

HERE'S HOW TO

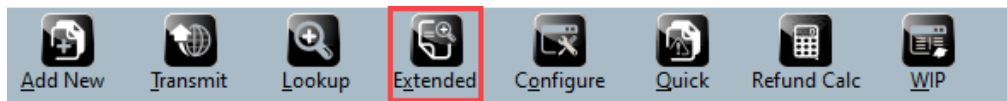
Run an Expired ITIN Client Report in the Desktop Software

Creating the Report

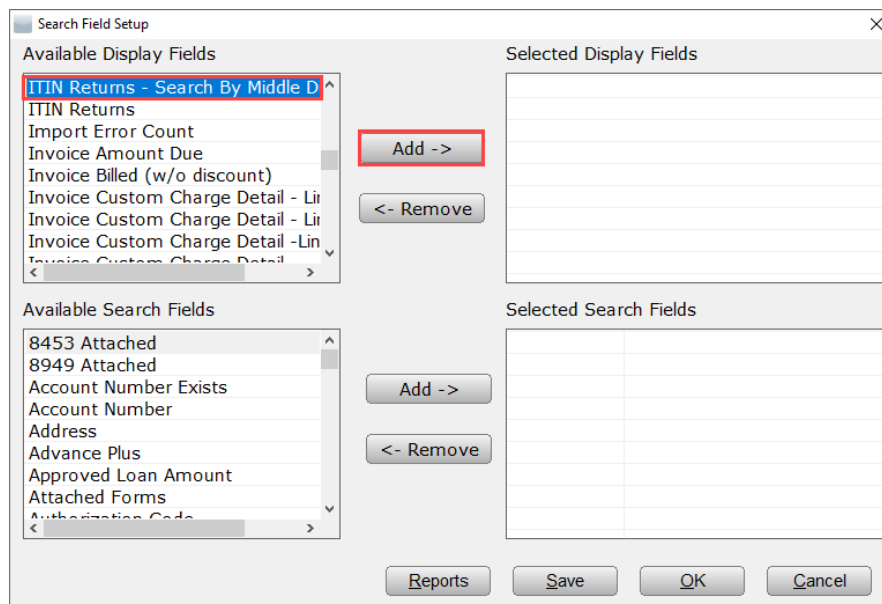
1. Click the **Lookup** icon in the toolbar located on the Work in Progress (WIP) Screen



2. Click the **Extended** icon in the toolbar



3. In the Available Display Fields box, click on **ITIN Returns – Search by Middle Digits** and then click the **Add** button.



4. **A:** Add the applicable taxpayer related fields to the report using the same method described in Step 3 above. In the Available Display Fields box, simply scroll down to “T” options to make your selection(s) and then click the Add button for each.
B: In the Available Search Fields box, click on **ITIN Returns – Search by Middle Digits** and then click the **Add** button.

5. Find and double-click **ITIN Returns – Search by Middle Digits** in the **Available Search Fields box**. Double-click on **83** and then click the **Add** Button. Double-click on **84** then click the **Add** button. Follow the same steps for **85, 86** and **87**.

Note: For TY2019 individual returns filed in 2020, all ITINs not used on a federal tax return at least once in the last three years expired on December 31, 2019. Additionally, all ITINs issued before 2013 with middle digits of **83, 84, 85, 86, or 87** (Example: (9XX-83-XXXX) also expired at the end of the year.

