

# How to start as a CSA

Preparer's need to make sure they are picking the Started CSA return

First example is Customer who has been with Jackson Hewitt in the Past and has a LYS file



## Tax Programs - Tax-Year 2023

- Tax Return Preparation
- Program Help
- Calculator
- BACK



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:

< Back   Next >   Cancel

First example is Customer who has been with Jackson Hewitt in the Past and has a LYS file



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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
47240	BUSONE, VINCENT DANE	FD-LYS	JHnet	Locked

< Back   Next >   Cancel

First example is Customer who has been with Jackson Hewitt in the Past and has a LYS file

## JACKSON HEWITT TAX SERVICE

### Tax Programs - Tax-Year 2023

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Tax Return Preparation - Select Tax Return Option

Name: BUSONE, VINCENT DANE  
Receipt: 47240 - LYS    Type: LYS

**Select one of the following available tax return options:**

- New Individual Return - Interview Entry from selected Return
- New Individual Return - Forms Entry from selected Return
- New Client Service Associate Interview from selected Return**

< Back    Next >    Cancel

Q: What is your first name and middle initial (if any)?

A: JOE

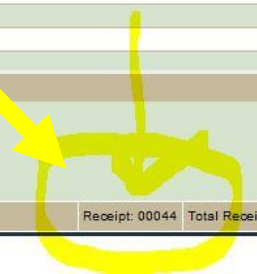
- Question
- Tax preparer ID
- Drop-Off Return
- First name and middle initial
- Last name
- First four letters of last name

Before you start entering information-  
 Look down at bottom of screen – Take the Receipt  
 Number and write it on the top of the  
 CUSTOMER DATA SHEET

# Receipt 00044

**Jackson Hewitt** Customer Data Sheet **We Must see a PHOTO ID**

Primary Name (as shown on SS Card) Joe Smith		Spouse Name (as shown on SS Card) _____			
Social Security # 40009876	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 (NO circled)		If married, Live together? Y or N If no when did you separate?(MM/DD/YYYY)			
Occupation: SALES	Occupation:				
Email Address: jhawe@gmail.com		Email Address:			
Address IRS can send notices to: 1st Main St	City: Bowling Green	State: Ky	Zip: 42103		
Phone: Primary	Phone: Spouse				
<b>Dependents:</b>					
Name	DOB	SS#	SS Card (Y or N)	Relationship	Months in Home in 2023
(NO circled)					
***Can anyone else claim your dependent(s) listed above? YES or NO.***					
Did you or your spouse own the IRS or have Student Loan debt? YES OR NO?					



**Help**  
Enter the taxpayer's first name and middle initial, if any. Be sure to appropriately designate taxpayer or spouse when prompted.

Q: What is your first name and middle initial (if any)?

A:

Pending

At this point start scanning documents

- Drivers License
- W2's
- 1099's
- ALL DOCUMENTS CLIENT HAS

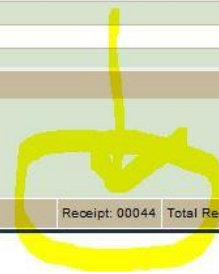
Tax preparer ID  
 Drop-Off Return  
**First name and middle initial**  
 Last name  
 First four letters of last name

Questi

Answer

**Help**

Enter the taxpayer's first name and middle initial, if any. Be sure to appropriately designate taxpayer or spouse when prompted.



## Client Service Associate Interview

Client Service Associate I...

Personal Information

Taxpayer Special Situati...

Spouse Special Situatio...

Type of W-2

Select both boxes if the customer only has Paystub and Earnings Statements.

Form W-2 - Income from wages or disability pension

Paystubs and Earnings Statements

As a CSA-You can enter W2 information only.

You will at this point go through the documents and do the data entry  
Required



Return Summary				
Jurisdiction	Product Type	Electronic/Paper	Signature Form	Refund/(Balance Due)
Federal	PAP	Paper	Form 1040	0.00

**Review**

Supervisor Review Indicator

Due Diligence Indicator

**Save and Exit**

This return contains diagnostics.

Place return on Hold

Void return

**Exit**

Diagnostic Summary	
	Description
*	This is the end of the Client Service Associate Interview. Please direct the customer to the next available tax preparer.
*	Preparer - The taxpayer is claiming Head of Household filing status, Earned Income Credit, Child Tax Credit / Other Dependent Credit, or American Opportunity Credit and no current year preparer notes have been added to the return.

This is at the end of the interview- You can't go any further. At this point you will message the Help Desk the following- "CSA start- please hold"

Return Notes	
Date/Time	
	No retu



Once return is open, CSA will enter all personal data and w2 information.  
After everything is entered the return will be placed on hold. It is imperative  
That the CSA go all the way to the end where the hold is forced and not put it in a hold status prior to that point

Please teach CSA to message Help Desk-  
“CSA start-please hold”

2<sup>nd</sup> example: NEW CLIENT

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Tax Return Preparation - Home/Start

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Primary SSN:

Secondary SSN:

Or

Receipt Number:

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

Last Name:

Phone:

< Back   Next >   Cancel

- Practice Tax Return Preparation
- Program Help
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- BACK

Practice Tax Return Preparation - Select Tax Return Option

555-55-1212

Select one of the following available tax return options.

- Practice New Individual Return - Interview Entry
- Practice New Individual Return - Forms Entry
- Practice New Individual State Only
- Practice New Amended Individual Return
- Practice New Early Access Standalone Application
- Practice New Form 4868 (Automatic Extension) Including States
- Practice New Form 2350 (Expatriate Extension)
- Practice New Form 9465 (Installment Agreement)
- Practice New Form 1040 ES (Estimated Tax)
- Practice New Form 8379 (Injured Spouse)
- Practice New Client Service Associate Interview**
- Practice New Client Service Associate Form 4868 (Automatic Extension)

< >

< Back Next > Cancel

Q: What is your first name and middle initial (if any)?

A: JOE

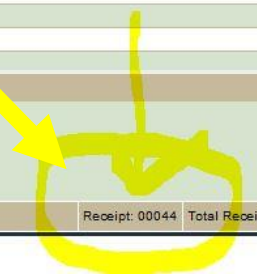
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Can anyone claim you as a dependent? YES or NO Were you married as of Dec 31st? Yes or NO		If married, Live together? Y or N If no when did you separate?(MM/DD/YYYY)			
Occupation: SALES		Occupation:			
Email Address: jhawe@gmail.com		Email Address:			
Address IRS can send notices to: 1st Main St	City: Bowling Green	State: KY	Zip: 42103		
Phone: Primary	Phone: Spouse				
<b>Dependents:</b>					
Name	DOB	SS#	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 or anyone on your behalf Purchase HEALTH INSURANCE FROM THE MARKETPLACE? YES OR NO?					
Do you or your spouse own the IRS or have Student Loan debt? <small>When was the date?</small>					



**Help**  
Enter the taxpayer's first name and middle initial, if any. Be sure to appropriately designate taxpayer or spouse when prompted.

Q: What is your first name and middle initial (if any)?

A:

Pending

At this point start scanning documents

- Drivers License
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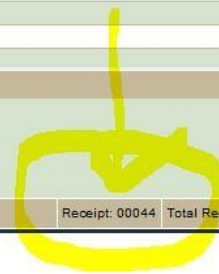
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