

# IRS e-file Signature Authorization 2023

Priority Processing

Check here if you were referred by your Paid Preparer

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- o This form must be completed by the Taxpayer/Spouse. Please include a one-time-use Personal Identification Number (PIN), which will be used as your signature in your electronic tax return.
- o Choose your method of payment at the bottom of the page.
- o Fax or upload this page with your tax forms, W-2s (required), and 1099s (if tax withheld). Fax/Upload info below.
- o Call (800) TAX REFUND or go to [www.irs.gov](http://www.irs.gov) to track the status of your tax return.

Total Pages  
(incl. this cover)

▼

P R I N T O R	Your first name and initial	Last name	Your Social Security No. <b>IMPORTANT!</b> Spouse Social Security No.
	If a joint return, spouse first name and initial	Last name	

Our Self-Serve e-file is a convenient way for taxpayers to file their self-prepared and professionally-prepared tax returns electronically. It's an IRS e-file Signature Authorization with instructions, enabling taxpayers to complete it and fax or upload their tax forms to 800-TAX REFUND for electronic filing without assistance. It's been a popular service option for practitioner sites that are not authorized IRS Electronic Return Originators – also known as **Referral Sites** – and no contract is necessary for practitioners to participate.

The Electronic Filing service is 800-TAX REFUND's. You can print the Authorization Form off of our web site at [www.800taxrefund.com/individuals.html](http://www.800taxrefund.com/individuals.html). Clients who wish to file their tax return electronically (Fed and State) simply complete the form, consenting to a charge of \$49.95 payable to 800-TAX REFUND by credit card or account debit. You **may not** complete the Signature Authorization for your client, however, you may review the form with them to ensure that it has been filled out properly and signed. A toll-free number is provided for your client to fax his or her tax return, with the Signature Authorization, to 800-TAX REFUND for electronic filing. No cover sheet is required to accompany the return because the Signature Authorization is machine-readable – it Date/Time stamps the tax return and records the referral source, which would be the paid preparer information on the accompanying tax return. We remit to you, as the referral source, a \$12.50 referral fee for each client return which is faxed or uploaded to us, payable upon completion of the tax season.

**Low Priority = Low Price:** Our "Low Priority" e-file service has proven to be popular for many balance-due and low-refund clients. Low Priority means we'll take up to ten days to process the return (vs 24 hours with our "Priority" e-file), and there will be no money-back guarantee on refunds which are delayed by IRS beyond our published Electronic Filing Precautions (vs the money-back guarantee on our "Priority" e-file). We remit to you, as the referral source, a \$2.50 referral fee for each \$37.95 Low Priority client return which is faxed or uploaded to us, payable upon completion of the tax season. If 25% of your e-file clients opt for the Low Priority service, you'll realize an overall average referral fee of \$10.00 per return.

Other items to note:

- The Low Priority Signature Authorization is not available to the public on our website, practitioners must request it. Call us and we'll email you a link to download the form.
- An \$8.00 "Complexity Surcharge", associated with more complex Low Priority returns, is authorized by the taxpayer in the Pay Plan section at the bottom of the Low Priority Signature Authorization.
- Our "free State with Federal" policy means one State return. E-filing multi-State returns will be subject to an extra \$20.00 fee for each additional State.
- We do not issue commission checks to practitioners for less than \$25.00.

800-TAX REFUND, Inc.  
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secure server uploads: <https://share.hyperfiles.net/filedrop/800taxrefund>  
e-signature enabled for remote clients: <https://1040plus.com/formcloud/efileauth.aspx>

## Getting Started as an e-file Referral Site

Along with these guidelines are the \$49.95 and \$37.95 IRS e-file Signature Authorizations (fill & save data using Adobe Reader 8+) and a color poster to help you promote the e-file service.

