

# How to Pull Monthly Data Reports

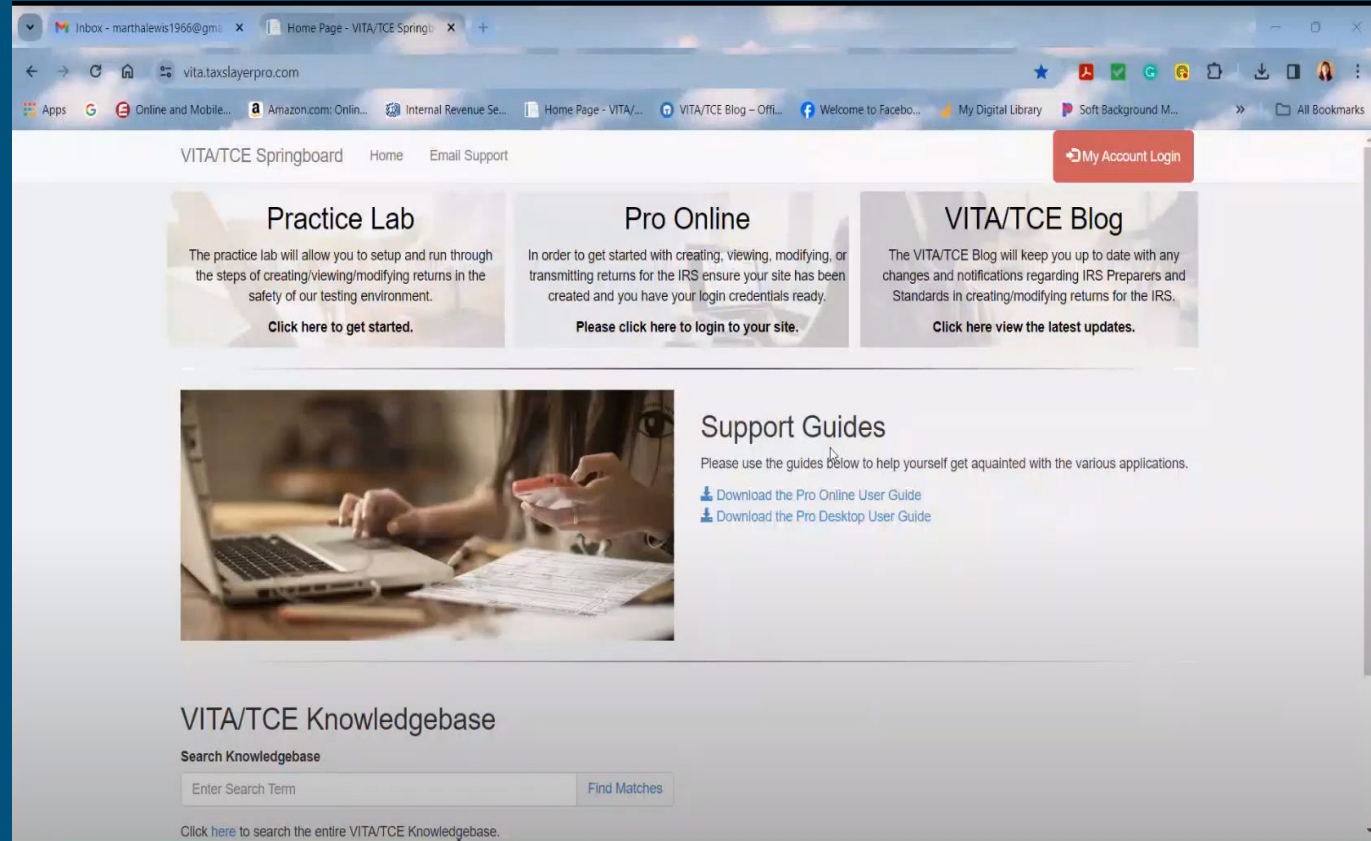
---



# Open Taxslayerpro.com

Go to your search bar  
and type in  
Taxslayerpro.com

Go to:  
“My Account Login”



The screenshot shows the homepage of the VITA/TCE Springboard website. The browser address bar displays "vita.taxslayerpro.com". The navigation menu includes "VITA/TCE Springboard", "Home", "Email Support", and a red "My Account Login" button. The main content area features three columns: "Practice Lab" (with a "Click here to get started" link), "Pro Online" (with a "Please click here to login to your site" link), and "VITA/TCE Blog" (with a "Click here view the latest updates" link). Below these is a "Support Guides" section with a photo of a person at a laptop and two download links: "Download the Pro Online User Guide" and "Download the Pro Desktop User Guide". At the bottom is a "VITA/TCE Knowledgebase" search bar with a "Find Matches" button and a link to search the entire knowledgebase.

