

## Preparing for Software Change – 2016 Filing Season

The 2016 filing season is the last with TaxWise® tax preparation software. Below are the suggested steps for Counselors when wrapping up with each taxpayer in 2016 to help minimize any transition issues in 2017:

- Print the following documents for each taxpayer:
  - Main Information Sheet
  - Three-year Summary
  - Taxpayer Diary if there are meaningful notes (can also copy to bottom section of MIS or Summary page before printing either of them)
  - Screenshot of Form 1099-R Simplified Method worksheet if applicable
  - Form 8606 if used and not in print package
  - Sch D Wkt 2 – capital loss carryover if applicable and if not in print package (also note amount on Records envelope)
  
- Remind taxpayers to bring their records envelope with the complete 2015 Return with them next year.
  
- Remind taxpayers they must bring social security card or other SSA documentation that shows the **full** SSN of everyone on the return (most tax documents now show only a truncated number). If necessary, they should get a new social security card if they cannot find their original. This Social Security web site ([www.ssa.gov/ssnumber/](http://www.ssa.gov/ssnumber/)) has information on how to obtain a replacement card.