Starting a New Return

Welcome to SUPPORT

Message Center **0**   Rejected Clients **0**

Start New 2020 Tax Return
Create a brand new tax return for a client.   [Select]

> The Start a New Tax Return option enables you to begin the data input process for a taxpayer.

Client Search
Edit returns you previously started.   [Select]

Review Returns
Returns that are currently waiting to be reviewed   [Select]

Configuration
Setup the configuration options for your office.   [Select]

Reports
Print acks, mailing labels, bank reports, and old reports.   [Select]
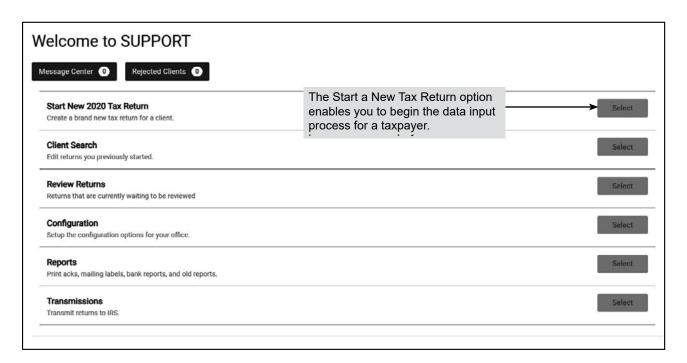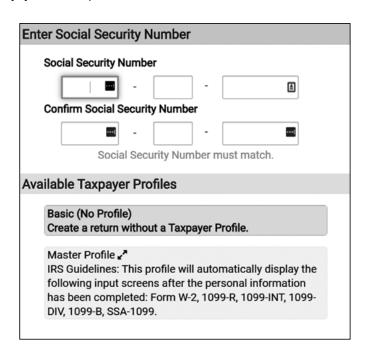
Transmissions
Transmit returns to IRS.   [Select]

Note: These options will not appear for all users. Your screen may have different options based on the security template you are assigned.

Social Security Number Entry

The next step in creating a new tax return is entering the taxpayer's Social Security number (SSN) in the space provided. To ensure accuracy, you are required to enter the SSN twice.

Enter Social Security Number

Social Security Number

[   ] - [   ] - [   ]

Confirm Social Security Number

[   ] - [   ] - [   ]

Social Security Number must match.

Available Taxpayer Profiles

Basic (No Profile)
Create a return without a Taxpayer Profile.

Master Profile ↗
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Note: All returns are completed are using the Basic (No Profile) Create a return without a Taxpayer Profile.

If the SSN is already in use, or the two entries don't match, the software will display an error message. Re-enter the numbers.