VITA/TCE Springboard Home Email Support [My Account Login](#)

**Practice Lab**  
The practice lab will allow you to setup and run through the steps of creating/viewing/modifying returns in the safety of our testing environment.  
[Click here to get started.](#)

**Pro Online**  
In order to get started with creating, viewing, modifying, or transmitting returns for the IRS ensure your site has been created and you have your login credentials ready.  
[Please click here to login to your site.](#)

**VITA/TCE Blog**  
The VITA/TCE Blog will keep you up to date with any changes and notifications regarding IRS Preparers and Standards in creating/modifying returns for the IRS.  
[Click here view the latest updates.](#)

**Support Guides**  
Please use the guides below to help yourself get acquainted with the various applications.  
[Download the Pro Online User Guide](#)  
[Download the Pro Desktop User Guide](#)

**VITA/TCE Knowledgebase**  
Search Knowledgebase  
Enter Search Term [Find Matches](#)  
[Click here](#) to search the entire VITA/TCE Knowledgebase.

# Login in

Use your username  
and Password to  
open your account

## 2023 Tax Program

- IRS website
- IRS Mailing Addresses
- IRS Publications, Instructions, and Fill-In Forms

This TaxLayer Pro Online system is only for authorized use under the VITA/TCE program. Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. Unauthorized use of this system is prohibited. Users of this system agree to the Volunteer Standards of Conduct as listed in Form 13615.

### Log in to Pro Web

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

Username

Password

LOG IN

# Home Page

Once you are on your homepage it should look like this. Once here, scroll down till you see the reports tab. Click the “Select” button.

The screenshot displays the '2023 Tax Program' interface. At the top right, it shows 'Current User: Martha L', 'Change Tax Year' with a dropdown arrow, and a 'Logout' button with an external link icon. The main content area is divided into sections, each with a title, a brief description, and a 'Select' button:

- Start New 2023 Tax Return**: Create a brand new tax return for a client.
- Client Search**: Edit returns you previously started.
- Review Returns**: Returns that are currently waiting to be reviewed.
- Configuration**: Setup the configuration options for your office.
- Reports**: Print acks, mailing labels, bank reports, and old reports. (A red arrow points to this 'Select' button.)
- Transmissions**: Transmit returns to IRS.

The left sidebar contains the following navigation items:

- Main Menu
- Client Status
- IRS website
- IRS Mailing Addresses
- IRS Publications, Instructions, and Fill-In Forms
- Release Notes
- VITA/TCE Publications and User Guides
- VITA/TCE Blog
- Suggestion Box: VITA/TCE Enhancement Requests
- Speed Test Link

At the bottom of the page, it says '2024 All Rights Reserved.' and provides a URL: <https://vita.taxslayerpro.com/ProAvalon/Office/Reporting>

# Management reports

After you have selected reports. Scroll down till you see the “management reports” tab. Once here click the plus sign on this tab and select it again.

The screenshot displays the '2023 Tax Program' interface. On the left is a sidebar menu with the following items: Main Menu, Client Status, IRS website, IRS Mailing Addresses, IRS Publications, Instructions, and Fill-In Forms, Release Notes, VITA/TCE Publications and User Guides, VITA/TCE Blog, Suggestion Box: VITA/TCE Enhancement Requests, Speed Test Link, and Interactive Tax Assistance (IRS Decision Trees). The main content area is titled '2023 Tax Program' and includes user information: 'Current User: Martha L', 'Change Tax Year', and a 'Logout' link. Below the title is a list of report categories, each with a plus sign on the right: 'Financial Reports', 'Custom Configuration Items', 'Other Data Reports', and 'Management Reports'. A red arrow points to the 'Management Reports' category. At the bottom right of the main content area is a blue 'Back' button. The footer of the page reads '2024 All Rights Reserved.'

# Web Reports

Once you have selected the management reports tab, you will be directed to the web reports tab. Here you will select “site production detail reports -Electronic” this will be under the “Production Detail Reports” table.

