident state. **Part-Year Resident** and **Non-Resident** states **returns** are only supported in **Forms Mode**.

13) Refund/Payment Options

(a) The **Refund/Payment Options & Bank Account Information** screen will open that displays the **Return Type**, **Return Status**, **Refund/Balance Due**, and **Actions** menu.

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Refund/Payment Options & Bank Account Information Tommy Tester 555-55-0015

Refund/Payment Options & Bank Account...

Return Type	Return Status	Refund/Balance Due	Actions
Federal	Not Transmitted	\$329	

(b) Click the **Pencil** icon. Then click **Start** from the **Refund/Payment Options** screen.

Tax Year 2024 What's New

Save	Close	Perform Review	Tools ▾	Instant Form View	Forms Mode	Signature
Refund/Payment Options Refund/Payment Options & Bank Informa...						Tommy Tester 555-55-0015
Refund/Payment Options Refund/Payment Option & Bank Account Information						Start

(c) The screen will open and you can select the **Return Filing Options, Refund/Payment Options** and/or **Audit Protection**. Then, click **Continue**.

Save	Close	Perform Review	Tools ▾	Instant Form View	Forms Mode	Signature
Refund/Payment Options Refund/Payment Option & Bank Account ...						Tommy Tester 555-55-0015
Return Filing Options						
<input type="checkbox"/> Check the box to Paper File.						
<input type="checkbox"/> Check the box to E-File the return						
Refund/Payment Options						
<input type="checkbox"/> Bank Product <input type="text"/>						
<input type="checkbox"/> Direct Deposit						
<input type="checkbox"/> Direct Debit Date of withdrawal <input type="text"/>						
<input type="checkbox"/> Paper Check / Pay Balance Due by Mail						
Bank Account Information						
Prior Year Routing Number: <input type="text"/>						
Prior Year Account Number: <input type="text"/>						
						Continue →

(d) The **Refund/Payment Options** screen will be displayed. Click **Continue**.

Save	Close	Perform Review	Tools ▾	Instant Form View	Forms Mode	Signature
Refund/Payment Options Refund/Payment Options & Bank Informa...						Tommy Tester 555-55-0015
Refund/Payment Options Refund/Payment Option & Bank Account Information						Edit


Tax Year 2024 What's New

(e) The **Refund/Payment Options & Bank Account Information** screen will be displayed. Click **Continue**.

Refund/Payment Options & Bank Account Information

Refund/Payment Options & Bank Accoun...

Tommy Tester 555-55-0015






Return Type	Return Status	Refund/Balance Due	Actions
Federal	Not Transmitted	\$329	

← Back **Continue →**

14) Perform Review

(a) The **Perform Review** screen will be displayed. Click **Continue**.

Tax Year 2024 What's New

 Save	 Close	 Perform Review	 Tools ▾	 Instant Form View	 Forms Mode	 Signature
---	--	---	--	--	---	--

Perform Review

Tommy Tester 555-55-0015

There are errors in your return. Please click "Continue" to resolve them one by one.

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Continue →

(b) Resolve all **Perform Review** validations. Then click **Continue**.

Tax Year 2024 What's New

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Signature Authorization

Tommy Tester 555-55-0015

Signature

Signature Date

Send to Client for Review

Request for Remote Signature

E-File Signature Authorization - Personal Identification Number (PIN)

Automatically generate PIN equal to last 5 digits of Taxpayer(s) SSN or Spouse SSN

Electronic Signature (PIN)

Taxpayer PIN

Taxpayer Date

Perform Review

Reject: 8

Warning: 1

← 2 of 8 → Show Advance Options

Signature Authorization

FrmReturnInfo_ERC1004

The Taxpayer/Spouse Declaration and Signature Authorization section of the E-File Summary screen is incomplete. Please select the appropriate checkbox.

← Back

Continue →

Tip: If e-filing, check the box to automatically generate the PINs for Form 8879.

