TaxSlayer Entry Enhancements

(Changes that will significantly improve volunteers' ability to prepare correct/accurate returns. Note: some changes are included that do not impact the federal return but are required for a state return since information is entered in federal section.)

Contents

1. **Ability to View Any Form (Federal or State) within Return**

   Description – Other than the 1040 View, TaxSlayer requires the volunteer to go through many time consuming steps to create a pdf file of the print set and a long wait to see actual forms. The pdf pages are inactive, e.g., there is no ability to link back to an entry page to correct an error found during this review. Preparer should be able to skip (one click) to a current working view of both the complete federal and state returns.

   Business Case - Many landing pages for forms do not show all the data that affects that form, e.g., medical expenses or state sales tax deduction when itemizing deductions on Schedule A or offsets to retirement plan contributions on Form 8880. Volunteers understand what the results should be, but cannot verify specific entries on forms as data

are entered. Volunteers should be able to readily double-check a form while preparing, reviewing or Quality Reviewing a return. This is particularly onerous when dealing with state returns that have various different ways to handle some or all of the income or expense information entered for the federal return.

The Quality Reviewer must note or remember any errors found while reviewing the return and then work through multiple window changes to get to an input that needs to be corrected and then multiple window changes and time to get back to the Quality review print out. This increases likelihood of overlooking a needed correction.

Use Case: This would speed up production and Quality Review and reduce errors since the preparer can quickly check and correct inputs as necessary. The taxpayer experience would also be enhanced by the preparer not having to work through multiple pages.

2. **Ability to view the Federal and State Refund/Balance Due on demand**

Description: Allow the user to access the Federal and State Refund/Balance due while working inside the tax return without having to navigate to the Summary/Print screen or by generating a PDF

Business Case: Preparer should be able to quickly check the Federal and State Refund when working in the following sections of the return:

- Federal Section
- Health Insurance Section
- State Section

This ability allows the preparer to have quick status view after completing an entry such as Schedule A itemized deductions or entering a series of Interest and dividend transactions.

Use Case: Be able to toggle the refund monitor on to aid in confirming entries and off so the taxpayer is not watching the Refund/Balance due change during data input.

3. **Ability to view the Federal AGI on demand**

Description: Allow the user to access the Federal AGI while working inside the tax return without having to navigate to the Summary/Print screen or by generating a PDF

Business Case: Preparer should be able to quickly check the Federal AGI when working in the following sections of the return:

- Federal Section
- Health Insurance Section

This provides the preparer a quick status view after completing a series of entry forms such as Schedule A itemized deductions or entering a series of Interest and dividend transactions to quickly identify obvious typographical errors and also allows the preparer to see if the AGI is above or below AGI thresholds for applicable tax situations.

Use Case:

- Use Case #1: As a preparer, I want to have the ability to select an option that displays the current Federal AGI from one of the primary menu items when a return is open.

- Use Case #2: As a preparer, I want the Federal AGI to be hidden while I am entering data on an entry form, to eliminate calculation contingencies on the system.

4. **One Entry Page for All Information on a Given IRS Form**

Description: There are several situations that require the preparer to navigate to multiple entry pages to enter all the information on the IRS form. As examples:

- Tax-exempt interest on a Form 1099-INT must be entered on a separate tax-exempt entry page rather than on the interest entry page

1099 Description Schedule B

Choose the type of Interest or Dividend item you want to enter:

○ Interest Income, Form 1099-INT, Form 1099-OID (including interest income < 1,500)

○ Tax Exempt Interest Income, Form 1099-INT, Box 8 or Form 1099-DIV, Box 10

○ Dividend Income, Form 1099-DIV

- Interest from private activity bonds must be added to income for AMT purposes. TaxSlayer requires preparer to open Form 6251 to enter PAB interest rather than including field on either interest or dividend landing pages.

Form 6251 – Alternative Minimum Tax

Adjustments to Alternative Minimum Taxable Income

Certain interest on a home mortgage **not** used to buy, build, or improve your home $

Investment interest expense (difference between regular tax and AMT) $

Depletion (difference between regular tax and AMT) $

Interest from specified private activity bonds exempt from the regular tax $

- There is a separate page for 1099-R Nontaxable Income – these items should be on the 1099-R entry page:

1099-R Nontaxable Income

Nontaxable Distribution

If part or all of your 1099-R distribution(s) was for any of the following reasons, please check the appropriate box.

