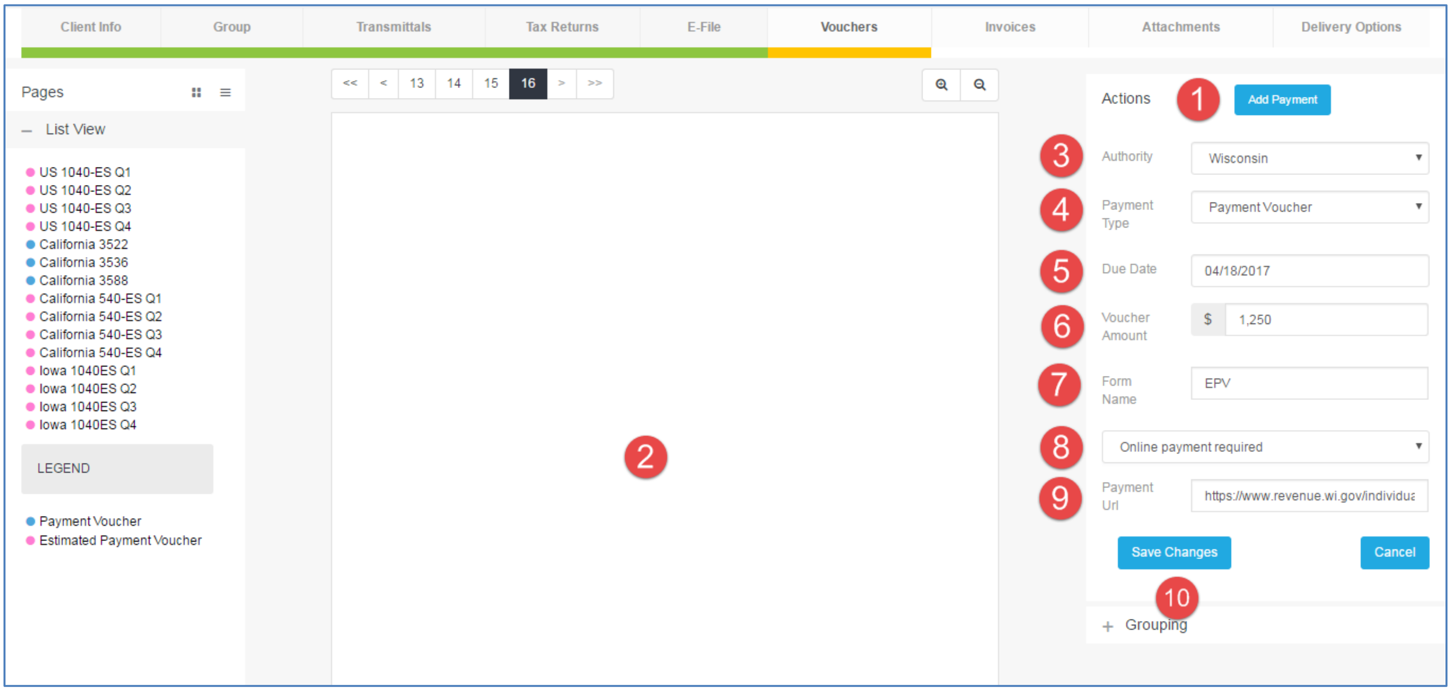
Adding Vouchers

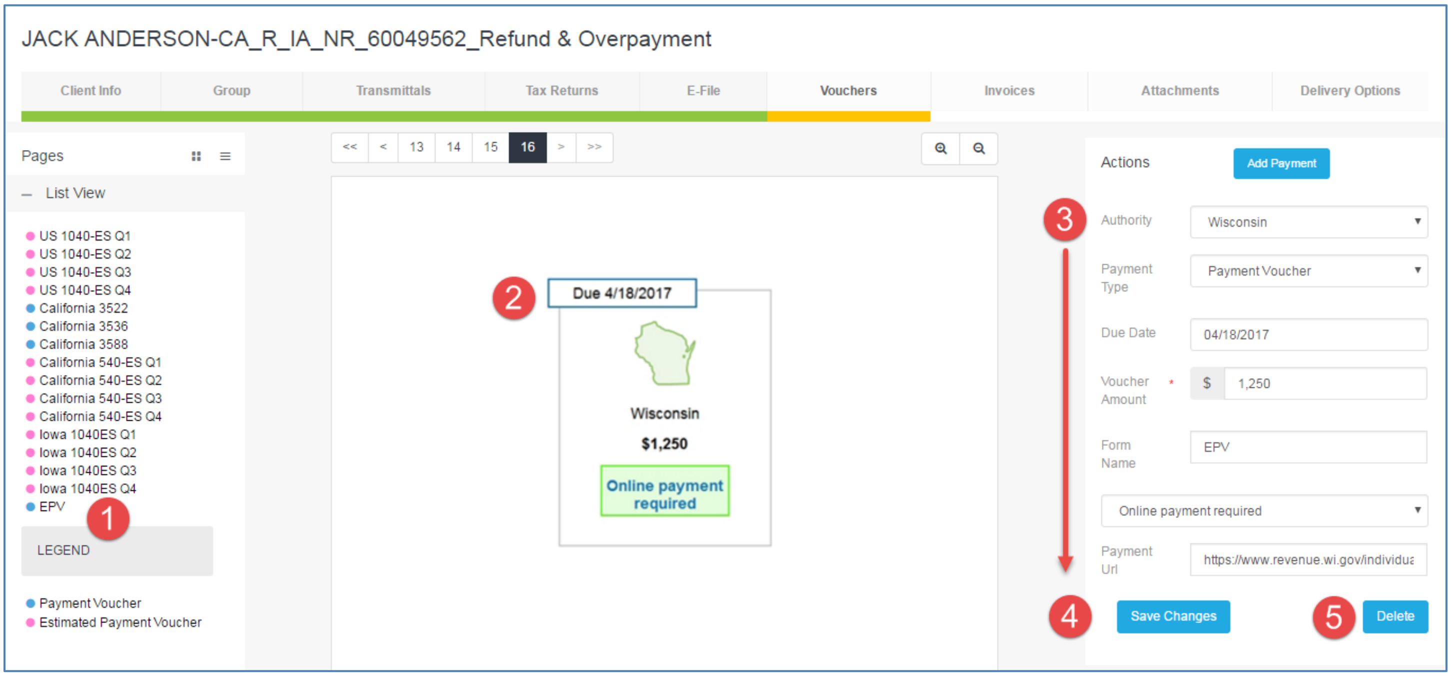
SSR captures tax payment information from Vouchers. When payments are 1) Scheduled for automatic withdrawal or 2) Online payment is required, Vouchers do not print from ProSystems. This feature will allow you to add a Voucher for these two situations and effectively communicate the payment requirements to the taxpayer.

