

Accounting Aid Society
Site Coordinator Update – January 31, 2026

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Contact Information

Do not hesitate to contact us for assistance. Any questions you have about tax law, tax site procedures, tax software, or other issues should be addressed to the following individuals:

For All Tax Sites

- Maysaa Rahal – For staffing, facilities and supplies issues
- Kasandra Ward – For computer and network setup issues

For Staff-Led Sites

- Maysaa Rahal – For tax law, TaxSlayer and site procedure questions

For Volunteer-Led Sites

- Kathy Holka – For tax law and TaxSlayer questions
- Maysaa Rahal, Sam Spolarich, or Lamis Alnajjar – For site procedures such as using Quickbase, CFR debit card application, using Cervis, etc.

Phone numbers for each person listed above were provided in the email that contained this update. We ask that only the site coordinators or assistant site coordinators request assistance and that you not share our cell phone numbers with others.

Quality Site Requirement Alert and Volunteer Tax Alerts

The IRS has so far issued one Quality Site Requirement Alert (QSRA) and two Volunteer Tax Alerts (VTA) for the current filing season; they are listed below. We are required to share them with you and all volunteers and staff.

All three alerts identify issues with the certain certification tests. We realize that all volunteers and staff at the tax sites should already be certified. Please share the alerts with anyone who may inquire about taking the IRS certification tests.

- QSRA 2026-01, [Intake/Interview and Quality Review Certification Test Update](#)
- VTA 2026-01, [Changes to Form 6744, VITA/TCE Volunteer Assistor's Test/Retest](#)
- VTA 2026-02, [Changes to Form 6744, VITA/TCE Volunteer Assistor's Test/Retest](#)

The IRS issues QSRAs and VTAs throughout the tax season. They are available on our Resources page, <https://www.accountingaidresources.org>, under the Site Manual tab, and in the IRS Site Coordinator Corner at <https://www.irs.gov/individuals/quality-and-tax-alerts-for-irs-volunteer-programs>.

Note: The IRS has not yet posted QSRA 2026-01 to the Site Coordinator Corner. We have attached it to the email with this update.

IRS Publication 4491-X, VITA/TCE Training Supplement (2025 Returns)

IRS Publication 4491-X has been issued and contains corrections and updates to Publication 4012, Form 6744, and Publication 4491. At the time of this Site Coordinator Update, the electronic version of Pub 4012 had not been updated to reflect the changes listed in Pub 4491-X. It is our understanding that an updated electronic copy of the 4012 will be available in February 2026.

In the meantime, all volunteers who prepare tax returns **must** review the information in Pub 4491-X before preparing tax year 2025 returns, in particular the changes to Pub 4012 and Pub 4491. Pub 4491-X is available on our Resources page and also available at irs.gov.

- **Pub 4012** – The list of changes is on page 2 of Publication 4491-X. The replacement pages begin on page 13 of the 4491-X.
Hard copies of Publication 4012 are in the Site Boxes. For your convenience, we have attached the replacement pages for the publication to the email with this update. When time permits at your tax site, please print the replacement pages and insert them in the 4012. Pen-and-ink changes may also be made to the printed publication, but some changes require the new replacement pages.
- **Pub 4491** – The list of changes is on page 2 of Publication 4491-X. The replacement pages are on pages 34–37 of the 4491-X.

Certification Levels for Additional Deductions on Schedule 1-A

One update in the 4491-X to Pub 4012 was a listing on the Scope of Service chart of the IRS certification levels required for the new additional deductions that are claimed on Schedule 1-A. See the new page ix in the Pub 4012 replacement pages attached to the email with this update. The required certification levels are:

- **No Tax on Tips** – Advanced certification
- **No Tax on Overtime** – Advanced certification
- **No Tax on Car Loan Interest** – Advanced certification
- **Enhanced Deduction for Seniors** – Basic certification

Please make sure that preparers and quality reviewers have the appropriate certification level for tax returns claiming the above deductions.

Refund Returns with Earned Income Tax Credit or Advanced Child Tax Credit

Please advise clients with federal refund returns that are claiming the Earned Income Tax Credit (EITC) and/or the Advanced Child Tax Credit (ACTC) that their refund will be delayed.

The IRS expects most early EITC or ACTC refunds to be available in taxpayer bank accounts or debit card by March 2, 2026, if they choose direct deposit and there are no other issues with the return. Some taxpayers may have access to their refunds sooner depending on their financial institution's process. Where's My Refund at irs.gov will be updated with projected deposit dates for most early EITC/ACTC refund filers by February 21, 2026.

Site Administration

POSTERS

Please make sure the following three publications are posted at your tax site.

- **Publication 4836, VITA/TCE Free Tax Programs (Rev. 10-2024)**
- **Publication 4836 (Spanish version), VITA/TCE Free Tax Programs (Rev. 10-2024).**
- **Publication 4053, Your Civil Rights are Protected (Rev. 4-2015)**
 - **IMPORTANT:** Please update the email address on this poster to civil.rights.division@irs.gov in both the English and Spanish sections of the poster.

Both the English and Spanish versions of Pub 4836 are required to be posted in an area viewable to all taxpayers requesting in-person service. Post Pub 4053 at the first point of contact with taxpayers. Please contact us if you do not have the version of a poster with the revised date noted above.

Pub 4836 should be in your Site Box. We are not sure if Pub 4053 and the Spanish version of Pub 4836 are included in all Site Boxes. We have attached both posters to the email with this update.

NAME TAGS

All staff and volunteers working at a tax site must wear a name tag. Please make sure everyone is wearing a name tag that shows their first name and the first initial of their last name. Name tags are in the Site Boxes. Basic certified volunteers should have a blue name tag and Advanced certified volunteers should have a red name tag.

