Fact Sheet
VITA/TCE Transition to TaxSlayer Software
May 2016

This Fact Sheet provides transition information regarding the software contract with TaxSlayer.

Key Messages:

- VITA/TCE contract has been awarded to Rhodes Computer Service, Inc., DBA TaxSlayer, LLC beginning with the 2017 Filing Season.

- SPEC will roll out a phased training approach on TaxSlayer to ensure everyone involved is ready for the next filing season.

- All SPEC employees, partners and volunteers will be involved during all phases of the transition to using TaxSlayer.

- The carry forward feature in the tax software that automatically fills in taxpayer information from prior years will **not be available** the first year of this new TaxSlayer software contract.

- We know not having carry forward ability means some extra work for you and your volunteers this first year. However, this is only for the initial year.

- The IRS staff will work closely with TaxSlayer to ensure they provide the best support possible.

Background:
TaxSlayer will be the new software provider for the VITA/TCE program beginning with filing season 2017. From now until the beginning of next filing season, SPEC will focus on readiness and training to ensure all SPEC relationship managers, partners and volunteers have a working knowledge of the TaxSlayer software and are prepared to deliver a successful 2017 filing season.

Carry forward of taxpayer data
The carry forward feature in the tax software that automatically fills in the taxpayers' required information from prior years will **not be available** the first year of this software contract.

This is a normal occurrence whenever there is a change from one software contractor to another. We know this means some extra work for you and your volunteers this first year. However, this is only for the initial year. Once we get through this year, the amount of data input required will drop significantly as these taxpayers return to the site.

IRS recognizes that the change in tax software will impact the number of returns prepared by our partners. For those receiving a grant, expected growth will be set at 1% over the returns prepared in 2016. In addition, we will continue to provide all partners with the opportunity to share challenges encountered in delivering expected returns.

TaxWise Online (TWO) Users
- Partners must not attempt to download tax return data to a flash drive or other media devices in an attempt to upload the data to TaxSlayer for Filing Season 2017 or for purposes of retaining a copy of the return for other uses. IRS does not support this action because it presents several risks such as:
    o Losing taxpayer data and adding an increased potential risk for identity theft,
    o Putting the taxpayer at risk; the partner organization at risk for liability; and the entire volunteer program at risk.
- TWO Users can not convert to TaxWise Desktop (TWD) in order to have Tax Year 2015 data available to carryforward to Tax Year 2016.
    o If a TWO user converts to TWD now, the user will not have access to the returns prepared in TWO since they are located on CCH's server. The user will only have access to the returns prepared in TWD after the conversion.
    TWO does not provide a mechanism to download returns prepared. Users can only print returns to PDF and save to a device. However, the PDF file is not automatically encrypted from the CCH software.

5/5/2016

Benefits of TaxSlayer Pro Online

- Provides **enhanced security**. With identity theft continuing to be a concern, online software provides an extra security level for taxpayers that Desktop does not provide.

- **Relieves the need for storing return information on any removable media**. This gives partners the ability to assure their customers they are taking extra security measures with their personal private information.

- **Reduces some of the administrative burden** imposed when using Desktop software, such as not having to install anything on the computers at the site and no need to add additional software updates.

Transition to TaxSlayer

Together, we can get through this first year hurdle and even embrace some opportunities. As we continue to focus on protecting taxpayer's information, we can take advantage of the fact that we need to re-input taxpayer information as a way to strengthen the quality of our programs.

Training on TaxSlayer will roll out in the coming months and we all will play a vital role in ensuring everyone is ready for next filing season. The TaxSlayer Practice Lab is currently accessible for your use to get familiar with the software's functionality and practice preparing returns. The Practice Lab also includes instructional videos that will guide you through the software.

We here at the IRS will work closely with TaxSlayer to ensure they provide you and your volunteers with the best support possible. We have already begun testing and analyzing the software, making recommendations for change, and updating training and volunteer resources.

Steps to assist with transition if prior year return information is needed

- Ask clients to bring a copy of their prior year return to the site

- Using **Get Transcript** at irs.gov is the quickest way to get a copy of a tax transcript. Taxpayers can request a

  Tax Return Transcript - shows most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript doesn't show account changes made after the return is processed; or

  Tax Account Transcript - shows basic data including return type, marital status, adjusted gross income, taxable income, credits and payments. It also shows adjustments made by you or the IRS after you filed the return.

  By planning ahead they should receive the free transcript in the mail within five to 10 days from the time the IRS receives the request online. They can order a transcript of any return filed within the past three years including forms 1040, 1040A and 1040EZ.

- Taxpayers can simply go online and click the "Get a Transcript by Mail" button to order a paper copy of the transcript and have it sent to the address the IRS has on file. To get started they will need their Social Security number (SSN) or their Individual Tax Identification Number (ITIN), date of birth, and address from their latest tax return.

- For more information, read the *Get Transcript Frequently Asked Questions* on IRS.gov