

Accounting Aid Society
Site Coordinator Update – April 12, 2025

CONTENTS:

<ul style="list-style-type: none">▪ E-File Transmissions▪ Best Practices<ul style="list-style-type: none">○ Intake/Interview○ Client Review	<ul style="list-style-type: none">▪ Site Clean-up▪ Thank You!
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E-file Transmissions

During these last couple of days of the filing season’s tax site operations, please transmit e-file returns periodically throughout the day, if possible, so that any rejects can be handled more easily and timely, especially for tax sites that close this Saturday or Monday.

Our recommendation for e-file returns:

- For **ALL** tax returns prepared in the next few days, please verify the phone number the client has listed on the intake sheet, letting them know that it is critical that we have a phone number where we can reach them in the event there is an issue with their electronically filed tax return.
- Transmit returns periodically throughout the day, or even after the taxpayer signs Form 8879, if possible.
- Ask the client to wait, if possible, until the IRS acknowledgement is received.
 - If the return is accepted, advise the client of the accepted federal return, that their Michigan return will now automatically be e-filed, and that acknowledgement of the Michigan return should be received within the next 24 hours.
 - If the return is rejected, volunteer-led sites should please call Kathy Holka so a resolution can be made while the client is still at the tax site. Kathy should also be contacted if the client was unable to stay.
- Kathy will continue to handle the rejected returns for the volunteer tax sites.

For ALL tax returns, both e-file and paper, please make sure taxpayers are aware of the due date for any tax owed on a return.

Be sure to add Notes in TaxSlayer that will help explain any unusual circumstance or the status of a return.

Best Practices

Intake/Interview

It is important all season long, but it is especially critical during these last few days of the filling season that we do a complete and thorough intake and interview with the taxpayer(s). In order to minimize preparing an incorrect tax return and to minimize rejected returns, please make sure to:

- Address each item on the intake sheets, federal and Michigan. Do not make any assumptions about what the client may or may not have received in income and about expenses incurred or life events. Take your time when doing the intake/interview and quality review.

- The top two reasons for rejected returns this filing season are an Identity Protection PIN (IP PIN) was not entered in the return and Form 8962, Premium Tax Credit, was not present in the return.
 - **IP PIN** – The item on page 1 of Form 13614-C asks the taxpayer and spouse to check the box if they were issued an identity protection PIN (IP PIN). If they indicate No, follow up and ask if they’ve been a victim of tax-related identity theft in the past. Ask if they have had issues with tax returns in prior years. Did the IRS ever send them a letter about a federal tax return they filed? Were they told that an Identity Protection PIN was needed?
 - **Health Insurance Through the Marketplace** – Page 3 of Form 13614-C asks if the taxpayer purchased health insurance through the Marketplace (Exchange). If they answer No:
 - Ask them what kind of health insurance they had in 2024. Document it in the gray section, on the right side of the intake/interview sheet.
 - If there are others to be listed on the tax return (spouse and dependents), ask if any of them had health insurance through the Marketplace in 2024.
 - Ask what kind of insurance a spouse or any dependents had in 2024.
 - Ask if the taxpayer, spouse, or any dependents received form 1095-B, Health Coverage, or Form 1095-C, Employer-Provided Health Insurance Offer and Coverage. Having one of these forms can help identify the type of health insurance an individual had.
- In addition to the screener and preparer asking about an IP PIN and health insurance through the Marketplace, the quality reviewer **must** also address each of these items with the taxpayer(s) during quality review.

Client Review

Make sure the taxpayer is reviewing the completed return to ensure:

- All names are spelled correctly.
- All Social Security numbers are correct.
- The taxpayer’s address is correct.
- The date of birth for any dependents is correct.
- Bank account information is correct if there is direct deposit for a refund or direct debit for a payment.

After the client reviews this information, they **must** initial at the bottom of page 2 of Accounting Aid’s Michigan Intake/Interview Sheet.

Site Clean-Up

Equipment and supplies will be picked up from our seasonal tax sites early next week. If you have any personal items at these sites, please be sure to take them with you at the end of your last day.

THANK YOU

As the filing deadline fast approaches and we wrap up the final Saturday of the season, we want to say thank you for all of the hard work, dedication and compassion that each of you have contributed.

So far this year, more than 18,000 families and individuals have been assisted because of you. What an amazing accomplishment that all of you should be proud of! Thank you again; you are APPRECIATED!