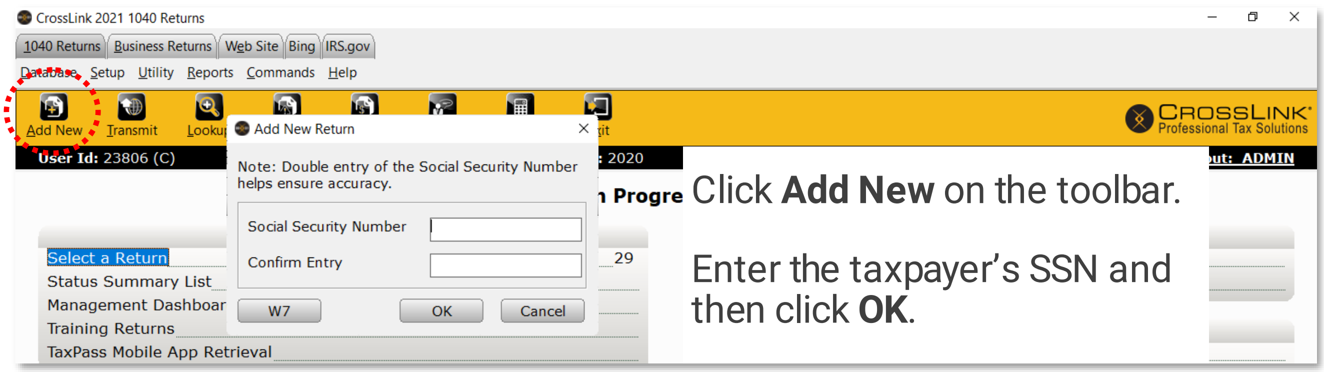
CrossLink 1040
Prepare a Tax Return Job Aid

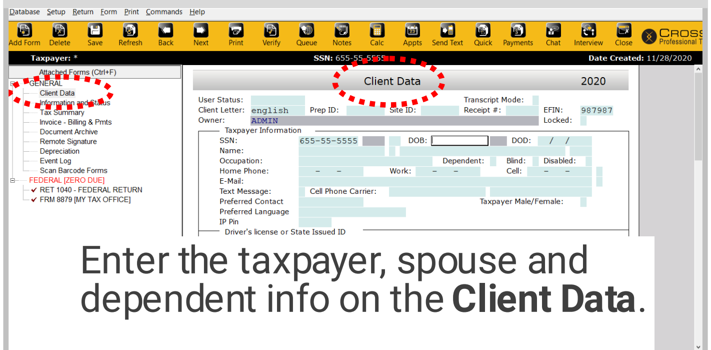
1 Start a new tax return



Click **Add New** on the toolbar.

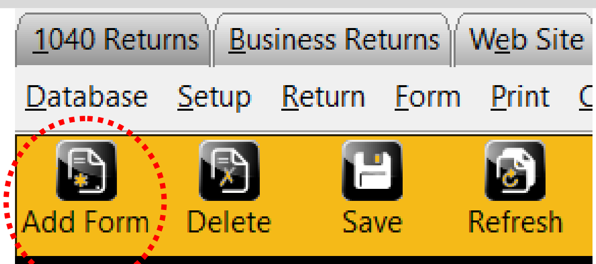
Enter the taxpayer's SSN and then click **OK**.

2 Complete the Client Data



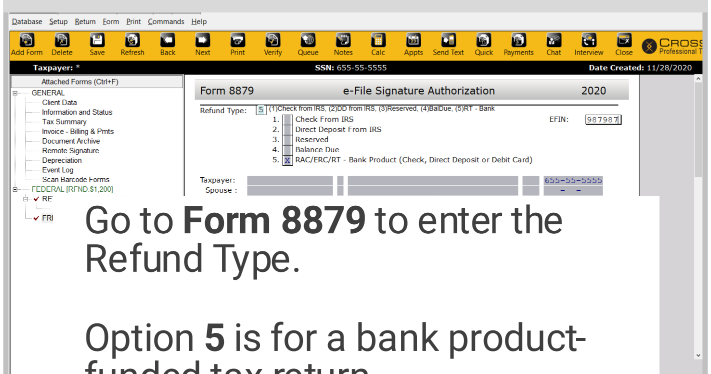
Enter the taxpayer, spouse and dependent info on the **Client Data**.

3 Add the forms you need



Click **Add Form** (top-left) to add tax forms as you need them.

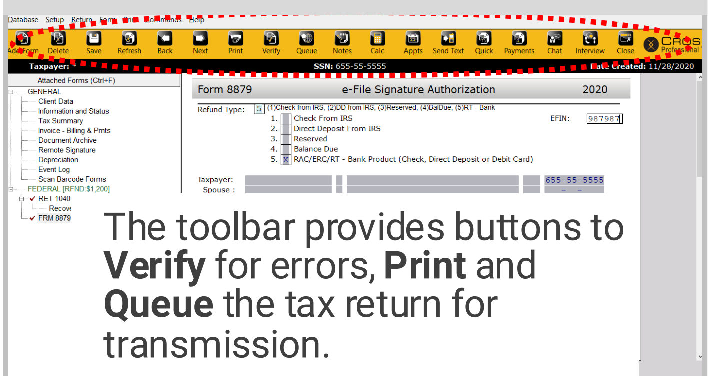
4 Review refund options



Go to **Form 8879** to enter the Refund Type.

Option **5** is for a bank product-funded tax return.

5 Use the toolbar to finish up



The toolbar provides buttons to **Verify** for errors, **Print** and **Queue** the tax return for transmission.

Need additional help? Contact us. 800.345.4337 Support@CrossLinkTax.com