6. Click the **OK** button.

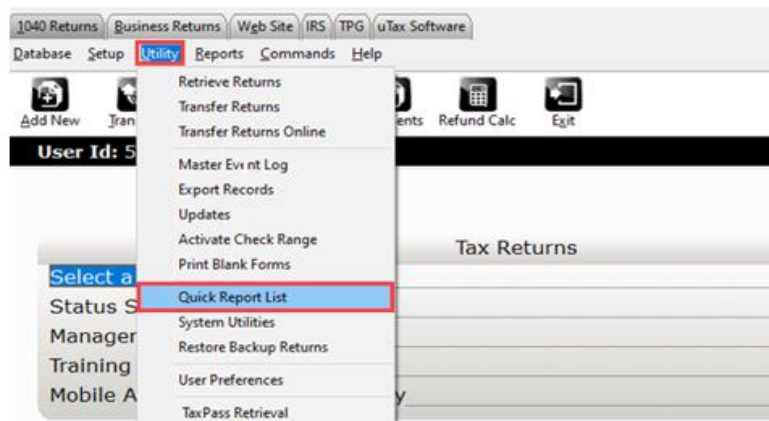
A dialog box with a dropdown menu at the top showing '50'. Below it is a list box containing the numbers 83, 84, 85, 86, and 87. To the right of the list box are four buttons: 'Add', 'Remove', 'OK', and 'Cancel'. The 'OK' button is highlighted with a red rectangle.

7. (1) Click the **Save** button, (2) **type a name** for your report, (3) then click **OK**.

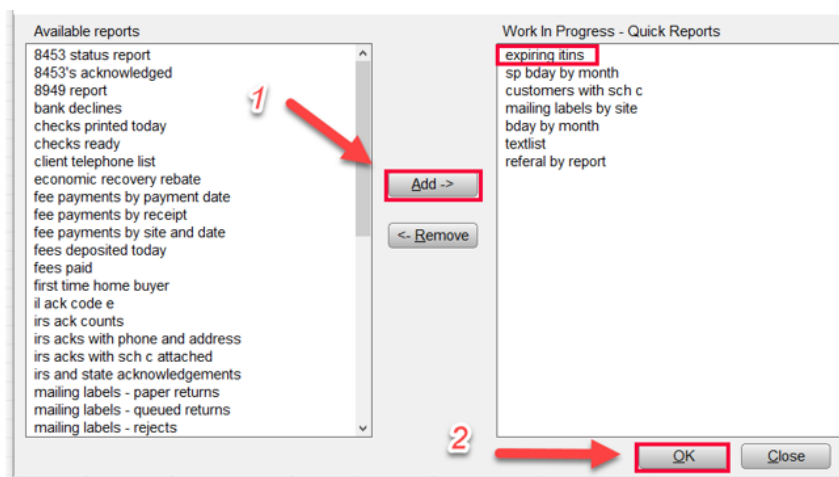
A screenshot of a software interface showing a 'Save Report' dialog box. The dialog box has a title bar 'Save Report' and a close button 'X'. It contains a label 'Report Name:' followed by a text input field containing the text 'Expiring ITINs'. Below the input field are 'OK' and 'Cancel' buttons. Red arrows and numbers indicate the steps: (1) points to the 'Save' button at the bottom of the main window; (2) points to the 'Report Name:' label; (3) points to the 'OK' button in the dialog box. The background shows a list of 'Available Display Fields' and 'Available Search Fields'.

Adding the Report to the Quick Reports List

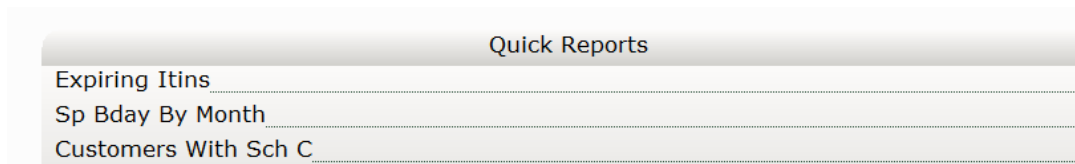
1. Click **Utility** from the menu located on the Work in Progress (WIP) Screen, then click **Quick Report List**.



2. Scroll to the name of your report (created in step 7 above), then (1) click the **Add** button, (2) then click **OK**.



3. The report now appears on the Quick Reports list > Work in Progress (WIP) Screen.



If you have additional questions about these instructions, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at help@erosupport.com.

For ITIN renewal forms, common FAQs and other information and guidance, be sure to check out the helpful [ITIN Fact Sheet](#) and the [ITIN Resources](#) page available at IRS.gov.