

Using Prior Year TaxSlayer Returns to Verify SSN/ITIN

The Tax Help program must confirm the identity of the taxpayer (and spouse, if applicable) to avoid the potential for identity theft or tax fraud. Additionally, all taxpayers must present proof of SSN or ITIN for themselves and any dependents on the tax return. See Confirming Identity and SSN/ITIN [[link](#)] for more information on accepted forms of identification.

If the taxpayer does not present documentation of SSN/ITIN, the Tax Help Program will accept as proof of SSN/ITIN the Main Info page from TaxSlayer under these circumstances:

- The return was prepared by the Tax Help Program for any tax year between 2016 and 2020; **AND**
- The return was **electronically filed and ACCEPTED** by the IRS and this can be verified in TaxSlayer.

Note: Returns marked as **Paper** in TaxSlayer may **NOT** be used to verify SSNs/ITINs.

If both conditions above are true, the Tax Help Program will accept the SSN/ITINs from the prior year tax returns as proof of those numbers for anyone listed on the tax return to be prepared (ie, primary, secondary or dependent).

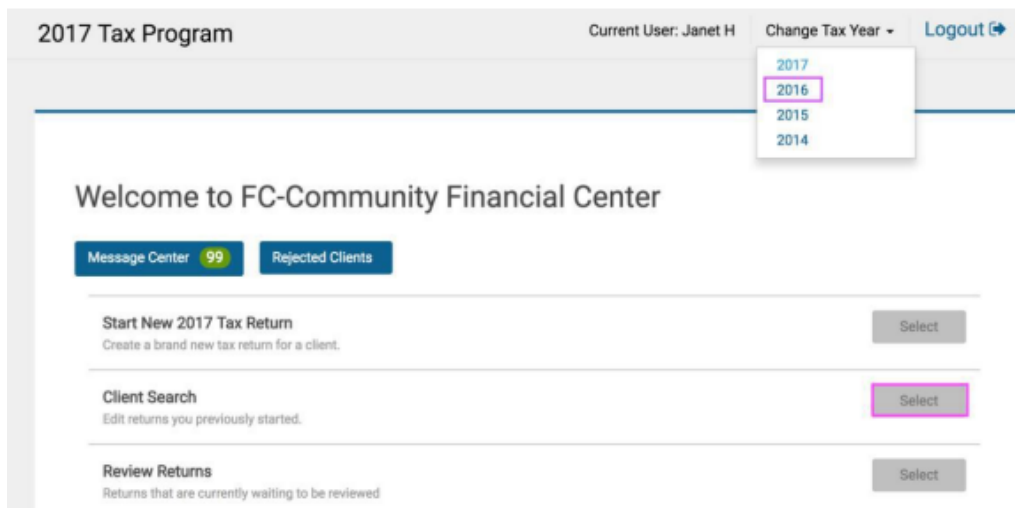
This policy is based on the assumption that in order to prepare and e-file the prior-year tax return, the taxpayer had to provide SSN/ITIN proof for that tax return to be prepared. "Accepted" status in TaxSlayer verifies that the names, SSNs/ITINs, and dates of birth are correct on that return.

Remember: Prior year returns can be used to verify SSN/ITINs, but photo identification is still required of the primary and secondary taxpayers.