CHECKING VOLUNTEER IDENTIFICATION

The identity of new volunteers at your tax site **must** be verified by checking their photo identification.

INCOME GUIDELINE

The Accounting Aid Society will serve taxpayers with income up to \$69,000 for both individuals and families. Advise screeners and preparers that they should add up all income, both taxable and nontaxable, during the intake/interview process to ensure that a person(s) total income is within our income guideline.

PROTECTING CLIENT INFORMATION and CLIENT PRIVACY

Please do not have clients email you any personal identifiable information (PII) or tax documents. The best method to receive client information is by using the QR code to directly send the information to a ShareFile Folder for the tax site. This process ensures that the information remains encrypted and protected.

Also remember to protect the client's privacy during all steps of the tax return preparation process.

- Remind volunteers and staff that if they leave their workstation, to please make sure the computer screen has been minimized so that taxpayer information is not showing and make sure that the client is in possession of their tax documents and PII.
- Do not leave the client's printed tax return at the printer for a lengthy time.
- Be sure that you have all pages of your client's tax return from the printer and that it does not include any pages from another person's return.
- Be mindful when speaking with clients so that others may not overhear.

CHROMEBOOK LOGINS

Please refrain from logging into personal information on the Chromebooks. The logins are synced together to allow for better management and security. Your information may be viewable by others at your site.

Mailing Labels

The IRS has updated the mailing address for federal individual income tax returns with a refund, zero refund returns, and returns with no payment enclosed for Michigan residents:

Internal Revenue Service Center

P.O. Box 931000

Louisville, KY 40293-1000

Please make sure the labels you have in your site boxes contain this new address. We are aware that some site may have received labels with an incorrect P.O. box or the P.O. box address may be missing the final zero. If you need corrected labels, please contact Sam Spolarich.

TaxSlayer

PRINTING ISSUES

Schedule 1-A, Additional Deductions – The schedule is not in any of the print sets, including our custom print set and the Quality Review print set. If you have a return claiming an additional deduction (no tax on tips, no tax on overtime, no tax on car loan interest, and/or the enhanced deduction for seniors) , Schedule 1-A will have to be printed on its own.

- At the top of the Tax Return Summary page, select either View/Print Return or Preview Return. Make sure to only select Schedule 1-A for printing as these print results have a lot of extra pages that the taxpayer does not need for their copy of the return.
- Place Schedule 1-A in the taxpayer's copy of their return following the Sequence No. at the top right of the form.

Note: There is a similar issue with Form 4547, Trump Account Election(s). If the taxpayer is making one, or both, of the elections, Form 4547 will have to be printed on its own from the Tax Return Summary page.

Custom Print Sets

When printing the tax return for the client, please select the custom print sets that Accounting Aid Society has created in TaxSlayer:

- AAS (For E-File Returns) FEDERAL & STATE RETURNS – Use for both e-file and paper returns.
- AAS MI COMMON FORM for MAILING – If taxpayer is filing the Michigan Common Form, MI CF-1040, also print the AAS MI COMMON FORM for MAILING print set. This print set will provide the taxpayer with all pages of the Common Form and any federal forms or schedules that need to be attached to the city return for mailing.

MICHIGAN HOME HEATING CREDIT CLAIM

TaxSlayer has fixed the issue when there are more than three dependents on the claim. You should now be able to enter race, ethnicity and gender for each dependent

MICHIGAN CITIES COMMON FORM

If a taxpayer or spouse is disabled, the exemption is not automatically populating from the Michigan return. TaxSlayer is aware of the issue. At this time, if the taxpayer or spouse is claiming a disability exemption, please hold giving the taxpayer a copy of the Michigan Cities Common Form until the issue is fixed. Let them know we will contact them once the issue has been fixed.

- Please add the Return Tag of **CF-1040 Issue** to the return so that we may flag it when needed.

Another option is to manually prepare the return from the city's web site and giving two copies to the taxpayer. If this is done, please include a Note in TaxSlayer (entitled "d/m/yr CF-1040") explaining that this was done. Be sure to include the refund amount or balance due amount from the manual return in the Note and to enter this amount in Custom Credits.

CUSTOM CREDITS

Please make sure all staff and volunteers are aware that for the city refund/tax due field, that it is not just for Detroit returns. If there is a refund or balance due on *any* city return, the amount should be entered in this custom credit field in TaxSlayer. If a taxpayer has filed two city returns, add the amounts together and enter the total in TaxSlayer. Reminder: A balance due amount should be entered as a negative number.

FORM 4547, TRUMP ACCOUNT ELECTION(S)

Be aware that if the taxpayer has a child(ren) under 18 years of age, a Warning will appear at the end of the return in TaxSlayer that the return contains a dependent that may be eligible to open a Trump account. The two elections are:

- Opening a Trump Account for each eligible child by completing Parts I and II of the form.
- Electing the \$1,000 Pilot Program Contribution Election by completing Part III of the form.

Please know that completing the form is optional for the taxpayer at this time; the Warning does not mean it has to be completed.

We will provide guidance on Trump accounts early next week.

USERNAME PASSWORDS

If a password was changed for a TaxSlayer username, please email Maysaa Rahal at mrahal@accountingaidociety.org with the new password and the date it was changed.

At the time of this update, we are not aware of any other significant issues with TaxSlayer. If you encounter a problem with the software, we ask that the site coordinator or assistant site coordinator call Kathy Holka or send an email to kholka@accountingaidociety.org.

Rejected Returns

For volunteer-led tax sites, Kathy Holka will handle any rejected returns. Please do not resolve any rejects for these sites. If there are any questions, please contact Kathy.