

Filing Season 2021: TaxSlayer Procedural Updates for SPEC Partners and Employees

Background

For filing season 2021, TaxSlayer remains the software provider for the VITA/TCE program. SPEC continues to focus on readiness and training to ensure all SPEC relationship managers (RMs), partners and volunteers have the knowledge, skills, and abilities to deliver another successful filing season.

TaxSlayer Facilitated Self Assistance (FSA) product

TaxSlayer FSA is available this year as a fusion, stand-alone, and remote product. The fusion product must be ordered at the same time as the traditional online or desktop software. If the first order was already processed, then a stand-alone product must be ordered. TaxSlayer will send an email containing a customized URL embedded with the site's unique SIDN.

Site administrators cannot run reports for sites using TaxSlayer FSA products. The RM must pull Kiosk production reports for these sites. Reports are uploaded weekly to the TaxSlayer Shared Drive during the filing season.

TaxSlayer FSA Fusion:

A **fusion site** will have the same physical location as the traditional site. The site will offer clients the opportunity to self-prepare their current Federal and State tax returns. The site must have a certified volunteer available to assist the client with tax law questions.

TaxSlayer FSA Stand Alone:

A **standalone site** will have a physical location and posted hours for clients to come and use the self-prep software. The site must have a certified volunteer available to assist the client with tax law questions. Can be located at a traditional site and can operate the same hours.

TaxSlayer FSA Remote:

A **remote site** will be able to email the site's TaxSlayer custom URL to a known individual and/or place a link on a private-facing website, commonly known as an intranet site. The site must have a certified volunteer available to assist the client with tax law questions. The assistance can be via phone, chat or email. Response must be provided in a timely manner.

- TaxSlayer FSA Remote sites cannot do any of the following with their custom URL:
 - Place on public-facing web site
 - Send out in mass email
 - Post on any social media/blog platform

- Include in electronic or paper newsletter/newspaper article

Scanned Document Program:

The program has been expanded for Filing Season 2021. This program allows a certified volunteer to scan and upload documents into TaxSlayer for storage. When the return is prepared, a certified volunteer will be able to prepare the return by accessing those scanned documents and inputting the data to complete the return.

Scanned Document Program Requirements:

- Site must provide scanners and software for scanning. TaxSlayer will not support this part of the process.
- Once documents are uploaded to TaxSlayer, the documents must be deleted within 14 days.
- Sites must create a "SCAN" return tag and add it to each client that has documents uploaded under this program.
- Sites must create security templates that will allow users to access scanned documents.

Scanned Document Program Benefits:

- Client keeps original documents.
- Documents are securely stored with TaxSlayer.
- Return can be prepared remotely.

Sites that are interested will let their Relationship Manager know of their interest.

Security Protocol – (reCAPTCHA):

reCAPTCHA, "*Completely Automated Public Turing test to tell Computers and Humans Apart*," is a newly mandated security tool to verify a user is human. After two unsuccessful logins, a user will be prompted to check a box that they are not a robot.

Pro Online Site Activation:

Returning sites/users will be able to use the same login/active username from the prior year. All sites from filing season 2020 will receive an email letting them know when their filing season 2021 software is available. An activation link will not be sent for a site that is a returning site from last season. TaxSlayer will deactivate a returning site if a software order for tax year 2020 is not received by 12/31/2020. Once the order is received, TaxSlayer will re-activate the site.

If a returning site has a different contact name on the software order, the new contact person will need to contact TaxSlayer customer support. TaxSlayer will generate an email with a link to provide administrative rights to the new site contact.

New sites will receive two emails with activation links. One email will contain the Site Activation Notification code, requiring the site to verify site-specific information when creating an Administrator account. Another email will contain a User Activation code that requires the contact person on the software order to create a user account for their "My Account" page.

Prior Year Software Access:

TaxSlayer Pro Online and Desktop software gives sites the ability to **prepare** federal, state, and local individual tax returns for the **previous four tax years** (TY2019, TY2018, TY2017, and TY2016). Sites can electronically file federal and state individual tax returns for the previous two years (TY2019 & TY2018).

Note: If sites have desktop software (possibly from a contingency plan) for earlier years, then they can still prepare paper returns for those years; however, TaxSlayer will not actively provide support.

TaxSlayer User Guides:

Beginning for filing season 2021, TaxSlayer will no longer provide any printed TaxSlayer User Guides. Desktop sites, Pro Online sites, and IRS employees must access the user guide electronically. The electronic user guide is available to all users in three locations:

1. VITA/TCE Springboard
2. “Helpful Tools” while inside a return
3. Under “VITA/TCE guides & publications” located in the left navigation bar on the Pro Online homepage

VITA/TCE Publications Available on TaxSlayer Pro Online Homepage:

Now added to the left navigation bar is a choice for VITA/TCE guides & publications including:

- Publication 4299: Privacy, Confidentiality, and Civil Rights
- Publication 4012: VITA/TCE Volunteer Resource Guide
- Publication 1084: VITA/TCE Volunteer Site Coordinator Handbook
- Publication 17: Your Federal Income Tax (For Individuals)
- Publication 5166: Quality Site Requirements
- TaxSlayer Pro Online User Guide
- TaxSlayer Pro Online 1040-NR User Guide
- TaxSlayer Pro Online Amended Return User Guide
- TaxSlayer FSA Presentation
- TaxSlayer FSA Best Practice
- TaxSlayer FSA Troubleshooting Tips
- IRS Reject Resource Guide

TaxSlayer Pro Desktop:

TaxSlayer Pro Desktop is beginning a 2-year reduction plan

- Year 1 (Filing Season 2021) Only sites that had Tax Year 2019 Desktop can order Tax Year 2020 Desktop or new sites that have server connectivity issues.
- Year 2 and beyond (Filing Season 2022+) Only sites that have connectivity issues (e.g., rural areas that have unreliable Wi-Fi and cell coverage) will be allowed to order TY 2021 and beyond Desktop product. **Area Director Approval is required for these orders.**

This reduction plan will not preclude the use of desktop software on a contingency basis.

TaxSlayer Pro Desktop: Use of Personal, Partner & IRS loaned computers:

Use of volunteer personal (BYOD) computers at sites using TaxSlayer Desktop is prohibited. Sites are strongly encouraged to retain partner owned or IRS loaned computers at the site during non-site hours. Note: Exceptions for partner owned or IRS loaned computers will be made for volunteers who are traveling between sites or if security at the site is such that leaving computer equipment is not possible.