### **The REFERRAL SITE Process:**

- As you can see, our IRS e-file Signature Authorization forms have been customized to enable taxpayers to complete the forms without assistance. Many taxpayers complete the Authorization Form on-site during the course of their tax interview. Taxpayers can also complete the Authorization Form off-site and fax it with their tax return themselves directly to 800-TAX REFUND, and your organization will still receive credit for the referral. It is important to note that the REFERRAL SITE **may not create the PIN** for the taxpayer – this is in accordance with IRS e-file regulations, and, without proper authorization, creating the PIN for the taxpayer is the equivalent of signing their name! We monitor this closely and will not accept tax returns from sites that violate this regulation.
- The taxpayer authorizes one of two payment options to 800-TAX REFUND at the bottom of our Authorization Form. Should the taxpayer choose to pay us by direct debit, the debit will occur 2 or 3 days after we process the return. Please remind taxpayers to put their phone numbers on the form so a) we can contact them in the event of a payment problem and b) IRS and most states require a phone number for ACH Debit balance due returns. In accordance with IRS e-file regulations, the REFERRAL SITE **may not collect any payment** from the taxpayer for the e-file service. We will not accept tax returns from sites that violate this regulation.
- Because State tax returns can “piggyback” with the Federal return (both returns transmitted to IRS simultaneously), the REFERRAL SITE should encourage taxpayers who wish to e-file their State tax return to submit it with his or her Federal return at no extra charge (one State). Taxpayers who submit their Federal Only return for \$49.95 or \$37.95 will be charged an extra fee of \$15 if they later choose to submit their State return *after* their Federal return has already been processed by us.

### **The 800-TAX REFUND Process:**

- 800-TAX REFUND shall contact the REFERRAL SITE by telephone, email, or fax should a non-substantive error be discovered which prevents the return from being successfully transmitted. A non-substantive error is one which does not change the taxpayer’s refund by more than \$14.00. For substantive errors, 800-TAX REFUND may require the REFERRAL SITE to submit a revised tax return in accordance with IRS e-file Procedures, or the taxpayer forfeits the electronic filing fee. Revised tax returns generally are submitted to 800-TAX REFUND without incurring any additional charges.
- 800-TAX REFUND generally receives acceptance or rejection acknowledgments (ACKs) from IRS within 24 hours of transmission. If the taxpayer’s return is rejected by IRS, then 800-TAX REFUND must notify the REFERRAL SITE to resolve the problem. Neither the REFERRAL SITE nor 800-TAX REFUND is required to notify the taxpayer if the tax return has been accepted. Instead, for an individualized refund deposit date, taxpayers are encouraged to use the “Where’s My Refund?” link on the IRS website at [www.irs.gov](http://www.irs.gov).
- 800-TAX REFUND remits \$12.50 to the REFERRAL SITE for each “Priority” tax return referred, and \$2.50 for each “Low Priority” tax return referred, with payment issued to the REFERRAL SITE upon completion of the tax season, after all outstanding tax returns, refunds, and payments have been resolved. This usually is completed by mid-June. There is a second check run after the e-file season shuts down in late November. We do not issue any commission checks if they are less than \$25.00.
- 800-TAX REFUND, as an IRS-approved Electronic Return Originator/Service Bureau which performs auxiliary services in connection with the preparation and filing of your client’s tax return, adheres to the same disclosure regulations as the preparer of the tax return as defined in Section 7216 of the IRC. We perform only the tax-related filing service that your client authorizes on our IRS e-file Authorization Form, and have never used your client’s personal information for any purpose other than to file his or her tax return for the tax year authorized.



**800-TAX REFUND, Inc.**  
a better way...

Fast & Affordable

# Getting a Refund?



Acceptance Date*	Deposit Date**
Jan 18 thru Jan 24	Feb 1
Jan 25 thru Jan 31	Feb 8
Feb 1 thru Feb 7	Feb 15
Feb 8 thru Feb 14	Feb 22
Feb 15 thru Feb 21	Feb 29
Feb 22 thru Feb 28	Mar 7
Feb 29 thru Mar 6	Mar 14
Mar 7 thru Mar 13	Mar 21
Mar 14 thru Mar 20	Mar 28
Mar 21 thru Mar 27	Apr 4
Mar 28 thru Apr 3	Apr 11
Apr 4 thru Apr 10	Apr 18
Apr 11 thru Apr 17	Apr 25
Apr 18 thru Apr 24	May 2

\* historical cycle

\*\* Wed Thu or Fri

## New Tax Laws: Just Ask

We've Got You Covered

