

TaxSlayer Site Management Enhancements

(Changes that will simply/improve managing returns [finding, e-filing, correcting rejects, etc.]

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1. Allow multiple returns to be moved between users

Description – Allow the site administrator/ERO to move multiple returns at a time from one user to another.

Business Case – At end of season it is often desirable to move all the returns to the Local coordinator

2. Additional return selection and sorting capabilities

Description – Ability to sort or only display active returns, e.g., exclude accepted returns. Add date created as sort field. Add ability to archive returns

Business Case – If ability to manage returns within system is not available, EROs will download returns to Excel in order to manage the returns. This is a waste of time and creates security exposures because client information now resides on the desktop.

3. Ability to see status of State Returns without opening each Federal return.

Description – Allow users the ability to see status of state returns. This function is also needed for prior year returns.

Business Case – ERO needs ability to track the status of returns.

4. Ability to sort transmission screen by any column in report

Description – Ability to sort transmission screen by any column in report. First priority is Return Preparer Name

Business Case – Would assist in reviewing list of returns prior to transmitting. This would reduce errors in selecting returns for transmission.

5. Ability to easily display any form that will appear in the printed return.

Description – Ability to easily display any form that will appear in the printed return without having to go to a print PDF. First priority is the 1040 Schedule A form

Business Case – It is often necessary to display a screen in order to verify data that has been inputted. Schedule A is a high priority because it is necessary to know if the standard deduction is the correct choice.

6. Provide ability to sort date columns.

Description - Put all dates in date format and not text format.

Business Case – Would provide ability to sort dates into a logical sequence.

7. Include first name in acknowledgement screens.

Description – Currently acknowledgement screens show last name but not first name. Add the first name to these screens.

Business Case – Easier to find correct client – reduces chance of errors

8. Ability to remove “complete” tag on submission page

Description – Provide ability to toggle off the complete tag

Business Case – Once a return is marked as “complete” and the screen is saved the complete tag cannot be removed. Returns that are marked as “complete” and are marked for EFILE appear on the transmission screen. It is then easy to transmit a return that has not been correctly completed.

9. Apply current year fixes to prior years

Description – Many problems that were fixed for TY16 were not applied to prior years. Examples: Eliminate preparer information from forms, Allow direct debit on paper returns, Remove “practice Lab” from prior year screens.

Business Case – We will be doing TY15 and TY14 returns during TY17. A correct environment is required.

10. Provide ability to monitor status of prior year returns

Description – Provide a report that shows accepts and rejects for prior years.

Business Case – It is currently necessary to inquire on the status of each return. This is tedious and error prone.

11. Eliminate redundant information on the “Returns not Transmitted” report.

Description - The report currently has two entries for one return if the return is MFJ. Eliminate this redundancy.

Business Case – Simplify the report output.

12. Ability to Change Rejected Status to Paper Return

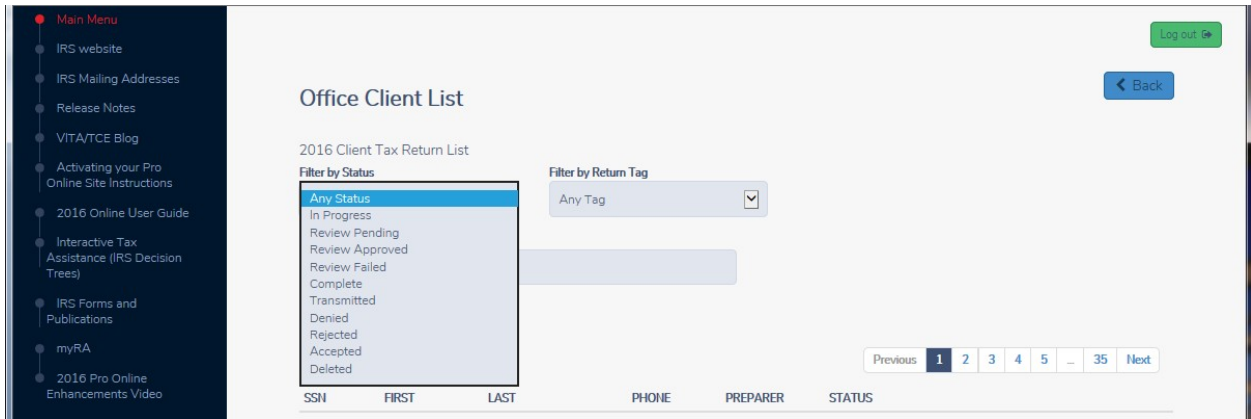
Description – A rejected return that must be paper filed (two taxpayers claiming same dependent for example) remains on the reject list. Provide capability to change status to paper file to assist ERO trying to follow-up to ensure all returns are filed.

