

# Pro Online 2020: Identifying Returns that need to be opened prior to submitting e-files (February 12)

VITA/TCE sites that prepared tax returns prior to February 12, 2021 will be required to open the returns prior to transmitting to TaxSlayer. This will ensure these returns are re-calculated based on the updated forms and instructions released by IRS to software vendors. This will ensure previously prepared tax returns have the updated IRS and state forms calculations applied prior to transmission and reduce the need of VITA/TCE sites having to prepare amended returns.

Tips for identifying these returns:

- (1) If they were marked complete, they will be listed in the transmission list. If you select them for transmission prior to opening the return, you will get a message that they must be opened with a listing of the returns.
- (2) Run the Pro Web Returns – Detailed Return Report. It also includes the state abbreviation of any state listed on the return. This is listed under Reports>>Management Reports. Make sure you select 2020 and select the EFIN even if you are running it at your site level. If you run this list prior to opening the returns, the amounts listed will be based on the last edited date.
- (3) You can utilize return tags to identify the returns. This allows you to filter on the specific return tag to see the identified returns