

Preparing Returns with ITIN Renewals in TaxSlayer

Before beginning, review these documents on CTC Resources if applicable:

- [About ITINs](#)
- [Which ITIN Numbers Need to be Renewed?](#)
- [ITINs: Who is Eligible to Apply or Renew?](#)
- [Preparing Returns with ITIN Applicants in TaxSlayer](#)
- [Tax Credit Eligibility & ITIN Filers](#)
- [Restricting CTC/COD in a Tax Return When Ineligible](#)
- [Quality Reviewing & Finalizing Paper Returns for ITIN Applicants](#)
- [ITIN FAQ](#)

Inform the taxpayer that:

- The return will be completed but should not be e-filed. It must be a **Paper** return.
- They will be referred for an appointment to complete the ITIN renewal and should not mail the tax return before their appointment.
- After the ITIN appointment, the tax return and the renewal documents will be mailed to the IRS.

Remember these basics:

- **Form W-7**, *Application for IRS Individual Taxpayer Identification Number* does not need to be added to the tax return in TaxSlayer for ITIN renewals. The tax return is prepared using the ITIN number as usual. Any necessary documents will be finalized during the taxpayer's ITIN appointment.
- Tax returns with ITIN renewals are always **Paper** returns.

Preparing the Return in TaxSlayer

1. Prepare the return in TaxSlayer using the tax documents presented by the client.

Remember: **Form W-7**, *Application for IRS Individual Taxpayer Identification Number* does not need to be added to the tax return in TaxSlayer for ITIN renewals.

2. Carefully consider the steps 3 and 4 before continuing.
3. **Does the individual who wants to renew their ITIN qualify for an ITIN renewal?** Recent tax law changes have impacted the eligibility of certain individuals to renew an ITIN.

- a. If the individual renewing the ITIN falls into one of the two groups below, use the table in [ITINs: Who is Eligible to Apply or Renew?](#) to determine whether the inclusion of the spouse or the dependent results in a qualifying tax benefit.
 - Spouses living outside the US
 - Dependents regardless of where they live
 - b. After your review, if the individual is eligible to renew the ITIN, continue preparation of the return. If the individual is not eligible to renew, remove the individual from the tax return.
4. **Is the taxpayer eligible for certain tax credits?** Eligibility for certain tax credits can depend on the date an ITIN will be issued, the tax year is being prepared, and the status of any dependents. See [Tax Credit Eligibility & ITIN Filers](#) for more information.
 - a. Earned Income Tax Credit (EITC): Verify that no EIC has been included on the tax return. ITIN holders are not eligible for EIC.
 - b. Make a note in TaxSlayer to document any decisions or changes.
 5. Continue preparation of the tax return.
 6. In the **E-File** screen, set the Return Type to **Paper**.
 7. Complete the **E-File** and **Submission** screens as usual in order to prepare the return to be Quality Reviewed.

For information on quality reviewing and closing an ITIN-applicant tax return, see [Quality Reviewing & Finalizing Paper Returns for ITIN Applicants](#).