Fact Sheet

September 2025

TaxSlayer® Software Ordering Guidance

for SPEC Partners

Software Ordering Requirements:

Most sites using TaxSlayer® software may choose one of the following products:

- TaxSlayer® Pro Online
- TaxSlayer® Pro Desktop
- TaxSlayer® Self-Prep (FSA Fusion, FSA Stand-Alone or FSA Remote)

Software Ordering Timeline:

The deadline to place software orders for Tax Year 2025 is midnight, March 30, 2026. **SPEC territory offices must ensure all software orders are saved and confirmed in SPECFORCE by the March 30th deadline.**

Date	Action
October 1, 2025	TaxSlayer® software ordering season begins.
November 21, 2025	Deadline for initial TaxSlayer® software orders to be entered for inclusion in first distribution.
November 26, 2025 – January 30, 2026	Remaining TaxSlayer® software orders for partners are placed. **Note:** Software orders will be placed with the vendor on a weekly schedule through **December 19, 2025.** Orders placed with the vendor on Tuesday of each week will be delivered from the vendor on Friday of the same week. Beginning **January 2, 2026**, software orders will be placed with the vendor twice a week on Tuesday and Thursday. Orders placed by Tuesday will be delivered from the vendor on Friday of the same week and Thursday orders will be delivered from vendor Tuesday of the following week. Then beginning February 2nd, we revert to orders being placed once a week with the vendor. Orders placed by Tuesday will be delivered from the vendor on Friday of the same week.
December 1, 2025	First Pro Online order confirmation emails sent from vendor. All subsequent orders will be sent weekly thereafter depending on the order date.

Date	Action
December 7, 2025	First Pro Desktop orders delivered from vendor. All subsequent orders will be delivered weekly thereafter depending on the order date.
Mid-January 2026	Customized URLs will be emailed for TaxSlayer® FSA sites.
March 30, 2026	Final day to place TaxSlayer® software orders.
March 31, 2026	Final order placed with the vendor.
April 4, 2026	Final order delivered from the vendor.

Placing Tax Software Orders:

Due to the cost of the tax software and added risks with changes, **software should not be ordered until the site is established**. An established site is defined as one where the partner has committed resources and has a reasonable expectation to open (i.e., site coordinator identified; EFIN secured and/or applied for; site location secured (including days/hours of operation); secured computer equipment). **Except for self-prep sites**, each site must have its own unique EFIN.

Your SPEC relationship manager (RM) is responsible for placing your software order. **Software should not be ordered until conversations have taken place with partners to ensure they are aware of all available software options.**

Partners are strongly encouraged to verify the status of each EFIN in the Registered User Portal (RUP) prior to placing the software order. If the EFIN is not active in RUP, the issue must be resolved prior to placing the software order. Refer to **Publication 5683**, VITA/TCE Handbook for Partners and Site Coordinators, for additional information.

Note: If you are a returning site with a new EFIN you must:

> Notify SPEC HQ with the EFIN change prior to the software order being sent to TaxSlayer or after the software order has been placed.

If you access the system and your preparers did not appear, then a new EFIN was used to order the software. If you begin to prepare returns, it will be too late for TaxSlayer to help you gain access to the previous year returns.

Note: Publication 5683 is a new comprehensive product that includes all partner resources, site coordinator job aids, and instructions in one guide. Publication 5683 will be available by early-November. As a result, Publications 1084, Volunteer Site Coordinator Handbook, and 4396A, Partner Resource Guide, are now obsolete.

To place an order, the Volunteer Income Tax Assistance/Tax Counseling for the Elderly (VITA/TCE) site must be listed in our database (SPECforce) and identified on the site record as an e-file site, including the:

- Site's name, address, city, state, and zip code
- EFIN

- Transmitting EFIN
- Relational EFIN (if applicable)
- Site's primary contact email address (the person who is receiving the software email information)

Pro Online Users:

The RM must verify the email address for the contact associated with the site order. TaxSlayer® will use the email address to send software activation links to **all** online users.