Home Page - Web Report - Google Chrome  
vita.taxlayerpro.com/reports/web/

Web Reports MarthaVC - Home Logoff

**New:** If a report contains too much data to export on demand, they will be scheduled as a Saved Report and be available for download approximately the next day from the Saved Reports Section of Web Reports.

### Available Reporting Tools

#### Summary Reports

<a href="#">Electronic Filing Summary</a> View a list of Electronically Transmitted Returns	<a href="#">State Detail Summary Report</a> View Production State Detail Summary for your EFINs	<a href="#">Federal Return Summary</a> View Federal Return Information and Statistics
--	--	--

#### Pro Web Reports

<a href="#">Pro Web Returns - Audit Report</a> View Production Audit information for your site and EFINs	<a href="#">Pro Web Returns - Detailed Return Report</a> View Refund and State Refund Information for your EFINs
---	---

#### Production Detail Reports

<a href="#">Site Production Detail Report - Electronic</a> View Electronic Production Detail information for your site and EFINs	<a href="#">Site Production Detail Report - Paper</a> View Paper Production Detail information for your site and EFINs	<a href="#">Site Production Summary Report</a> View Production Summary information for your site and EFINs
<a href="#">Site Production State Detailed Report</a> View Production State information for your site and EFINs		

#### Return Reports

# Select Dates

From here you will select your tax year as well as the start date and end date you want the report to cover.

The screenshot shows a web browser window with the URL `vita.taxslayerpro.com/reports/web/Report/Setup?ReportType=ProductionDetailElectronicReport`. The page title is "Web Reports" and the user is logged in as "MarthaVC - Home". The main heading is "Report Setup: Site Production Detail Report - Electronic".

The "Filter Selection" section contains the following fields:

- Tax Year:** A dropdown menu currently set to "2022".
- Start Date:** A text input field containing "2/1/2023".
- End Date:** A text input field containing "2/15/2024". A calendar pop-up is open below this field, showing the month of February 2024. The date "15" is highlighted.

The "EFIN Selection" section is currently empty.

At the bottom right, there are three buttons: "Run Report" (dark blue), "Run Report For Export" (light blue), and "Cancel" (orange).

At the bottom left, there is a "Privacy Policy" link and a copyright notice: "© 2024 - Web Reports".

# Don't forget to click "EFIN Selection"

After you have selected your dates click the "EFIN Selection" Tab

Setup - Web Report - Google Chrome  
vita.taxslayerpro.com/reports/web/Report/Setup?ReportType=ProductionDetailElectronicReport

Web Reports MarthaVC - Home Logoff

### Report Setup: Site Production Detail Report - Electronic

**Filter Selection**

Tax Year: 2022

Start Date: 2/1/2023 End Date: 2/15/2023

**EFIN Selection**

Run Report  
Run Report For Export  
Cancel

[Privacy Policy](#)

© 2024 - Web Reports



# Select your EFIN and Run Report

Once you have selected your sites EFIN go ahead and select “Run Report”

The screenshot displays the 'Web Reports' interface in a browser window. The page title is 'Report Setup: Site Production Detail Report - Electronic'. The interface includes a 'Filter Selection' dropdown menu and an 'EFIN Selection' dropdown menu. Below these, there are 'Check All' and 'Clear' buttons, followed by an 'EFIN Filter' input field. A table lists the selected EFINs, with '842072' checked. At the bottom right, there are three buttons: 'Run Report', 'Run Report For Export', and 'Cancel'. The footer contains a 'Privacy Policy' link and the copyright notice '© 2024 - Web Reports'.

Setup - Web Report - Google Chrome  
vita.taxslayerpro.com/reports/web/Report/Setup?ReportType=ProductionDetailElectronicReport

Web Reports MarthaVC - Home Logoff

### Report Setup: Site Production Detail Report - Electronic

Filter Selection >

EFIN Selection >

Check All Clear EFIN Filter

<input checked="" type="checkbox"/>	842072
-------------------------------------	--------

