## 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 <u>Display</u> Fields box, click on **ITIN Returns – Search by Middle Digits** and then click the **Add** button.

Search Field Setup		×
Available Display Fields		Selected Display Fields
ITTIN Returns - Search By Middle D ↑ ITTIN Returns Import Error Count Invoice Amount Due Invoice Billed (w/o discount) Invoice Custom Charge Detail - Lii Invoice Custom Charge Detail - Lii Invoice Custom Charge Detail - Lii Invoice Custom Charge Detail - Lii	Add ->	
Available Search Fields		Selected Search Fields
8453 Attached		
Account Number Exists Account Number	Add ->	
Address	C Romovo	
Advance Plus Approved Loan Amount Attached Forms	<- Kelliove	
< >>		
	<u>R</u> eports	Save OK Cancel

4. A: Add the applicable taxpayer related fields to the report using the same method described in Step 3 above. In the Available <u>Display</u> 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 <u>Search</u> Fields box, click on **ITIN Returns – Search by Middle Digits** and then click the **Add** button.

Available Display Fields	Selected Display Fields
A Taxpayer PIN Number Taxpayer Payment Date Taxpayer YTD Payments Taxpayer's Age Taxpayer's Birth Date Taxpayer's Birth Month Taxpayer's Cell Phone Carrier Taxpayer's Middle Initial	Add -> Add -> TTIN Returns - Search By Middle Digits Taxpayer's SSN Taxpayer's Last Name Taxpayer's First Name Taxpayer's Cell Phone Taxpayer's Home Phone
Available Search Fields IRS Reject Count IN Returns - Search By Middle D	Selected Search Fields
Interventional Import Error Count Invoice Amount Due Invoice Billed (w/o discount) Invoice Custom Charge Detail - Lin Invoice Custom Charge Detail - Lin	Add ->
	Reports Save QK Cancel

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

Available Display Fields		Selected Display Fields
Taxpayer PIN Number	^	ITIN Returns - Search By Middle Digits
Taxpayer Payment Date		Taxpayer's SSN
Taxpayer YTD Payments		Taxpayer's Last Name
Taxpayer's Age	Search Field Values	× Name
Taxpaver's Birth Date		hone
Taxpaver's Birth Month		e Phone
Taxpaver's Cell Phone Car	50	Add
Taxpaver's Middle Initial	01	
Taunauaria Nama Cuffin	81	^
<	82	Remove
wailable Search Fields	84	Fields
wallable Search fields	85	leius
IRS Reject Count	86	OK
ITIN Returns - Search By	87	
ITIN Returns	88	
Import Error Count	90	Cancel
Invoice Amount Due	91	
Invoice Billed (w/o discour	92	
Invoice Custom Charge D	94	
Invoice Custom Charge D	95	v
Invoice Custom Charge Dr	that tin	
`		
	Repo	rts <u>S</u> ave <u>O</u> K <u>C</u> ancel

6. Click the **OK** button.



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



## 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**.

1040 Returns Busine	ss Returns Web Site IRS TPO	G uTax Software
Add New Jran	Retrieve Returns Transfer Returns Transfer Returns Online	ents Refund Calc Exit
User Id: 5	Master Evi nt Log Export Records Updates Activate Check Range Print Blank Forms	Tax Returns
Status S	Quick Report List	
Manager	System Utilities Restore Backup Returns	
Iraining	User Preferences	
MODILE A	Tax Parr Patriaval	γ

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

Available reports		Work In Progress - Quick Reports	
Available reports 8453 status report 8453 status report 8453's acknowledged 8949' report bank declines checks printed today checks ready client telephone list economic recovery rebate fee payments by payment date fee payments by site and date fees deposited today first time home buyer il ack code irs ack swith sch c attached irs ack swith sch c attached irs and state acknowledgements mailing labels - queued returns mailing labels - rejects	Add -> <- Remove	expiring tins sp bday by month customers with sch c mailing tabels by site bday by month textlist referal by report	
	-	<u>QK</u> <u>C</u> lose	

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

Quick Reports
Expiring Itins
Sp Bday By Month
Customers With Sch C

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

For ITIN renewal forms, common FAQs and other information and guidance, be sure to check out the helpful <u>ITIN Fact Sheet</u> and the <u>ITIN Resources</u> page available at IRS.gov.