



2020TY

WHAT'S NEW AND HOW TO BE PREPARED FOR TAX SEASON 2021

2021 Tax Season

- ▶ Start Date: TBD
- ▶ End Date: April 15, 2021

EFIN Validation for Verified EFINs in PY

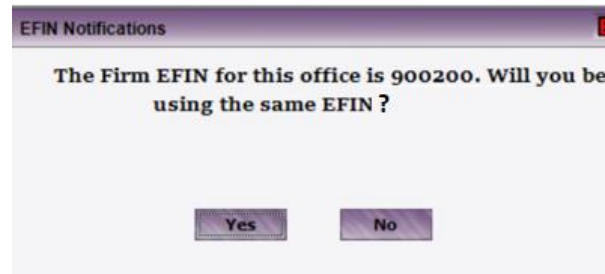
For EFINs verified in the 2019TY, you have the option to Integrate with Prior Year. Integrating the EFIN with Prior Year will verify the EFIN for the 2020TY.

EFIN Status Information

EFIN	
900200	Integrate with prior year

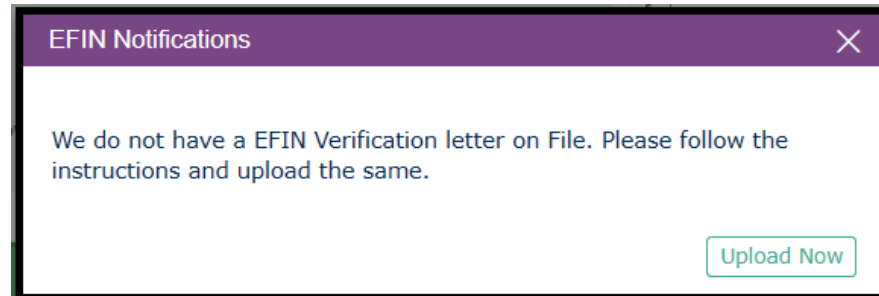
EFIN Validation for Verified EFINs in PY

A notification will pop-up in the software if the EFIN was verified for the 2019TY. If the EFIN for 2020TY is the same as the 2019TY, select Yes.



EFIN Validation New or Unverified EFIN

A notification will pop-up in the software if the EFIN is not verified for the 2020TY. Selecting Upload Now will take you to the Firm Setup screen where the EFIN summary can be uploaded.



EFIN VALIDATE			Instructions	
EFIN	TRACKING NUMBER	EFIN STATUS		
700100	<input type="text" value="20171234567774564"/>	✖ NOT UPLOADED	<input type="text"/> <input type="button" value="Browse..."/>	<input type="button" value="Upload and Save"/> <input type="button" value="Set as Not Used"/>

EFIN Validation

The software will indicate once the EFIN summary is successfully uploaded.

✓ EFIN letter uploaded and save successfully!!!

EFIN VALIDATE Instructions

EFIN	TRACKING NUMBER	EFIN STATUS		
700100	XXXXX4564	✗ UPLOADED NOT VERIFIED	<input type="text"/> Browse...	<input type="button" value="Upload and Save"/> <input type="button" value="Set as Not Used"/>

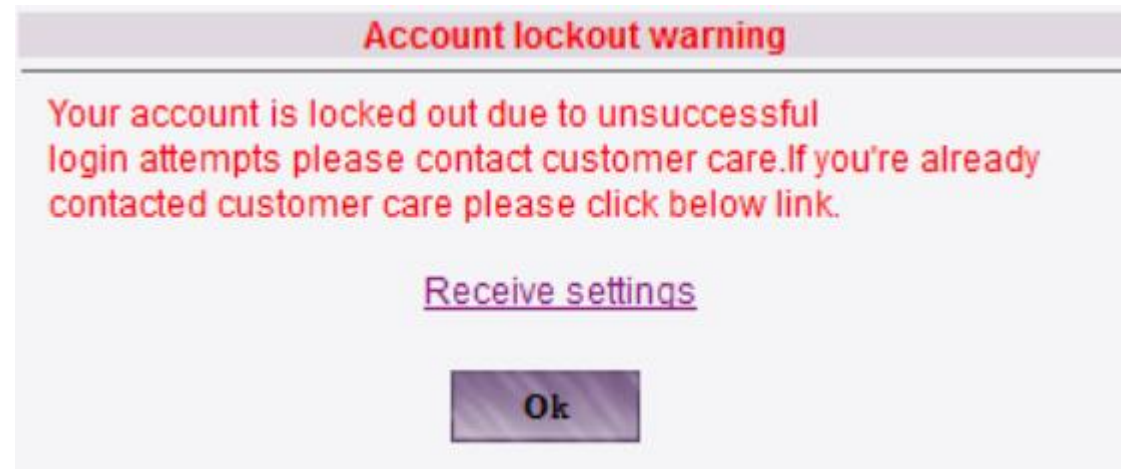
The software will indicate once the EFIN summary is verified.

EFIN VALIDATE Instructions

EFIN	TRACKING NUMBER	EFIN STATUS		
700100	XXXXX4444	✓ VERIFIED	<input type="text"/> Browse...	<input type="button" value="Upload and Save"/> <input type="button" value="Set as Not Used"/>

Security

- ▶ The software will become locked after 8 unsuccessful password attempts to login. If the account is locked, call customer support assist with unlocking.



Bank Products

- ▶ **January 2, 2021** is the start date to transmit returns where the taxpayer is requesting a pre-season advance loan (PreAck). Please note the returns are locked once the pre-season advance request is transmitted to the bank. This means the returns may not be edited prior to the start of the tax season.
- ▶ Once the tax season begins, the advance loans will be considered an in-season advance loan.
- ▶ Tax Preparers should never use last paystubs to file any tax return, including an application for a pre-season advance loan (PreAck).



Virtual Tax Office Solutions-Web Based Users

- ▶ Client Portal
- ▶ Remote Signature
- ▶ Mobile App

