

How to Assist Tax Clients

- For returns prepared anytime beginning January 2017 for tax year 2015, 2016, or 2017.

If the taxpayers' tax return (for TR 2015, 2016, or 2017) was prepared in January 2017 or later and was e-filed and accepted, we may be able to verify the SSN/ITIN. If we locate a tax return in our tax software marked as e-file accepted, we can allow the taxpayers to file (without presenting SSN/ITIN proof) for anyone listed on that tax return. In order to prepare and electronically file a return in a prior year, we required that the taxpayers provide SSN/ITIN proof. IRS acceptance of that prior year e-filed return is proof that the names, SSNs/ITINs, and dates of birth are correct on that return, enabling us to prepare tax returns for the clients without seeing the social security or ITIN card each year.

To do this, log into the TaxSlayer site the return was prepared at and locate the return.

The screenshot shows the login interface for the 2017 Tax Program. At the top, it says "2017 Tax Program". Below that is a "Login" section with two input fields: "Username" and "Password". A blue "LOGIN" button is positioned below the password field. At the bottom of the login section, there are two links: "Forgot username" and "Forgot password".

Make sure to search from within the correct tax year.

The screenshot shows the dashboard for the 2017 Tax Program. At the top, it says "2017 Tax Program" and "Current User: Janet H". There is a "Change Tax Year" dropdown menu with a "Logout" link. The dropdown menu is open, showing the years 2017, 2016, 2015, and 2014. The year 2016 is highlighted with a pink border. Below the dashboard header, there is a "Welcome to FC-Community Financial Center" message. There are two buttons: "Message Center 99" and "Rejected Clients". Below that, there are three sections: "Start New 2017 Tax Return" (Create a brand new tax return for a client.), "Client Search" (Edit returns you previously started.), and "Review Returns" (Returns that are currently waiting to be reviewed). Each section has a "Select" button. The "Client Search" button is highlighted with a pink border.

Look up the specific return.

2016 Tax Program Current User: Janet H Change Tax Year Logout

Client Search

2016 Client Tax Return List
Total Returns: 6222

Search By: SSN
✓ Name - First or Last
Phone
Preparer - First or Last

Date From: Date Type:

Show By Return Tag: Show By Status:

Search >

100 most recent returns

If and only if the status says ACCEPTED can we prepare a return for the tax members listed on that return without seeing SSN/ITIN proof. If the tax return status for that prior year says anything other than ACCEPTED, 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 Type:

Show By Return Tag: Show By Status:

Search > Reset

9 most recent returns

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	
	AMANDA				Accepted	Tools Select

If this is the case, select the print the print set titled "Main Info Page."

2016 Tax Program Current User: Janet H Change Tax Year Logout

10 most recent returns

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	Tools	Select
					Accepted	Print Return Main Info Page Efiled Return - FC Print Set Paper Return - FC Print set QUALITY REVIEW MASTER PRINT MASTER PRINT (2 8879s)	Select
					Accepted		Select
					Accepted		Select
					Accepted		Select

Print the main info page and highlight the names and SSNs of everyone on the return for that year and write "Accepted" somewhere on the page along with the date and your initials or volunteer ID. Anyone not included on this page will have to provide separate SSN/ITIN proof before being included on the new return. (We encourage volunteers to make a copy of all social security and ITIN cards presented at intake regardless of whether we can verify the numbers through this process.) Please also note we will *always* still need to see a photo ID for the taxpayer and spouse.

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

PDF Viewer chrome-extension://oemmdncblbdoiebfnladdacbfmadadm/https://vita.taxslayerpro.com/ProAvalon/Print/Print...

1 of 2 Automatic Zoom

Accepted - JH 1/23/2018

TAX YEAR: 2016 PROCESS DATE:

CLIENT : 123-45-6789 AMANDA 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