

Pub 4012 NTTC Modified TY 2022 – What's New

Throughout – larger font in many places

Cover

- Important Changes for 2022 links to Pub. 4491 NTTC Modified
- Tax-Aide Scope Manual – reformatted and improved
- NTTC Resources Available by Direct Link (now called NTTC's Useful Tax Prep Links) – updated recently

p. 5 – new symbols being used this year for Notes, Tips, Caution, TaxSlayer and Navigation

B-10 (Determination of Filing Status), B-15 (Entering Basic Information) - note added – do not use the TaxSlayer Filing Status Wizard

B-18 (Entering Basic Information) - note at top reworded to recommend surviving spouse as the primary taxpayer

B-18 – digital asset out of scope noted

D-11, D-15, G-6 – added note that reporting less than foreign tax withheld to avoid using Form 1116 is not allowed

D-20 – new 1099-K page

D-27 (Entering Capital Gains and Losses) – directions included beside #3 for reporting summary transactions, no dates needed

D-42 – rewritten directions for conversion from traditional to a Roth IRA

D-44 (1099-R Box 7 Distribution Codes) – updated directions for Codes J and T

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E-7, E-8 (HSAs) – edited pages to include common situations and some not so common, complicated situations may need to be referred

H-5 (Other Taxes) – expanded list of Form 5329 exception codes from draft instructions

K-4 – added direct debit information

K-7 – Customer Portal – note to refer to TaxSlayer user guide for complete information

K-14 – added note about printing direct debit information since it does not print out on the return

K-17 – added Tax-Aide best practice to have taxpayer initial printed bank account information indicating verification that the numbers are correct

M-1, M-1.1 – rewritten amended returns information, note about superseding returns

M-8 – new section on filing an injured spouse claim

P-10 – Where's My Refund – taxpayers can check for current year and two prior years