A. Adding Payments:

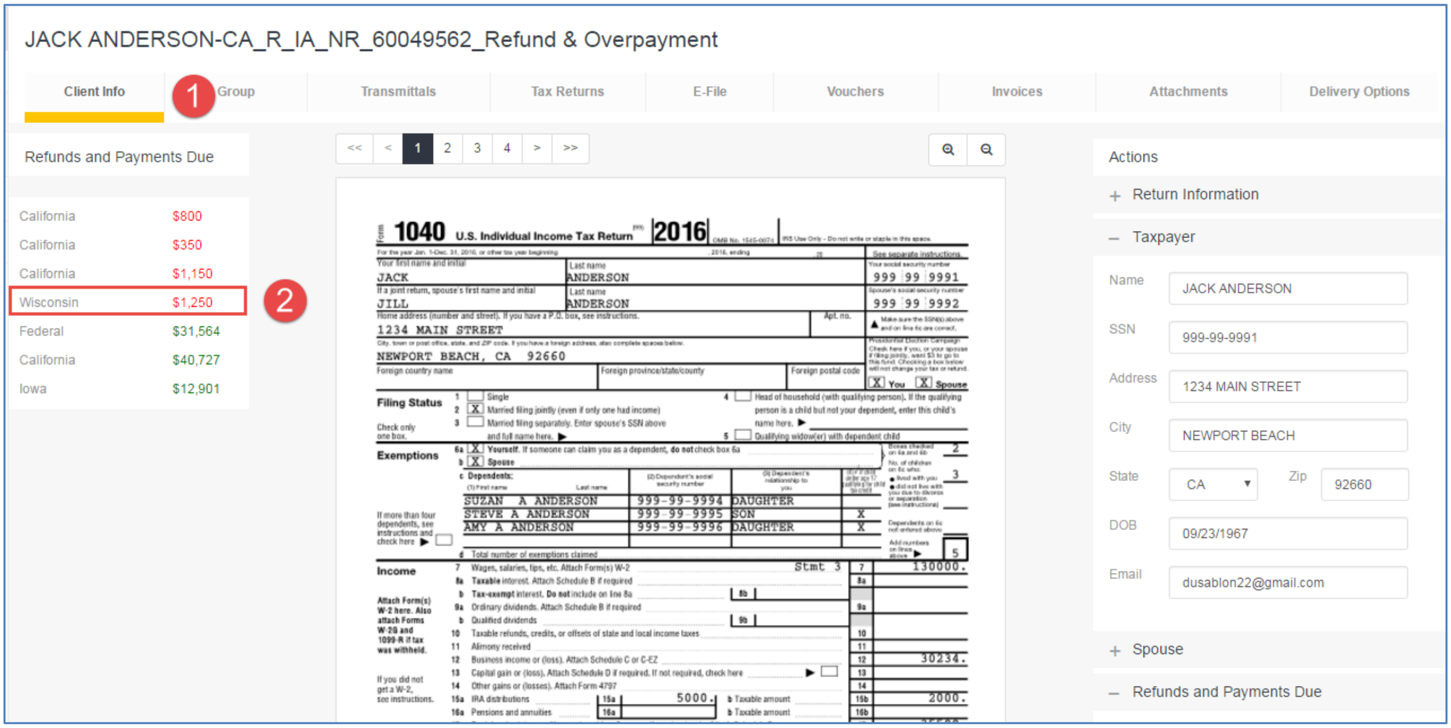


1. From the Vouchers tab, select “Add Payment”
2. A blank page, in the center of the screen will appear
3. Select Authority
    a. Select from the dropdown or begin typing the authority and it will auto fill
4. Select Payment Type
5. Enter Due Date
    a. For Payment Vouchers, the field will be blank and needs to be entered manually
    b. For Estimated Payments, the standard date from the form will appear but can be changed
6. Enter Voucher Amount in whole dollars without commas
7. Enter Form Name
8. Select Voucher Type
    a. DO NOT PAY: Scheduled for automatic withdrawal
    b. Online payment required

9. Enter online payment URL
    a. For 1040’s the URL will auto fill but can be changed
    b. For entity returns the URL will need to be manually entered for each return
10. Select “Save Changes” to add this voucher



1. The Form name will appear in the list view
2. An image of what the taxpayer will see is displayed in the middle of the page
    a. NOTE: This page will also be included in the PDF files (Vouchers) delivered to the taxpayer.
3. You can modify any amounts listed in Item 3
4. Select Save Changes to apply the edits
5. Used to Delete a Payment that was manually added

