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| **Where****Training Topics:** | **Issue/Challenge** | **Concern** | **Recommendation(s)** | **Comments from TaxSlayer** |
| ***What training topic(s) is this associated with?******(Ex: Section 4/Topic 6-Basic Credits)******\*There can be more than one\*******Resources needed:*** ***Training Topics List & TaxSlayer Training Manual*** | ***Identify what features or process in the software that could present a challenge for the volunteer*** |  |  |  |
| 1. Form search
 | Searched for Forms 8962 and 8965 and they weren't there. | How can preparer open these forms? |  | 3/3Found within Health Insurance menu and will generate in PDF (if necessary) based on how the Health Insurance questionnaire is completed. This will be covered in detail in one of the recorded training topics. |
| 1. Direct deposit
 | How/when does a preparer enter bank information? | This needs to be easy to use - VITA promotes direct deposit. I only saw it once - kind of by accident - and couldn't find it on other returns.  |  | 3/3The bank information is presented to the preparer during e-file. Once the preparer selects Direct Deposit, they will have the ability to enter the Taxpayer Bank Account Information. TaxSlayer does not present the bank account information to the volunteer unless it is requested for completion of the return.  |
| 1. Direct deposit
 | Asks for name of bank. | That's not necessary. Why ask? |  | 3/3Development already planning to remove |
| 1. When starting a new return
 | Popup says, "Be sure you get your 7216 Consent to Use Tax Return information signed before starting a new tax return." | Volunteers don't need this. Why is it even here? Can it be removed? Would be terrifically confusing. |  | 3/10TaxSlayer will review with IRS CORE team after 7216 consents are implemented in the application |
| 1. Filing status
 | It asks, "What is your filing status?" | Questions should not be in second person. It should say, "What is the taxpayer's filing status? |  | 3/3The wordings on the screens are written as if the preparer is asking the taxpayer the questions. The on screen wording will not be changed. |
| 1. Finished return
 | How does preparer close a return? | Appears that preparer needs to log out to close a return.  |  | There are three ways to close a return:* After completing the e-file menu (prior to review), there is a "Save and Exit Return" button.
* Select Save & Exit return from the left Navigation page to save and exit of the return
* You can also click the drop down menu next to the Taxpayer's name on the top left and return to your office menu.
 |
| 1. Entering dependent
 | If preparer indicates dependent is a full-time student, it requires the school name. | School name not necessary. Why bother? |  | 3/3Development will remove the entry field.5/11Entry has been removed |
| 1. Entering dependent
 | Message: “If child was born in 2015 you must check 12 months.” | This is not always correct.  |  | 3/3 This is on screen guidance due to the number of inquiries received regarding the number of months that should be used for children born within the tax year |
| 1. W-2
 | Apt. number does not carry over to W-2 | We're supposed to make W-2 match paper W-2.  |  | 3/3Development looking into |
| 1. Form 8888 - split refund
 | I couldn't figure out how to do it. Form search did not find it. | VITA sites encourage savings and splitting refunds.  |  | 5/11F8888 is currently set to not show in e-file section |
| 1. gambling income
 | Could not figure out how to add gambling income when there is no W-2G. | Without a W-2G, could not enter gambling expense on Schedule A. |  | 3/11Will get with development to remove the validation.5/11Validation has been removed |
| 1. "Helpful Information" menu
 | This includes links to things VITA does not - and shouldn't use.  | Such as: look up W-2 on ADP, look up W-2 on W2 Express, Efile Opt out form, contingency plan |  | 3/3The links on the left navigation pane, with the exception of the links added by Kim (including the Contingency Plan link) can be removed at the request of the CORE IRS Team |
| 1. EIC
 |  | the whole EITC thing seems to need an overhaul |  | 3/10 – Updated (KM)TaxSlayer will provide enhanced training to help the preparer complete a quality return based on TaxSlayer’s implementation of EIC calculations and prompts. |
| 1. Personal Info
 | Dates | Dropdowns for birth are cumbersome |  | 3/3TaxSlayer will train on the recommended way to enter dates efficiently in the applications. |
| 1. Saver's credit - Form 8880
 | Taxpayer had code D on w-2 and TaxSlayer did the 8880 without any further action | Need to ask if taxpayer was full time student or had a retirement distribution? |  | 3/3TaxSlayer automatically calcs based on return info entered. If Code D marked in box 12, program then looks to see if a 1099-R has been entered and/or the student checkbox has been marked within Basic Info for TP/SP |
| 1. 1099-R
 | Box 1 amount automatically carries over to box 2. | Often they are not the same and this could easily cause an error.  |  | 3/3Most 1099-R forms come with box 2a not populated to the taxpayer. We determined that a lot of our customer base were filling out what is on their hard copy and would leave 2a blank (and not using the simplified method)- On side of caution, box 2a pre-fills from box 1 but can be edited (or choose to complete simplified worksheet). We feel that this will create more quality return and prevent IRS notices |
| 1. Schedule C
 | The income menu did not include 1099-MISC. | Had to leave Sch. C to add 1099-MISC income - the most common source of Sch. C income. We want to discourage preparers entering a 1099-MISC without doing a Sc. C.  |  | 3/3TaxSlayer is designed for preparers to complete 1099-MISC first based on form received in the mail. After entering the necessary 1099-MISC, the program will prompt you to carry that income to the necessary Schedule based on what box (i.e. Box 7 will prompt you to create a Schedule C or add to existing Schedule C).  |
| 1. Starting the return
 |  | Why does the 7216 message come up at the start of each return? |  | 3/10 Updated (KM)TaxSlayer will review with IRS CORE team after 7216 consents are implemented in the application |
| 1. F1099R and W-2
 |  | Why are there the checkboxes for "IS this a standard 1099-R" etc at the top of the 1099-R, W-2, etc? |  | 3/9Defaults to Standard but if someone receives a corrected (W-2C) or substitute W-2 (Form 4852), additional information may be needed for the IRS and our program has the necessary prompt when continuing from that screen. |
| 1. Form 1099-R
