

Accounting Aid Society
Site Coordinator Update – February 4, 2023

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Quality Site Requirement Alert

The IRS has issued the first Quality Site Requirement Alert (QSRA) for the current filing season. The alert is listed below; please share the information with volunteers and staff.

- [QSRA 2023-01, Quality Reviews](#)

The alert discusses the three types of reviews the IRS may perform at a tax site. Please note they are resuming in-person reviews in 2023. If you get a visit from an IRS SPEC employee at your tax site, please contact your assigned VITA Program Manager.

The IRS issues QSRA's throughout the tax season. They are available on our Resources page at <https://www.accountingaidresources.org/qstras> and in the IRS Site Coordinator Corner at <https://www.irs.gov/individuals/quality-and-tax-alerts-for-irs-volunteer-programs>.

Site Administration

SITE SECURITY AGREEMENT

The IRS requires that each tax site's Security Agreement be available electronically at the site. Please note that your site's Security Agreement is located in a folder in the site's ShareFile Folder. Please do not delete the Security Agreement folder.

PRINTER NOT WORKING

If the tax site printer is not working, please try the following solutions:

- The printer may need an update:
 - Go to the brother app located on the task bar and look for an orange exclamation mark
 - If indicated that an update is needed, click Install Update, and sign in using the password on the printer. The password can also be located on the back of the printer on the upper right side.
- If an update is not needed:
 - Go to the bottom left of the Chromebook and enter "printers" in the Search field
 - Click the three dots next to the printer and select "Remove"
 - Then when the printer appears in the "Add Printer" section, select "Save"
- If the above two steps do not work, please submit the [IT request form](#)

CHROMEBOOK KEYBOARD OR SPECIFIC KEYS NOT WORKING

If you are experiencing issues with specific keys or the entire keyboard not functioning on the Chromebook:

- Close the lid of the Chromebook; do not shutdown
- Wait 10—30 seconds and open the lid. The keys/keyboard should now work.

Form W-2 and/or Form 1099-R – What to Do if Incorrect or Not Received

The steps below must be followed if a taxpayer hasn't received his or her Form W-2 and or Form 1099-R by January 31st or if the form is incorrect.

- 1) Taxpayer should contact the employer/payer
- 2) If the missing or corrected form still hasn't been received by the end of February, the taxpayer may contact the IRS at 800-829-1040 for assistance. The attached *IRS Topic No. 154* lists information the taxpayer should have before calling the IRS.
- 3) The IRS will contact the employer/payer and request the missing or corrected form. They will also send the taxpayer Form 4852 (Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.) along with a letter containing instructions for the taxpayer.
- 4) If the taxpayer does not receive the missing or corrected form in sufficient time to file their tax return, they may use Form 4852 sent by the IRS to complete their return.

For more complete details on this process, please see the attached *IRS Topic No. 154 Form W-2 and Form 1099-R (What to Do if Incorrect or Not Received)*. It can also be found at the following link, <https://www.irs.gov/taxtopics/tc154>, and will also be posted on our Resources page.

Note: The return should not be started in TaxSlayer if the taxpayer is missing a W-2 and/or 1099-R, or if it is incorrect. If Form 4852 has to be used to complete the tax return, it must be the one sent by the IRS.

Missing Information

Taxpayers do not always show up at the tax sites with all of their documents or information needed to prepare the tax return. We have attached a *Missing Information* document that can be completed and given to the taxpayer so they have a clear understanding of what is needed in order for us to prepare the return. Reminder: The return should not be started in TaxSlayer if we know the client is missing information.

At the bottom of the sheet, please be sure to indicate the days and times the tax site is open.

Michigan Issue

PROPOSED INCREASE IN MICHIGAN EARNED INCOME TAX CREDIT

The Michigan House and Senate have passed legislation for an expanded, retroactive 30% earned income tax credit (EITC) on the Michigan Individual Income Tax Return (increased from the current 6% of the federal EITC). As the final steps are being taken to move the legislation forward, we are not certain how Michigan Department of Treasury will handle the matter should it become tax law and therefore retroactive to tax year 2022.

Guidance: Prepare and file 2022 tax returns claiming the EITC as you normally would. Do not hold or delay the filing of these tax returns. If a taxpayer has any questions, please inform them that, if it should become tax law, we anticipate Michigan Department of Treasury will provide information on how taxpayers eligible for the additional Michigan EITC should proceed.

TaxSlayer Issue

Form W-2 with No Amounts in Boxes 3—6

We have been experiencing issues on the W-2 page in TaxSlayer when entering information from a Form W-2 that does not have amounts reported in Boxes 3 (Social Security wages), 4 (Social Security tax withheld), 5 (Medicare wages and tips), and 6 (Medicare tax withheld). The software puts a red warning under boxes 4 and 6 stating "... tax withheld must be a 'number' type, but the final value was: 'NaN' ", and does not let you continue off of the page. The issue has been sporadic.

If you encounter the issue, enter the amount of wages from Box 1 in Boxes 3 and 5. This should allow you to move off of the W-2 page. Save and exit the return. Open the return, go back to the W-2 page, enter zero in Boxes 3—6, and see if you can continue off the page. This may have to be attempted more than once. If you cannot continue from the W-2 page with no amounts shown in Boxes 3—6, do not file the return, put a Note in TaxSlayer, and contact your assigned VITA Program Manager with the tax return information.