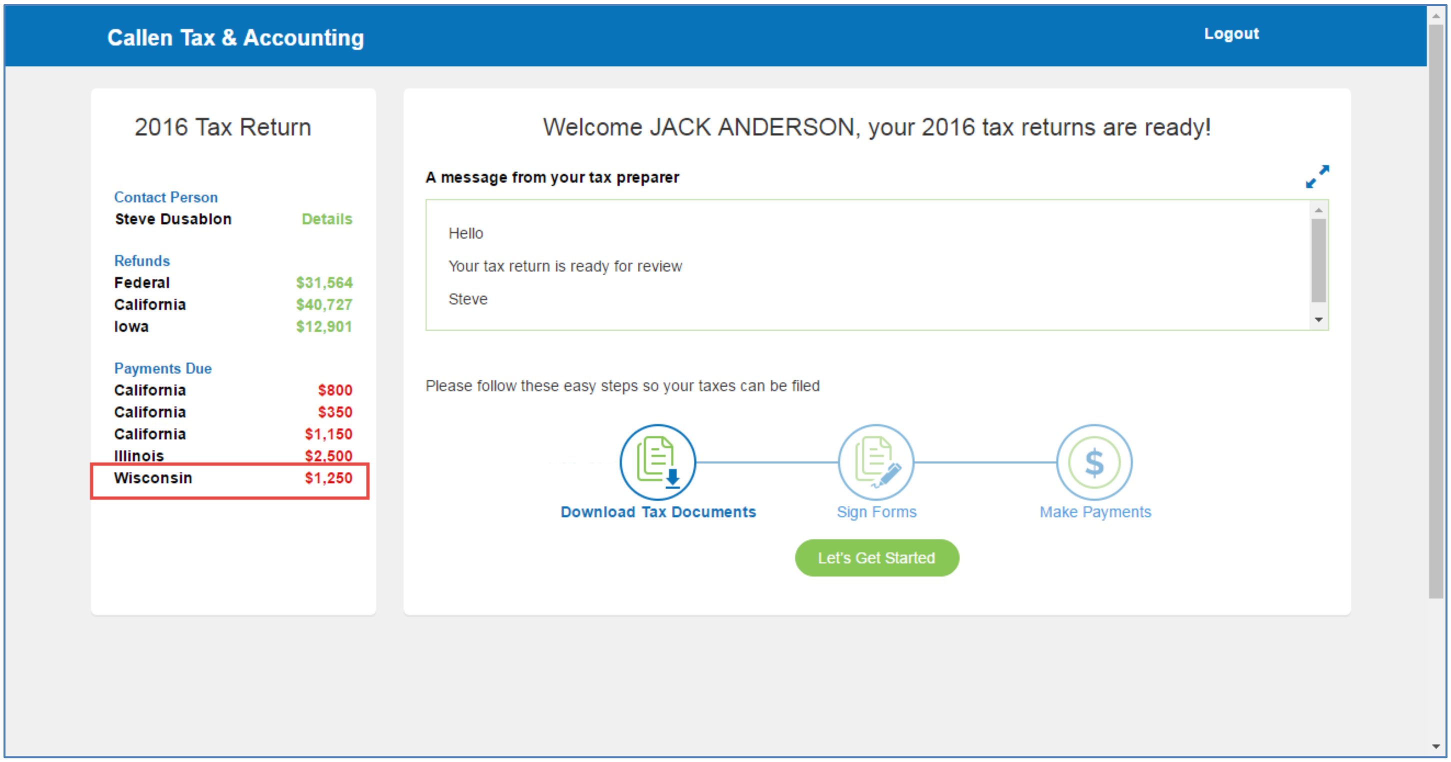


1. Select Client Info Tab
2. The payment will be listed

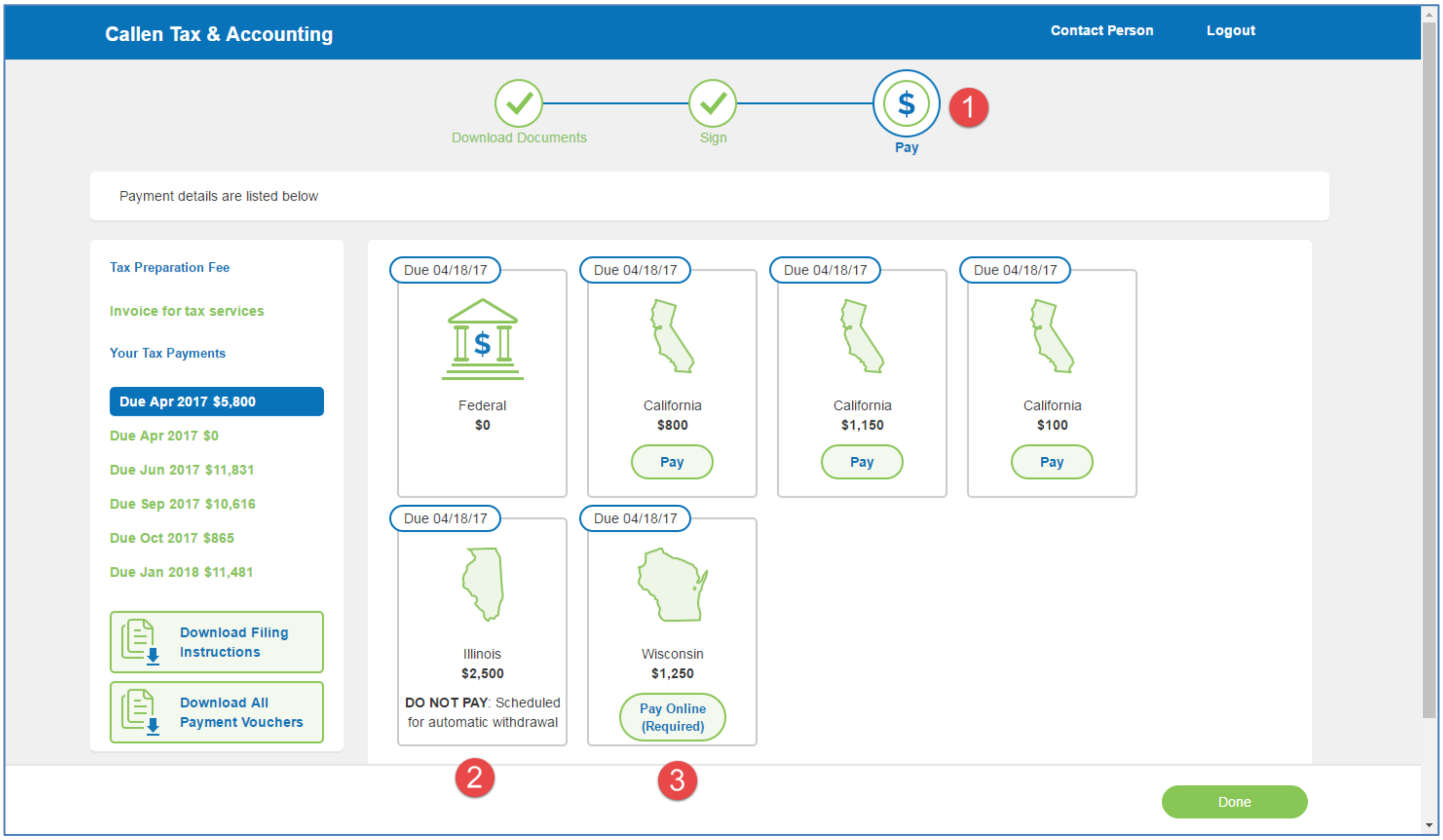
Taxpayer Views

Summary Page

The taxpayer will see the payment due on the left hand Summary panel when they initially login



Pay Screens



1. Taxpayer navigates to the Pay Screen
2. Clear instructions for “DO NOT PAY: Scheduled for automatic withdrawal”
    a. There is command button since this is for informational purposes only
3. Selecting the “Pay Online (Required)” button
    a. Displays the standard dialog with a link to the URL you provided