 |  | After you do the Simplified Method worksheet, the new calculated taxable amount appears in Box 2 of the 1099-R. This form is transmitted to IRS -- doesn't it have to identical to the paper form? |  | 3/9Most paper 1099-R’s don't have box 2a filled out requiring the taxpayer to determine taxable amount from gross distribution. If most taxpayers completed the 1099-R based on their hard copies, they may leave box 2a blank resulting in a possible audit of not reporting taxable retirement income |
| 1. Sch D
 |  | I don't like that you have a separate screen for every entry, instead of being able to enter them all at once. |  | 3/9Sale of stock from the same company can be totaled and entered as one entry (ST lumped together and LT lumped together) if also sold on the same date |
| 1. Form 8880, Saver's Credit
 |  | The software allows this credit, but never asks me if I have taken a distribution in the two prior years (line 4 of F8880.) If I have taken money from a retirement account in the previous 2 year, it will reduce the amount of this year's contributions eligible for the credit. |  | 3/9Line 4 is covered by the first two questions inside the 8880 menu - May just need a verbiage update to better understand |
| 1. Schedule E
 |  | Domestic Military VITA is trained to do residential rental, but they're not trained on depreciation. Currently, we just have them use a scratch pad to enter the depreciation figure provided by the taxpayer. TaxSlayer doesn't have the scratch pads -- how can we just enter depreciation, instead of having to fill out all the depreciation info? There's an "additional expenses" block where it could go, but that seems misleading.  |  | 3/9We will see if a direct entry can be implemented5/11Direct entry added to expenses menu within Sch E |
| 1. Credit Section
 | Credit Child tax credit not listed in the credit section. | Sometimes need to make entries for children with ITINs? |  | 3/10Automatic calculations based on return entries |
| 1. Summary/Print - EITC
 | The "Why is there no EITC?" section is incomplete. | It omits two of the most obvious reasons: No earned income and an ITIN. If the software is going to take on this task, it should do it completely and not mislead the preparer.  |  | 3/10The answers displayed are return specific based on entries |
| 1. Misc. Forms
 |  | Where to enter ID theft PIN for dependents? |  | 3/10Within Misc. Forms if a dependent is listed on the return |
|  | Form Entry | There needs to be an easier way to see specific tax forms as they are prepared to ensure data is properly captured and flowing through to the correct places. It appears preparers may have to wait until the entire return is completed to see all the forms filled out. By then, preparers may have forgotten what issues they needed to check (to ensure that data was properly captured and flows through correctly). |  | 3/14The 1040 view will be enabled from the Summary/Print menu before season. Preparers can also view PDF at any time during return prep from Summary menu. We are also implementing a Quick View feature that will allow the preparer to view the information on the form for schedules such as A, B, C, etc.5/11 – 1040 View is live in the practice lab |
| 1. Schedule A
 | State and Local Sales Deduction | The applicable percentages do not appear to be automatically filled by the program and there appears to be no way to look up the correct percentages using the program itself. It appears you manually need to search for the correct percentages and then fill them in. At a minimum, a hyper-link should be provided to where the percentages can be found. |  | 3/14Unable to auto-fill because program does not know local general sales tax percentages. Will look into adding link to IRS on this screen.5/11 – Link to IRS General Sales Tax Calc has been added to menu |
| 1. Schedule A
 | State and Local Sales Deduction | It also appears there is no easy way to capture income that is not subject to taxes (for purposes of inclusion) in order to get credit for the state and local general sales tax deduction. For example, military housing and subsistence allowances are non-taxable but should be included in income when calculating the state and local general sales tax deduction. The program does not appear to have a simple way to capture this data, resulting in a lower deduction for the taxpayer. |  | 3/14Ability to adjust the MAGI for General Sales Tax Deduction has been sent to development. |
| 1. State Section
 | State Tax Returns | Military members are often from non-income taxing jurisdictions (e.g., TX, FL, etc.), but often have rental properties in taxing jurisdictions (e.g., VA, NY, etc.). There needs to be a better way to exclude the military income from the non-resident state tax returns. |  | 3/14Income from Federal return (i.e. W-2) does not carry to Nonresident state returns unless specifically sourced w/in the state information section of said forms (W-2, 1099-R, etc.) |
| 1. Schedule E
 | Depreciation | There needs to be an easy way for tax preparers to put in the land value so that the land value is not mistakenly captured in the cost basis and improperly depreciated |  | 3/14We will suggest a verbiage update to say “Do not include land value” next to cost basis field |
| 1. RRB-1099-R
 |  | Where is Simplified Method worksheet for RRB-1099-R |  | 4/4Current enhancement with Development to add – will function like 1099-R simplified worksheet link5/11 – Simplified link has been added to Box 7a |
|  | Technical Issues | Throughout the program (especially setting up tax returns initially), there are boxes that cannot be checked. This causes confusion. |  | 3/14 = Not a TaxSlayer issue - We have had a developer look at this on an IRS COE computer and have asked them to if a certain font will be allowed. This may also be an issue for computers using a military network |
| 1. F8615
 | Kiddy Tax | The software doesn’t automatically add the Form 8615, or give the preparer any kind of warning that one is probably required.  Although there are some situations where a dependent child with unearned income over $2100 is not subject to the kiddy 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 kiddy tax?) with a link to the kiddy tax rules |  | 4/1Will get with Development to create e-file warning to complete F8615 based on return info entered |
| 1. F8615
 | Earned Income | When the F8615 is manually added, the form doesn’t correctly calculate the unearned income from the child’s return on Line 1 of F8614.  The child’s return includes a total of $4572 in unearned income ($1500 taxable schol + $400 dividends + 600 unemployment + $2072 PFD.) It seems to be adding the $150 allocated tips and $600 unreported tips to the child’s unearned income, which is not correct (tips are earned income.) |  | 4/1Will get with Development to not include tip income as “unearned” |
| 1. F8615
 |  | Form 8615 asks for the parent’s tax to be entered on Line 4, it doesn’t provide any instructions. |  | 4/1Will update verbiage for on screen guidance |
| 1. ACA
 | Dependent MAGI | The software has a nice screen that asks for dependents’ MAGI and taxable SS, but this input screen only seems to come up if the return includes Form 8962.   Household income (HHI) for the Shared Responsibility Payment also includes MAGI from all dependents that have enough income for a filing requirement. |  | 4/1Getting with development to include Dependent MAGI entry screen as permanent menu |
| 1. ACA
 | Dependent MAGI | When I manually input an amount in for dependents’ MAGI when asked, it added it to the HHI on Form 8962, but did not include the dependent’s MAGI in HHI (Step 3 of the Shared Responsibility Payment worksheet.)  This would result in an understatement of HHI.  |  | 4/1Getting with development to include Dependent MAGI for SRP |
| 1. ACA
 | SRP | The Shared Responsibility Payment worksheet did check the box to say Form 8814 was attached, but for some reason it only picked up $4000 from the 8814s, instead of the correct number of $4144. This would result in an understatement of HHI. |  | 4/1Program is picking up base from TY 2014 of $2,000 and not base amount of $2,100 for TY 2015. Will present to development |
| 1. ACA
 | F8965 | On Form 8965, a quality issues exists for the Part II exemption for “gross income below the filing threshold.”  If the preparer checks the box yes for this exemption, the software just gives the exemption – even though the gross income on the return is well over the filing threshold |  | 4/4Under Review5/17Has been sent to development to correct |
| 1. ACA
 | F8965 | When calculating the Premium Tax Credit, TaxSlayer automatically used the Federal Poverty level for the tax return address.  If there’s a way to change the FPL used, I couldn’t find it. |  | 4/4Under Review5/17Ability to adjust FPL located in basic information |
| 1. ACA
 | F8965 | When asking about coverage exemptions, TaxSlayer shows an outdated list of exemptions–  The current list of exemptions can be found in the instructions for f8965, or on page ACA-6 of P4012 |  | 4/4Under Review5/17Dev already updating exemption list |
| 1. Itemized Menu
 | Schedule A | Difficult to Maneuver |  | 3/3TaxSlayer will be enabling a “view form” feature that will allow the preparer to view the entries made on the Schedule A form. **Action Requested: Send TaxSlayer detailed information on how you are inputting Schedule A information and notate the pain points.** |
| 1. W-2
 |  | Don't we need to have the exact entry in box 12 and box 14? You don't seem to be able to enter anything not in the drop-down list. It's common for our state to have AK SUI or ESC -- how can we enter that, or do I have to choose "Other"? Can we get AK SUI carried to Schedule A? |  | **3/10****Action Requested: What info other than a code and dollar amount is needed in box 12? Box 14 is generally informational and not included to the IRS. Items that are included in the return do carry over to where they need to go. If box 14 description is not listed, use “Other”. We can look into adding AK SUI** |
| 1. Form 8863
 |  | Never addressed special rules for student under 24 |  | **3/9****Action Requested: What is the special rule for under 24?****5/11** **Has been sent to development to add** |
| 1. Sch D/Sale of Main Home
 |  | The Main Home Sale worksheet doesn't consider the special rules for military, although I like the worksheet in general.  |  | 3/10Under Review |
| 1. Form 8453
 |  | Ability to aggregate transactions for Capital Gain input |  | 3/10Has been sent to development |
| 1. RRB-1099
 | SSEB | How to report? |  | 3/10SSEB Tier I benefits are reported in the Social Security Benefits menu to carry to line 20a and 20b of 10405/11 – Will request verbiage update |
| 1. Difficulty of Care Payments
 | Medicaid Waiver | Excluding this needs to subtract from line 7 wages to correctly calculate any EIC, etc., correctly |  | 3/10Has been sent to development |
| 1. 1099-G
 | Determining Taxation of State Refund Determining | Calculating General Sales Tax vs state withholdings in prior year to determine taxable state refund amount on current year return |  | 4/18 Has been sent to development |
|  | ERO PIN in Practitioner PIN Menu | I was prompted to enter an ERO PIN - message stated as "must enter" | I could not move to the next screen unless I entered a PIN (desktop) | **4/18 It is required on the version you have. 98765 will be defaulted as the Practitioner PIN for each preparer in TS2016** |
|  | SSN does not auto-populate in main info section | You have to re-enter SSN on main info although you entered it to start a return | It would be nice if the primary SSN auto-populated (desktop) | 4/18 – Training Issue **This is where the secondary validation occurs since you did not enter the SSN twice when creating the return.** |
|  | Preparer Code | After responding "no" to dependents, a Preparer Code is requested  | Prep Code not warranted (desktop) | 4/18 – Covered in Training. **Preparer code is required and will be assigned when the preparers are setup. This is how Desktop tracks history** |
|  | There are two places to enter Interest Income - lines 2 and 3 | Line 2 is for Schedule B or F8815; Line 3 is for Interest less than $1500  | It appears line 2 is for when there is a Form 1099INT; how do you know this? (desktop) | 4/22 – Training issue. Line 3 is when a Schedule B is not required - <https://www.taxslayerpro.com/kbhelp/KnowledgebaseArticle50248.aspx>  |
|  | Dependent Section | Automatically enters the dependent's last name  | This is a nice feature except many dependents do not share the same name as the taxpayer. This could be the cause for many errors. | 4/18 – Training issue. Rather than looking for a blank enter the different last name, they just need to key over the existing last name |
|  | W-2-Boxes 1, 3, 5 | Boxes 3 and 5 (Social Security and Medicare amounts are not adjusted when code D is entered in box 12. | Requires additional data entry for something that the software could calculate.  | 4/22 – Non-issue. Boxes 3 and 5 already come adjusted from employer if applicable |
|  | Direct Deposit  | No warning was given when an incorrect routing number was input. | Routing and account numbers are entered twice. A warning is appropriate if they don't match.  | 4/18 – Defect logged and will be corrected5/17 Has been corrected |
|  | Interest income - screen shot 1 | No choice for interest income not reported on 1099-INT. | Should have an option for Other Interest. (desktop) | 4/22 – Training issue. Line 3 on income menu (interest/dividend <1500) |
|  | Entering credits - screen shot 2 | The page that refers to deductions actually includes deductions and credits | Deductions and credits should be separate - or rename the page "Deductions and Credits." | 4/18 – Covered in training, Suggestion will be reviewed |
|  | Selections for "Federal Return Type" - screen shot 3 | The only choices are: Electronic Mailed, Direct Deposit, and Paper Return.  | This makes it seem like Electronic Mailed and Direct Deposit are mutually exclusive. What is to be checked if someone wants to file electronic and do direct deposit? Or wants to file paper and use direct deposit? And "Electronic Mailed" sounds like both electronic transmission and mailing a paper return. Confusing. | 4/18 – covered in training\*Need to find out about paper return and direct deposit5/11 – Paper direct deposit has been added |
|  | Itemized Deductions | Charitable Contribution requires date of donation. | Date not needed or used for anything | 4/18 – Will review suggestion |
|  | Itemized Deductions  | Mortgage Interest-asks for mortgage payee info | Not required  | 4/18 – will review suggestion |
|  | Spanish | Can TaxSlayer print in Spanish? | Useful for many taxpayers.  | 4/18 – Training issue: Select the drop down menu while in a return and select change language. |
|  | Client Letter | Is there a way to develop a Closing Letter in TaxSlayer to clients that can be catered to individual program needs? | Most programs currently use such a letter for every client. (Shows up in the desktop version)  | 4/18 – Future Enhancement Request. Pro Online does not support a client letter |
|  | Rounding | TaxSlayer does not round of to the nearest dollar. | Can it be set to round so we don't have to deal with all the pennies?  | 4/18 – need specifics because it does round once you hit Continue on the page |
|  | Schedule C-EZ | Appears that TaxSlayer doesn't do C-EZs. | Is that correct? Shows up in the desktop version | 4/18 – Pro Online does not support CEZ – Has been sent to development5/11 – Sch C-EZ will be added for production release |
|  | 1040A and 1040EZ | TaxSlayer does 1040A and 1040EZ. Quality Issue | Can it be set to 1040 only?  | 4/18 – This is controlled by the print sets. Mark 1040A and 1040EZ to 0 |
|  | Age not generated | When a birthdate is entered TaxSlayer does not generate the person's age.Quality Issue | Seeing the age helps avoid data entry errors and is needed to correctly apply tax law. (shows up on desktop version)  | 4/18 – Enhancement Request.5/17 Age written out will be required on intro sheet at each site |
|  | Highlighting and blocking fields | Is there a way to highlight certain fields that we don't want volunteers to miss and to block fields that they should never need? | Improves quality and helps volunteers prepare faster. | 4/18 – No |
|  | SCH C Question | Inventory question defaults to "Cost" | Should default to "Not Applicable." | 4/22 – Most common inventory method is cost. If COGS is not entered in Sch C, page 2 of Schedule C does not generate. Cost is required if cash method of accounting is used (Sch C instructions – C15) |
|  | Filing Status Wizard | Asks many questions about dependents.  | Would it be easier to ask about dependency first? | 4/18 – reviewing to see if we can display the link to the IRS decision trees on the left navigation panel while inside a return |
|  | Dependents | It seemed to take a long time to enter because each dependent has its own page.  | It might be easier if the dependents were on one page | 4/18 – Takes longer to enter because TaxSlayer gathers more information at the dependent level for calculation purposes |
|  | Dependents | Willie from Beringer return should not be a dependent. I entered his information (not related and lived in the house 8 months).  | The software should give a warning that he probably is not a dependent. | 4/22 – Will not include dependent exemption in return |
|  | W-2 | Entered Medicare wages and the boxes shuffled and it showed up on the right side of the screen (see screenshot) |  | 4/22 – Non-issueScreen resolution issue or browser issue?? Need to see screenshot |
|  | Unemployment | The phone number is requested on this form | Phone number of no use | 4/22 – Phone number is not a required field |
|  | Form 1040 | It is difficult to open the 1040 to check on the progress of the return and ensure entries are properly feeding onto the 1040 | It would be helpful if the process to review the return was made easier | 4/18 – Return preview will be implemented for TS 20165/17 1040 View is enabled from Summary/Print |
|  | Form 8880 | Form did not ask if I took retirement income |  | 4/22 – Training issue.Based on if a 1099-R or RRB-1099-R is reported on return – auto-calc based on entries |
|  | AGI Monitor | No AGI Monitor | The refund monitors are great but it is also helpful to have an AGI monitor. They help when determining if clients are eligible for different credits.  | 4/18 – Enhancement Request |
|  | State Tax Refund | The sheet did not ask if taxpayer included state tax withholdings on the 2014 return.  | How can it determine if the taxpayer should include state tax refunds without this? | 4/18 – In development |
|  | Gambling Winnings | It seems to force Gambling Winnings on the W-2G sheet. Many taxpayers do not receive a W-2 G. If gambling winnings are placed in "Other Income Not Reported Elsewhere", gambling losses will not be included under Itemized Deductions (see below) | There should be another way to report gambling winnings | 4/18 – Enter it in Other Income not reported to be reported on Line 21 |
|  | Itemized Deductions | Miscellaneous Deductions- If Gambling losses are not included on a W-2G, then it will not recognize the losses (see above) | This would cause an inaccurate return | 4/22 - Sent to development |
|  | Itemized Deductions | Medical Expenses: On the Webster return I was forced to enter glasses and dental on the same line. | A "Scratch Pad" would be helpful when two entries need to be entered on the same line.  | 4/22 – Training issueThere is an “Other Medical Expenses” entry field – can be used for glasses and dental |
| 1. Warning banners informing the preparer that an item (e.g., failure to enter a spouse’s birthdate) has been missed
 | Making the program user-friendly | If the program is designed not to progress to subsequent screens if data is missing, recommend that the warning banner be placed at the bottom of the screen immediately next to the “continue or next” button. In addition, areas that need to be completed should be hi-lighted in red similar to TaxWise so that preparers can quickly identify and correct the issue. Also, it would be great if the warning banners could display technical help such as letting preparers know how to address unique TaxSlayer issues such as the need to enter “0”s where ITINs are involved.  |  | 4/19 Will review to add warning to the bottom of the page, as well as the top.  |
| 1. Entering SSNs
 | Making the program user-friendly | Have a single screen used to input all SSNs at the same time. Currently the program is built in a manner that the preparer has to go back and forth between screens to prepare a return. If a single screen could be used to enter all SSNs, it would save the prepare a significant amount of time where numerous dependents are involved  |  | 4/19 – training issue.  |
| 1. W-2
 | Build the program to minimize the change of error | The W-2 should be built so mirror the paper W-2 in all aspects. Currently the program is built in such a manner that if the amounts in the W-2 are changed from the pre filled amounts, the blocks in the electronic W-2 shift. This could result in preparers putting the amounts in the wrong blocks.  |  | 4/19 – Will review the shifting. Need the exact steps to reproduce. Also, man employer W-2’s do not mirror IRS generated W-2. |
| 1. ITIN Application
 | Program does not inform you that all zero’s are needed until the end when applying for an ITIN | This information needs to be included in the training material |  | 4/19 – will add after initial launch |
| 1. W-7 not being populated correctly
 | In case of NRA spouse applying the reason code E is selected but the spouses name does not populate | Software should be able to recognize the spouse name and populate the correct information |  | 4/19 – will review with development |
| 1. Foreign Tax Credit
 | Can only enter up to $600 | TaxSlayer did state this problem would be addressed |  | 4/19 – On the development list |
| 1. Stock transaction input
 | Can only see the one you are entering.  | If entering multiple transactions it can be easy to miss or duplicate an entry. Having a grid to complete would eliminate this issue |  | 4/19 – the preview return that we’re adding should help  |
| 1. E-file section
 | Return type | The current wording of “Federal Return Type” is confusing – it seems like you’re really asking for both return and refund type. The responses available are Electronic Mailed, Direct Deposit, and Paper Return. There doesn’t seem to be a provision for a paper return with direct deposit. The responses might be more clear if they were **E-file No Direct Deposit**, **E-file Direct Deposit**, **Paper Return No Direct Deposit**, and **Paper Return Direct Deposit.** |  | 4/19 – In trainingChecking on paper with direct deposit5/17 Paper Direct Deposit has been added |
| 1. E-file section
 | Third party designee | Is the third party designee info going to be over-ridden for volunteers? Or will we always have to check the box to clear the entries? |  | 4/19 – it will be blank with TS 2016 with the ability to add if needed. Covered in training |
| 1. Form 1099-R
 | F1099-R Distribution Penalty page | This page appears to be triggered when there is a F1099-R with distribution code 1, but I don’t understand the purpose of the entries. I can understand the software giving me a reminder, but why does it matter what type of distribution it is, if I have to go to F5329 to address any early distribution penalty, anyway? The wording of “What type of plan” is not entirely clear (does “retirement plan” include IRAs and employer plans?) Not sure why Qualified Tuition Plan is on this page. The TP would receive a 1099-Q if they had a distribution from a 529 plan or Coverdell ESA. And I can’t tell what happens if you check the bottom box, since that doesn’t register on my IRS computer |  | 4/22 – Will review |
| 1. ACA
 | Non-dependents are being included in the tax family for ACA | The Hannah Fleming problem (Advanced Exercise 3) includes a son who is being claimed by his father under the special rules for divorced /separated parents. Since Jerry (the son) is being claimed by his dad this year, Jerry is not part of the tax family for ACA purposes. I thought I could delete him by clicking on the “Dependents” button, but if I do, it will remove him as a dependent, so I have to leave him. Hannah should not be responsible for Jerry’s ACA issues – dad must include Jerry in his tax family, since he is claiming Jerry’s exemption. This results in an incorrect outcome. |  | 4/19 Development is already reviewing allowing the option to remove dependent from the household |
| 1. Dependents
 | Requires the preparer to enter the “type of disability” | When the “Check if this person is disabled” box is checked for a dependent, it asks for the type of type of disability. This is not required, and not the preparer’s business. I don’t think our Civil Rights people would approve ☺ |  | 4/19 – This actually carries to the EIC checklist - has been sent to development |
| 1. 1099-R
 | When a 1099-R is entered with the taxable amount lower than the gross distribution, you get a warning screen | You get the warning screen even if the software just calculated the taxable amount from the Simplified Method Worksheet. The warning screen also says if you have a rollover you must select Return to 1099-R and make an entry under Rollover or Disability. It doesn’t say whether you need to do this if the Box 7 distribution code correctly identifies the return as a rollover; I didn’t do it with a F1099-R with Code G. The software treated the amount correctly, even though I hadn’t entered it. |  | 4/19 – will review warning |
| 1. Adjustment – IRA Distribution
 | Preparer required to indicate whether the TP or SP “has a retirement plan” | The software already has this information from the checkbox on the W-2s – why must it be manually entered? **Desktop does this automatically.** If the preparer **must** check this, better wording is needed; otherwise preparers might be confused by taxpayers who may already be receiving a pension from a retirement plan. Receiving a pension doesn’t impact whether you can deduct you contribution – it’s only if the TP or SP was covered by an employer retirement plan during the year. The simplest way to say it would be, “Is the Retirement box checked on any W-2 for the Taxpayer [or Spouse]?” But really, the software already has this information. |  | 4/22 – will not be adjusted – TP/SP may not have a W-2 but still has retirement plan |
| 1. Simplified Method Worksheet
 | Amount excluded does not appear during input | The worksheet calculates the correct amount but in order to determine how much the person has previously recovered you have to click continue and the second screen will appear that shows you the amount taxable. You then subtract the amount taxable from the gross amount, in this case $12,743 - $12,303 = $740, go back to the simplified method worksheet and enter the $740. In the Kent case, he began receiving benefits on 1/1/14 so you could use the $740. If the annuity beginning date had been during the year you would have to divide the amount by 12 and then multiple it by the number of months he had been receiving the benefit in order to complete the worksheet. You can also pick up the amount previously recovered from the completed simplified method worksheet that you can view when you use the print function. However, that requires using the print function, scrolling down to the simplified method worksheet, the 36th page, noting the amount and then going back to the entry screen for the worksheet and entering the amount. Both approaches are too confusing.   | My suggestion is to show the monthly exclusion amount on the worksheet and then the preparer can simply multiply that amount by the number of months from the annuity beginning date to the end of the previous year, in this case 2014. Not a big deal but should be an easy modification that will help complete the form and eliminate a couple of manual calculations. | 4/19 – will review |
