Step-by-Step Enrollment Process for CFR Card

Step 1: Ensure the Taxpayer Signs the 7216 Consent to Use and Consent to Disclose

- **Before beginning the enrollment process**, confirm that the tax preparer has the taxpayer sign the 7216 Consent to Use and Consent to Disclose form.
- This form is available and can be accessed on the accounting aid resource page. To find it, navigate to the **Site Manual tab** > **Tax Documents**.

Step 2: Follow the CFR Cards Step-by-Step Guide to Complete the Enrollment Process

- Next, refer to the **CFR Cards Step-by-Step Guide**, which is located on the accounting aid resource page. To find it, navigate to the **Client Assistance Tools** > **CFR Cards >Enrollment Step By Step for Preparer.**
- Follow the instructions carefully as outlined in the guide to ensure a smooth enrollment process for the taxpayer.

Step 3: Share the CFR Card Orientation Guide with the Taxpayer

- After completing the enrollment process, **share the CFR Card Orientation Guide** with the taxpayer. To find it, navigate to the **Client Assistance Tools** > **CFR Cards > CFR Card Client Orientation Flyer.**
- On the orientation guide, make sure to write the taxpayer's **bank account information** on the top left corner, specifically under the routing number information. This ensures they have the correct banking details on file.

Step 4: Provide "How to Load Money onto Your Focus Card" Information

- To assist the taxpayer with future card loading, **share the "How to Load Money onto Your Focus Card"** resource.
- This will provide them with step-by-step instructions on how to load funds onto their Focus Card.