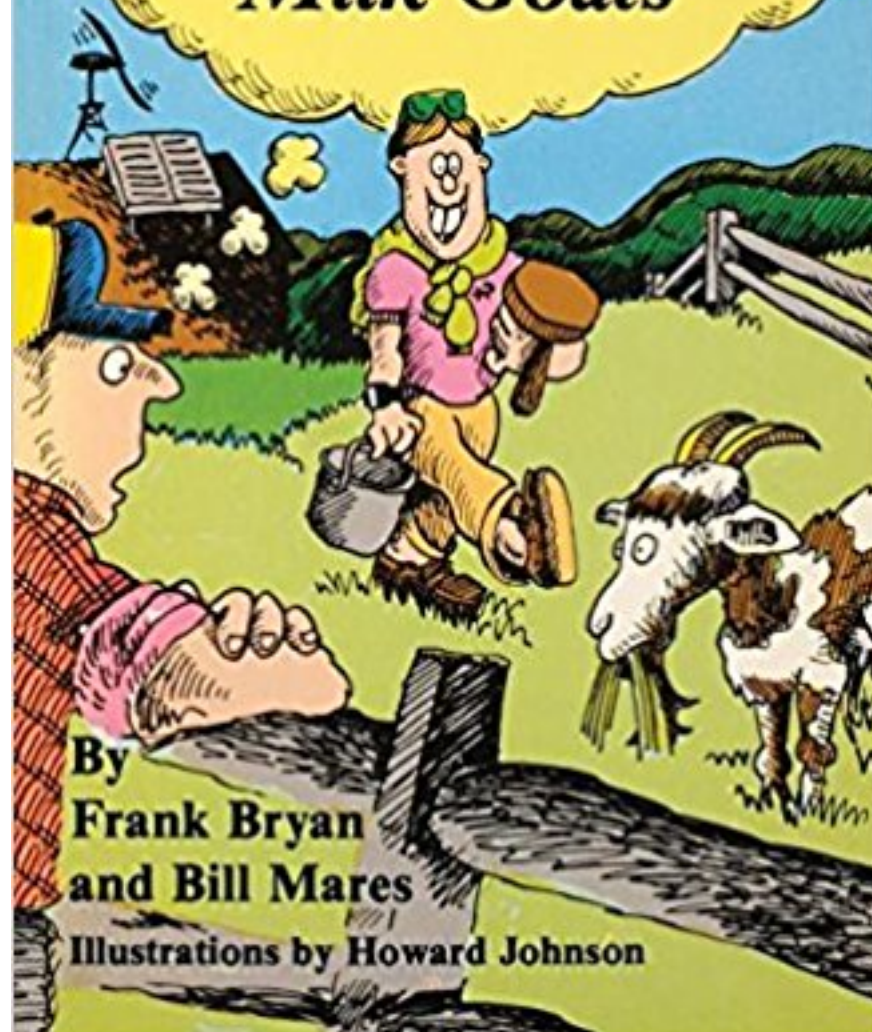


TaxSlayer: Round 2



*Real Vermonters
Don't
Milk Goats*



By
**Frank Bryan
and Bill Mares**
Illustrations by Howard Johnson

TaxSlayer Status

Where are we...

Enhancements

- **In preparation for 2018 tax season, TaxSlayer:**
 - **Fixing many calculation/awkward workaround issues**
 - **Changing user interface to improve navigation**
 - **Adding tools to manage returns**
 - **Enhancing customer support**
 - **Increasing server capacity to improve stability**

Enhancements

- **Overhauling states' infrastructure**
 - **Pulling more data from federal entries**
 - **Selecting Continue will save data on each page**
 - **Field level validations on each page**

Enhancements

- **Some federal changes implemented in current software and more due with TY2017 version**
- **Federal and state change status as reported by TaxSlayer in *TaxSlayer Issues* Dropbox folder**

Enhancements

- **TaxSlayer does not have resources to address every issue**
 - Tax calculation errors are most critical
 - Training materials must address all others
- **Work continues – do not have additional information on other requested changes**

Enhancements

- **Practice Lab 2017 due mid-November**
- **Production version at sites later**
- **States typically released in December – have asked for earlier visibility**
- **Expect much less “software agility” after November**

TaxSlayer

- **Practice Lab is the training platform for TaxSlayer**
 - Do not use production sites
 - Practice Lab is same as production when preparing a return
- **Encourage Instructors to browse Practice Lab(s) to become familiar with changes**
- **Practice Lab 2016 available until mid-November 2018**

Carryforward

- ***Normal*** carryforward of data from return prepared at site for previous tax year
- ***Extended*** carryforward of data from return prepared at any Tax-Aide site the previous tax year
- **Possibly option for taxpayer to agree for cross-VITA/TCE carryforward for TY2018**

Account Update

- **First login to site (except Practice Lab) with a given username**
- **Verify cell phone number and email associated with username**
- **Preparation for Multi-factor Authentication process**

Account Update (cont)

- **Same email address and cell phone number can be used with multiple usernames**
- **Requires intervention by site administrator for multiple use**

Account Update (cont)

- **Still evolving – suggest waiting to complete user set-ups and Account Updates (but not until end of January)**
- **Detailed instructions coming**

Multi-Factor Authentication (MFA)

- **Adds layer of protection to mitigate risk of identity theft**
- **IRS requirements for increased security of taxpayer data**
- **Uses something other than what you know to authenticate yourself**

Multi-factor Authentication

- **Six-digit authentication code either by text to smartphone or by email**
- **Authentication required:**
 - **First use of username on a given computer**
 - **Every 1 to 30 days – set by site administrator**
 - **Three failed login attempts**
 - **Forgot password request**
 - **Computer reimaged**
 - **Change browser on same computer**

National Tax Training Committee



Vermont Issues VT4 – VT9

VT5	Line Q2 on the printed form [PR-141] shows no answer checked (Yes or No); the form will be rejected by the state (or at least the Rent Rebate Claim will be denied).
VT6	I can not find any place to enter the CU-FJ or CU-FS status for taxpayers who are in a Civil Union
VT8	Incorrect mailing address in returns with one spouse deceased: surviving TP name appears in address field on IN111
VT9	Out-of State MUNI interest doesn't get carried from 1040 to the IN-112.

