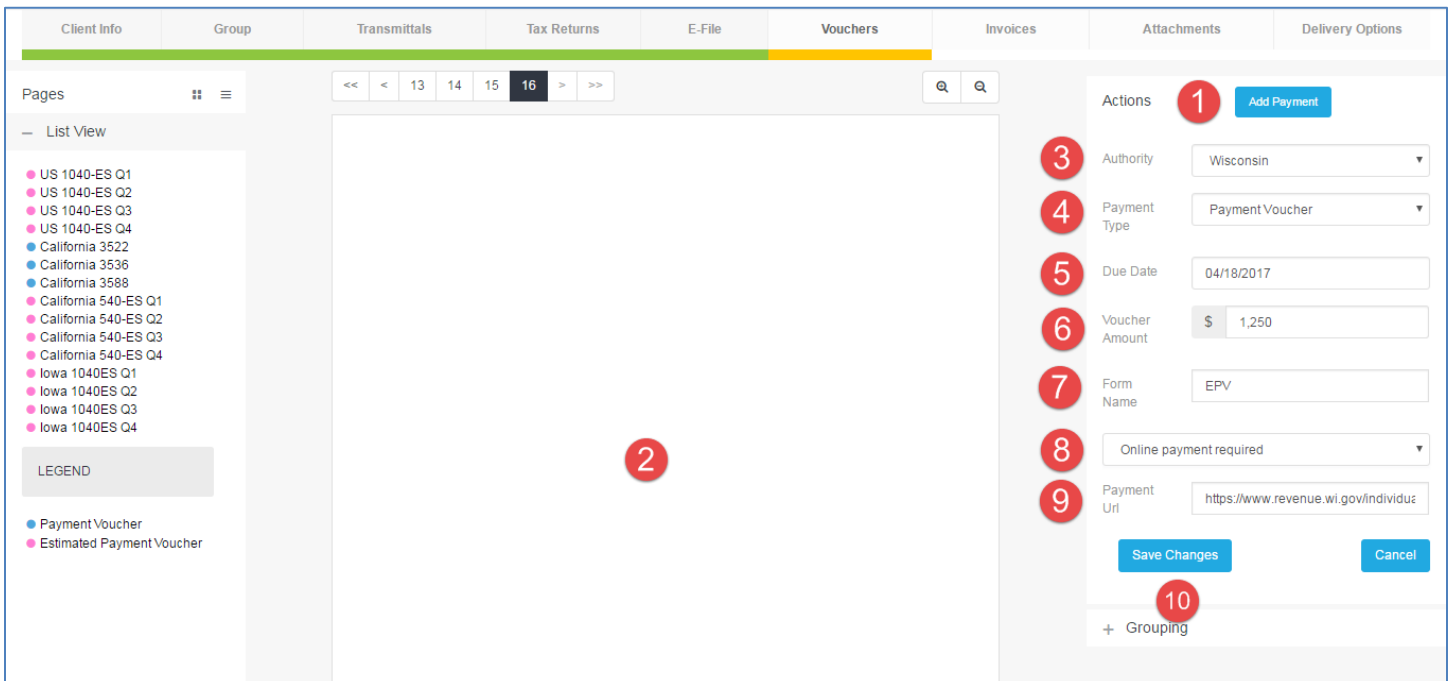


# Adding Vouchers

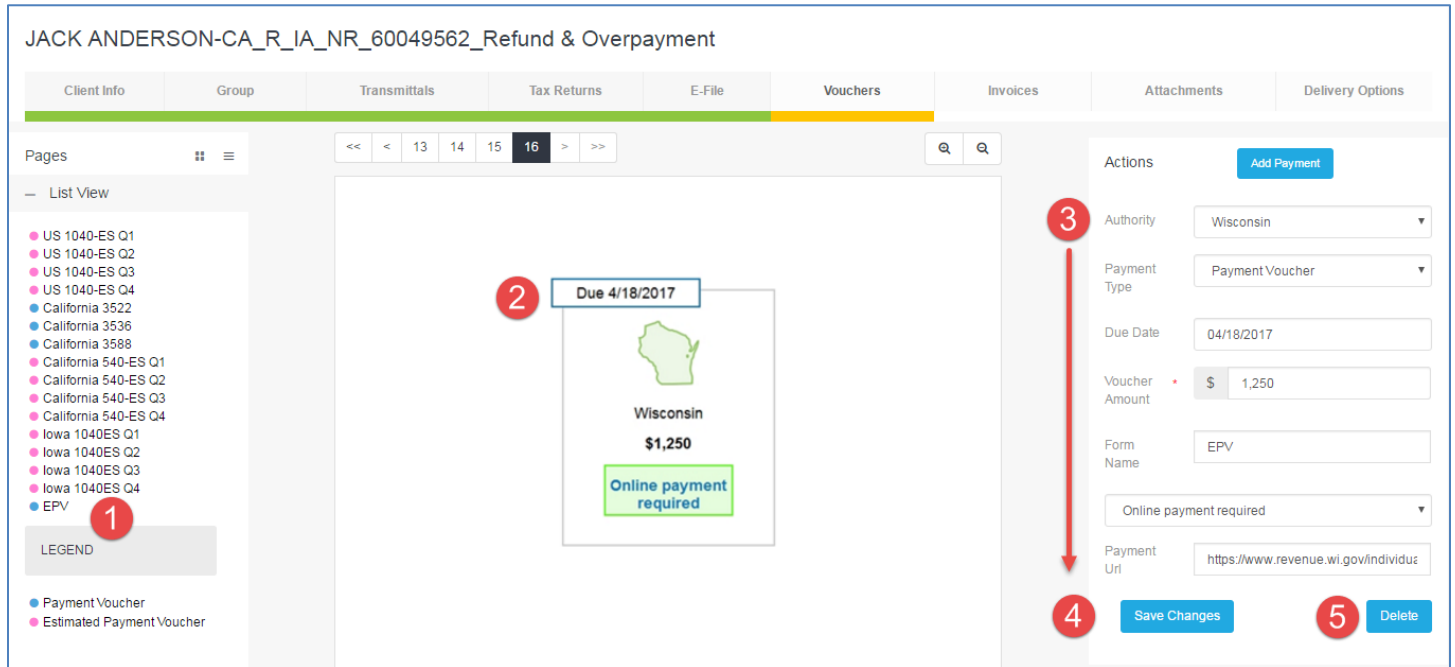
SSR captures tax payment information from Vouchers. When payments are 1) Scheduled for automatic withdrawal or 2) Online payment is required, Vouchers do not print from ProSystems. This feature will allow you to add a Voucher for these two situations and effectively communicate the payment requirements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



JACK ANDERSON-CA\_R\_IA\_NR\_60049562\_Refund & Overpayment

Client Info | Group | Transmittals | Tax Returns | E-File | **Vouchers** | Invoices | Attachments | Delivery Options

Pages: << < 13 14 15 16 > >>

Actions: Add Payment

Authority: Wisconsin

Payment Type: Payment Voucher

Due Date: 04/18/2017

Voucher Amount: \$ 1,250

Form Name: EPV

Online payment required

Payment Url: https://www.revenue.wi.gov/individua

Save Changes | Delete

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

JACK ANDERSON-CA\_R\_IA\_NR\_60049562\_Refund & Overpayment

Client Info **1** Group Transmittals Tax Returns E-File Vouchers Invoices Attachments Delivery Options

Refunds and Payments Due

California	\$800
California	\$350
California	\$1,150
Wisconsin	\$1,250
Federal	\$31,564
California	\$40,727
Iowa	\$12,901

1040 U.S. Individual Income Tax Return 2016

YOUR FIRST NAME AND INITIAL: JACK ANDERSON  
 LAST NAME: ANDERSON  
 SOCIAL SECURITY NUMBER: 999 99 9991

IF A JOINT RETURN, SPOUSE'S FIRST NAME AND INITIAL: JILL ANDERSON  
 LAST NAME: ANDERSON  
 SPOUSE'S SOCIAL SECURITY NUMBER: 999 99 9992

HOME ADDRESS (NUMBER AND STREET): 1234 MAIN STREET  
