TaxSlayer for VITA: Mastering the TaxSlayer Report Feature

February 8, 2017
1-2:30pm ET; 10am-11:30am PT
Welcome

Carmen Shorter
Senior Manager for Learning, Field Engagement
CFED
Housekeeping

- This webinar is being recorded and will be available online within one week.
- All webinar attendees are muted to ensure sound quality.
- **Ask a question any time** by typing the question into the text box of the GoToWebinar Control Panel.
- If you experience any technical issues, email gotomeeting@cfed.org.

Trouble dialing in? Just listen through your computer with speakers or headphones!
Keys to Success on Today’s Webinar

• Join from a **quiet space**
• Grab a **coffee** or snack and **settle in**
• **Engage!** Send us your **questions** and **comments** as you listen
• Create a **watch party** with your team to **listen & learn** together
Our mission at CFED is to make it possible for millions of people to achieve financial security and contribute to an opportunity economy.
How do we do it

We **push to expand** innovative practical solutions that empower low- and moderate-income people to build wealth.

We **drive policy change** at all levels of government.

We **support the efforts of community leaders** across the country to advance economic opportunity for all.
Taxpayer Opportunity Network Members...

- Participate in learning and advocacy opportunities
- Learn about the latest developments in the field
- Access valuable resources for volunteers, program managers and site coordinators
- Get discounts to Taxpayer Opportunity Network convenings

To join or learn more, go to: cfed.org/programs/taxpayer_opportunity_network
What’s in store for today?

- IRS SPEC Perspective and Resources
- TaxSlayer Reporting Feature
- Q & A
- Close
Today’s Speakers

Rebecca Thompson
Program Director
Taxpayer Opportunity Network

Don Dill
Senior Tax Analyst
SPEC Headquarters
IRS

Kim Manuel
Director of VITA/TCE
Relations
TaxSlayer
Welcome from TON

Rebecca Thompson
Project Director
Taxpayer Opportunity Network
"If we have data, let's look at data. If all we have are opinions, let's go with mine."

Jim Barksdale, Netscape
“Numbers have an important story to tell. They rely on you to give them a clear and convincing voice.”

—Stephen Few | Data Visualization Expert, Perceptual Edge
Data is like garbage. You'd better know what you are going to do with it before you collect it.

~ Mark Twain
Welcome from the IRS

Don Dill
Senior Tax Analyst, SPEC Headquarters
Internal Revenue Service
SPEC’s Support for 2017 Filing Season

SPEC’s Appreciation to Partners for Start of the 2017 Filing Season

• SPEC Thanks All Partners and Volunteers for Their Diligence in Starting the 2017 Filing Season

• SPEC Offers Sincere Apologies for Challenges, Barriers and Angst Created From Software Interruptions

• SPEC Vows to Work Hand-in-Hand With TaxSlayer To Mitigate Future Impact on Partners, Sites, Volunteers and Taxpayers
SPEC’s Support for 2017 Filing Season

TaxSlayer Support from SPEC

• SPEC Relationship Managers
  • All Have Been Trained to use the TaxSlayer Software
  • Work closely with TaxSlayer Software Subject Matter Experts in their Territories
  • Have Access to a Full Array of Resources
  • Partners and Volunteers Should Contact Your Local SPEC RM With Your Questions and Concerns
SPEC’s Support for 2017 Filing Season

Utilizing Support Resources Effectively

- TaxSlayer Customer Support Can Provide Assistance With the Following:
  - Software Activation and Operation
- Your SPEC Relationship Manager Can Provide Assistance With the Following
  - Tax Law Issues
  - SPEC Policy Issues
  - VITA/TCE Procedures
SPEC’s Support for 2017 Filing Season

Additional TaxSlayer Support During The Filing Season

• SPEC Employee/Partner Joint Webcasts
  • March 7th
  • April 4th

• Conference Calls with TaxSlayer
  • Weekly Calls Thursday 1pm EST
    • 1-888-331-8226, participant code 1816842

• SPEC Will Still Provide Data Support from Internal IRS Data in Addition to TaxSlayer Data
Updates from TaxSlayer