Important: The amount that you enter as the Taxable Amount in Box 2a for each 1099-R will be carried to your return as taxable income. If any of the exclusions apply, do not include the excludable amount in Box 2a for the appropriate 1099-R. Only include in Box 2a the amount that you want reported on your return as taxable income.

Exceptions:

☐ Check here to mark this as a Qualified Charitable Distribution (QCD) on your return.

☐ Check here to mark this as a qualified health savings account (HSA) funding distribution (HFD) on your return.

☑ Check here if you are an eligible retired public safety officer, and part of your distribution was used to pay the premiums for accident or health insurance, or to pay long-term care insurance.

Business Case: An entry page should include all the fields present on the IRS form and questions to be answered so that the preparer does not have to navigate to another page. By aligning data entry with forms received the possibility of data entry errors such as double entry of data or missing data due to need to access multiple data entry screens for the same document is reduced. A single data entry screen reduces TaxSlayer's system processing load by reducing the number of times that data entry screens need to be compiled. For example, Form 6251 is out of scope for VITA/TCE program and volunteers should not be expected to remember to enter PAB income on this form. This will save preparer and reviewer time and avoid potential errors if preparer forgets to create a separate entry for an item. The Form 1099-INT entry page should include the relatively new bond premium fields (boxes 11, 12 and 13).

Use Case Example: Preparer is entering info from a 1099-DIV or 1099-INT and encounters an entry in the "Tax Exempt Income" line. Being able to simply enter it on the same form (rather than having to exit that form and open a new one) will be more efficient and less error prone.

5. **Add Destination Selection to Form 1099-MISC Entry Page**

Description: Add a selection on the 1099-MISC page that routes the information to the correct destination.

Business Case: The 1099-MISC page is an initial entry point of data and TaxSlayer currently provides a choice where the income should appear after the 1099-MISC page is closed. It is currently possible that the income on the 1099-MISC page goes nowhere if the preparer misses that next step. Add a question at the bottom of the 1099-MISC page to avoid this. Should this income go to (1) Schedule C, (2) Schedule E or (3) Line 21?

1099-MISC Middle

1099-MISC Information

Rents	$
Royalties	$
Other income	$
Federal income tax withheld	$
Fishing boat proceeds	$
Medical and health care payments	$
Nonemployee compensation	$
Substitute payments in lieu of dividends or interest	$

☐ Payer made direct sales of $5,000 or more of consumer products to a buyer (recipient) for resale

Crop insurance proceeds	$
Foreign tax paid	$
Foreign country or U.S. possession	
Excess golden parachute payments	$
Gross proceeds paid to an attorney	$
Section 409-A Deferrals	$
Section 409-A Income	$

State Information 1

Box 1 Rent

Box 2 Royalty

Box 3 Other Income

Box 7 Non-employee Compensation

These numbers are going to move, the question is where?

FOUNDATION

If You Don't Click Sch E or C:

Box 1 & 2 Rent and Royalty

Form 1099-MISC

Owner	Payer	Carried To	
Taxpayer	irs	None	✏ Edit 🗑 Delete

⊕ Add a Form 1099-MISC

✔ Continue

Box 3 Other Income

Form 1099-MISC

Owner	Payer	Carried To	
Taxpayer	irs	Line 21	✏ Edit 🗑 Delete

⊕ Add a Form 1099-MISC

Box 7 Non-employee compensation

Form 1099-MISC

Owner	Payer	Carried To	
Taxpayer	irs	None	✏ Edit 🗑 Delete

⊕ Add a Form 1099-MISC

✔ Continue

AARP TAX-A

FOUNDATION

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Lynchburg

Use Case: All preparers have made this error and with the increasing use of 1099-MISC Forms, we need a fail-safe process of routing the information.

6. **Automatically Activate Form 8615 (Kiddie Tax) when Required**

Description: The software doesn't automatically add the Form 8615 or give the preparer any kind of warning that one is probably required.

Business Case: Although there are some situations where a dependent child with unearned income over $2100 is not subject to the kiddie tax (if both parents are deceased, for example) most will be. There should at least be a question for the preparer to answer (Is this taxpayer subject to the kiddie tax?) with a link to the kiddie tax rules.

