

Tax Return flow

When completing a tax return the basic flow includes:

- 1. Completing the Filing Status Worksheet
- 2. Completing the Client Data Page
- 3. Adding Tax Forms
- 4. Completing the state return information (if applicable)
- 5. Completing refund types
- 6. Completing the Bank Application (if applicable)
- 7. Verifying the return
- 8. Saving the return