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" 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 2018 and 2022; **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 tax return Main Info page as proof of SSN 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 <u>photo identification is still required</u> of the primary and secondary taxpayers.
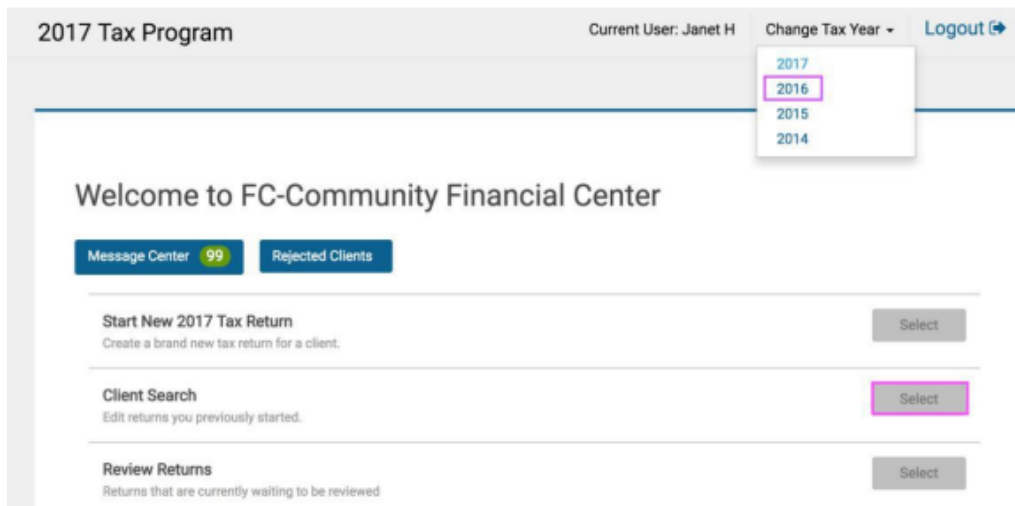
Locating Prior Year Tax Returns in TaxSlayer

Site Where Prepared	2023 TaxSlayer Login Suffix	Example
NORTH	NO	1234JENO
SOUTH	SO	1234JESO
DROP-OFF	DO	1234JEDO
ROUND ROCK PUBLIC LIBRARY ROUND ROCK SERVING CENTER	RR RR	1234JERR
SOUTHEAST HEALTH & WELLNESS	SE	1234JESE

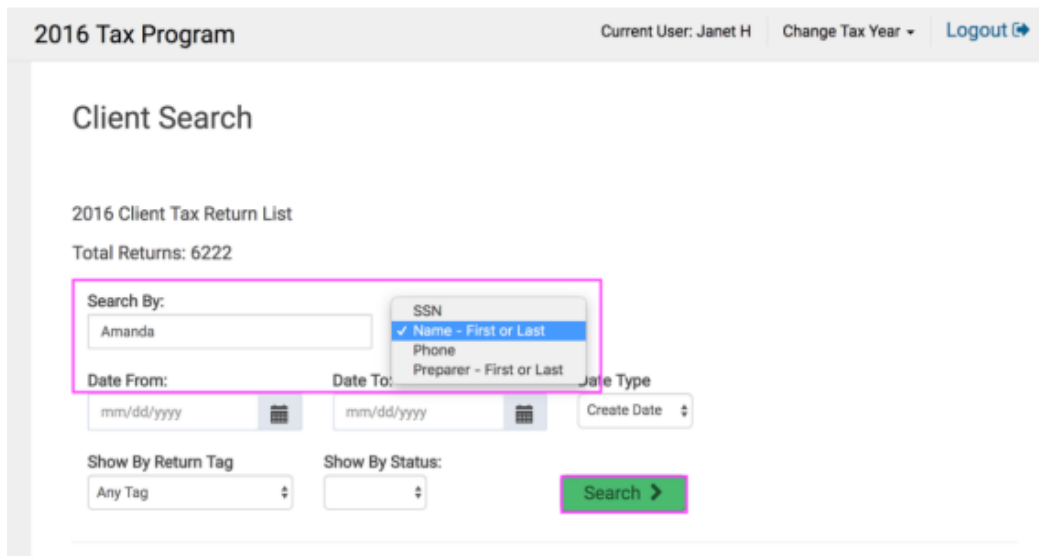| Site Where Prepared	2023 TaxSlayer Login Suffix	Example
MONTOPOLIS REC & COMMUNITY CENTER	SE	
WELLS BRANCH RECREATION CENTER GOODWILL ASIAN AMERICAN RESOURCE CENTER (AARC)	WB WB WB	1234JEWB
CEPEDA TURNER ROBERTS LIFEWORKS **As of 1/24/24 we can no longer access data from this site**	CE CE CE	1234JECE
ACC HIGHLAND ACCELERATOR	AC	1234JEAC
OPERATION LIBERTY HILL	LH	1234JELH
ST JOHN VIANNEY CATHOLIC CHURCH	SJ	1234JESJ
HUTTO PUBLIC LIBRARY	HU	1234JEHU
TAYLOR PUBLIC LIBRARY	TA	1234JETA

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 <u>cannot use</u> 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.

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.

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.