Business Case – Difficult for ERO to sort through returns on reject list that were actually properly filed. Eliminate confusion and possibility that rejected return is ignored and not filed.

13. Add Status of “Paper”.

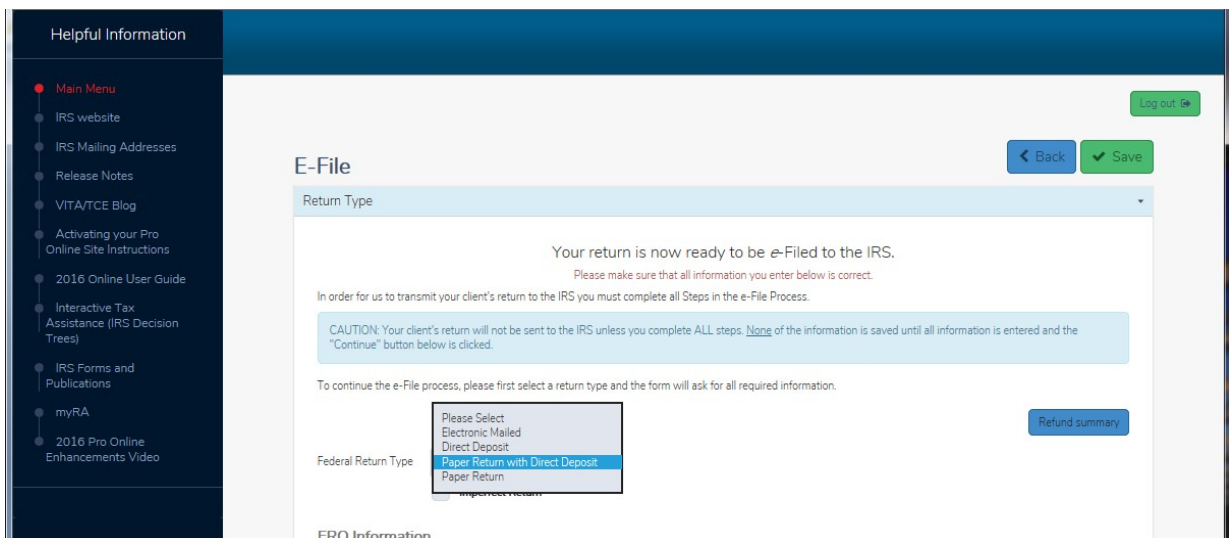
Description: Add “Paper” as a return Status and provide a method of designating a return as “Paper”.

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Business Case: There is no status for returns which are mailed. These “Paper” returns may have different statuses (e. g., In Progress, Complete and Rejected) depending on when and why it was determined they would be mailed. The lack of a “Paper” status results in commingling of electronic and paper returns when filtered by Status. A user defined tag to designate Paper returns can identify the paper returns but cannot provide client lists of only electronic returns. Providing a “Paper” Status distinguishes electronic from paper returns and prevents confusion caused by commingled returns with the same Status.

Use Case: The Federal Return Type is selected from the E-File page and includes “Paper Return with Direct Deposit” and “Paper Return”. Selecting either of these options should set the return Status to “Paper”.



14. Add a Date Column to Office Client List.

Description: Add a date column to the office client list such as date last edited.