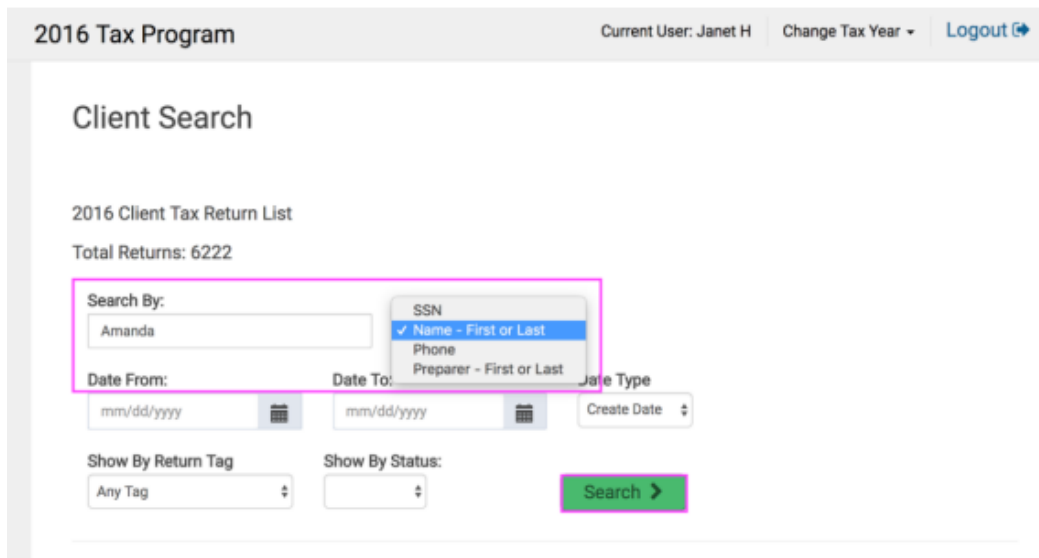
How to Assist the Taxpayer

In order to use a prior-year return as proof of SSN/ITIN, you will first need to locate the return and then verify that it has been accepted by the IRS.

1. Confirm with the taxpayer at which Tax Center site the prior year return was prepared.
2. Log into the TaxSlayer site identified by the taxpayer.
3. In the TaxSlayer main screen, click on **Change Tax Year** in the upper right-hand corner and select the tax year you will search.



4. In the **Client Search** screen, search for the taxpayer.



5. Verify that the tax return status is **ACCEPTED**.

Important: If the return status is any other status (including **Paper**), we cannot use the prior year tax return as proof of SSN/ITIN. the taxpayer will have to provide SSN/ITIN proof for each member of the tax household again this year in order for us to prepare the return.

2016 Tax Program Current User: Janet H | Change Tax Year ▾ | Logout ↗

2016 Client Tax Return List

Search By: Name - First or Last ▾

Date From: Date To: Date Type:

Show By Return Tag: Show By Status:

9 most recent returns

SSN	FIRST	LAST	PHONE	PREPARER	STATUS		Tools	Select
	AMANDA				Accepted		<input type="text" value="Tools"/>	<input type="button" value="Select"/>

6. Once you have verified that the return status is **Accepted**, you will print the Main Info Page, which is used to demonstrate that the SSN/ITIN of any taxpayer has been verified.
 - a. Click on the printer icon and select **Main Info Page**.
 - b. Print the **Main Info Page**.
7. On the printed **Main Info Page**:
 - a. Write the word “Accepted” on the top of the printout. Include the date, your initials, and the TaxSlayer site that you printed the tax return from.
 - b. Highlight the names and SSN/ITINs of everyone on the return for that year.

H:\H003\TaxSlayer\2016\webprocs\463975145t - PrintResult

PDF Viewer | chrome-extension://oemmn... | 1 of 2 | Automatic Zoom

Accepted - JH 1/23/2018

TAX YEAR: 2016 PROCESS DATE:

CLIENT : BIRTH DATE :

ADDRESS : PREPARER :

Home : PREPARER FEE:

Work : - ELECTRONIC :

Cell : - TOTAL FEES :

STATUS : 4

FED TYPE: Direct Deposit

ST TYPE : Regular Tax

E-MAIL :

DEPENDENT NAME	BIRTH DATE	SSN	RELATIONSHIP	MONTHS
TIFFANY	<input type="text"/>	234-56-7890	DAUGHTER	12

8. Make photocopies of all SS cards or ITIN letters presented during Intake regardless of whether we can verify the numbers using the **Main Info Page**.

Anyone who will appear on the tax return to be prepared and who does not appear on the **Main Info Page** must have separate proof of SSN/ITIN.