Vermont Issues VT1, VT4, VT7

- **VT1**
 - VT input not saved until you exit gracefully at the end
 - Error message persists, even though error was corrected
- Fixed(?) in TS-17
- **VT4** Enter 100% as 10000? 55% as 05500?
- Enter as percentage in TS-17
- **VT7** Tax exempt interest doesn't get carried to HI-144 – Line f
- (10/6) Dev work complete — TS-17

Vermont Issue VT3 HS-122

- If Part A (Homestead Declaration) is filled in, the question re filing a property tax adjustment at a later date is answer NO, and Part B is left blank, the resulting message claims that the return will not be e-filed due to errors on Section B. If Part A is filled in, it should be e-filed regardless of whether Part B is filled in. All primary residence homeowners are required to file IN122 Part A; only those that qualify for the Property Tax Adjustment are required to file Part B.
- **Status:** (06/22) Live in production for TY2016
- **TBD:** What if filing as Part-Year in VT and bought a home that will be their primary residence next year?

Vermont Issue VT2 IN-155

- When you itemize deductions, you must add back onto state AGI the amount of state income tax claimed. The amount of state and local income taxes from federal adjusted gross income for the taxable year is required to be added back to Vermont Taxable Income. However, the amount is limited to that which will reduce total itemized deductions below the standard deduction. TaxSlayer doesn't appear to do this add-back.

Vermont Issue VT2 IN-155

- **TS response:** Tested by creating a return with federal itemized deductions. IN-155 is generating correct figures and adding amount back into VT AGI. We need a sample return where the program is not doing this.
- **Status:** Closed. No development action required.
- **TS Notes:** (06/29) From the Area: We have reached out to the partner for clarification. The partner is unable to access files at the present time. If TaxSlayer has stated that the issue was tested and corrected, the partner will retest the issue in the upcoming Filing Season.

IN-155 Issue(s) for TY 2017?

- Fess up! Who reported this problem?
- In TY-16, TS instructions for line 6 were incorrect (lifted from IN-155 for TY-15)
- For TY-17, will TS carry forward prior-year data for IN-155?
- In TY-16, TS included IN-155 in every PDF
- For TY-17, will they include it only when required (generally, if TP itemized on 1040)?

TaxSlayer Enhancement Status

- TaxSlayer has essentially completed the changes planned for the federal return for TY2017. In some cases, training is required to accomplish a task. The NTTC plans to update the TaxSlayer Tips document they prepared last year on how to accomplish specific tasks in the software.
- TaxSlayer is at the end-point of software development for the tax season. Additional enhancements will be on hold until next year.

TaxSlayer . . . New Issues

- New issues must be critical calculation errors for which there is no workaround possible to create an accurate return.
- A workaround may not be the ideal way to accomplish the task, but if it exists, this is not a critical issue at this point.

Will TY 2017 Bring New Issues?

Wait and see . . .

- When the Practice Lab for TY 2017 (PL-17) becomes available, do the Workbook problems ASAP
- When VT-17 becomes available, try doing a variety of VT returns (IN only, HS, RR, etc) based on the Workbook problems or *de novo*
- Report any problems to me, after trying to isolate the issue

Reporting VT-2017 Issues

- **Reporter:** The DC or their designee
- For production returns, create a return in the PL that illustrates the problem
- Send me a description of the problem with enough information to reproduce the problem. This could include
 - A PDF of the PL return
 - Screen shot(s)
- I will send it on to TaxSlayer and possibly post a comment on the VtTaxAide blog

Resolution of Issues



TaxSlayer wins . . . in OT

- TaxSlayer LLC, of Evans, Georgia, protests the cancellation of request for proposals (RFP) No. TIRNO-14-R-00028, issued by the Department of the Treasury, Internal Revenue Service (IRS), for electronic tax return preparation and transmission software and support. TaxSlayer argues that the cancellation was improper because the agency failed to reasonably identify errors or defects in the solicitation.
- We deny the protest.
- From <http://www.gao.gov/products/D10343>; read the full decision there (PDF, 10 pages)

First round ... usability findings

- All of the participants indicated that training with the new software would be quite a challenge and large task due to the volume of volunteers. TaxSlayer Online is very close to TaxWise Online. They both have their pros and cons. However, most of the testers did not prefer the TaxSlayer versions of the desktop and self-preparer platforms. Overall, most said they would rather stay with TaxWise because TaxSlayer was not so outstanding that it would be worth the expense and workload of changing.

Second round ... Evaluation scores

- The overall point scores assigned to TaxSlayer's and TaxWise's proposals during the initial and final evaluations were as follows:

	Initial Evaluation		Final Evaluation	
	TaxSlayer	TaxWise	TaxSlayer	TaxWise
Software (50 pts)	46.6	42.0	37.6	46.3
Operational (30 pts)	29.3	26.7	29.3	29.5
Regulatory & Security (20 pts)	20.0	20.0	9.3	19.6
Total (100 pts)	95.9	88.7	76.2	95.5