




USING CLIENT SEARCH

Accurate Tax Solutions
2021 Tax Tips

GO TO YOUR MAIN MENU

- 
- Main Menu
- Client Status
- IRS website
- e-File Opt Out Form
- IRS Mailing Addresses
- IRS Publications, Instructions, and Fill-In Forms
- Consent To Use
- Consent To Disclosure
- Check Printing
- ATS Website
- Step by Step Guide
- Audit Pro Agreement
- Refund Calculator

Welcome to SUN LOAN

Message Center **0**

Rejected Clients **0**

Start New 2021 Tax Return

Create a brand new tax return for a client.

Select

Import App User

Import a user from the Mobile App

Select

Client Search

Edit returns you previously started.

Select

**CLICK - Client Search-
TO VIEW YOUR RETURNS**

**CLICK ON THE
- Search Client List -
BOX**

**ENTER THE
INFORMATION OF
THE TAXPAYER
YOU WANT TO
ACCESS**

- IRS Mailing Addresses
- IRS Publications, Instructions, and Fill-In Forms
- Consent To Use
- Consent To Disclosure
- Check Printing
- ATS Website
- Step by Step Guide
- Audit Pro Agreement
- Refund Calculator

2021 Tax Program Current User: Change Tax Year Logout [↗](#)

Office Client List ← Back

2021 Client Tax Return List

Filter by Status **Filter by Return Tag**

Do Not Show Deactivated Returns Do Not Show Accepted Returns Do Not Show Paper Returns

Date From: **Date To:** **Date Type**

Search Client List

Show entries

Showing 1 to 69 of 69 entries

SSN FIRST LAST PHONE PREPARER S

YOU CAN SEARCH BY:

- **SOCIAL SECURITY NUMBER**
 - **PHONE NUMBER**
 - **FIRST NAME**
 - **LAST NAME**
 - **DATE**

Office Client List

← Back

2021 Client Tax Return List

Filter by Status

Any Status

Filter by Return Tag

Any Tag

Do Not Show Deactivated Returns

Do Not Show Accepted Returns

Do Not Show Paper Returns

Date From:

yyyy/mm/dd

Date To:

yyyy/mm/dd

Date Type

Create Date

Search Client List

PATRICIA SANDERS

THIS WILL PULL UP ALL OF THE RETURNS THAT MATCH YOUR SEARCH

Show 100 entries

Showing 1 to 3 of 3 entries (filtered from 69 total entries)

Previous 1 Next

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	STATE STATUS
	Patricia	Sanders			In Progress	Tools Select
	Patricia	Sanders			In Progress	Tools Select
	PATRICIA	SANDERS			In Progress	Tools Select

YOU CAN SORT BY ANY COLUMN

Previous 1 Next

← Back

Create 2021 Return

YOU CAN VIEW RETURNS BY THEIR STATUS

2021 Tax Program Current User: Change Tax Year Logout [↗](#)

Office Client List

2021 Client Tax Return List

Filter by Status **Filter by Return Tag**

- Any Status**
- In Progress
- Review
- Approved
- Failed
- Complete
- Transmitted
- Rejected
- Accepted
- Paper
- Accepted Extension
- Rejected Extension
- State Only
- Deactivated

Do Not Show Accepted Returns Do Not Show Paper Returns

Date

ous **1** Next

Showing 1 to 3 of 3 entries (filtered from 69 total entries)

- On the taxpayer's client status screen to check the status of an Advance look at Advance Status Key
- Do not look at anything else

A = Approved

D= Denied

N/A= Pending

I = Waiting for IRS acknowledgement to make decision

Fee Summary

R Fees	\$35.00
Transmitter Fees	\$71.00
Preparer Fees	\$319.00
Total Fees	\$425.00

All Fees Paid No

Advance Information

Advance Amount Requested \$5,619.75

Advance Approved YES

Advance Status Key A

Advance Status Updated

Advance Paid

Advance Paid Date

Is PreAck

Bank Information

Fed Bank Status

Fed Bank App Sent

Fed Bank Ack Received

Bank Check Printed