Automatically generate PIN equal to last 5 digits of Taxpayer(s) SSN or Spouse SSN

15) How to E-File

(a) Once all **Perform Review** Reject validations are resolved you will be able to e-file your client's tax return.

Tax Year 2024 What's New

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Create E-File for Transmission

Tommy Tester 555-55-0015

Please mark the federal and/or state checkbox for the return you would like to e-file.

Federal/States	Return Type	E-File Status
<input checked="" type="checkbox"/> FEDERAL	1040 [Federal 1040]	
<p>Forms Refund/Payment Options</p> <p>1040</p> <p>W-2</p>		

Perform Review Show Advance Options



Congratulations, there are no errors in this form.

[← Back](#) [Send →](#)

(b) The **Create E-File for Transmission** screen will display the **Forms** and **Refund/Payment Options** tab.

Create E-File for Transmission Tommy Tester 555-55-0015

Please mark the federal and/or state checkbox for the return you would like to e-file.

Federal/States	Return Type	E-File Status
<input checked="" type="checkbox"/> FEDERAL	1040 [Federal 1040]	
<p>Forms Refund/Payment Options</p> <p>1040</p> <p>W-2</p>		

Tax Year 2024 What's New

Create E-File for Transmission Tommy Tester 555-55-0015

Please mark the federal and/or state checkbox for the return you would like to e-file.

Federal/States	Return Type	E-File Status
<input type="checkbox"/> FEDERAL	1040 [Federal 1040]	

Forms **Refund/Payment Options**

The Taxpayer will receive a **Paper Check** from the IRS via USPS
Expected Federal Refund Amount: \$329.00

(c) Select the **FEDERAL** checkbox and click the **Send->** button to e-file your client's tax return to the IRS.

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Search Forms & Categories

Save Close Perform Review Tools Instant Form View Forms Mode Signature

Create E-File for Transmission Tommy Tester 555-55-0015

Please mark the federal and/or state checkbox for the return you would like to e-file.

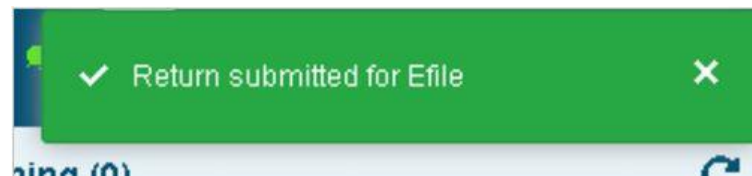
Federal/States	Return Type	E-File Status
<input checked="" type="checkbox"/> FEDERAL	1040 [Federal 1040]	

Forms **Refund/Payment Options**

The Taxpayer will receive a **Paper Check** from the IRS via USPS
Expected Federal Refund Amount: \$329.00

← Back **Send →**

(d) A confirmation message will be displayed in the top right corner.



(e) The return will be locked until the IRS acknowledges the return (Accepted or Rejected).

Tax Year 2024 What's New



(f) The **Recent Returns** widget will display a **lock** icon and the status will be **E-Filed**.

Recent Returns				
SSN/EIN	TAXPAYER'S NAME	STATUS	TYPE	PHONE NUMB...
 0015	Tommy Tester	E-Filed	1040	(307)414-1211
2024	Jeff Jones	In Process	1040	(307)414-1211
0011	Mathew Merry	In Process	1040	
2024	George Williams	In Process	1040	(307)414-2345
2024	Bob Smith	In Process	1040	(307)414-1211

→ New Return → New Federal Extension → Return List

Why Choose the New Interview Mode?

With our completely revamped Interview Mode, tax professionals can focus on what they do best—serving clients. Our enhanced experience reduces errors, improves client interactions, and helps you complete returns with accuracy and efficiency.

Take the stress out of tax season and elevate your client interactions with our all new Interview Mode because the way you prepare taxes should be as seamless as possible.