Run Report

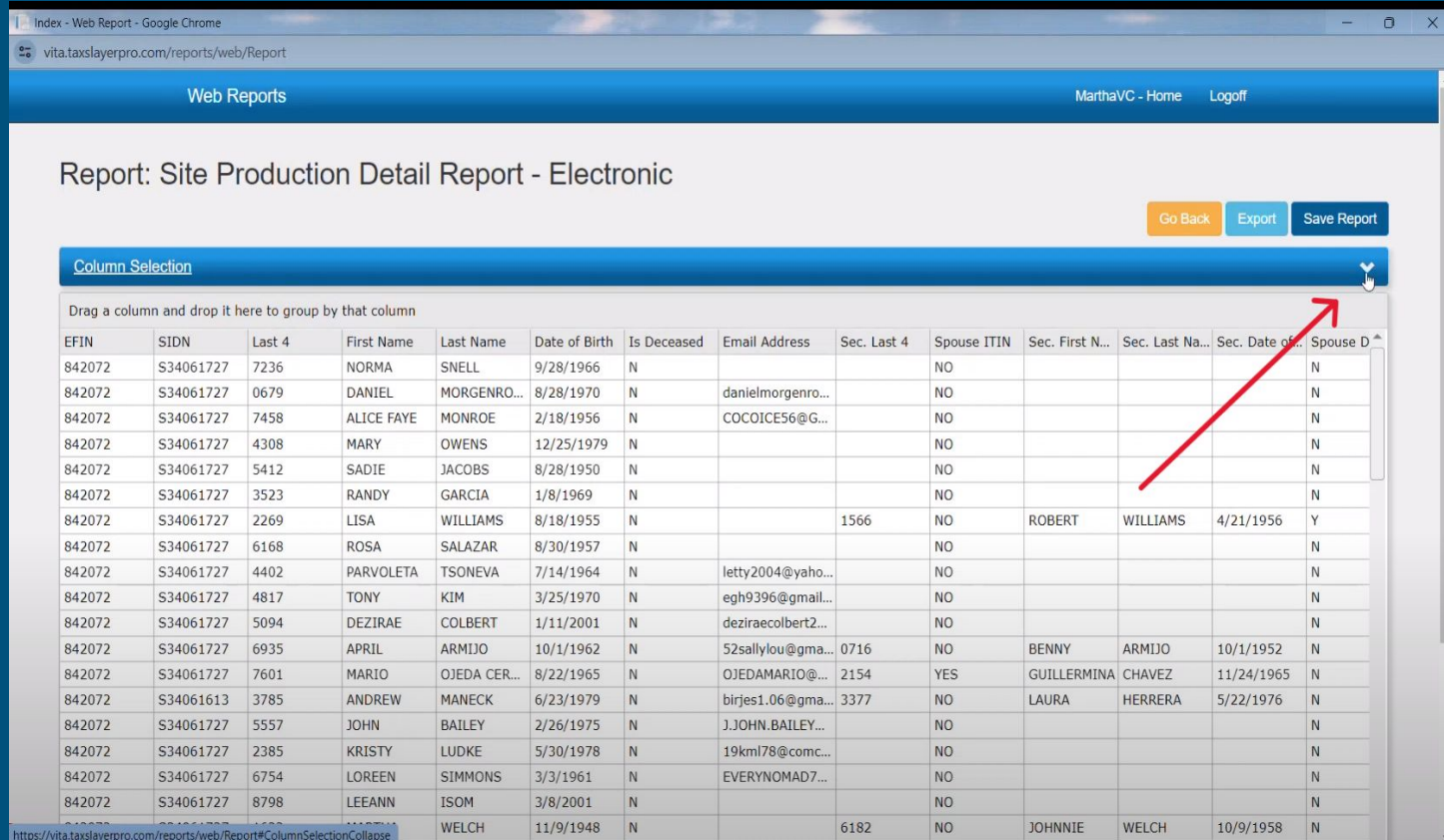
Run Report For Export

Cancel

[Privacy Policy](#)  
© 2024 - Web Reports

# Narrow the Data

Now that you have run the report it's time to narrow it. From here, select the "V" button on the top right of the report.

