

# ATX™ Learning Portal

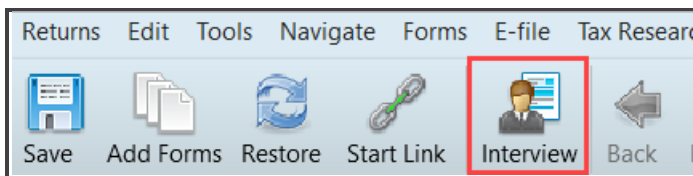
## Interview Mode

ATX includes an Interview feature, which allows you to input taxpayer data in an interview-style format, rather than directly inputting data into the forms.

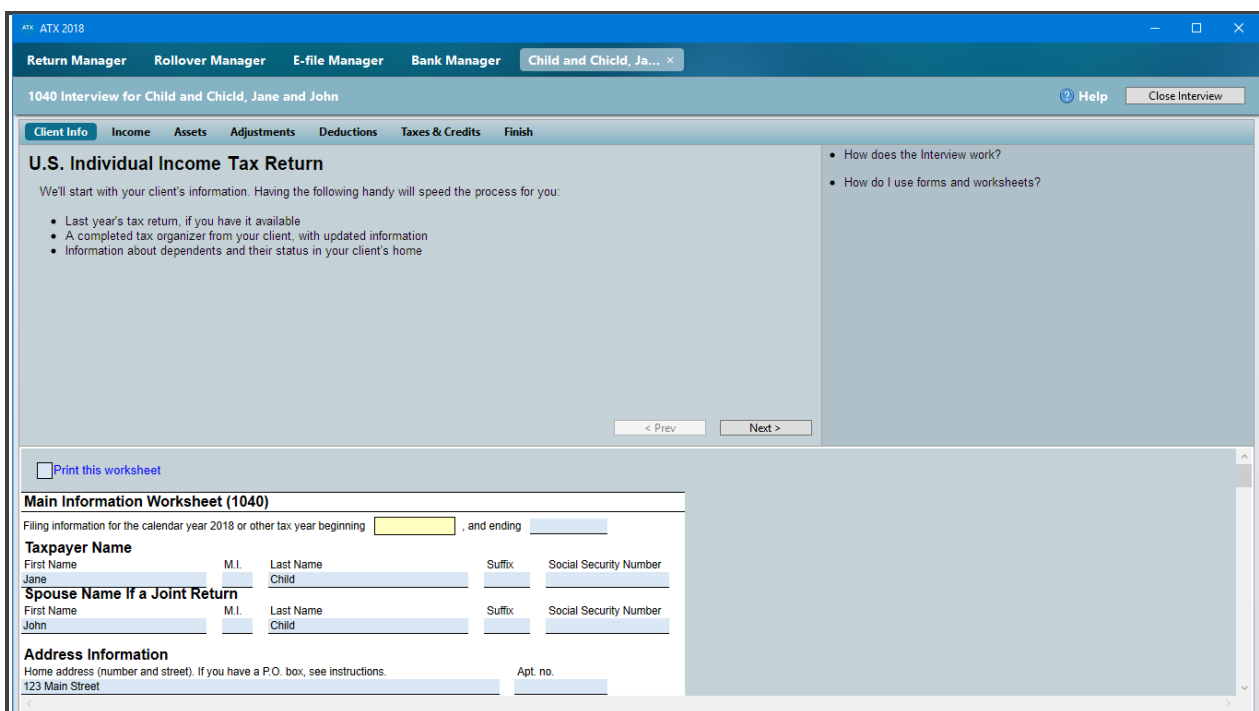
The Interview tool guides you step-by-step through a series of questions for the return. As you enter data in the tool, that data populates in the forms in the return. Based on your interview responses, the program automatically adds required forms or schedules to the return.

To access the Interview in an open return:

1. Click **Interview** on the toolbar.



2. ATX displays the Interview in the top section of the return and displays the forms below.

A screenshot of the ATX 2018 software interface. The window title is 'ATX 2018'. The main menu includes 'Return Manager', 'Rollover Manager', 'E-file Manager', 'Bank Manager', and 'Child and Child, Ja...'. The current view is '1040 Interview for Child and Child, Jane and John'. The interface is divided into sections: 'Client Info', 'Income', 'Assets', 'Adjustments', 'Deductions', 'Taxes & Credits', and 'Finish'. The 'U.S. Individual Income Tax Return' section is active, displaying instructions and a list of helpful information. Below this is a 'Main Information Worksheet (1040)' form with fields for 'Taxpayer Name' (Jane Child), 'Spouse Name If a Joint Return' (John Child), and 'Address Information' (123 Main Street). A 'Print this worksheet' checkbox is also visible.

3. Click **Next** to move through each screen of the Interview or click the tabs along the top to jump to a specific section.

**Client Info** Income Assets Adjustments Deductions Taxes & Credits Finish

### U.S. Individual Income Tax Return

We'll start with your client's information. Having the following handy will speed the process for you:

- Last year's tax return, if you have it available
- A completed tax organizer from your client, with updated information
- Information about dependents and their status in your client's home

< Prev Next >

4. ATX highlights the corresponding field on the forms to help you learn where data should be reported.

**Client Info** Income Assets Adjustments Deductions Taxes & Credits Finish

### Birth Date and Other Personal Information

	Filer	Spouse
Date of birth (MM/DD/YYYY)	9/14/1972	6/28/1975
Date of death (MM/DD/YYYY)		
Check if deaf	<input type="checkbox"/>	<input type="checkbox"/>
Check if disabled	<input type="checkbox"/>	<input type="checkbox"/>
Check if blind	<input type="checkbox"/>	<input type="checkbox"/>
If Qualifying Widow(er). Enter year spouse died.		

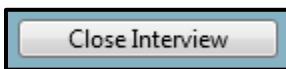
as your dependent, enter the child's name above.

#### Individual Filer Information

	Taxpayer	Spouse
Date of birth . . . . .	9/14/1972	6/28/1975
Age . . . . .	51	48
Date of death . . . . .		
Identity protection PIN (if applicable) . . . . .		

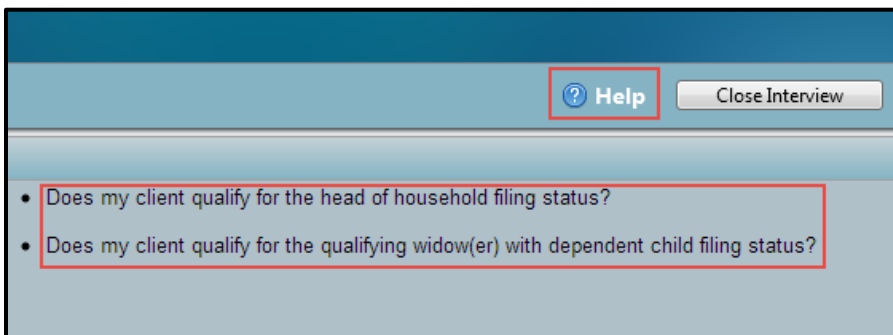
Check which phone number to list as "Daytime phone number":

5. Once you complete the Interview, click **Close Interview** to return to the forms.



## Interview Help

If at any point you need help with the Interview, you can click the provided quick links in each section or click the **Help** button on the top right.



Clicking the links opens a separate window to display the content:

