

Feedback on TaxSlayer Production System

As of 1-26-2017

- Cannot prepare a 2016 return if you first prepare a 2015 return
- If you prepare a 2015 return, when you get to the e-file section of return prep, it kicks you back and essentially, you cannot prepare a 2015 return
- There is no submission ID # that appears on the 8879
- Preparer name and/or preparer email address appears on and prints on page 4 of the NY return and on the NYS Efile Authorization form
- No efile can be transmitted without a signature on the computer unless the box "Mark Complete" under the Tax Preparation Charges is checked
- No acks appear in the Office Reports: IRS Acknowledgements section - the only way to find them is to look under Old IRS Acknowledgements and put in yesterdays' date
- The Administrator cannot create returns or review returns. I had to set up an additional User ID for myself that was Assistant Admin before I could create a return. Additionally, I could not delete a return unless I used the Administrator ID.
- Taxslayer selects the form used (ie.1040, 1040A, 1040EZ) and not the user.
- Able to change phone number displayed on tax return in ERO setup
- NYS Validation Errors message is not preventing us creating and sending NY returns. It is displaying in error. Will be posted on the TSO blog
- W2 message about Box 1 and 2 not matching is being displayed all the time. TaxSlayer Response: "The message is pretty small and we do not have the automatic ability to hide it. They can tab over it after they complete entering the data on it".
- The deactivate a return can be done from the assistant admin user now, but you can only deactivate returns that are in progress.
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- The IRS acks now show up in the IRS acks report.
- The real issue is that the site specific print set is not the default set.



New York Filers Note:

When entering a locality for New York please note the following:

- If entering New York City as the locality, you MUST enter: **NYC** in box 20
- If entering Yonkers as the locality, you MUST enter: **YONKERS** in box 20

If entering an amount in box 14:

- If the amount in box 14 is a 414H amount, select **NY IRC 414 (h) -NY 414** from the drop-down menu beside the amount.
- If the amount in box 14 is an IRC 125 amount, select **NY IRC 125/SEC18-NY125** from the drop-down menu beside the amount.

Otherwise, NY could reject if you try to send the state electronically