| 1. Simplified Method worksheet
 | Enhancement request | This isn’t an error, but it would be a huge enhancement if the software calculated the “age of recipient at start date.” The software already knows the TP and the SP’s birth dates, and knows the start date of the annuity. It would avoid many errors if the software made the calculation for us, and instead just had a check box to indicate if it was a Joint & Survivor Annuity.  |  | 4/19 – Enhancement will review |
| 1. Itemized Deductions
 | Charitable contributions – cash | Is it necessary to ask for the date and a description of each cash contribution? This seems unnecessary. **Desktop does not ask for this level of detail.** Preparer can choose “override” and enter a lump sum, but then the preparer would have to manually add up all the cash contributions from all sources. An enhancement would be to remove the date & description but still allow individual entries if desired. |  | 4/19 – will review |
| 1. Itemized
 | PMI | Currently, there is a separate entry screen for PMI. It would be much easier if there was an entry field for PMI on the Mortgage Interest Reported on 1098 screen, as is done for property tax |  | 4/19 – Will review5/17 Training Issue |
| 1. Form 2441
 | Provider Entry Field (Enhancement) | If a name is entered more than 26 characters, you get an error and have to fix it. Couldn’t the entry field just be limited to 26 characters? |  | 4/19 -- will review5/17 Has been sent to development to correct |
| 1. Form 8863
 | Can’t change student once selected | I like the way the drop-down menu functions, allowing us to select the student instead of having to type the name and SSN again. But I let it default to the wrong name, and there didn’t seem to be a way to change it to the correct student. I had to delete the F8863 and re-enter. Is this a Font Awesome problem?  |  | 4/22 – F8863 calc is tied to the initial student selected based on dependent entries in basic info. Must delete and choose correct student if necessary |
| 1. Direct Deposit
 | No warning | I purposely made mistakes for both the routing number and account number when I entered it the second time, but did not receive a "warning" that the numbers did not match. It may be that the warning would not show up until you attempt to e-file, but that is too late. Also, I foresee some errors being made regarding direct deposit. The same numbers could be entered, simply by copying what is right there for the second person to see (or even the same person copying his own mistake) with an incorrect RTN or account number entered. No cross-check. |  | 4/19 – Known issue and will be fixed5/17 Has been fixed live |
| 1. Destkop – ACA
 | No way to indicate that an individual had MEC for part of the year | If I answer “NO” to the Full Year Minimum health care question on the Personal Info menu, the software asserts a full year’s shared responsibility payment. It does not ask which, if any, months an individual does have coverage. It doesn’t seem to ask about the different members of the tax family, either. I watched the nice education video on ACA at Taxslayer.com, but part-year coverage was not addressed.  |  | 4/19 – Training issue Within F8965 – specific to each individual within SRP menu |
| 1. Personal Info
 | Last name on spouse and dependents defaulting | Defaulting the last name on the return is is going to be a disaster. If the error is found later, we have to go back to basic info detail, but there are way too many times when there is a different last name. Should remain blank and make us type it in. |  | 4/19 – training issue. The different last name had to be changed from blank to last name in previous software |
| 1. Desktop – 1099SSA
 | Entry of Medicare premiums | It would be a nice enhancement in desktop if you could add your great little calculator feature to the Medicare Premiums box. Since many taxpayers have both Part B and Part D, the preparer will have to add the premium amounts. It would be even nicer if both desktop and online software had separate entry boxes for Part B and Part D. |  | 4//19 – will review |
| 1. Desktop – Calculation of Debt
 | Form 982 Amount Excluded Due to | The pick list is outdated, and does not list Primary Principal Residence Indebtedness. The Form 982 that prints is also outdated and doesn’t show the current description for line 1e (Discharge of qualified principal residence indebtedness) |  | 4/22 – F982 list is current – verified by current version of F982 |
| 1. Desktop Printing -
 | Can’t view the full return prior to printing | I like that you can see the 1040 any time, but to see the rest of the return you have to Print the return. Unlike Pro-Web, the print file doesn’t open in a separate window first – you have to select a printer. I got around that by printing to Adobe. Is there a better way to view the actual return without printing?  |  | 4/22 – Training issue – Can change the config for printer preferences |
| 1. Desktop Printing
 | Quick View Feature | I accidentally discovered the very nice QuickView feature for some forms – this should be highlighted in training for desktop users. This is coming in ProWeb, too, right? |  | 4/19 – something similar will be implemented in Pro Web5/17 This will be trained on – Taxpayer Profiles |
| 1. Desktop Form 3903
 | No way to indicate a military move | The F3903 sections doesn’t ask if it’s a military move (if moving under orders, the TP doesn’t have to meet the time or the distance tests.) You can check the box “meet the requirements for the time test” but I think the TP would have a problem if their move was less than 50 miles, which is rare but can happen. The on-line version has a checkbox for military move. |  | 4/22 – sent to development |
| 1. Desktop – Form 8863
 | Education Credit | The desktop software defaults the answers to questions 7-10 to allow the credit; the preparer should have to answer these questions, to make sure they ask the TP or check the 1098-T.  |  | 4/22 – sent to development5/17 Will not change |
| 1. Desktop – Missing Items
 | Extenders | I think I must be practicing on the early release version? |  | 4/19 – will review this could be a side effect of updates not being applied to the IRS computers yet |
