

14 CHAPTER: ACCELERATED TAX DUE RETURNS

14.1 Overview

An Accelerated Tax Due Return entry is a method of speeding up the processing of an Individual Income Tax return that indicates that the taxpayer owes tax. This functionality will not be used for Fiduciary tax returns.

You can create an Accelerated Return for current year Individual Income Tax returns (760, 763 & 760 PY only) you receive in your locality, provided that the taxpayer's name, address, and filing status is the same as the previous tax year.

You initiate the Accelerated Tax Due Return process by entering a minimal amount of information from the return into IRMS.

14.2 Process Accelerated Tax Due Returns

The first step in creating Accelerated Tax Due Returns is creating a New Group. Accelerated Tax Due returns are grouped together into batches of 100 returns for processing.

After you have created the new group, you can enter your Accelerated Tax Due Returns. If there is an error, the system will prompt you with an error message to give you an opportunity to correct it. After two attempts to correct errors, the return will be denied and will not be eligible for Accelerated Tax Due processing. Most often, the reasons for denial are incorrect SSN or a mismatch between two Tax Due Amount entries.

You can view the last 10 returns entered from the Last 10 Accelerated Tax Due Returns window. The fields on this window are view only and cannot be edited. Editing must be done from the Create Accelerated Tax Due window.

If you enter all of your returns for a group and they total less than 100, IRMS will not automatically prompt you to close the group. However, you can manually close the group.

Create New Group Window

The illustration below is the Create New Group window.

Create New Group Window - Fields

The table below lists the fields in the Create New Group window and provides a brief description of each.

Field	Field Type	Description
Group Number	System Generated	The identification number by which this batch of returns is known to TAX.
Return Source	System Generated	This should reflect the location of the taxpayer
Submitted Date	Required	The date the group is actually submitted to TAX. System defaults to current date, but allows you to change it.
Received Date	Optional	The date the information is actually entered. This may be different from the submitted date, but cannot be later than the submitted date. The system defaults to the current date, but you may change it.
Return Detail Type	Required	A pull-down box with two choices: Accelerated Refund and Accelerated Tax Due.
Tax Year	System Generated	The current year for which Individual Income Tax Returns are being filed. The system defaults to the previous calendar year.
Source Locality	System Generated	The system will set the Locality based on the login of the user entering the return information.
Paid in Full	Optional	Only used when the group is for Paid in Full Accelerated Tax Due Returns.
Locality/Tax Rep	System Generated	The system will set the Locality and Tax Rep information based on the login of the user entering the return information.

Create Accelerated Tax Due Return Window

The illustration below is the Create Accelerated Tax Due Return window

The table below lists the fields in the Create Accelerated Tax Due Return window and provides a brief description of each.

Field	Field Type	Description
Primary SSN	Required	The customer's Social Security Number on the return.
Primary Name	Required	The first 4 characters of the customer's Last Name as shown on the return (or the customer's entire name if it is 4 characters or less).
Secondary SSN	Conditionally Required	The second Social Security Number on the return if it is provided. Required only if the filing status is Married Filing Joint.
Secondary Name	Conditionally Required	The first 4 characters of the second Last Name as shown on the return (if it is provided and if it is different from the Primary Name). Required only if the filing status is Married Filing Joint.

Create New Group

Group Information

Group Number: 10020610

Submitted Date: []

Return Detail Type: []

Source Locality: []

Locality/Tax Rep: Arlington, User

Return Source: Local

Received Date: []

Tax Year: 2001

Paid In Full

[Create...] [Cancel]

Step 2: Enter the **Submitted Date**.

Step 3: Enter the **Received Date**.

Step 4: Select **Tax Due** from the Return Detail Type field.

Step 5: Select the appropriate **Source Locality**.

Step 6: Click **Create**.

IRMS creates the new group and displays the Create Accelerated Tax Due Return window.



Note: You do not see the completed information again before you see the Create Accelerated Tax Due Return window. To review the information you entered, see the section in the chapter on Viewing Last 10 Returns Keyed.

