

e-file for Form 1040





Application Process

- Form 8633
- Year-round
- Submit application by Dec. 1
- Mail application to Andover



e-file Tax Returns

- Forms 1040, 1040A and 1040EZ
- Convenient and accurate
- Combined federal/state filing
- See Publication 1345A at www.irs.gov



New Forms for Tax Year 2003

Form 8860

Form 8873

Form 8874

Form 8881

Form 8882

Form 8884



Electronic Signature Methods

 Self-select PIN - Taxpayer files on-line or through an Electronic Return Originator (ERO).

 Practitioner PIN - Taxpayer must file through an ERO.



Self-Select PIN Signature Method

- Taxpayer selects a five-digit PIN
- Taxpayer or practitioner may enter the PIN
- Prior year AGI is validated
- Open to most taxpayers, except: first-time filers under age 16 and/or returns requiring paper attachments to Form 8453



Practitioner PIN Signature Method

- Taxpayer selects five-digit PIN
- Taxpayer or practitioner enters the PIN
- Form 8879 required for all returns
- Prior year AGI is not needed
- Open to most taxpayers, except: returns requiring paper attachments to Form 8453



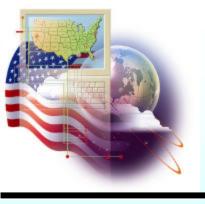
e-file Signature Authorization Forms

- Form 8879 & Form 8878
 - Authorize ERO to enter taxpayer's PIN
 - **ERO** must retain forms for three years from return due date or IRS received date, whichever is later
 - Do NOT submit to IRS



Electronic Processing Problems

- SSN numbers transposed/mis-entered
- Continuing to transmit return even after accepted
- Filers transmit same return multiple times in same transmission
- Not checking acknowledgment indicators



e-Help Desk

- **♦ Quick Alerts**
- **♦** Services provided
- **♦** Locations
- **♦** 866-255-0654



Electronic Payments

Individual payment options:

Electronic Funds Withdrawal from a checking or savings account or credit card using touch-tone phone or internet.



Recap

- *♦ e-file* overview
- e-file signature options
- e-file processing
- e-help desk