

## **SINGLE SOLDIER EXPRESS FILING (SSEF)**

The (SSEF) Program is designed to speed up the filing process for those single Soldiers and individuals who qualify to use the program. Only individuals who can successfully complete the questionnaire, (Appendix A), can utilize the program. **There is no requirement that single individuals must use this method of filing.** It is a completely voluntary program, and is up to the taxpayer if they want to utilize. They may choose to make an appointment or come on a walk-in day and wait in line like anyone else. If they elect to take advantage of the SSEF program these individuals bypass the normal screening and go through an “express lane” for screening and filing. Eligible individuals will complete a questionnaire along with some IRS tax forms; attach their documents, and speak with the express filing SD Soldier. The taxpayer is instructed to return again, after 1300, in two (2) days to review, sign and pick-up their copies of their completed tax documents.

Each morning, once the ITAC opens and people have started taking a number, the front desk personnel should ask if there are any single individuals who would like to take advantage of our SSEF program. Those working the front desk will briefly explain the program and have the questionnaire available.

If the individual completes the form and qualifies, they sign-in on the “Single Soldier” sign-in book. (This allows the SD Soldier handling SSEF to insure that everyone is seen in the proper order). The SD Soldier clerk, will review the questionnaire with the taxpayer, and if all is correct will provide them with the IRS forms to complete. Once the taxpayer completes all the forms the clerk reviews the forms, collects the rest of the documents, and other information, (such as banking and routing number). It is critical that a working phone number is received, in order to contact the taxpayer if any additional questions arise during return preparation.

\*The clerk puts all the information into a Client Envelope and labels it with the taxpayer’s name—Last Name, First Name.\*

The SSEF clerk prepares all the necessary tax documents for both federal and if necessary, state returns. They run the diagnostic and mark the return READY FOR REVIEW. These returns need to go to a quality reviewer, as they need to be reviewed just like any other returns. After reviewing, if everything looks correct, the reviewer will change the status from “ready for e-file” to “SS FILING”. (This is done to remove them from the e-file que and to avoid confusion in looking for a packet to e-file that is really not ready to be e-filed, as it has not been signed). The clerk either makes any necessary corrections and returns it to a reviewer again, or prints a copy for the client’s packet. **The 8879’s will not be printed until the taxpayer returns to review, sign and pick-up their packet.** (The 8879 needs to be dated the day the forms are signed....not in advance, as we have 48 hours to process the return once the form is signed). Printing this form prior to the taxpayer returning could result in an 8879 form being dated several days or even weeks before it was really signed!! This could be an audit issue.

All packets are kept at the SSEF clerk’s desk in an accordion file folder, both when dropped off and when completed and awaiting pick-up.

When a taxpayer returns to pick-up their packet they will sign-in where the “Pick-Up Log”, (Appendix B), is located. There is a “Pick Up” Log sheet, (Appendix C), for the single taxpayers to sign-in. The return will be review with the taxpayer, and the diagnostic will be run again and the e-file recreated. It will now be marked with a status of “Ready to Transmit”. The original packet will be turned in to Mrs. Olsen so the returns can be e-filed or counted for weekly stats if a Paper File return is filed. The clerk will initial next to the person’s name on the pick-up sheet **after** the packet has been delivered complete. This provides a date, time and contact person for validation that the tax return was returned to the tax payer.

Since all returns are required to be locked up each night, the SSEF clerk will insure that the accordion folder is turned in to the Mrs. Gayle Teza’s office each night and then retrieve it again each morning. In the event the SSEF clerk is out of the office for the day, another soldier will be cross-trained and will assume the role in their absence.