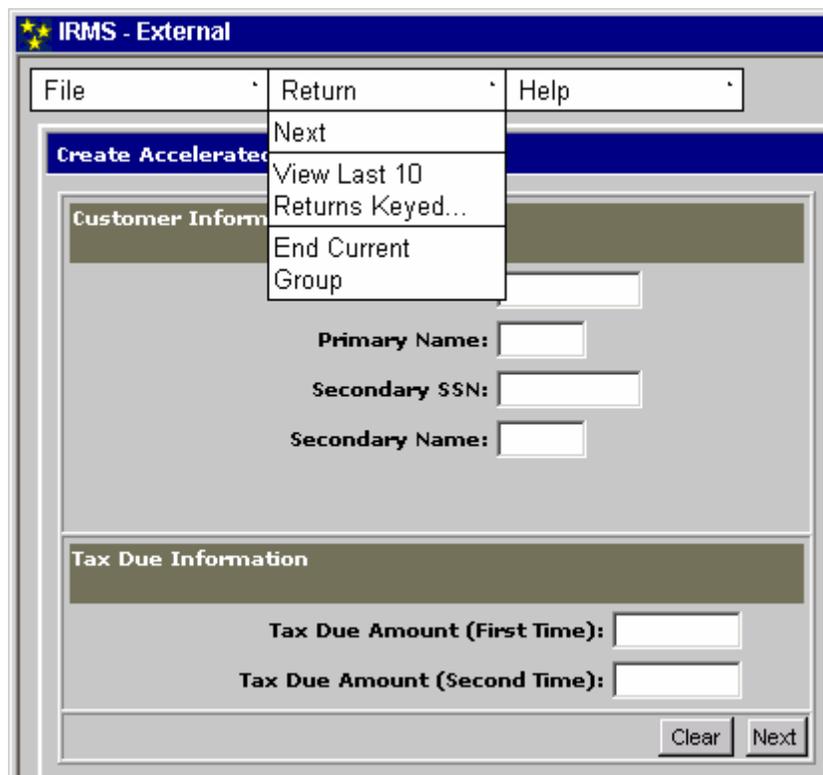


If the return is accepted, the next window you view is a refreshed Create Accelerated Tax Due Return window allowing entry of the information from the next taxpayer's return. This Accelerated Tax Due entry process is repeated until 100 returns have been entered. The system then prompts you to start a new group.



Note: You must end a group to exit the continuous process of refreshed Create Accelerated Tax Due Returns. If you have a group of less than 100 entries, you can close it by selecting End Current Group from the Return menu on the Menu Bar on the Create Accelerated Tax Due Return window.

If you need to end a group with less than 100 entries, perform the following step.

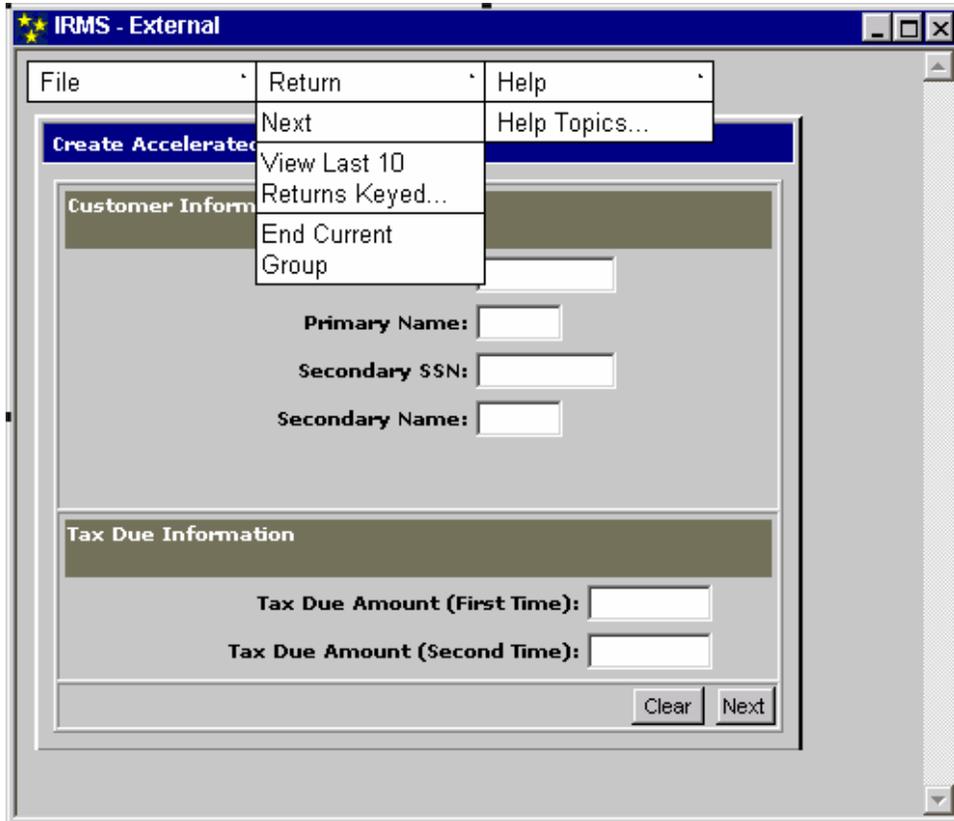


Step 14: Select **Return: End Current Group**.

IRMS ends the group and returns you to the IRMS Main window.

14.2.2 Denied Accelerated Tax Due Entry

If the system rejects the entry, you will see an error message pop-up box superimposed on the Create Accelerated Tax Due window, containing the reason(s) the entry was denied.



Step 1: Select Return: View Last 10 Returns Keyed.
The Last 10 Accelerated Tax Due Returns Keyed window displays.

Primary SSN	Primary Name	Secondary SSN	Secondary Name	Tax Due Amount	Status
227-81-7211	Ryan			\$100.00	Posted
874-84-2234	Smith			\$50.00	Posted
102-93-4857	Jones			\$140.00	Denied

The fields on this summary of the Last Ten Tax Due Returns Keyed are the same as on the Accelerated Tax Due Return entry window, with the addition of Status.



Note: The entry on the third line is shown as having been entered even though the Accelerated Return has been denied.

Step 2: Click **Close** to return to the Create Accelerated Tax Due Return window.