7. **Mask Bank Information**

Description: The form for entering bank information on the E-File page allows cut and paste of bank routing number and account number. Requiring the information to be entered twice serves as an important check against typographical errors. Both should be masked as soon as entered (the same manner the SSN is masked when starting a return) and the preparer should not be able to cut and paste.

Business Case: Entering the information twice is an important safeguard. The current procedure significantly reduces the value of the double-entry.

8. **Eliminate Due Diligence questions**

Description: Eliminate the due diligence questions (federal and all states) that do not apply to VITA/TCE volunteers.

Business Case: Navigating through these questions is a burden and confusing to many volunteers, especially when working through the E-File page multiple times. There are also questions that can result in incorrect denial of a credit.

9. **Revise Return Type Descriptions**

Description: The return type descriptions are not obvious or clear to preparers. Suggest changing to the following for both federal and state returns:

- For refund due:
  - Electronic Mailed – Change to E-file with Paper Check
  - Direct Deposit – Change to E-file with Direct Deposit
  - Paper Return with Direct Deposit – Keep it the same
  - Paper Return – Change to Paper Return with Paper Check
- For balance due returns:
  - Mail Payment – Change to E-file with No Direct Debit

- Direct Debit – Change to E-file with Direct Debit

- Paper Return with Direct Debit – Keep it the same

- Paper Return – Change to Paper Return with No Direct Debit

Business Case: The preparer must select the type of return to indicate if it is e-file or paper and how the over-payment or balance due is to be processed. The return type names are confusing and lead to errors.

10. **Make Fields Not Required for Form 8283 Non-Cash Donations Optional**

    Description: Non-cash donations that total more than $500 require submission of Form 8283, but individual donations listed on that form that are less than $500 do not require data in columns (e), (f) and (g) as shown on the IRS form:

Note. If the amount you claimed as a deduction for an item is $500 or less, you do not have to complete columns (e), (f), and (g).					
	(d) Date of the contribution	**(e)** Date acquired by donor (mo., yr.)	**(f)** How acquired by donor	**(g)** Donor's cost or adjusted basis	**(h)** Fair market value (see instructions)	**(i)** Method used to determ the fair market value
A					
B					
C					

    Business Case: TaxSlayer does not recognize that this information is not required, but taxpayers do not typically have it for donations of multiple small items which means form cannot be properly completed by the preparer without guessing at required information.

11. **Add Filing Status Comparison – MFJ versus MFS**

    Description: Add the ability to split an MFJ return into two MFS returns to determine the better filing situation. Note: this requires that all income and expense items are identified as taxpayer, spouse or joint.

    Business Case: Although MFJ is usually better than MFS for a couple, there are situations when separate returns offer advantages. Examples include:

    - Taxpayer and/or spouse owe unpaid taxes or child support (filing a joint tax return may result in the IRS offsetting joint refund to pay the taxes)

    - Taxpayer and/or spouse have income-based student loan payments (payments will be based on one income rather than couple's combined income)

    - Taxpayer and/or spouse have a lot of medical expenses (especially if one spouse has a lower Adjusted Gross Income amount than the other spouse)

12. **Allow Choice of Landing Page When Reopening a Return**

    Description: Allow the user to choose which page to view rather than automatically forcing the summary view and include as a choice the Submissions page.

    Business Case: The user many times has reason to choose a different page for data entry or for quality review. Simplify the navigation by allowing user to choose which page to view. This will save time waiting for the calculation when preparer knows he or she has

more data to enter. When entering an existing return, preparer is often doing so to make an update. If he or she simply wants to see the summary, he or she can use the print function without opening the return.

13. **Add Separate Menu Item with Direct Link to Submissions page**

    Description: Provide a link to the Submission page from any part of the return

    Business Case: Eliminates non-productive paging through screens

14. **Standard Menu on E-File Page**

    Description: Include the same "hamburger" MENU Drop-Down box that appears in upper left corner of the Summary/Print page on the E-File page.
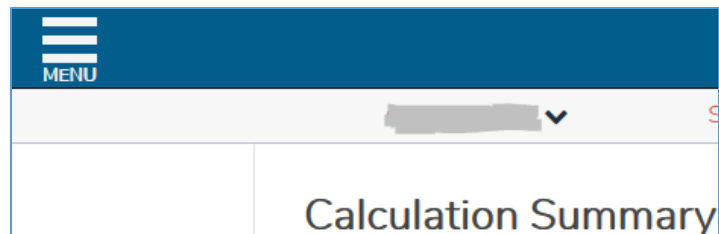
    Business Case: Often need to return to another section.