Pro Desktop Users:

Desktop orders can only be placed for sites with connectivity issues. Only sites with connectivity issues (e.g., rural areas that have unreliable Wi-Fi and cell coverage) will be allowed to order TY2025 and beyond Desktop product. Your RM must verify the contact name/email address associated with the order to ensure you receive the proper emails to download the software.

Note: AARP Foundation Tax-Aide sites are NOT permitted to order Desktop software. If local Tax-Aide sites have questions on this rule, they should speak to their respective State Coordinator.

Exceptions:

There are three exceptions to placing separate software orders for VITA/TCE sites. RMs are not required to place a separate software order if the SPECforce site indicator is:

- Ad-hoc Site,
- Special Event, or
- Multiple Site Admin (Desktop Users Only)

Note: All sites preparing returns must be entered into SPECforce and must have a unique SIDN. Each location for a Mobile site is not required to be entered into SPECforce.

Ad-hoc Site:

Applies when a site serves as a main site but offers free tax preparation to taxpayers in underserved communities on an intermittent basis.

- Example: In addition to providing tax preparation at their main site located in Augusta, GA, volunteers also service two small towns. Tax preparation services are provided through an arrangement with the local library, community, senior center, etc. and are offered on an appointment-only or as-needed basis. The volunteer does not have set days or hours when they will arrive at the two small towns. Visits to the towns, outside of the main site, are intermittent in terms of both frequency and location. One transmitting computer from the main site performs the transmissions of all returns. The site indicator in SPECforce must be reflected as "TS - Ad-hoc Site."

Special Event:

Applies when a partner or coalition operates a tax preparation site and offers free tax preparation services at a special event (e.g., Midnight Madness, EITC Day, Super Saturday, etc.).

- **Example:** A special event hosted by a partner or coalition using the computers and volunteers from their main tax site or free tax preparation services offered in conjunction with a community function such as a Financial Literacy Conference. One transmitting computer from the main site performs the transmissions of all returns.

If a site is hosting a one-day or once-a-year event, the RM must be notified. The RM is required to check the box indicating one-day site in our database.

Multiple Site Admin:

Applies to Desktop users only. An Electronic Return Originator (ERO) with multiple sites transmits all returns and receives all acknowledgements using the same computer. The same computer must be used to transmit all returns for all locations.

- **Example:** An ERO operates a main site on Monday, Wednesday, Friday, and Saturday. On Tuesday, the volunteer prepares returns at a senior center. On Thursday, the volunteer prepares returns at a library. Each site has fixed hours. The ERO is responsible for transmitting all returns on one transmitting computer from the main site.

Desktop sites using the Multiple Site Admin indicator will be able to use the same software package at their other locations by associating the additional sites in SPECforce to the main site; no additional EFIN is needed.

Request for Relational EFIN (Online Users Only):

The Relational EFIN allows the primary "parent" site with oversight or management responsibility for multiple VITA/TCE "children" sites to have access to reports or production data for all "children" preparing sites under their control. The Relational EFIN also allows the sharing of customized or modified profiles (such as Custom Print Sets, Custom Questions and Custom Security Templates). Using a Relational EFIN requires the site to complete the Relational/Regional Office (RO) Disclosure form that is included in TaxSlayer® Online packages.

The partner identified as the primary EFIN can then access reports and share profiles through a single login to access/run reports for all sites under their primary EFIN.

Note: Requests for a Relational EFIN should be made at the time the order is placed in the Software Ordering Module.

Note: AARP will continue to use Relational EFINs at all their sites. Existing sites' Relational EFINs will remain the same as last season. **If there is a new AARP site being added this year and you do not know what your Relational EFIN is, ask your RM to obtain that for you.**

Request for Relational EFIN after Placing Order:

If the partner decides to use a Relational EFIN after the original order has been submitted, the RM will submit a request for one through SPEC's Field Support &

Analysis (FS&A) to the TaxSlayer® Core team. **A site cannot request a Relational EFIN after the site has started transmitting returns. The request must be made and processed by TaxSlayer® before transmitting any returns.**

TaxSlayer® will process requests for a Relational EFIN within four business days after receipt.

