

Accounting Aid Society
Site Coordinator Update – March 18, 2023

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Best Practices

- Cell Phone Use – Please be mindful of using your cell phones when you are near taxpayer documents and personal identifiable information (PII). If a volunteer or staff member must use their cell phone while with a client, they should excuse themselves from the client, and make sure they do not hold their phone near or over any PII or taxpayer documents. (Note: We have received a few phone calls from concerned clients about this.)
- Using Notes in TaxSlayer – Please make sure you use the Notes feature in TaxSlayer to record information about the return that is helpful for another user to know about the return or a taxpayer situation. This can include information for the tax year being prepared and/or information that will be useful for the subsequent tax year. Some examples include:
 - Paper Returns – A Note must be entered indicating why a paper return was filed.
 - Missing Information – In addition to adding the Return Tag for missing information, a note must be added detailing what information is needed. (If the client returns with the missing information and the return is completed, be sure to delete the Note.)
 - Disability Pensions – If a taxpayer received a Form 1099-R with a distribution code of 3 in Box 7 and they are under the minimum retirement age as set by the employer, include a Note indicating the minimum retirement age and the employer.
 - Simplified Method – If the simplified method was used to determine the taxable amount of a pension or retirement distribution, include a Note indicating the taxpayer’s annuity start date, age at the start date, and amounts previously recovered to help next year’s preparer. (Note: It is uncertain if this information will carry forward to the subsequent tax year.)

These are just a few examples of when a Note should be added to the tax return. Please keep in mind the use of the Notes feature for entering information beneficial to another user looking at the tax return in TaxSlayer.

Adding a Note – A Note can be added while in the return by selecting the pulldown arrow to the right of the taxpayer’s name in the top right corner of the page. Select Notes from the pulldown menu and then give the note a name and enter details. Be sure to include the date the note is entered and the tax year. The Note will be attached to the page where it was created and it will also be accessible from the Client Search List. A Note can also be created by selecting the flag icon to the right of the EFIN in the Client Search List.

Election Worker Income

The workaround instructions issued last week for Election Worker Income have been revised to include additional steps that will remove the self-employment tax generated by entering other earned income. Please make sure volunteers and staff are using the 03-17-2023 revised instructions attached to this update. They will also be on our Resources page.

Note: After the workaround, the PDF of the tax return should show the amount of election worker income on line 1h of Form 1040, there should be no net profit or (loss) on Schedule C and no income on line 8z of Schedule 1 for the election worker income, and there should be no self-employment tax on line 4 of Schedule 2 for this income.

Reminder: Payment(s) received that are less than \$600 and not reported on an information return (Form W-2, 1099-NEC, or 1099-MISC) must still be reported on the tax return.