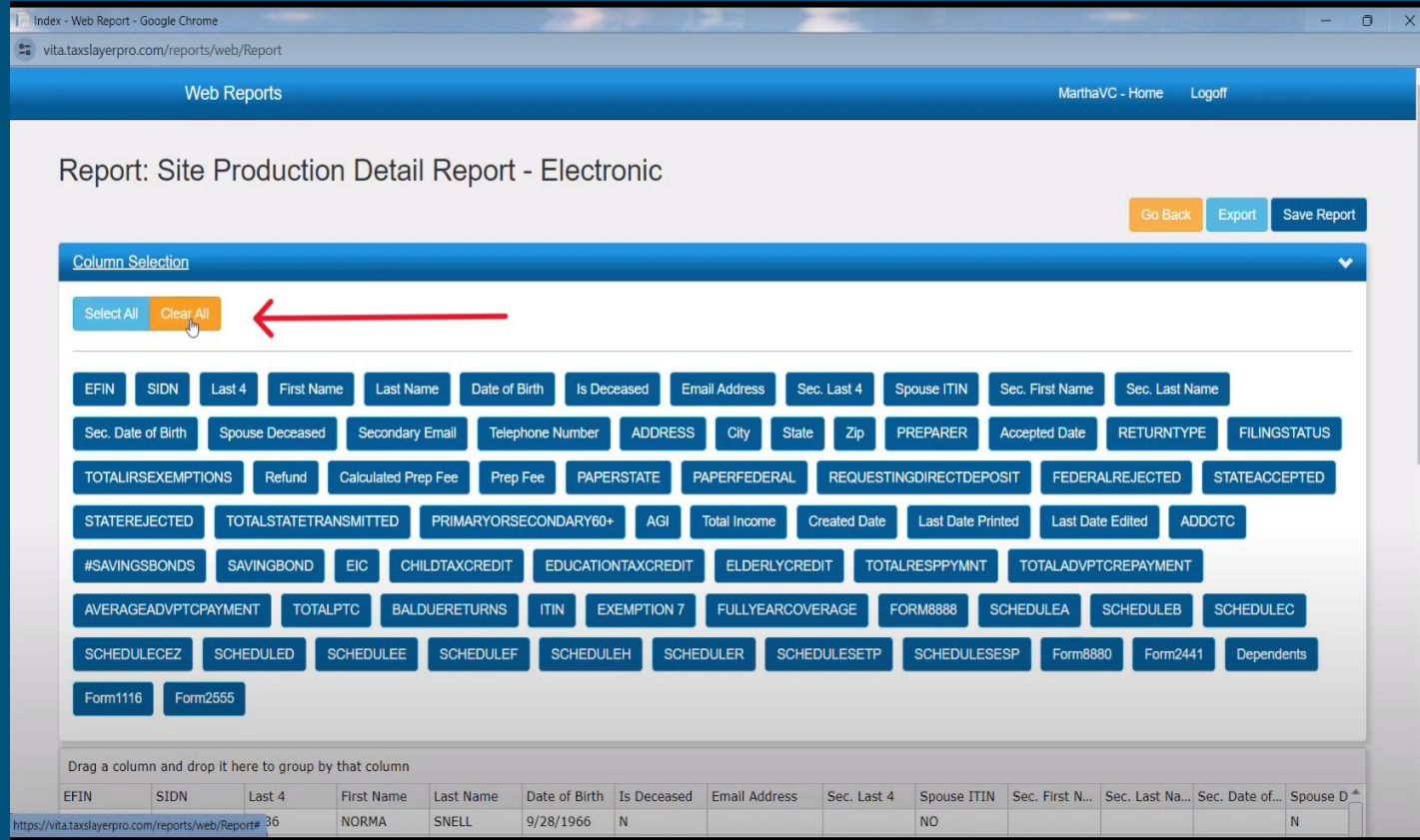


The screenshot shows a web browser window displaying a report titled "Report: Site Production Detail Report - Electronic". The report interface includes a "Web Reports" header, a user name "MarthaVC - Home", and a "Logoff" link. Below the header are three buttons: "Go Back", "Export", and "Save Report". A "Column Selection" dialog box is open, with the instruction "Drag a column and drop it here to group by that column". The dialog box contains a table with the following columns: EFIN, SIDN, Last 4, First Name, Last Name, Date of Birth, Is Deceased, Email Address, Sec. Last 4, Spouse ITIN, Sec. First N..., Sec. Last Na..., Sec. Date of..., and Spouse D... A red arrow points to a "V" icon in the top right corner of the dialog box. The data table below the dialog box contains the following rows:

