TaxSlayer Procedural Updates

for SPEC Partners and Employees

Background

For filing season 2025, 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.

The remote product is only available for the 2025 filing season to those partners/sites who ordered the remote product in the 2024 filing season and select Pilot programs. New partners/sites cannot order the remote product.

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 and monthly after the filing season through October.

NOTE: To activate the URLs for all of the FSA products the sites must provide the Relationship Manager with a support email and/or support phone number prior to their URL link being activated.

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. It 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 website

    - Send out in mass email

    - Post on any social media/blog platform

    - Include in electronic or paper newsletter/newspaper article

Scanned Document Program

The Scanned Document program is a standard part of TaxSlayer. 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 will be deleted in November of each year by TaxSlayer.

- Sites must create security roles 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.

Customer Portal

The Customer Portal feature is a standard part of TaxSlayer.

- All active TaxSlayer Pro® Online sites have access to Customer Portal.

- Preparers can initiate the Customer Portal for a client after completing Taxpayer Basic Information.

- Taxpayer will need access to the Internet and an email address or cell phone to utilize Customer Portal.

Customer Portal Benefits

- Will reduce client appointments and call backs in the event a document was initially forgotten.

- Allows the Taxpayer to upload documents to TaxSlayer. This can include images (jpeg, gif) and documents (PDF, word). Individual files cannot exceed 10MB with a 25MB max per tax return.

- Allows the client to electronically sign necessary documents without being present at the site.

- Sites can make copies of tax returns available to clients through the Customer Portal.

- The Customer Portal has been enabled in the Practice Lab to allow hands on training so the volunteer can see what the taxpayer sees

- Reduce cost of paper and printer toner

- Work your rejects via secured messaging in the scenario where you need additional documentation

When using the TaxSlayer Scanned Document Program or the Customer Portal, the same site and virtual requirements must be followed and approved by your SPEC territory manager. This includes completing **Form 15272**, VITA/TCE Security Plan, and **Form 14446**, Virtual VITA/TCE Taxpayer Consent. See Publication 5450 for more information.

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.

Security Role

A security role is a listing of permissions for a user. Each user can only be assigned one security role. Assign the user a security role that allows them to complete their duties at the volunteer site. It is highly recommended that coordinators assign volunteers to the lowest level "ROLE" possible.

All TaxSlayer Pro® Online predefined Security Roles will include access to Customer Portal, Scanned Documents, and the ability to delete scanned documents.

In most cases, you can use the security roles that TaxSlayer Pro® Online predefines with your software. You can choose from the following six (6) predefined security roles for each user:

- ADMINISTRATOR (TS)

- SUPERUSER

- PREPARER CURRENT YEAR*

- PREPARER ALL YEARS*

- INTERVIEWER

- REVIEWER

NOTE: Tax returns will display and print with truncated Social Security/Individual Tax Identification Numbers for Taxpayer, Spouse, and Dependents.

When users/preparers are created, security roles must be selected. If one of the predefined roles is not enough, a site is able to create customized security roles. For a listing of what is included in the predefined security roles, click the link: **https://vitablog.taxslayerpro.com/default-security-template-definitions/**.

Pro Online Site Activation

Returning sites/users will be able to use the same login/username from the prior year. All sites from filing season 2024 will receive an email letting them know when their filing season 2025 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 2024 is not received by 12/31/2024. 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 five tax years** (TY2023, TY2022, TY2021, TY2020, and TY2019). Sites can electronically file federal and state individual tax returns for the previous two years (TY2023 and TY2022).

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

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 5683, VITA/TCE Handbook for Partners and Site Coordinators

- 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

Only sites that have connectivity issues (e.g., rural areas that have unreliable Wi-Fi and cell coverage) will be allowed to order TY 2024 and beyond Desktop product. **SPEC area director approval is required for these orders.**

This 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.