

Tax Preparer Reminders - Key Reminders

Please make sure you are checking the following information.

Basic Information:

- When entering names, social security numbers, or ITIN, make sure they match their Social Security Card or ITIN letter.
- When entering addresses, make sure they match the **yellow 13614-C** that the client filled out and not the ID.
- If the client is Married Filing Separately, and does not have the spouse's social security number, we must input **111-00-1111** and it **MUST** be a paper file.
- ***If you are pulling information forward from last year, double check that the information is current. (Name, Address, Social, Dependents, and Income Documents)***
 - Delete any forms not applicable to this tax year.

Income Section:

- When entering a tax form, make sure you are entering the numbers in the correct box.
 - Enter the number exactly how the form is and include the decimals.
- If the client has an ITIN and has a W-2, you must enter the social security number that is shown on the W-2 in the W-2 section.

State Section:

- Make sure the Driver's License, State ID, IL Pin, **OR** prior year AGI is entered on the **E-filing Information** section.
 - If we do not have any of these, IL return must be a paper file.
- In **Basic Personal Information**, make sure the County is on there.
- Removing Retirement Income: State side, under **subtractions to income** section.
- Property taxes: State side, under **Credits** section.
- Only K-12 Fees, expenses, etc..

Return Details:

- Make sure we mark the return accordingly – Paper Return or Efile.
- Make sure the Direct Deposit information is correct, double check with the client on their account and routing numbers.
- Direct Debit: We do not use Direct Debit, please choose **Mail Payment** option, when the client owes.

Paper File:

- We must paper file 2018-2020
 - When it is a paper file, make sure you are printing out 2 copies, one for the client to keep and one for the client to mail out.
 - If they are receiving the **EIC** on the State return, you must include the first 2 pages of the Federal 1040.
- If they are Married Filing Separately and do not have the spouse's social security number, it **must** be a paper file.

E-file:

- We can only e-file 2021-2023.