EFIN	SIDN	Last 4	First Name	Last Name	Date of Birth	Is Deceased	Email Address	Sec. Last 4	Spouse ITIN	Sec. First N...	Sec. Last Na...	Sec. Date of...	Spouse D...
842072	S34061727	7236	NORMA	SNELL	9/28/1966	N			NO				N
842072	S34061727	0679	DANIEL	MORGENRO...	8/28/1970	N	danielmorgenro...		NO				N
842072	S34061727	7458	ALICE FAYE	MONROE	2/18/1956	N	COCOICE56@G...		NO				N
842072	S34061727	4308	MARY	OWENS	12/25/1979	N			NO				N
842072	S34061727	5412	SADIE	JACOBS	8/28/1950	N			NO				N
842072	S34061727	3523	RANDY	GARCIA	1/8/1969	N			NO				N
842072	S34061727	2269	LISA	WILLIAMS	8/18/1955	N		1566	NO	ROBERT	WILLIAMS	4/21/1956	Y
842072	S34061727	6168	ROSA	SALAZAR	8/30/1957	N			NO				N
842072	S34061727	4402	PARVOLETA	TSONEVA	7/14/1964	N	letty2004@yaho...		NO				N
842072	S34061727	4817	TONY	KIM	3/25/1970	N	egh9396@gmail...		NO				N
842072	S34061727	5094	DEZIRAE	COLBERT	1/11/2001	N	deziraecolbert2...		NO				N
842072	S34061727	6935	APRIL	ARMIJO	10/1/1962	N	52sallylou@gma...	0716	NO	BENNY	ARMIJO	10/1/1952	N
842072	S34061727	7601	MARIO	OJEDA CER...	8/22/1965	N	OJEDAMARIO@...	2154	YES	GUILLERMINA	CHAVEZ	11/24/1965	N
842072	S34061613	3785	ANDREW	MANECK	6/23/1979	N	birjes1.06@gma...	3377	NO	LAURA	HERRERA	5/22/1976	N
842072	S34061727	5557	JOHN	BAILEY	2/26/1975	N	J.JOHN.BAILEY...		NO				N
842072	S34061727	2385	KRISTY	LUDKE	5/30/1978	N	19kml78@comc...		NO				N
842072	S34061727	6754	LOREEN	SIMMONS	3/3/1961	N	EVERYNOMAD7...		NO				N
842072	S34061727	8798	LEEANN	ISOM	3/8/2001	N			NO				N
842072	S34061727	1420	MARION	WELCH	11/9/1948	N		6182	NO	JOHNNIE	WELCH	10/9/1958	N

# Clear All

After clicking the “V” to expand the data parameters, select “clear all” for the columns.



The screenshot shows a web browser window displaying a report titled "Report: Site Production Detail Report - Electronic". The interface includes a navigation bar with "Web Reports" and user information "MarthaVC - Home Logoff". Below the title, there are buttons for "Go Back", "Export", and "Save Report". A "Column Selection" dropdown menu is open, showing a "Select All" button and a "Clear All" button. A red arrow points to the "Clear All" button. Below the dropdown, there is a grid of buttons representing various data parameters, such as "EFIN", "SIDN", "Last 4", "First Name", "Last Name", "Date of Birth", "Is Deceased", "Email Address", "Sec. Last 4", "Spouse ITIN", "Sec. First Name", "Sec. Last Name", "Sec. Date of Birth", "Spouse Deceased", "Secondary Email", "Telephone Number", "ADDRESS", "City", "State", "Zip", "PREPARER", "Accepted Date", "RETURNTYPE", "FILINGSTATUS", "TOTALIRSEXEMPTIONS", "Refund", "Calculated Prep Fee", "Prep Fee", "PAPERSTATE", "PAPERFEDERAL", "REQUESTINGDIRECTDEPOSIT", "FEDERALREJECTED", "STATEACCEPTED", "STATEREJECTED", "TOTALSTATETRANSMITTED", "PRIMARYORSECONDARY60+", "AGI", "Total Income", "Created Date", "Last Date Printed", "Last Date Edited", "ADDCTC", "#SAVINGSBONDS", "SAVINGBOND", "EIC", "CHILDTAXCREDIT", "EDUCATIONTAXCREDIT", "ELDERLYCREDIT", "TOTALRESPPYMT", "TOTALADVPTCPREPAYMENT", "AVERAGEADVPTCPAYMENT", "TOTALPTC", "BALDUEReturns", "ITIN", "EXEMPTION 7", "FULLYEARCOVERAGE", "FORM8888", "SCHEDULEA", "SCHEDULEB", "SCHEDULEC", "SCHEDULECEZ", "SCHEDULED", "SCHEDULEE", "SCHEDULEF", "SCHEDULEH", "SCHEDULER", "SCHEDULESETP", "SCHEDULESESP", "Form8880", "Form2441", "Dependents", "Form1116", and "Form2555". At the bottom, there is a table with columns corresponding to these parameters and a row of data.

