CrossLink Desktop

Return Interview

User Guide

Complete tax returns the easy way

What is Return Interview?

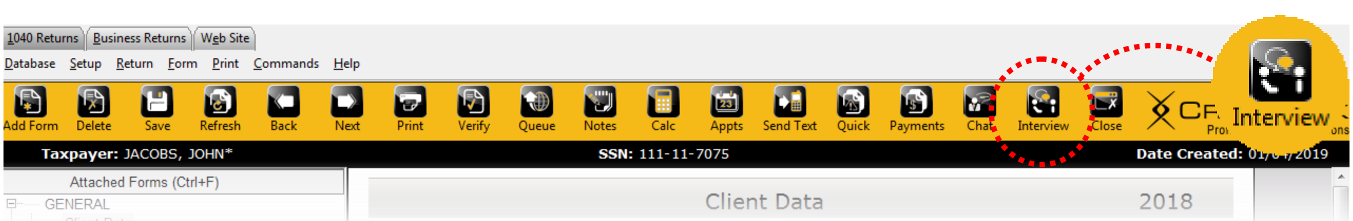
Return Interview is the newest method you can use to prepare tax returns in CrossLink Desktop. Instead of selecting and adding forms manually, Return Interview will help guide you step-by-step through the completion of a tax return.

Why should you use Return Interview?

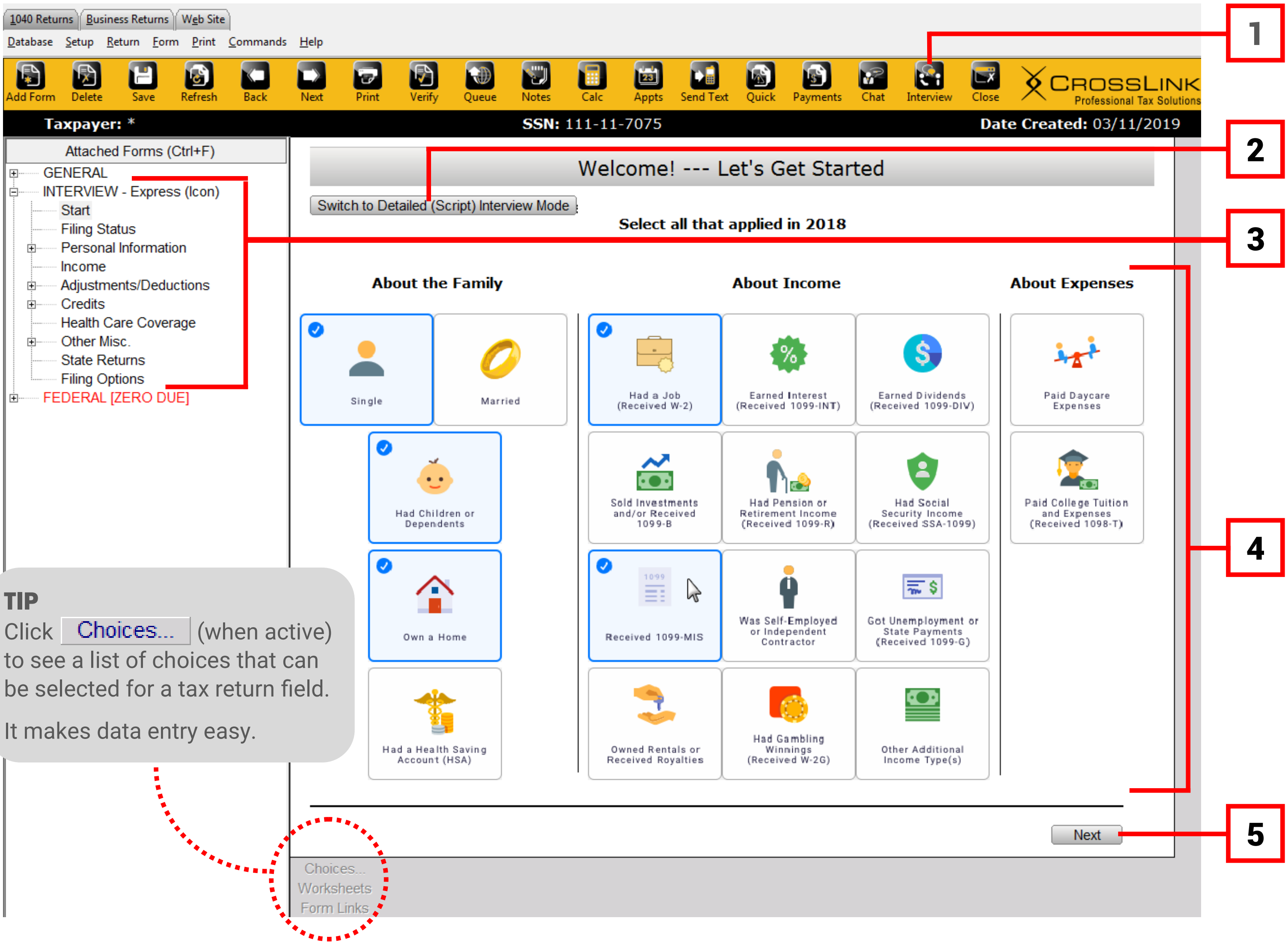
Use Return Interview if you're new to CrossLink or need help remembering which tax forms to add to a tax return. Return Interview is designed to assist anyone complete a tax return.

How do you use Return Interview?

Just click **Interview** on the tax return toolbar to get started.



Return Interview Basics



TIP

Click Choices... (when active) to see a list of choices that can be selected for a tax return field.

It makes data entry easy.