15. **Provide "List" based entry screen for 1099B (Cap gains/losses) data.**

    Business Reason: Most common is that taxpayers receive a consolidated brokerage statement rather than a Form 1099-B. These statements typically include many transactions from the same payer. To improve efficiency for preparer and reviewer, provide a screen that allows entry of all information related to a transaction on a single line and multiple lines (list format) to allow entry of multiple transactions on a single screen. The ability to "tab" from field to field on that screen would allow much faster data entry.

    Use Case: Preparer is working with taxpayer that has a large number of transaction entries. They can all be entered on a single screen.

16. **Add W-2 Verification Code to Print Set Image**

    Description - More and more W-2s include a Verification Code. The W-2 shown in the Quality Review 2016 print package does not have a field for this which requires the Quality Reviewer to open the return to review it. Include the verification code in the Quality Review print package.

    Business Case: The IRS is expanding the initiative to verify the authenticity of Form W-2 data through the use of the Verification Code. This initiative is one in a series of steps to combat tax-related identity theft and refund fraud.

17. **Revise W-2 Social Security and Medicare Entries for Pre-Tax Contributions**

    Description: When pre-tax contributions to a qualified retirement plan are included in Box 12 (codes D – H), Box 3 and Box 5 should automatically be adjusted.

Business Case: Boxes 3 & 5 are auto-populated to be identical to Box 1. If there are pre-tax contributions in box 12, boxes 3 & 5 should be automatically adjusted by the program. The preparer should not have to correct the auto populated boxes in 3 &5. It is very easy for the preparer to miss this entry.

18. **Allow Free-form Box 14 entry on W-2**

Description: Box 14 is used for a number of items. The current pull-down menu covers a small portion of them. Nationally, the use of Box 14 is too varied for a fixed menu.

Business Case: Forcing preparers to use "Other" for a majority of Box 14 entries loses all information from that Box.

Use Case Examples:

- New Mexico State and City workers have pre-tax cafeteria plan contributions listed in multiple named entries in Box 14. The input W-2 should accurately reflect these. Even better, the system could offer matching choices as the preparer enters data based on previous local uses of Box 14.

- PA State Unemployment Insurance (often but not always shown as PASUI) is a deduction on Schedule A line 5 when itemizing. Should be clear on W-2 and flow to line 5 automatically

19. **Allow Form 8888 on Return-By-Return Basis**

Description: Form 8888 for entering multiple bank accounts for splitting refunds and/or purchasing savings bonds is not needed for the vast the majority of taxpayers so site administrators uncheck "Offer 8888" in office set-up. If a taxpayer wishes to split their refund, the Site Administer must go into Office Set-up and check "Offer 8888" which turns it on for all subsequent returns prepared at the site until the return for which it is needed is completed.

Business Case: This is time consuming and disruptive and likely doesn't apply to the other returns being prepared which means they lose benefit of the duplicate entry of routing and account numbers. Provide a provision so that individual preparers can simply add Form 8888 to a return if needed.

20. **Activate Form 1310 When Needed**

Description: If a taxpayer is deceased and has no surviving spouse, the preparer is prompted to enter the name of the person representing the taxpayer. The preparer must then remember to file Form 1310 with the return.

Business Case: The software should prompt the preparer to execute Form 1310 in this situation. Otherwise the return will be rejected by the IRS and require a return visit by the person representing the deceased taxpayer.

21. Enable Multiple Forms When Using *Quick File*

Description: In some cased, selecting an entry form allows preparer to enter multiple versions of a form, e.g., after entering first W-2, option to add another is offered:

W-2 Wage Statement

Employee	Employer	Income	Tax Withheld		
Taxpayer	JACKS STEAKHOUSE	$31,916	$2,685	✎ Edit	🗑 Delete

⊕ Add a W-2 Wage Statement

For other entry pages such as Form 1099-R, completing the first form takes preparer to next form in Quick File list.

Business Case: Taxpayers frequently have multiples of any given form. Software should consistently allow preparer to enter all of a given type before moving to the next one so that none are inadvertently overlooked.