EFIN	SIDN	Last 4	First Name	Last Name	Date of Birth	Is Deceased	Email Address	Sec. Last 4	Spouse ITIN	Sec. First Name	Sec. Last Name	Sec. Date of...	Spouse D
			NORMA	SNELL	9/28/1966	N			NO				N

# Pick Correct Data Columns

After you clear all selections. Go ahead and select the “SIDN”, “EIC” and “CHILDTAXCREDIT” Tabs.

Web Reports MarthaVC - Home Logoff

Column Selection

Select All Clear All

EFIN SIDN Last 4 First Name Last Name Date of Birth Is Deceased Email Address Sec. Last 4 Spouse ITIN Sec. First Name Sec. Last Name

Sec. Date of Birth Spouse Deceased Secondary Email Telephone Number ADDRESS City State Zip PREPARER Accepted Date RETURNTYPE FILINGSTATUS

TOTALIRSEXEMPTIONS Refund Calculated Prep Fee Prep Fee PAPERSTATE PAPERFEDERAL REQUESTINGDIRECTDEPOSIT FEDERALREJECTED STATEACCEPTED

STATEREJECTED TOTALSTATETRANSMITTED PRIMARYORSECONDARY60+ AGI Total Income Created Date Last Date Printed Last Date Edited ADDCTC