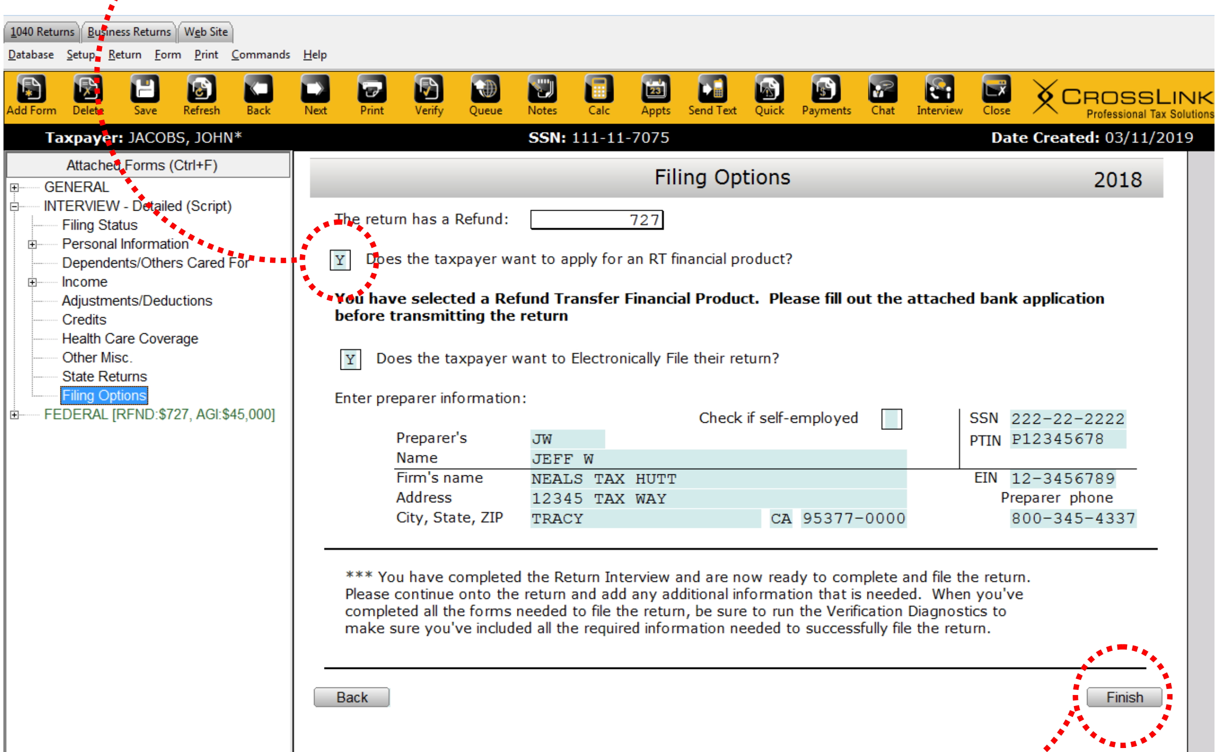
1. Click Interview to launch the Return Interview method
2. Switch between Detailed and Express interview modes
   Express (pictured above) is icon-based and good for common tax scenarios. Detailed is script-driven and based on detailed tax questions.
3. The Attached Forms pane lists all the sections that will be covered during the Return Interview process
   You can click + to expand a section or double-click to jump to a section.
4. Click the desired options to determine the forms added to the tax return
5. Use Next (and Back) to navigate through Return Interview

Final Steps & Refund Disbursement

Filing Options is the final section of Return Interview.

Does the customer want to use a bank product to receive their refund (and pay for their tax prep fees)?

Type ‘Y’ to answer Yes to the question that asks ‘Does the taxpayer want to apply for an RT financial product?’.



Click Finish once you're done

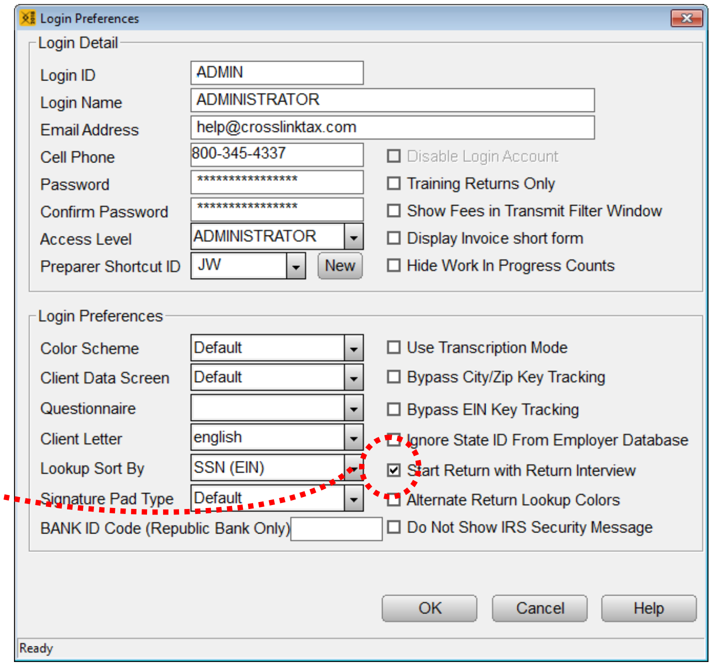
Once you click Finish, the program will Verify for errors and Queue/ Transfer the tax return. If you selected ‘Y’ for a financial product, CrossLink Desktop will guide to complete any missing data on the Bank App form.

Helpful Tip

Prefer to use Return Interview all the time?

You can configure the software to start all new tax returns using the Return Interview method. This configuration is based on your program Login and can activated (or deactivated) per Login Account.

1. Click **Setup > Login Accounts**
2. Double-click the Login you want to edit
3. Select the **Start Return with Return Interview** checkbox and then click **OK**



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Professional Tax Software

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