| 1. Desktop – EIC and combat pay
 |  | There was a diagnostic warning stating that “If you elect to use Combat Pay for EIC Purposes then Combat Zone must be selected in the Military Processing field.” Why is this necessary? If the W-2 has a code Q amount in Box 12, it’s combat pay. Why does the preparer have to make an additional indication just for EIC purposes? |  | 4/19 – will review |
| 1. ACA
 | Worksheets | In 2014 TW software the 2 worksheets were not available. In 2015 they were added. Not having them for 2016 is a step backwards. The 2 worksheets can be found on pages 10 & 11 of the Form 8965 Instructions. The current worksheets pull in data such as the federal poverty level from tables. The marketplace affordability worksheet also contains a link to the HCA website to be used to determine the LCBP and SLCSP premiums. The affordability exemptions were the most common questions from volunteers this year.  |  | 4/19 – training modules for both Pro Online and Desktop will be available |
|  | change in filing status | If after entering a filing status and completing a return through the state level, you make a change to the filing status, it will delete the state return if you want to change the filing status | Why can't the program carryforward the filing status change to the state level. This creates more work for the user and leaves greater room for error. Huge inconvenience | 5/31 - (CS) Some state forms are contingent on filing status. When states are initially created, a XML is created. From a programming standpoint and common with most tax prep applications, it is much easier to create a fresh XML with a new filing status than to edit existing XML. Training issue and will not change |
|  | Form 8889 employer contributions | if you have an employer contribution coded as a W in box 12, it does not automatically load the 8889 form, it appears that you must | Yes, the system provides a warning "We will automatically pull your employer contributions from your W-2. DO NOT enter amounts from your W-2", but it is very misleading that you have entered the data from the W-2, but it is not carried to the form and may cause a counselor to enter it again which will double up on the figure. | 5/31 - (CS) F8889 cannot be preloaded based solely on Code W in Box 12 because the preparer must indicate type of coverage within F8889 menu (self-only OR family). Current defect will visibly show carried over Box 12 amount within F8889 entry menu. |
|  | Summary/print/forms | There is a lot of discussion and concern over where we have access to see the 1040 and supporting documentation. The response in #27 indicates that the 1040 view will be enabled from the summary/print view before the start of the season.  Is that not what we are seeing now? and if so, it still does not allow us to see the supporting forms and/or state return unless you then go to the print feature | It is very cumbersome to see supporting forms and while we are hearing about "quick view", there is not enough information about it to determine if it will solve the concerns.  Will it or a 1040 view be available as a default vs. going through the "interview" process.  Can someone please provide more information on what is currently being planned? | 5/31 (KM) We will be enabling a preview feature at various places throughout the application. The preview from the summary page will show completed federal and state forms. We will also be delivering a QR Print Set that will show all supporting statements. The site will have the ability to create their own print set if none of these options work for them. |
|  | e-file section | includes many items that are not directly e-file related | Suggest re-naming it "completing the return" or "finishing the return" | 5/31 (KM) the majority of what is in there is all about e-file. Training issue. Will not change  |
|  | general navigation | Difficult to maneuver within categories or to get back to the start of a category at some points within the program. Similar to once you are in the summary section if you click back, it backs you out of the program to the secured login site which we are not using causing you to have to sign back in altogether, if you hit continue |  | 5/31 (KM) The log out issue will be resolved. We are currently working on that. It has to do with the time out issues within the system. |
|  | Form 1099-MISC/schedule C | Looking at the TS way of entering 1099misc to schedule C, would it be possible to allow you to enter all of your 1099misc forms and then choose to add a new schedule C or add to an existing one. | This would save a lot of steps if you have multiple 1099 misc forms.  | 5/31 (KM) This already exists. They can enter all 1099-MISC. Once they are through they can open the 1099-MISC up, scroll to the bottom and hit continue. This will prompt them to complete a New C or E, or add to an existing C or E. It will originally prompt them to do this if they enter anything in 1 or 7, but they can click continue without creating one. |
|  | other capital gains data | It is not clear, but it looks like the system will NOT carryforward capital losses from prior years and that we will have to manually enter them on the other capital gains data forms? | Too easy for them to be missed. If the return was done in TS for a prior year, so in 2017, will any capital loss carryforward from a 2016 return done in TS carryforward? | 5/31 (KM) We will be producing a list of what will carry forward from TS 2016 to TS 2017 after this filing season. Losses will carryforward  |
|  | Income | Cannot enter or describe more than one addition or subtraction to income. Preparer has to calculate the total plus or minus and enter the lump sum.  | This will make the return incomplete because there is inadequate explanation. | 5/31 (KM) Explanation is not required to go to the IRS. Can use the notes feature and pin the note to that page. |
|  | Adjustments | Adjusting medical expenses for HSA is totally manual  | Prone to make errors as this can be a convoluted calculation, especially if TS makes some adjustments and not others. | 5/31 (CS) Training Issue |
|  | Various | Red and Blue buttons difficult to read, and little difference between light blue and dark blue buttons | Color blind (and aged) preparers will have a difficult time reading the buttons. White letters would be much better such as is on the Edit choices | 5/31 (CS) Will not change |
|  | E-File:Print Return | When requesting to print one copy of 8879 only, TS also prints the quick summary and list of forms pages.  | Waste of paper and preparer/client frustration since the TP must take all printed documents home. | 5/31 (KM) Those are the preset software print defaults and will not change. They can choose from the Master Print file and any other print set the site administrator sets up for the site to use |
