

# Start a New Return

1. Once you have logged in, click Create
2. Enter Taxpayer SSN confirm your entry and click Create Return

The screenshot shows the Sunloan 'Returns' page. At the top left is the Sunloan logo with the tagline 'and tax services'. Below the logo are three buttons: 'Recent', 'Find', and 'Create'. The 'Create' button is highlighted with a red border. Below these buttons is a form for entering the Taxpayer SSN. The form has two sections: 'SSN' and 'Confirm SSN'. Each section contains three input fields with the values '450', '98', and '7878' respectively. A red border highlights the entire SSN entry area. At the bottom of the form is a blue button labeled 'Create return'.

2. You will start the return on the Taxpayer Information screen and work your way down the form list

The screenshot shows the Sunloan 'Taxpayer Information' screen. At the top left is the Sunloan logo with the tagline 'and tax services'. Below the logo is the text 'WOODS, 7878'. There is a search bar with the placeholder text 'Enter form code' and a magnifying glass icon. Below the search bar is a link for 'Form Code Guide'. A list of form categories is displayed, with 'Taxpayer Information' highlighted by a red border. The other categories in the list are: Consent, Dependents, Income, Due Diligence, Deductions & Credits, Health Care, States, Balance, Review Forms, Finish, and File.

## The first section is Taxpayer Information

1. Enter the Taxpayer's personal information:

- Filing status – from the dropdown list
- Taxpayer's First and Last Name
- Social Security number
- E-mail address (need for Tax Account)
- Date of birth
- Cell phone number (need for Tax Account)
- Click NO – cannot be claimed
- Address

WOODS, 7878

Enter form code

Form Code Guide

**Taxpayer Information**

Consent

Dependents

Income

Due Diligence

Deductions & Credits

Health Care

States

Balance

Review Forms

Finish

File

### Primary Taxpayer

Filing status:

First name:  Middle initial:

Last name:  Suffix:

SSN:  -  -

Email:

Date of birth:  Occupation:

Date of death:

Age: 24 (as of 12/31/2023)

Day phone:  -  -

Cell phone:  -  -

Evening phone:  -  -

Did taxpayer live with spouse?  Yes  No

Can be claimed as a dependent on another tax return?  Yes  No

### Address

Address:

In care of:

Apt.:

ZIP:  -

City:

State:

County:

This is a stateside military address

Change of address from last year

Combat zone:

I need to enter a foreign address:

### Resident State

Resident state:

School district:

2. You must answer these two questions

- Check the box
- Click NO

**Return Elections**

You Spouse

Full-time student?

\$3 of tax to go to the Presidential Election Campaign Fund?

Blind at the end of 2023?

**Foreign Accounts and Virtual Currency**

If taxpayer has any interest in or authority over any foreign account or foreign trust:

Foreign Accounts:

Otherwise  Answer "No" to Schedule B, Part III questions.

At any time during 2023, did the taxpayer receive (as a reward, award, or payment) or sell, exchange, gift, or otherwise dispose of a digital asset (or any financial interest in a digital asset)?

Yes  No

**Other Options and Codes**

Self-prepared return

Only preparer can view return

**Miscellaneous Codes**

Code 1:

Code 2:

Code 3:

Code 4:

Code 5:

**2210 Options**

Enter the prior year federal tax, minus refundable credits, and the program determines whether the taxpayer qualifies for the exception. If the prior year tax was zero, enter "0". A blank field indicates that this exception does not apply. If this exception applies but there was NO change in filing status, Form 2210 is NOT required, however, if information is entered for Form 2210, the program automatically calculates Form 2210.

Enter the prior year state tax for the taxpayer's resident state and the program determines whether the taxpayer qualifies for the deduction.

2210 code:

2022 federal tax:

2022 state tax:

**Return Options**

ERO override:

Invoice number:

Fee amount:

3. Click Save and Continue