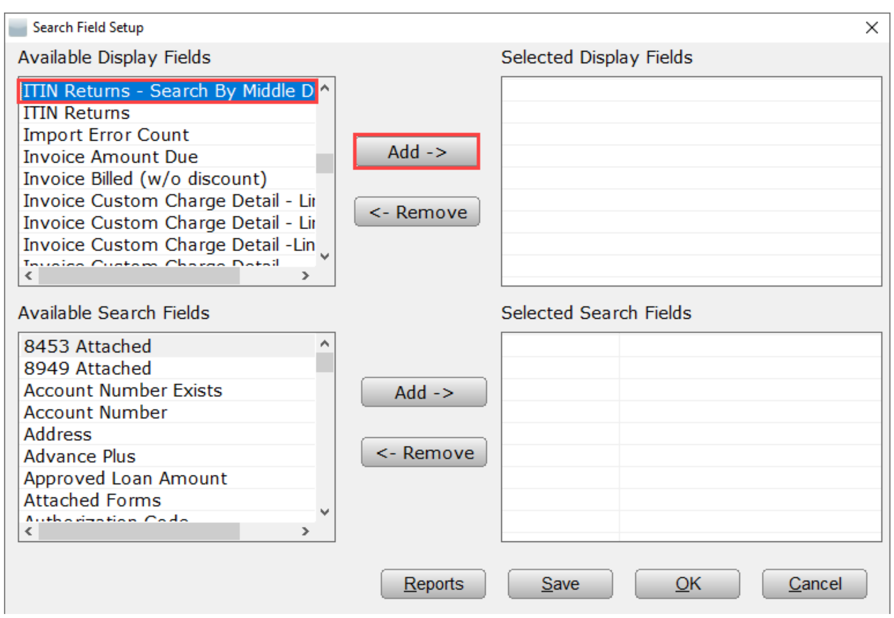
Run an Expired ITIN Client Report in the Desktop Software

Creating the Report

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

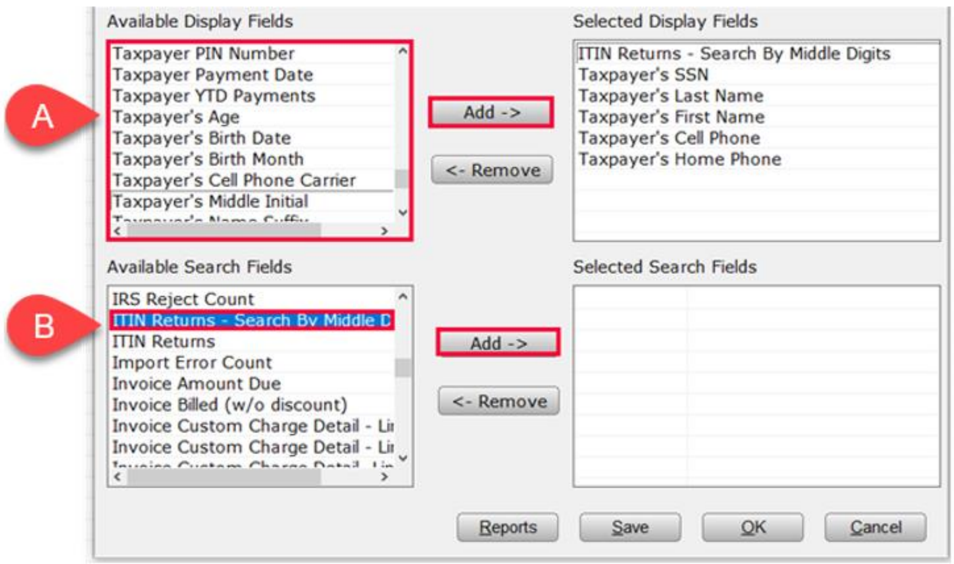
2. Click the **Extended** icon in the toolbar

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



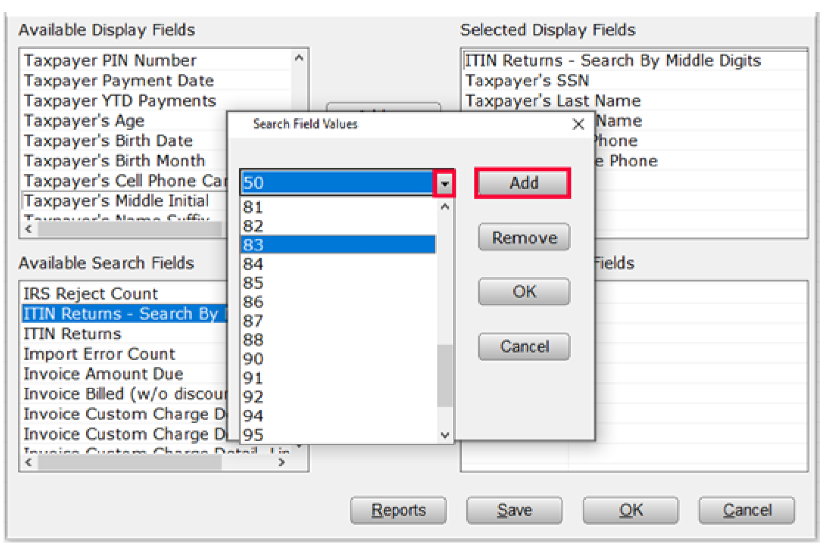
Last Updated 6.5.20

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.