22. Record of General Sales Tax When Itemizing

Description: When a taxpayer itemizes deductions and receives a state income tax refund, the portion of that refund that is taxable the following year depends in part on the general sales tax calculated for line 5b on Schedule A

Taxes You Paid	5 State and local (check only one box): a ☒ Income taxes, or b ☐ General sales taxes	. . . .	5	125

Business Case: Include the amount of general sales tax that was calculated for line 5b on the *Supporting Statements for SCHEDULE A* page even if sales tax is not used so that preparer has information available for next year's returns and can therefore treat the taxability of the state income tax refund correctly.

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Supporting Statements for SCHEDULE A
Client : YOUNG                                          212-00-0000

Medical and Dental Expenses

Description of Expense                                      Amount
Medical and Dental Insurance                                 5080
Amount Paid to Doctors, Dentists, Eye Doctors, etc.          2993
Prescription Medicine, Drugs, or Insulin                     1154
Nursing Help (Not for Healthy Baby or House Work)            3000
Hospital Care including Meals and Lodging                    1200
Medical Aids (Crutches, Hearing Aids, Wheelchairs, etc.)      210
Mileage (1236 miles x 0.190)                                  235

TOTALS:                                                     13872
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23. Add Estimated Tax Payment Worksheet

Description: Include an estimated tax worksheet to aid the volunteer and taxpayer in determining the estimated payments that are required. It should pre-populate with the current year income and expense data as a starting point, allow the preparer to revise those amounts and allow the preparer to enter specific payments if the taxpayer so chooses.

Business Case: Taxpayers often request that estimated payments be set up and this will aid in determining the amount of each payment.

24. Allow Direct Debit of Estimated Tax Payments

Description: Include a direct debit option for federal and state estimated tax payments that also allows taxpayers to select when to have the payment withdrawn.

Business Case: Some taxpayers prefer to have the IRS directly debit their estimated tax payments so that they don't have to remember to write and mail checks. This is consistent with the continuous movement away from paper toward a paperless process.

25. Update Direct Debit Amount if Balance Due Changes

Description: Preparer will enter amount to be debited to taxpayers account when preparing return and that amount may or may not be entire balance due per taxpayer's request. If the balance due later changes (as a result of quality review for example), the software should provide an alert to the preparer to review the originally requested direct debit to ensure it is still correct.

Business Case: If the balance due changes, the original direct debit will no longer be correct which means the taxpayer will under or over pay.

26. Show Age of All Individuals on Return as of End of Tax Year

Description: The end-of-year age is often required information to determine eligibility for credits, dependency, etc.

Business Case: The software determining and displaying the age(s) will help the preparers as the return is prepared such as in determining dependency. Will help to alert for upcoming RMD, ceasing of CTC and determining College Student dependency.

27. Increase Contrast and Provide Option to Increase Default Font Size on Entry Screens

Description: Increase font size and contrast on entry screens to improve readability. Allow the user to choose alternative color combinations to accommodate individual needs/preferences.
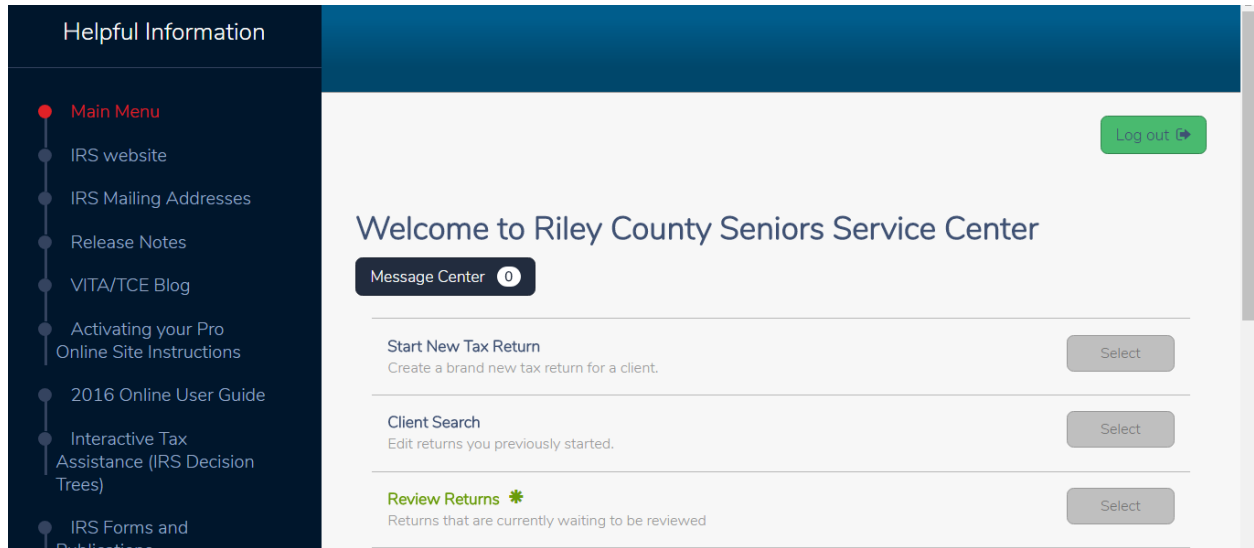
Business Case: Many of the AARP Foundation Tax-Aide volunteers are older adults and find the lighter color/small fonts difficult to read and it is not acceptable for color blind individuals, especially those with red/blue color blindness. Volunteers miss errors for similar characters such as m exchanged for n, 2 for 5, and b for d. Much of the items entered are in a gray color with a less than sufficient contrasting background. Recommend that entered data be in black with a background that provides good contrast.