#SAVINGSBONDS SAVINGBOND EIC CHILDTAXCREDIT EDUCATIONTAXCREDIT ELDERLYCREDIT TOTALRESPPYMNT TOTALADVPTCREPAYMENT

AVERAGEADVPTCPAYMENT TOTALPTC BALDUERETURNS ITIN EXEMPTION 7 FULLYEARCOVERAGE FORM8888 SCHEDULEA SCHEDULEB SCHEDULEC

SCHEDULEGEZ SCHEDULED SCHEDULEE SCHEDULEF SCHEDULEH SCHEDULER SCHEDULESETP SCHEDULESESP Form8880 Form2441 Dependents

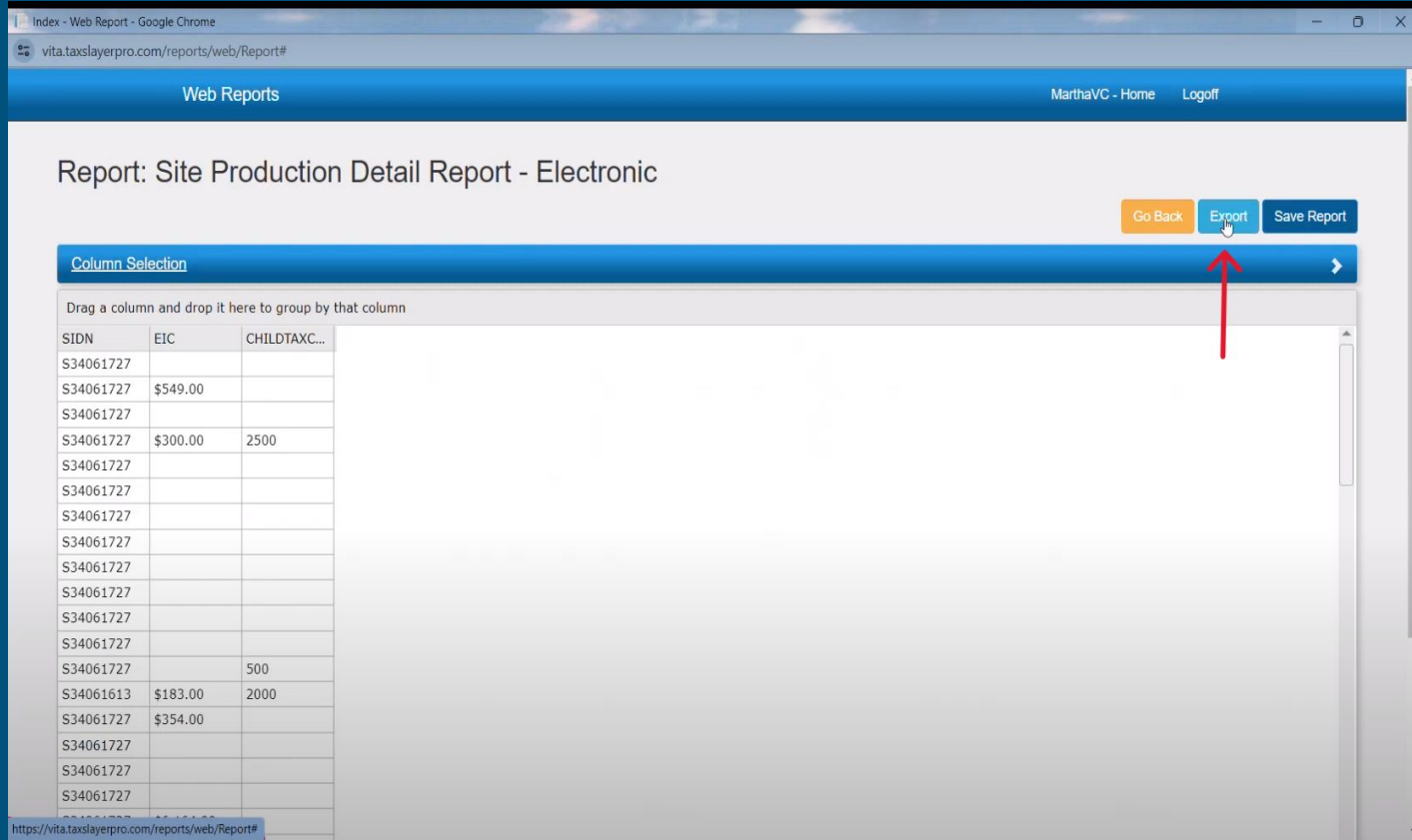
Form1116 Form2555

Drag a column and drop it here to group by that column

SIDN	EIC	CHILDTAXC...
S34061727		
S34061727	\$549.00	
S34061727		
S34061727	\$300.00	2500
S34061727		

# Confirm and export

Now you have all the data you need for the report. To make it easier for you to read. Select "Export" at the top and download the report as a Spreadsheet.



The screenshot shows a web browser window displaying a report titled "Report: Site Production Detail Report - Electronic". The interface includes a navigation bar with "Web Reports" and user information "MarthaVC - Home Logoff". At the top right, there are three buttons: "Go Back", "Export", and "Save Report". A red arrow points to the "Export" button. Below the buttons is a "Column Selection" section with a blue header and a right-pointing arrow. The text below the header says "Drag a column and drop it here to group by that column". A table is visible below this section, with columns labeled "SIDN", "EIC", and "CHILDTAXC...". The table contains several rows of data, including values like "S34061727", "\$549.00", and "2500".

SIDN	EIC	CHILDTAXC...
S34061727		
S34061727	\$549.00	
S34061727		
S34061727	\$300.00	2500
S34061727		
S34061727		
S34061727		
S34061727		
S34061727		
S34061727		
S34061727		500
S34061613	\$183.00	2000
S34061727	\$354.00	
S34061727		
S34061727		
S34061727		





# Submit Data On Site Coordinator tab

Now that you have all your data, go to the VITA website and enter the Site Coordinator tab. Scroll to the bottom and type in your monthly data and hit submit.



- HOME
- WHAT WE CAN DO
- WHAT TO EXPECT
- WHAT TO BRING
- LOCATIONS
- FAQ
- VOLUNTEERING
- SITE COORDINATOR LOGIN
- DONATE
- PARTNERS

## Monthly Progress Report

Site Identification Number \*

Site Address \*

Total Number Of Clients Served \*

Total Dollar Amount Of EITC Claims: \*

Total Number Of CTC Claims: \*

Total Dollar Amount Of CTC Claims: \*

Number Of ITIN Registrations, If Any: \*

Total Number Of EITC Claims: \*

Number Of Clients Who Claim CTC And/Or EITC: \*

Number of CTC/EITC claims for filers without a filing obligation (in Tax Year 2023: \$27,700 for married filing jointly and qualifying widow(er), \$13,850 for single, \$20,800 for head of household): \*