 CITY, STATE OR POST OFFICE, ABBR. AND ZIP CODE: NEWPORT BEACH, CA 92660

FILING STATUS:  Married filing jointly (even if only one had income)

EXEMPTIONS:  Yourself, if someone can claim you as a dependent, do not check box 6a  
 Spouse

DEPENDENTS:

Dependent's name	Dependent's social security number	Relationship to you	Is the dependent a child, grandchild, or stepchild of yours?	Is the dependent a student?	Is the dependent a disabled dependent?
SUZAN A ANDERSON	999-99-9994	DAUGHTER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STEVE A ANDERSON	999-99-9995	SON	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AMY A ANDERSON	999-99-9996	DAUGHTER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TOTAL NUMBER OF EXEMPTIONS CLAIMED: 5

INCOME:

7 Wages, salaries, tips, etc. (Attach Form(s) W-2)	130000.
8a Tax-exempt interest. Do not include on line 8a	
8b Qualified dividends	
9a Ordinary dividends. Attach Schedule B if required	
9b Taxable refunds, credits, or offsets of state and local income taxes	
10 Alimony received	
11 Business income or (loss). Attach Schedule C or C-EZ	30234.
12 Capital gain or (loss). Attach Schedule D if required. If not required, check here	
13 Other gains or (losses). Attach Form 4797	
14 IRA distributions	5000.
15a Taxable amount	2000.
15b Pensions and annuities	
16a Taxable amount	
16b Taxable amount	

Actions: + Return Information, - Taxpayer

Name: JACK ANDERSON  
 SSN: 999-99-9991  
 Address: 1234 MAIN STREET  
 City: NEWPORT BEACH  
 State: CA Zip: 92660  
 DOB: 09/23/1967  
 Email: dusablon22@gmail.com