Improve Quality Review AND reduce rejections due to readability issues.

28. **Add Sales Tax Worksheet as Default on Itemized Deductions Page**

    Description: The general sales tax worksheet must be selected and filled out by preparer to calculate the sales tax deduction. The worksheet Instead should automatically calculate based on the state rates and zip code since pertinent basic data are already in return. Software should allow the ability to change the assumed rate or have a split year if taxpayer moved. Also, provide an alert to edit for taxpayer specific situations such as purchase of a car or airplane.

    Business Case: Many volunteers forget to activate the worksheet and are therefore missing deductions. As a result the refund is less than it should be or amount owed is more than it should be.

29. **Revise Health Insurance Section**

    Description: Eliminate the introduction. The initial questions on the first page should be 1) did everyone in the household have insurance for all 12 months and 2) was insurance purchased through the marketplace. If yes to 1) and no to 2), exit session. For returns where the taxpayer can be claimed as a dependent, bypass the section. Move the affordability exemption to the end of the exemption section.

Business Case: The vast majority of our returns involve taxpayers who have minimum essential coverage such as Medicare or employer provided insurance for all 12 months

30. Revise Entry Method for Form 1040X

Description: Current method of entering corrected version of return, then creating the 1040X amendment, and then entering the original return information, increases the labor and increased the possibility of error.

Business Case: If the original information is entered first, then the 1040X created, and then the changes entered (for example adding or deleting a late W-2), there would be no need for entering all of the original return information as it would flow automatically. A return is going to have to be created regardless of the method, but the current method makes one have to, in effect, create two returns.

Use Case: This would ease the flow of information. It would only necessitate changing what needs to be changed, and then trusting the program to make the resulting changes throughout the return.

31. Display All Pertinent Information on Pages

Description: When a data item is entered on an entry page, it should be displayed in all other places of the return where that data item is used. Examples include HSA contribution on the W-2 should show on Form 8889, Medicare deduction on Social Security page should show on medical deductions page for Schedule A, etc. In like manner, items that are calculated on a work sheet should also show results of the calculation, such as the calculated General Sales Tax deduction should appear on the Sales Tax Deduction work sheet.

Business Reason: Even though TaxSlayer as currently configured will result in the correct solution, it is cumbersome to use in the preparer/taxpayer environment, as opposed to the individual taxpayer preparing his own return, and these inherent inefficiencies are magnified when attempting to complete and review multiple returns in a day.

32. Provide View of Completed ACA forms at the end of the ACA section

Description: Allow viewing of the completed ACA forms at the end of the ACA section so the counselor can verify how the calculations were done or if the correct result was obtained after all the ACA input.