|  | Federal: Income | Unemployment landing page does not show UI income amount. | Makes QR more challenging. | 5/31 (CS) Unemployment Income is clearly visible using 1040 View which will be default landing page for QR |
|  | Federal: Income | RRB 1099R EIN must be entered each time. | Since there is only one issuer of RRB 1099R the EIN could be pre-entered, reducing likelihood of an error. | 5/31 (CS) All returns pass through QR. If both preparer and QR do not identify incorrect entry, IRS will reject |
|  | Summary/Print View:F1040 | Blue numbers are difficult to read. Also dollar sign ($) is unnecessary and makes it difficult to see if there is a number entry. | Preparers with less than ideal eyesight may make errors such as seeing $0.00 as 50.00. May be improved with different color or bold font. Consult literature on color issues for seniors. | 5/31 (CS) Under Review |
|  | Summary View:F1040 | Dependents’ SSN truncated on summary views | Makes QR more challenging since the top of form 1040 page 1 is both a convenient place to perform some QR and a place that the TP can look at to confirm SSN's, address, name-spelling, etc. | 5/31 (KM) This is determined by Security Templates and can be modified at the site level. |
|  | Client List | Client list shows truncated SSN’s.  | Creates problems during training if we continue the policy of the first three digits indicating the exercise and the middle two digits id'ing the preparer. Couldn’t pick out specific return. | 5/31 (KM) This is determined by Security Templates and can be modified at the site level. |
|  | Federal:Adjustments:Educator Credit | If more than $250 per TP is entered the error message is, "Taxpayer Educator Expenses must be less than 250 dollars."  | Entry is handled correctly but the error message is misleading. More correctly it should read, "Taxpayer Educator Expense must not exceed 250 dollars." | 5/31 (CS) Verbiage update under review |
|  | Form 8879 | Last four digits of TP PIN are the last four digits of SSN |  SSN exposure | 5/31 (KM) This does not risk SSN exposure…any 4 random numbers could be someone's SSN. If the site does not like the calculation of the TP/SP PIN they can change it |
|  | E-file Question:TP Language | Languages are in random order, including OTHER and NONE buried in the middle of the pack. | Unnecessary demand on preparer. Should be alphabetical with OTHER and NONE at the top or bottom. | 5/31 (KM) They were entered via the list that was given by the IRS. It is not a required entry. |
|  | E-file Question:Required Question | Since the SIDN identifies the site type this question is redundant. | Unnecessary demand on preparer | 5/31 (KM) This is an example that is used for training on the fact that if the question is marked required, it must be answered. |
|  | "E-File" Link label and Landing Page Text | Confusing label and text, especially since one of the options is to paper file. Can more appropriate text be used? | Terms will add to confusion as preparers learn TaxSlayer. | 5/31 (KM) Training issue, wording is not changing for TS 2016 |
|  | Form w2 | Any entry in box 19 appears to be treated as if it is SDI and an itemized deduction. (CA SDI is treated as a state income tax deduction while VDI is not.)  | Unclear how to differentiate between CASDI and VDI when entering data. | 5/31 (CS) Training Issue: CASDI is handled in Box 14 from the drop down menu in TS and carries to Schedule A accordingly |
|  | General | Predictive data entry increases likelihood of an incorrect entry. | Based on previous values entered Fields often pre-fill with suggested completions based on previous values entered. For numerical entries this could very easily lead to an incorrect entry if the preparer isn't paying close attention. | 5/31 (KM) Not a TaxSlayer issue but your specific Internet browser settings. |
|  | Various | Can't enter 2/29 as a date unless the year was selected first and it was a leap year. | This could create confusion since in most cases the year is the last portion entered. Could the maximum number of days in February be set to "29" and then an error message be generated if a non-leap year was selected?(BTW, 1900 was not a leap year.) | 5/31 (CS) Will not change: Training issue |
|  | Form 5329 | TaxSlayer doesn't force this form in the case of an excess Roth IRA contribution. In fact other than F8880 no entry place for Roth contributions.  | Penalty won't be calculated | 5/31 (CS) If ROTH Contributions are made, manual entry is required in the appropriate area of the return. |
|  | General | A great shortcoming of TS is the failure to provide a persistent list of forms/schedules (both state and federal) that need to be addressed based on entries already made. There needs to be a TS equivalent to TaxWise's red "!" indicator. | Preparers don't know when forms such as F5329 (among many) need to be addressed, resulting in incomplete returns. | 5/31 (KM) TaxSlayer will not be adopting the Treeview or "Get the red out" methodology. Many warnings/validation checks are made when attempting to create the e-file |
|  | Paper Filing | Even though paper filing is selected, TS prints a copy of form 8879 |  | 5/31 (CS) Can be controlled using print sets  |
|  | Explanations to IRS? | The only form that seems available to provide an explanation to the IRS is the Miscellaneous Form in the e-file section. Is this a suitable place to enter explanations to the IRS, or is there a better alternative? | Explanations accompanying the return can prevent the IRS from contacting the TP.  | 5/31 (KM) We will check on adding Preparer Notes, but the Misc notes section in the e-file section will not go to the IRS |
|  | Printed Forms | Negative values are printed with a minus sign in front of the number. | IRS guidance in F1040 Instructions is to report negative values in parentheses. This also makes it less likely for the number to be mis-read by the TP. | 5/31 (CS) Under Review |
|  | Federal:Income:Other Income:Less Common Income:Gambling Winnings(W-2G) | Message in state section says: "*Leave the "State Tax Withholdings, State Taxes Paid To and State ID Number" section blank if no state tax withholdings were included on the W-2G form you received*." | If any state winnings are entered but no state tax was withheld, leaving those fields blank results in a TS error message that they must be completed. The Instructions say nothing about conditions that would cause the preparer to not enter anything in the "Gambling Winnings" field. | 5/31 (CS) If State Winnings were reported, necessary information required to complete the state portion of the W-2G would be available. Most people would leave State Info blank but would choose their state from the drop down prompting the program to look for withholdings, etc. that would not apply. |
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