

# How to add the Advance

The screenshot displays the Sunloan and tax services interface. On the left is a blue navigation sidebar with the following items: LYNN, 9790; Enter form code (with a search icon); Form Code Guide; Taxpayer Information; Consent; Dependents; Income; Due Diligence; Deductions & Credits; Health Care; States; Balance (highlighted); Review Forms; Finish; and File. The main content area is titled 'Balance' and includes a sub-section 'Return Balances' showing a 'Federal Refund: \$2,943.00'. Below this are several sections: 'Taxpayer Identification' (with a trash icon), 'Bank Product Information' (with a '+ Add form' button highlighted by a yellow box and a callout), 'Direct Deposit Information' (with a '+ Add form' button), and 'Electronic Funds Withdrawal Information' (with a lock icon). A yellow callout box on the right contains the text 'Click + Add form' with an arrow pointing to the highlighted '+ Add form' button in the 'Bank Product Information' section.

## Bank Product Information

**1. Always check this box**



The taxpayer has signed and been provided a copy of the Consent to Use of Tax Return Information AND the Consent to Disclosure of Tax Return Information as required by IRS regulation 7216.

**2. Click Refund Advance with RT**

### Product Selection

- Refund Advance with RT
- Refund Advance without RT (No fees collected)
- RT

[Clear](#)

### Refund Advance only

If the taxpayer is approved for an interest-based loan, does he or she want that loan or only the no-cost loan?

The taxpayer requests the disclosure of prior year's anticipated refund and funding amount (if available) be disclosed to the

**3. From the dropdown choose F (up to \$7000 with interest) or L (up to \$1000 no interest)**



F - Full amount available (interest-based)

L - No-Cost Refund Advance

### Refund Advance only

If the taxpayer is approved for an interest-based loan, does he or she want that loan or only the no-cost loan?

The taxpayer requests the disclosure of prior year's anticipated refund and funding amount (if available) be disclosed to the financial institution.

Add state refunds to the refund deposit product

A All states ▾

4. Click Yes

Full amount available (interest-based) ▾

Yes  No [Clear](#)

5. Click A - All states

### Pre-Ack Advance

6. Before the IRS officially opens on January 27th you MUST check Apply for a Pre-Ack Advance

Apply for a Pre-Ack Advance

### Disbursement Method

Prepaid Card

Check printed in tax office

Direct Deposit

**7. Choose how the taxpayer wants to receive their refund**

### ID Information

ID information should be entered on the IDS screen

### Additional Information

Override tax preparation fees to be WITHHELD

\$

Additional Preparation Fee to be WITHHELD

\$

Deduction for other fees paid to ERO

\$

Physical address, if different from taxpayer information screen

Address

ZIP

City

State

**8. Ask the taxpayer to choose a security question and enter the answer**

### Security Information

Security question

1 - What is your mother's maiden name?

Answer

SMITH

Preferred language

1 - English

**9. Choose taxpayer language**

Taxpayer is active military

Yes  No

Clear

**10. Answer active military question**

Cancel

Save