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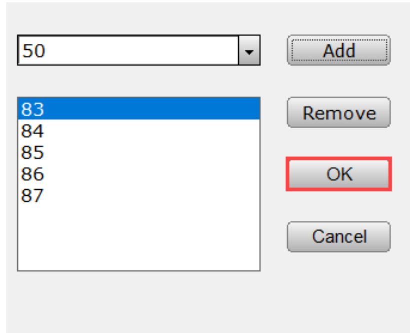
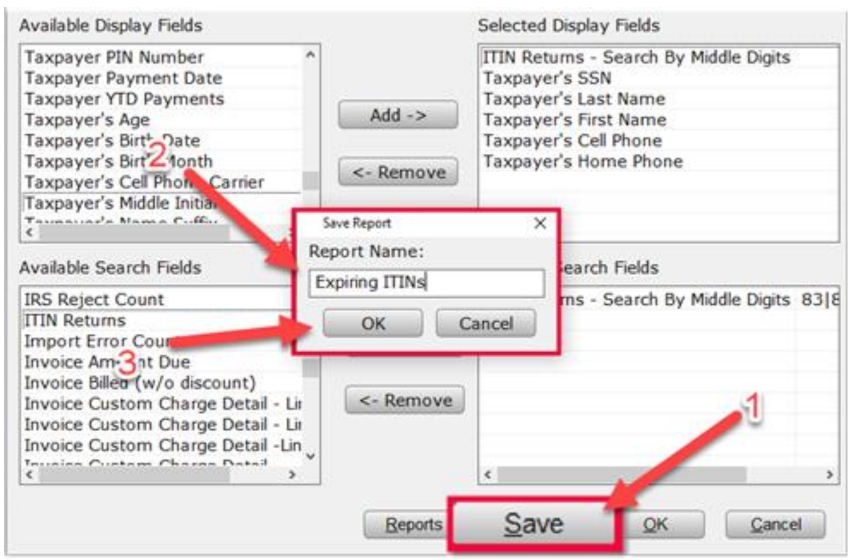
6. Click the **OK** button.

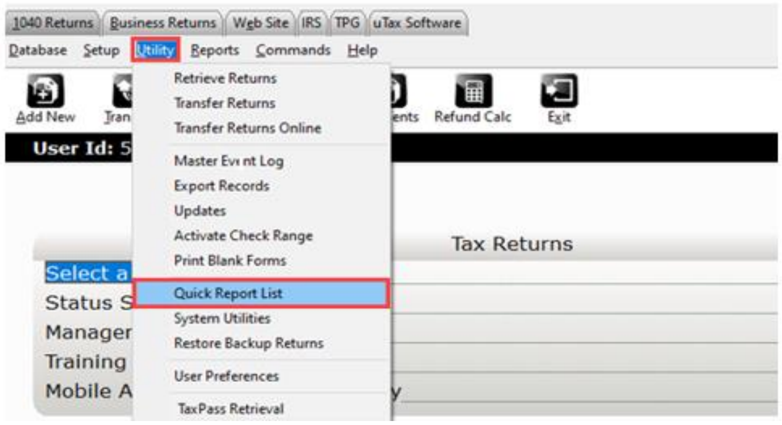


7. (1) Click the **Save** button**,** (2) **type a name** for your report, (3) then click **OK**.

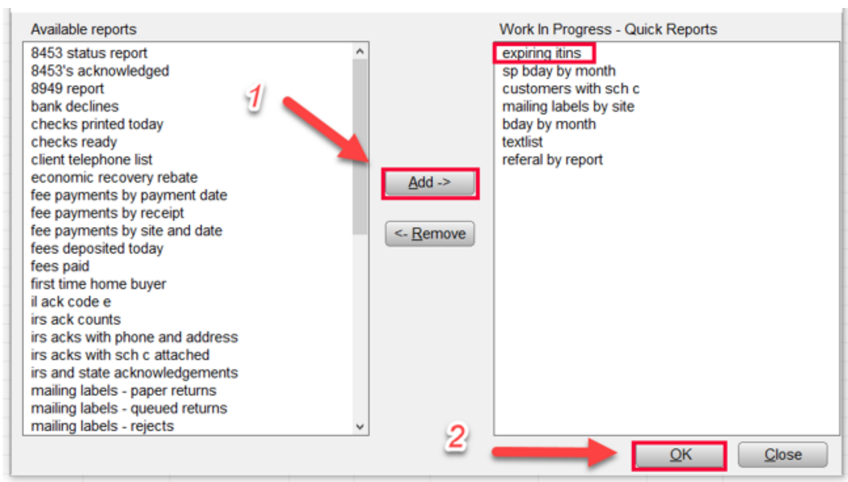


Adding the Report to the Quick Reports List

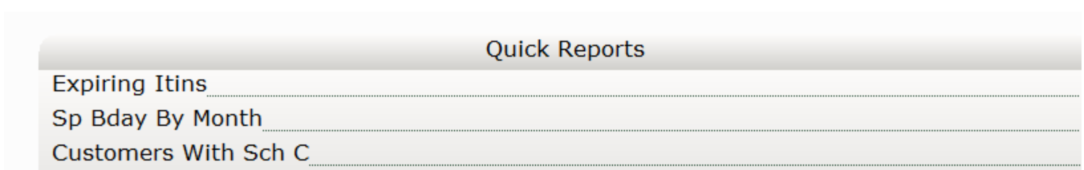
1. Click **Utility** from the menu located on the Work in Progress (WIP) Screen, then click **Quick Report List**.



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.