Business Case: Time consuming to go out to the "preview return" screens to see if the final results were the expected results for ACA

33. Save Each State Page When "Continue" Button is Clicked

Description: Each state page should be saved when the continue button is clicked – just as it is done in the Federal Section

Business Case: Saving data should be done in a consistent manner. The current process sometimes results in data being missing on the state return

34. **List Entry for Interest and Dividends**

Description: Do not require separate forms (and additional "clicks") to enter interest and dividends from multiple sources when the only data to be entered are name and amount

Business Case: Reduce data entry time

35. **Form W-2, Box 12, Code H Adjustment**

Description: Code H is an elective deferral to a section 501(c)(18)(D) tax-exempt organization plan and is to be entered as an adjustment on Line 36 of Form 1040 with the note "501(c)(18)(D)" next to the amount.

Business Case: TaxSlayer does not automatically enter this adjustment which means the preparer must recognize Code H and then manually make the adjustment. Easy to overlook and thereby create a return that penalizes the taxpayer.

36. **Meaningful and Correct Warning Messages**

Description: There are many invalid or unhelpful warnings before progressing to new page ("We have some concerns with your form…"), particularly on W-2s and 1099-Rs. Warnings should be fixed to reflect real problems. As examples:

- Since the software automatically fills in the taxable amount for a Form 1099-R, asking why it's $0 when changing it to $0 had to be a conscious decision by the preparer doesn't make sense:
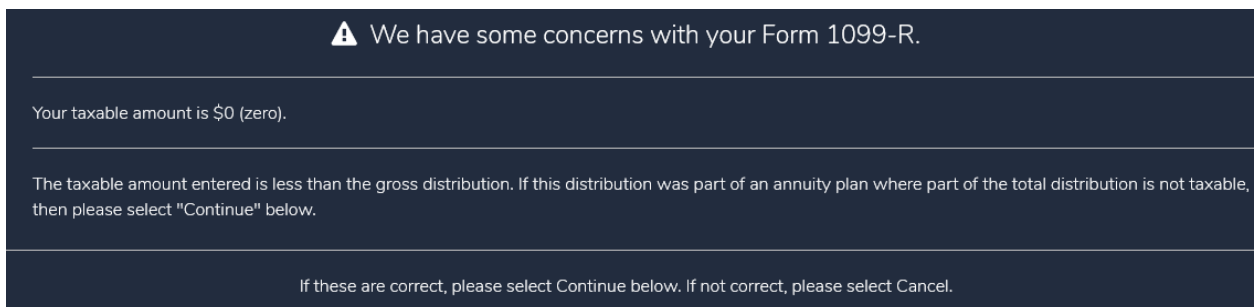
- There is often a message in pink on the E-File page that says you can't e-file but you can print, but this isn't true as there is nothing wrong with the file and it can be e-filed. This message is incorrect.

- There is a warning whenever a W-2 containing Social Security tips is prepared that social security withholdings exceeds the expected amount. This warning is based on incorrectly comparing social security wages (box 3) to social security tax withheld (box 4). The correct calculation compares social security wages (box 3) PLUS social security tips (box 7) to social security tax withheld (box 4).

- There is a warning when a 1099-INT contains both Interest on US Savings (box 3) and Federal tax withheld (box 4). This warning is based on an incorrectly comparing Federal tax withheld (box 4) to Interest Income (box 1). The correct calculation compares Federal tax withheld (box 4) to Interest Income (box 1) PLUS US Savings (box 3).

Business Case: Warnings should be based on correct calculations. Repeatedly issuing invalid warnings leads to the "Chicken Little" effect: tax preparers ignoring the warning even when the warning may be valid. Eliminating superfluous warnings reduces TaxSlayer's system processing load. Correcting this problem will improve return accuracy, since the warnings will be believable.

37. Expand Notes Space and Automatically Date

Description: Allow more space in Notes for more details rather than necessitate several notes; automatically include date/time and username.

Business Case: Notes are an important tool for documenting particular situations. Make them more use friendly.

38. Carry Address Changes to All Forms

Description: If address information in the "Basic Information" area is changed after entering other items in the return (such as an error found in quality review), the change should carry over to the W-2s and 1099-Rs sections of the software. As it stands now, if any part of the address is changed, each entry page with the address must be manually updated.

Business Case: While there may be times when a W-2 or other form has a different address for the taxpayer, those are unusual. The current process is time consuming and prone to be overlooked.

39. Display Gain or Loss on Capital Gains Transaction Page

Description: Add the calculated gain or loss to the Capital Gains Transaction entry page to aid the preparer in verifying the entries are correct.

