

New Hire Steps to complete a tax return:

STEPS:

- New hire needs to apply for PTIN online. Step by step instructions can be found on ATS website under Certification – PTIN Resources
- Employee PTIN Letter, store number, name, email address and cell phone number needs to be provided to ATS
- ATS will create a username and password to login to the tax software
- Employee should login and complete minimum 3 practice returns. To find the practice returns click Certification then click Monthly Practice Problems. Choose 2020 in the software for all practice problems
- The office will gather all the tax documents and make copies of everything the customer brings into Sun Loan.
- The taxpayer will fill out the Taxpayer Information Sheet and Dependent Information sheet (if they have dependents), taxpayer will sign and date.
- Sun Loan employee will ask the Taxpayer Due Diligence Interview sheet questions, sign and date. If they have dependents they will need to ask the Dependent Due Diligence questions, sign and date.

They can start the return and contact Accurate Tax with any tax or input questions. We will walk them through every step.

NO PTIN STEPS:

If the employee does not have a PTIN they should contact the floater in their area to input the return. All floaters should have logins for their offices.

If the office does not have a floater in their area the information should go to the District Manager.

If the DM has a PTIN we can set them up with a login for that office.

If the DM does not have a PTIN they should contact their Regional.

The Regional will contact ATS and we will handle the return on an individual basis.

To prepare for a customer that comes into Sun Loan to have their taxes done the store should have the following printed and ready:

- Taxpayer Information Worksheet (filled out by the taxpayer on all returns)
- Dependent Information Sheet (filled out by the taxpayer if they have dependents)
- Taxpayer Due Diligence Interview (These questions are asked and written down by the SUN LOAN employee on all returns)
- Dependent Due Diligence Interview (These questions are asked written down by the SUN LOAN employee if they have dependents)

Make copies of all tax documents the customer brings in including W-2's, 1099's etc.

All tax documents and information sheets should be kept in a taxpayer file and stored in a secure place.

To print the information and interview sheets go to the ATS Home page:

- Click Taxpayer Information Worksheets
- Click Print ALL