Kim Manuel
Director of VITA/TCE Relations
TaxSlayer
Webinar Objectives

- Acknowledgement Reports
  - IRS Acknowledgement
  - State Acknowledgement
  - Validation Errors
- Managing your e-files
- Management Reports
Acknowledgment Reports

Office Reports

- **IRS Acknowledgements**
  - Only shows acks not viewed

- **Old IRS Acknowledgements**
  - View previously viewed acks

- **State Acknowledgements**
  - Only shows acks not viewed

- **Old State Acknowledgements**
  - View previously viewed acks

- **Validation Errors**
  - Shows returns that did not pass secondary validation

- **Old Validation Errors**
  - Historical view of returns that did not pass secondary validation
## Sample IRS Acknowledgement

![Image of IRS Acknowledgement interface]

### IRS Acknowledgements

Search:

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<thead>
<tr>
<th>EIN</th>
<th>SSN</th>
<th>Last Name</th>
<th>Status</th>
<th>Reject Code</th>
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<td>N/A</td>
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<td>5</td>
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<tr>
<td>6</td>
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<td>COLE</td>
<td>Accepted - 01/23/17</td>
<td>N/A</td>
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<tr>
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<td>GREEN</td>
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<td>N/A</td>
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<tr>
<td>10</td>
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<td>HANNAH</td>
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<tr>
<td>11</td>
<td></td>
<td>TARTELL</td>
<td>Accepted - 01/23/17</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Old Acknowledgement Report

- Select the EFIN (even if only one is showing)
- Select the Date Range
- Select Continue
Reports Not Applicable
Reports for Daily Management

• **Returns not Transmitted**
  • Listing of Returns that have been created, but not transmitted

• **Returns Transmitted**
  • Listing of returns with the status of Transmitted
  • Run after sending a batch of e-files

• **Accepted Returns**
  • Listing of returns accepted by the IRS

• **Rejected Returns**
  • List of returns rejected by the IRS
Username Report

- Displays the following:
  - User name that you created for the user
  - Full Name (first and last name entered)
  - Security template assigned to the user

<table>
<thead>
<tr>
<th>User Log In</th>
<th>Full Name</th>
<th>Security Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 KIM@SOMEWHERE</td>
<td>KIM EMAIL ADDRESS</td>
<td>SETUP MANAGER</td>
</tr>
<tr>
<td>2 KIM@SOMEWHERE!</td>
<td>SPECIAL CHARACTERS</td>
<td>PREPARER CURRENT YEA</td>
</tr>
</tbody>
</table>
Custom Question Reports

- **Return Questions**
  - List questions and corresponding answers per return
  - Export to Excel or CSV to view the entire report

- **Question Statistics Report**
  - Summary level report of answers per question

- Track if custom consents were denied
- Capture information required for grant reports
Return Tags and Custom Credits

- **Return Tags Report**
  - Run a report that will list all tags associated with a return

- **Custom Credits**
  - Listing of credit description and corresponding answers

- **Track MyRA RTN**
- **Track refundable state credits**
- **Track any numeric valued answer**
Management Reports

Available Reporting Tools

- Site Production Detail Report
  View Production Detail information for your site and EFINs
- Site Production Summary Report
  View Production Summary information for your site and EFINs
- Electronic Filing Summary
  View Your Return Extension Summary
- Extension Report
  View Your Return Extension Report
- Returns Awaiting Acknowledgement
  View Your Returns Awaiting Acknowledgement
- View Saved Reports
  View and Run Custom Formatted Reports

• Launches in a new Window (disable pop-up Blockers)
What reports are Available?

- Site Production Detail Report
  - Detail at the return level
- Site Production Summary Report
  - Summary level report
- Returns Awaiting Acknowledgement
  - Includes both Federal and State
- Electronic Filing Summary
  - Includes both Federal and State
- Extension Report
Customize and Save

- Select date ranges
- Drag columns to see report grouped by the column
- Select columns to report on
- Save report to a new name once you have it the way you want it.
Q & A

What questions do you have?
Share them in the Questions box!
Join the Network!

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• Learn about the latest developments in the field
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