

TaxSlayer Productivity Enhancements

(Changes that will simplify navigation and entering information)

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1. Consistent Layout across Forms

Description: The W-2 and 1099-R page formats are inconsistent. The EIN and company name on the data input form should be the same. One form puts it on the left and the other on the right. Also, auto-populate payer information if EIN is in database – currently on for W-2 but not for all payer forms (1099s).

Business Case: Consistent formats increase data entry accuracy. This change would align the formats of these pages.

Use Case: Consistency will help new volunteers to build their skills and help all preparers with their accuracy.

2. Reorder Submissions Page Entries

Description: Reorder the selection sequence on this page to match the flow of the tax return process. "Review status - Ready for Review" and Approved button should be midway on the page and "Save and Exit Return" should be next to them. The "Mark Complete" check box should be at the bottom of the page and either the "Save and Exit Return" or "Save and Transmit Return" depending preparer's rights should be next to it. Other items on the page should be appropriately placed.

Business Case: The submission page does not logically flow and therefore is error prone.

Use Case: All preparers and reviewers use this page on every return. It should logically follow the sequence of the return preparation and review.

3. Modify Print Preview Print Set

Description: Modify the current PDF print selection on the Summary page to match the current Quality Review print set.

Business Case: The Quality Review print set is a more complete set of the forms and worksheets involved in the tax return.

Use Case: The return process is iterative and Forms needs to be checked as the return is prepared. Print summary is the hub page for TaxSlayer and is the right place to put this option.

4. Default Resident State on Entry Forms

Description: Automatically select the resident state as the default state on W-2s and 1099s and other forms that require state identification.

Business Case: More efficient use of preparer's time.

5. Allow Name Changes on Vouchers

Description: When there is a deceased spouse on a return, vouchers for estimated taxes should contain only the name of the surviving spouse.

Business Case: Obviously the decedent will not be making these payments.

6. Use Uniform Date Format

Description: The program uses 3 distinct formats for entering dates.

Business Case: For improved usability, preparers should always enter the same kind of information in the same way.

Use Case: The preparer enters the date of birth using three fields with pull-down menus; on the Education Credits page the date is entered as eight digits (mmdyyy); on the E-File page, the driver's license dates are entered as mm/dd/yyyy. And on some state forms, it is entered as yyyy/mm/dd.

7. Allow Search Only by Taxpayer Last Name

Description: Currently, the "Search Client List" includes preparers' names as well as taxpayers' names. Provide capability to search only taxpayers' names.

Business Case: Typically are seeking a particular taxpayer's return and do not need preparers' names included.