**How to Use Champion Tax Professional Software**

**Step 1: Installation and Setup**

1. **Download the Software**: Visit [Champion Tax Professional’s official website](https://championtaxpros.com/) and download the software for your system.
2. **Install the Software**: Run the downloaded file and follow the on-screen instructions to install it. Once installed, launch the software.
3. **Create an Account**:
   * Click on “Sign Up” or “Create Account.”
   * Fill in your professional details, including your tax preparer ID, firm name, and email.
   * Set a strong password and log in.

**Step 2: Setting Up a New Client**

1. **Add a Client**:
   * From the dashboard, click on “New Client” or “Add Client.”
   * Enter the client’s basic details, such as name, address, and Social Security Number (SSN).
   * Save the client profile for future use.
2. **Organize Client Documents**:
   * Scan and upload necessary documents like W-2s, 1099s, or other tax forms.
   * Use the “Document Upload” feature under the client profile to keep everything organized.

**Step 3: Preparing a Tax Return**

1. **Select Tax Type**: Choose the tax return type you want to prepare (Individual, Business, or Estate).
2. **Enter Income Details**:
   * Go to the “Income” section and input details from W-2s, 1099s, or other forms.
   * Use the “Import” option if you have electronic forms to save time.
3. **Deductions and Credits**:
   * Navigate to the “Deductions” tab.
   * Enter details for deductions such as medical expenses, home mortgage interest, or charitable donations.
   * Add credits like Child Tax Credit or Earned Income Credit, if applicable.
4. **Review Calculations**:
   * Use the “Review” button to check for errors or missing information.
   * The software will highlight areas that need attention.

**Step 4: E-Filing the Tax Return**

1. **Check the Summary**:
   * Review the summary page to ensure all details are accurate.
   * Confirm client details, income, and deductions are correct.
2. **Get Client Approval**:
   * Generate a PDF of the prepared return and share it with your client for review and signature.
3. **E-File the Return**:
   * Click on “Submit” or “E-File.”
   * The software will guide you through filing with the IRS and state authorities.

**Step 5: Post-Filing Tasks**

1. **Save Records**: Keep a copy of the filed return in the client’s profile.
2. **Track Refunds**:
   * Use the “Track Refund” feature to monitor the client’s refund status.
3. **Schedule Future Appointments**:
   * Add reminders for quarterly tax payments or next year’s filing.