

Preparer Starting a return from  
CSA start

# Jackson Hewitt® TAX SERVICE

## Tax Programs - Tax-Year 2023

- Tax Return Preparation
- Program Help
- Calculator
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You **MUST** start return with Social Security number

Tax Return Preparation - Home/Start

**Please enter the primary SSN or the receipt number.**  
If filing status is MARRIED FILING JOINT, enter BOTH SSNs and be certain the order you enter reflects how they should appear on their tax returns this tax season.

Primary SSN:

Secondary SSN:

Or

Receipt Number:

**Please enter the primary taxpayer's last name and phone:**

Last Name:

Phone:

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Tax Return Preparation - Existing Tax Returns

There are existing tax returns for this Social Security Number.

Create a New Tax Return

Use Existing Tax Return

Receipt #	Name	Type	Location	Status
00044	BUSO	FD-PAP, VA-PAP-For...	JHnet	Hold
	BUSO	<del>FD-LYS</del>	JHnet	Locked

Receipt 00044

We Must see a PHOTO ID

Primary Name (as shown on SS Card) Joe Smith		Spouse Name (as shown on SS Card)			
Social Security # 400 00 9876	Date of Birth (MM/DD/YYYY) 10/1/69	Social Security #	Date of Birth (MM/DD/YYYY)		
Can anyone claim you as a dependent? Were you married as of Dec 31st?	YES or NO YES or NO	If married, Live together? If no when did you separate?(MM/DD/YYYY)	Y or N		
Occupation: SALES	Occupation:				
Email Address: j.smith@gmail.com	Email Address:				
Address (We can send notices to) 123 Main St	City: Bowling Green	State: KY	Zip: 42103		
Phone: Primary	Phone: Spouse				
<b>Dependents:</b>					
Name	DOB	SSN	SS Card (Y or N)	Relationship	Months in Home in 2023
NO					

\*\*\*Can anyone else claim your dependent(s) listed above? YES or NO.\*\*\*  
Did you, any dependents, or Anyone on your behalf Purchase HEALTH INSURANCE FROM THE MARKETPLACE?  
Do you or your spouse own the IRS or have Student Loan debt? What about the debt?

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.



Q: Enter your tax preparer ID

A:

Question	Answer
Tax preparer ID	911
Drop-Off Return	1
First name and middle initial	
Last name	
First four letters of last name	
Taxpayer's E-mail address	*****
Verify 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
ID number	K321654
Issuing state	KY Kentucky
Issue date	01/01/2020
Expiration date of ID	01/01/2028
Date of birth	01/01/1971

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.**