**FAQs**

1. **Where’s my refund?**

You can check on your Federal refund at <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp> You will need your SSN, Filing Status and refund amount (whole dollar amount only).

For Ohio refund, you can find details at

<https://www.tax.state.oh.us/IFILE/WheresMyRefundWeb/wheresmyrefund.jsp>

You will need your SSN, Date of Birth and type of tax (Income or School District).

1. **How can I make a payment to a taxing authority?**

You can make a payment to the IRS for balances due on notices, estimated tax payments or extension payments at <https://www.irs.gov/payments/direct-pay>

You will need your “Reason for payment” that can be selected from a drop-down menu, “Apply Payment To” which will depend on purpose of the payment, and the “Tax Period” to start the process.

For Ohio, you can make payments at

<https://www.tax.state.oh.us/IFILE/IFileRegWeb/login.jsp> You will need to register first if you don’t already have an account. You’ll need your SSN, Name, Date of Birth, and either the issue date of your ID or an amount based on your filed return for the year indicated.

For RITA, you can make payments at <https://eservices.ritaohio.com/webtax/auth/login>

You will need to register first if you do not already have an account**.**

1. **Once I submit my tax documents for preparation, how long will it take to get my returns?**

A definitive date cannot be provided as there are so many factors that can affect your preparation time. First, we must wait until all taxing authorities have annually authorized forms, opened their online access and whether any last-minute tax law changes have delayed either of these factors. Then, there are the returns that have preceded your submission. Are those returns ahead of your return ones that will take two hours or 40 hours each**?**

1. **How can I speed up the preparation process?**

One easy way to speed up this process is to have all your information gathered. Make sure to review the annual organizer letter to see if any new guidelines have been added by the taxing authorities. Submit copies of IDs that have been renewed. Not sure? Check the organizer. Your last provided ID information is listed within the organizer. Compare your gathered documents to the organizer and notate any changes of employers, bank accounts, investments accounts, etc. Don’t forget to inform us when you have uploaded all your documents so we can put you on the preparation list!

1. **I got my tax returns, but where can I find details about what happened this year on my return?**

Included with your returns, there is an annual Cover Letter (either in the center section of the black tax folder or in the pdf files on your portal). This document covers many questions you may have about your tax return. We try to cover a lot of points, but please contact us if you still have questions.

1. **I’m completing my organizer, but I need additional pages. Where can I find them?**

In the “Public” section of your SecureFilePro portal, you can find blank organizer pages. These are not fillable pdfs, but are still useful.

1. **My withholdings are never enough to cover my tax liability. What can I do?**

You can submit a new Form W-4 for Federal purposes to change your withholdings. We can assist with this. We’ll need your latest pay stub (you and your spouses) and information about any changes for the current year from the prior year.

1. **My returns are going to be extended. Should I send any money to the taxing authorities?**

This is always a difficult moment. If you have not engaged us to prepare projections throughout the year, our best guidance is to use the prior year return as a suggestion.

1. **I forgot my SecureFilePro portal username and/or password!**

Your username is your first and last name with no spaces. If you need your password reset, please send us an email or text message and we will send you a password reset link.

1. **I would like more information about a specific tax topic. Where can I get more information before I call you?**

Check out our professionally produced videos for some great information. We have included a wide variety of topics to cover varying situations. There are also Client Lines newsletters that provide quick details. Six months of newsletters are available on the website and quarterly issues (February, May, August, and November) for every year are available on the portal under the “Public” section.

1. **I have heard that Married Filing Separately can save me money. Do you check this possibility for your clients?**

We generally run the returns both ways - as Married Filing Jointly and Married Filing Separately - to determine if there is a tax savings. The returns are then generally prepared in the most cost-effective format. There are some situations where a couple cannot file Separately and this will prevent the separation of returns. Explanation comments are included in the annual cover letter for this point and many other tax items.

1. **How can I check my account with the IRS?**

Once you have created an account with the IRS at <https://www.irs.gov/payments/view-your-tax-account>, you will be able to review your account.

You can also get transcripts at <https://www.irs.gov/individuals/get-transcript>