Business Case: Will provide the ability to sort on date when name, SSN or other criteria is not readily available. Will save considerable time in searching for a client.

15. Freeze Accepted Returns.

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

Business Case: It is important to see what was transmitted in case the return must be amended to include the changes

16. Ability to copy and then modify Print Sets

Description: Allow Administrator to Copy a Print Set and then modify it and save it as a new print set. Also allow Administrator to change order of forms in Print Set.

Business Case: To merely add or delete one form in a print set takes close to an hour of work. With this function it would be a couple of minutes to accomplish.

17. Provide Option to Force Use of Only Form 1040

Description: TaxSlayer chooses the simplest version of the 1040 family of forms (1040 1040A and 1040EX). Add a configuration option that will allow a site to only use the 1040 form in all views, print sets and for transmission.

Business Case: Our training and the IRS Pub 4012 all support only Form 1040. Currently some sites add an additional transaction on returns such as adding and deleting other income to force the use of the 1040 form. This is a waste of time.

18. Add a HOLD Status

Description: Add a HOLD status to differentiate returns that are returns that have been processed but need to be held, i.e. not transmitted, for different reasons. A HOLD status would alert the volunteer processing submissions that these returns are not ready to be transmitted. Simply relying on the IN PROCESS status does not sufficiently distinguish returns that need to be held versus a return where the preparer merely forgot to set the ready for review checkbox.

Business Case: The HOLD status would be a better filter than relying on the IN PROCESS or REVIEW PENDING statuses. It would provide a more obvious indication that the return should not be submitted. By being a proactive setting, it takes the guess work out of whether or not the return needs further processing versus an oversight by the preparer or reviewer.

19. Revise Complete and Review Approved Settings.

Description: One of the methods used to QR a return is to mark it as Ready for Review on the e-file submission page, save and exit the return, and then QR the return from a different computer. After completing the QR process, the status is changed to COMPLETE and the REVIEW APPROVED button checked. However, to get to the submission page to make these selections, the reviewer is required to go back through all of the e-file screens, including the due diligence questions when appropriate. With this process, there is always the chance that information on these screens is inadvertently changed. One solution would be to add the ability to set the COMPLETE status and REVIEW APPROVED status from the Client Search list or the Review Returns list. Adding a COMPLETE RETURN button that would take the volunteer directly to the submission page would also solve this problem.

Business Case: Since many sites use this approach to QR returns, the revised approach would save significant time in completing the QR process and lessen the possibility of making inadvertent changes to the original entries.

20. Provide Indication of E-File Status After Rejected Return is Resubmitted and Link the Original Return With Any Retransmissions to Show Latest Status

Description: After a return is rejected and resubmitted the administrator is not provided with any indication that the return was transmitted. The reports now list a return twice if retransmitted.

Business Case: The only option appears to be to wait for a few hours to see if the resubmitted return is accepted. There is no indication what will show in the system if rejected a second time. Providing a status indicator would provide immediate information to the site administrator. The reports show a return as rejected even though it was retransmitted. Preparer may mistakenly retransmit a return a second time if they do not see that the return was already resubmitted after a reject.

In addition, currently there is no indication that a state return has been transmitted. A status indicator for state returns would be extremely helpful.

21. Provide Identical Tools for Processing Prior-Year Returns

Description: E-filing prior years uses the same process as current years. The system must support them identically. All searches, reports and tools need to be equally available for prior year returns.

Business Case: Prior Year returns also must be accurately filed, their acceptance verified and returns corrected if rejected.

Use Case: Coordinator verifies all completed prior year returns are transmitted and accepted. If not accepted, corrections must be made and returns re-transmitted.

22. Allow Returns to Transition from Complete Back to In-Progress

Description: The transition to Complete is irreversible. However, sometimes issues are discovered later.

Business Case: Once Complete, it is difficult to secure a return against accidental filing.

Use Case: After the return is complete, the taxpayer may remember a missing form or transaction. The preparer needs to move the return back to the In-Progress state until the issue can be resolved.