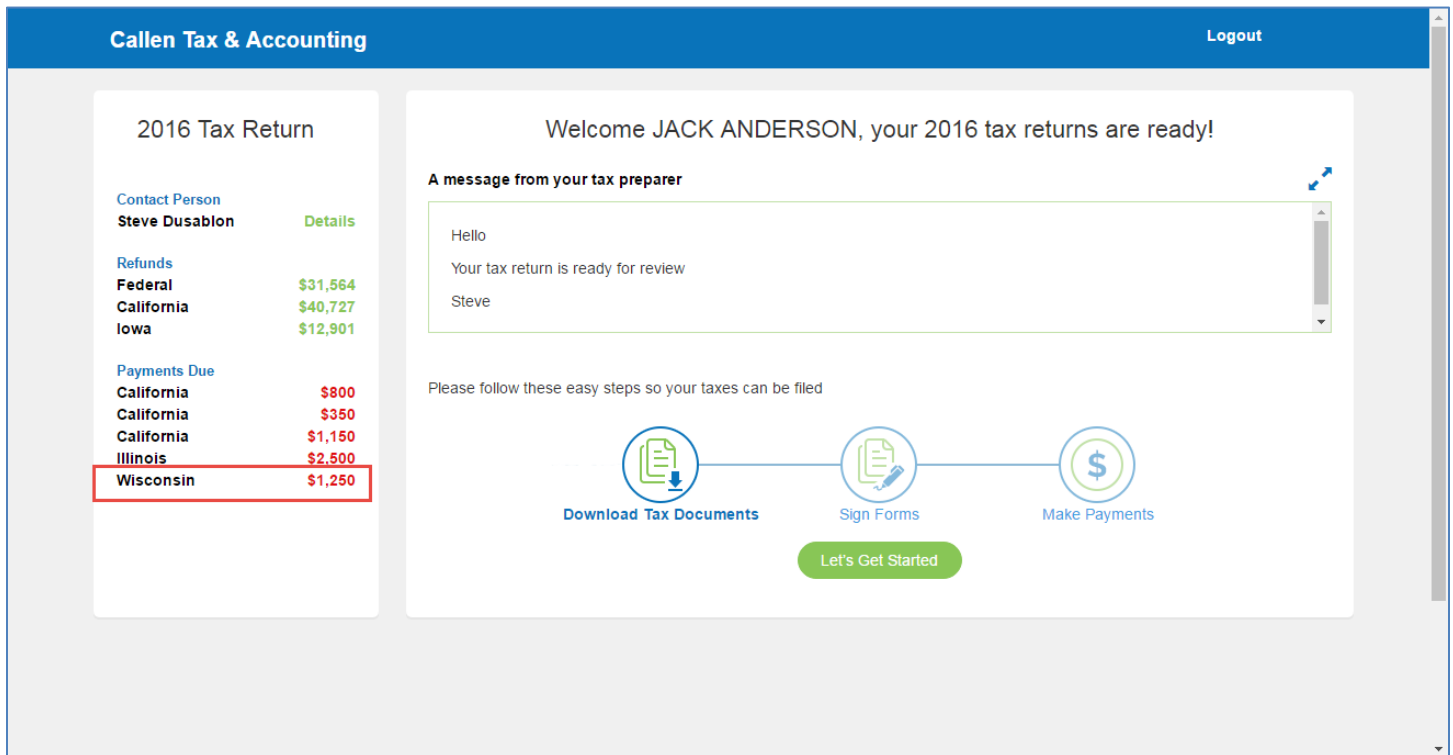
+ Spouse, - Refunds and Payments Due

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



The screenshot shows a web interface for 'Callen Tax & Accounting'. The header includes the company name and a 'Logout' link. The main content is divided into two panels. The left panel, titled '2016 Tax Return', lists contact information for Steve Dusablon and a table of refunds and payments due. The right panel, titled 'Welcome JACK ANDERSON, your 2016 tax returns are ready!', contains a message from the tax preparer and a flowchart with three steps: 'Download Tax Documents', 'Sign Forms', and 'Make Payments'. A 'Let's Get Started' button is positioned below the flowchart.

2016 Tax Return	
<b>Contact Person</b>	
Steve Dusablon	<a href="#">Details</a>
<b>Refunds</b>	
Federal	\$31,564
California	\$40,727
Iowa	\$12,901
<b>Payments Due</b>	
California	\$800
California	\$350
California	\$1,150
Illinois	\$2,500
Wisconsin	\$1,250

Welcome JACK ANDERSON, your 2016 tax returns are ready!

**A message from your tax preparer**

Hello  
Your tax return is ready for review  
Steve

Please follow these easy steps so your taxes can be filed

- Download Tax Documents
- Sign Forms
- Make Payments

[Let's Get Started](#)

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