Business Case: Displaying the gain or loss will help ensure a correct return, particularly when there are adjustments which are easy to miss-enter.

40. Add Linkable Worksheets

Description: Entries often require preparer to sum individual statements and enter a total. Real estate tax for example can be local, county and school district. Provide a worksheet for capturing the details that can be linked to any field.

Business Case: Provides an audit trail for the preparer and the quality reviewer of the underlying data for the entry. Reduces likelihood of a missed or miss-calculated entry since data are all visible.

41. **Filing Status Change Deletes State Return(s)**

Description: When the filing status on a return is changed (as a result of QR for example), the state return is deleted. This requires reentry of all the state specific information.

Business Case: Additional time required to recreate the state return plus increased likelihood of something being missed and the return being incorrect.

42. **Simplify State Income Adjustments on Forms 1099-INT and 1099-DIV**

Description: For state income tax purposes, federally reported tax-exempt income and US obligations income may need to be adjusted for state reporting purposes. Most brokerages report the adjustment as a % adjustment. TaxSlayer requires tax preparer to calculate a dollar amount. Allow the tax preparer to choose the state taxable amount as either a percent or a dollar amount.

Business Case: Many returns for seniors have a large number of these data entries. Eliminating some of the manual calculations would enhance productivity. In addition, the fewer the items calculated off-line, the less likely there will be errors. Also aids Quality Review as reviewer would not have to verify the calculation of the dollar amount.

Use Case: Tax preparer would toggle between data entry format options: dollars or %.

43. **Freeze Accepted Return**

Description: Once a return has been Accepted, it should not be affected by changes in the software.

Business Case: If changes are made in the software, the preparer must know what was transmitted to determine if the return must be amended to include the changes.

44. **Add Chat Option to Main Menu**

Description: Currently the chat support feature only appears inside of a tax return. There are times when there are support questions that can benefit from the chat feature but are not return specific. Chat should be accessible to the volunteer without being inside of the return.

Business Case: There are times when support is needed that is not specific to a return. These situations can require an immediate need, i.e. cannot wait for the turnaround time required for an email submission.

45. **Enable Multiple forms when Building Taxpayer Profiles**

   Description: Profiles can be an efficient means of entering a tax return. However, the current profile execution does not allow you to enter multiple copies of a form.

   Business Case: Currently, when creating a Taxpayer Profile, you cannot include multiple copies of the same form. However, when entering data without a profile, the user is taken back to a screen that prompts them to add a second form (e. g., W-2). When using the profile after entering the first W-2, the user is taken to the next document. The profile should return the user to the same screen as the manual entry. This should apply to all forms.

   Use Case: With the current approach to profiles, after completing the first document such as a W-2, additional W-2s have to be set aside and then revisited after going through the entire profile. So using the profile, rather than make the entry process more efficient actually makes it less efficient.

46. **Basic Information Summary Page**

   Description: Add a summary landing page to the Basic Information section. This page would collect and display of all the basic information, including age calculations for the tax year.

   Business Case: Print Summary does not show all biographical data entered by preparers. Quality Reviewers must click back through numerous pages to check taxpayer or dependent data. The benefit of this change is a quick preparer review of the tax family (especially beneficial with large tax families) and it would expedite QR significantly.

   Use Case: Quality Reviewers would check this summary landing page to review all of the client's biographical data. Preparers would check this page for qualifying ages for credits and dependency status.

47. **Error Messages on State Returns**

   Description: If a preparer selects a state return option, starts to complete the data entry and then decides that that particular form is not needed, there is no Cancel option to back out. TaxSlayer then gives an error message for an incomplete form.

   Business Case: The only obvious option to get past this is to delete the state and start over – a waste of time – and increases the likelihood of an incorrect return as the preparer is frustrated by this problem.

48. Substitute Form 1099-R or W-2 Requires EIN

Description: Entering a substitute for 1099-R or W-2 because taxpayer did not receive form from payer requires EIN.

Business Case: Taxpayer won't have an EIN from payer since proper form was not received. Eliminate this as required field.

49. Provide Option to Disable Complete Button Unless Approved Button Has Been Checked

Description: As an additional safeguard to ensure proper quality review, provide a site option to require each return to be submitted for review and then approved before the Complete button can be selected.

Business Case: Returns should not be able to be shown in Complete status without quality review.