Preparer Starting a return from CSA start

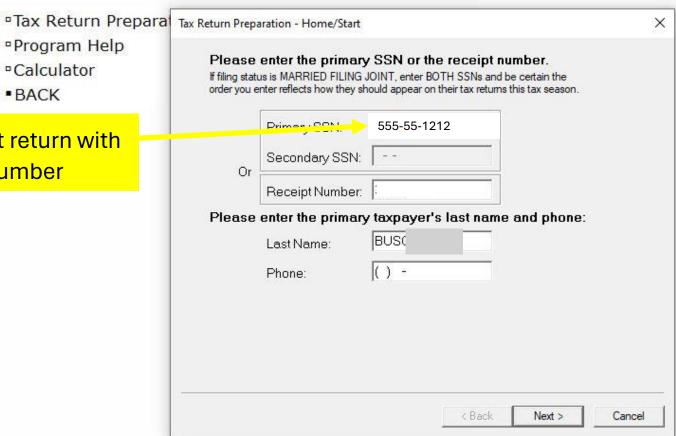




Tax Programs - Tax-Year 2023

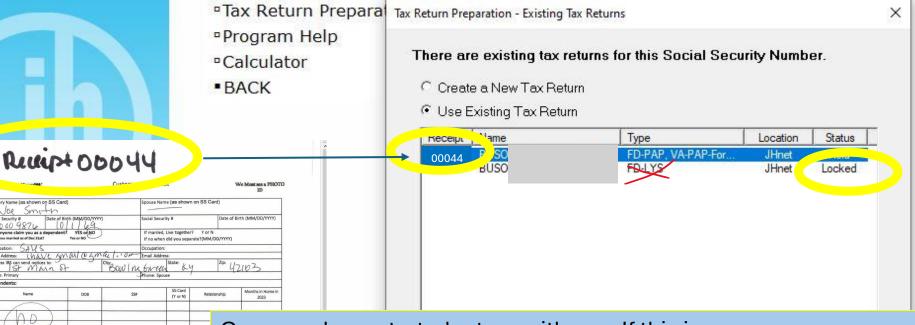
- Program Help
- Calculator
- BACK

You **MUST** start return with Social Security number





Tax Programs - Tax-Year 2023



Once you have started return with ssn- If this is a NEW CLIENT you will only get 1 choice with will be a hold Look for the correct THE RECEIPT number IF

This is a prior year client- You will see 2 choices- PICK the HOLD with the new receipt number. DO NOT pick the LYS.

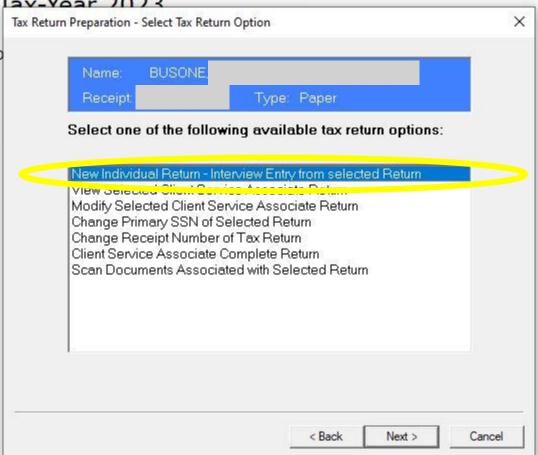


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Tax Return Preparatio

- Program Help
- Calculator
- BACK





Personal Information

C Previous Question Next Question

STACY R KUPC

Q: Enter your tax preparer ID

A: 911

Question	Answer
Tax preparer ID	911
Prop-Off Return	1
First name and middle initial	
ast name	
First four letters of last name	
Taxpayer's E-mail address	*****
/erify taxpayer E-mail address	***************
Student	NO
Paid qualified education expenses	NO
Federally declared disaster area	NO
PY Qualified disaster distributions	NO
Presidential election fund	NO
Occupation of taxpayer	TEACHER
Type of ID	1
D number	K321654
ssuing state	KY Kentucky
ssue date	01/01/2020
Expiration date of ID	01/01/2028
Date of birth	01/01/1971
Addr *****	

Once the return is open, You will do as normal. It is very important to verify information as you are the Preparer on record. You will put in notes and information just like you normally do. The help is that the W2 information and personal will be entered for you.

**Hit the View button and verify everything was scanned.