The FS&A Analyst or RM must identify the primary site EFIN (parent) and all associated EFINs (child) in the email request for the site where the partner is requesting a Relational EFIN. All site names must be included.

Note: Requests for Relational EFIN access must come from the IRS TaxSlayer® Core Team. TaxSlayer® will not honor a request directly from a partner.

Multi-Site Admin (MSA) ERO:

The ability to only allow the sharing of customized or modified profiles with other sites is called "Multi-Site Admin ERO." Site administrators can create and send customized template settings to sites under their control. TaxSlayer® Pro Online has an assigned master setting in accordance with SPEC guidelines. Sites with a Relational EFIN do not need MSA to share templates. Sharing the templates is included within the Relational EFIN setup. The site needs one or the other, not both.

Note: Based on IRC 7216, since no taxpayer return reporting data can be accessed by the Multi-Site Admin ERO, no extra consent is required.

To share customized template settings, the parent site must be associated to the child site software order during the software ordering process in our database. This will ensure the hierarchy of the Multi-Site Admin ERO master EFIN (parent site) to share settings with other sites under their control (sub/child sites).

Transmitting for Multiple EFINs (Desktop Product Only):

For Desktop sites preparing returns under their own EFIN, with one site transmitting returns for multiple EFINs, TCs will still need to identify primary Desktop sites transmitting for other secondary sites in SPECforce. These sites will be associated together during the software ordering process. The request for the Transmitting EFIN should be made at the time the software is ordered.

Note: All requests to add or delete one site's ability to transmit for another, after the software order is placed, must be completed in writing by the partner. The partner (i.e., contact name on account) can send an email to **support@vita.TaxSlayerpro.com** and should include "Transmitting EFIN Request" in the subject line. This request must be made and processed by TaxSlayer® prior to e-filing any returns. Include the SIDN and Order Number for all sites involved. TaxSlayer® will process these requests in two business days.

Co-located FSA Fusion VITA/TCE Sites:

Co-located self-prep Fusion sites (**located in the same building as the main/traditional site**) will have the option of ordering both the Online and Self-Prep software products. Fusion software orders **must** be entered into SPECforce at the same time the traditional Online order is placed, prior to the order going to the vendor.

Per the licensing agreement with TaxSlayer®, the two sites must be located at the same address (main and self-prep) with two different SIDNs. Tax consultants will place one software order for the main VITA/TCE and one software order for the FSA Self-Prep co-located Fusion site. These orders must be entered at the same time. TaxSlayer® will build a unique URL link for the co-located fusion component based on the two SIDNs' association.

Note: If the site desires a co-located FSA component **after** the software order has been placed for the main location, the tax consultant should order a **Stand-Alone** software package for the site.

Note: Each Fusion site must provide a support email and/or support phone number prior to their URL link being activated.

FSA Stand-Alone Sites:

FSA Stand-Alone sites will be able to order TaxSlayer® Self-Prep software. FSA Stand-Alone sites will have posted hours at a physical location. During those hours a Certified VITA/TCE Volunteer will be available to answer tax law questions and help with the software. TaxSlayer® will build a unique URL link and send an email to the site.

Note: Each Standalone site must provide a support email and/or support phone number prior to their URL link being activated.

FSA Remote Sites:

A **remote site** will be able to email the site's TaxSlayer® custom URL to a known individual (a previous client or a new client that is within the scope of the site i.e., Basic, Advanced, Puerto Rico) and/or place a link on a private-facing website, commonly known as an intranet site. The site must have a certified volunteer available to assist the client with tax law & software questions. The assistance can be via phone, chat, or email. Response must be in a timely manner.

- TaxSlayer® FSA Remote sites cannot do any of the following with their custom URL:
    - Place on public-facing web site
    - Send out in mass email
    - Post on any social media/blog platform
    - Include in electronic or paper newsletter/newspaper article

Note: Each FSA Remote site must provide a support email and/or support phone number prior to their URL link being activated. FSA Remote software can only be ordered for partners who ordered FSA Remote software for the 2025 filing season.