



## 2020 Tax Program

IRS website

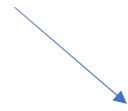
e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions,  
and Fill-In Forms

Refund Calculator

**ENTER YOUR  
USERNAME AND  
PASSWORD TO LOGIN**



### Log in to Pro Web

Enter your username and password below to access  
your cloud-based tax software.

Username

Password

LOG IN

[Forgot username](#)

[Forgot password](#)

## Welcome to ATS Test - Active Bank

Message Center 0

Rejected Clients 0

**CLICK SELECT TO START  
A NEW TAX RETURN**

### Start New 2020 Tax Return

Create a brand new tax return for a client.

Select

### Client Search

Edit returns you previously started.

Select

**1. ENTER TAXPAYER'S  
SOCIAL SECURITY  
NUMBER**

The screenshot shows a web application interface for entering tax information. A modal dialog box is open, titled "accuratetax.cloudtaxoffice.com says". The dialog contains the text: "Make sure you get your 7216 Consent to Use Tax Return Information signed before starting a new tax return!". Below this text are two input fields for a Social Security Number, each with a placeholder "Confirm Social Security Number" and a blue "OK" button. Below the dialog, there is a "Start Return" button. The background shows a search bar and a list of items.

**3. CLICK OK**  
**THIS TAKES THE PLACE OF THE 3  
DISCLOSURE FORMS WE FILLED  
OUT IN DRAKE**

**2. CLICK START RETURN**

## What's your filing status?

- Single
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualifying Widow(er) with Dependent Children

**1. SELECT FILING STATUS**

Need help determining your filing status?

FILING STATUS WIZARD

**IF YOU NEED HELP DECIDING, CLICK FILING STATUS WIZARD**

BACK CANCEL

**2. CLICK CONTINUE**

CONTINUE



2020

[Preview Return](#)

[Help & Support](#)

[User Menu](#)

[Save &](#)

[Exit](#)

Form Finder

Enter the form number...

**Basic Information**

Filing Status

Personal Information

Dependents/Qualifying Person

IRS Identity Protection PIN

Recovery Rebate Credit

Federal Section

Health Insurance

State Section

Summary/Print

# Personal Information

FILING STATUS

CANCEL

CONTINUE

## Taxpayer Information

Primary taxpayer first name \*

BEN

MI

Last name \*

HOGAN

Suffix (Jr, Sr, etc.)

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SSN *The IRS requires your Social Security Number for e-filing.* \*

544 - 55 - 5544

Date of Birth \*

7 / 3 / 1983

Occupation

**1. ENTER TAXPAYER BASIC INFORMATION**

**• REQUIRED FIELDS HAVE A RED STAR**



Form Finder

Enter the form number...

**Basic Information**

Filing Status

Personal Information

Dependents/Qualifying Person

IRS Identity Protection PIN

Recovery Rebate Credit

Federal Section

Health Insurance

State Section

Summary/Print

E-file

2020 Amended Return

Your Office

Address (street number & name) \*

123 SOUTH MAIN

Apartment (provide apartment number only)

ZIP code \*

63131

City, town, or post office \*

Saint Louis

State \*

Missouri



Resident State as of 12/31/2020 \*

Missouri



Daytime Telephone Number \*

(314) 867-5309

Secondary Telephone Number

( ) - -

FILING STATUS

CANCEL

CONTINUE

**2. ENTER TAXPAYER ADDRESS AND PHONE NUMBER**

**3. CLICK CONTINUE**



## How to Start a New Return

Complete the **Personal Information** screen.

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To **start** a new return:

- In the upper left corner, click “Main Menu”.
- Click “Start New 2020 Tax Return.”
- Enter the taxpayer’s social security number in the “Enter Social Security Number” boxes.
- Enter the taxpayer’s social again in the “Confirm Social Security Number” boxes.
- Click “Start Return.”
- Click “Ok” on the pop-up that says “Make sure you get your 7216 Consent to Use Tax Return Information signed before starting a new tax return!”
- Click the bubble next to the taxpayer’s filing status.
- Click “Continue.”

You should now be on the **Personal Information** screen.

- Fill in the taxpayer’s information using the Taxpayer Information Sheet.
- Read the options next to the boxes and click on anything that applies to this taxpayer.
- If the taxpayer is filing married(MFJ or MFS), you will need to complete the Spouse Information section.
- Read the options next to the boxes and click on anything that applies to the spouse.
- Enter the taxpayer’s address. Use the address where the taxpayer currently receives mail. It can be a P.O. Box.
- Complete the Resident State drop-down. The resident state will be the state the taxpayer lived in during the tax year. It may be a different state than the one listed in the Address section.
- Enter the taxpayer’s daytime phone number.
- Click “Continue.”