

Independent Association of Accountants of New York, Inc.

Driver license or state identification required

Beginning with Tax Year 2016, the taxpayer's driver license or state identification information is now required. If the taxpayer and/or spouse has been issued a driver license or state identification card, they are required to provide that information to be entered into the software. Taxpayers must provide the ID number, issuing state, issuing date, and expiration date for all licenses or identification cards. If the taxpayer license/ID is a New York State driver license or non-driver ID, the document number found on the license/ID must also be entered. In the event that a taxpayer does not have a driver license or state-issued ID, you will be prompted by the software to indicate this. If the taxpayer does not have either a driver license or state-issued ID, marking the check box indicating that they have neither will fulfill the new requirement. We are requiring this information as an additional means of validating the taxpayer's identification, and not having the information will not cause delays. However, if all other efforts to validate the taxpayer's identity are unsuccessful, the processing of the refund may be delayed.

How do I view my continuing education credits?

To view your continuing education credits follow the steps below:

Login to your [PTIN account](#).

1. On the Main Menu, click "Select" next to View My Continuing Education Credits.
2. Select the year of the CE you wish to view from the drop down menu.
3. Click on "Expand" to see the CE credits for each category.

For issues regarding missing or incorrect CE credits, you must contact the CE provider directly and ensure they have your correct name and PTIN. The name and PTIN you provide the CE provider must match the information in the PTIN system; otherwise, the CE credits will not be reflected in your account.

Note: Continuing Education (CE) completed after September 11, 2016 is currently not reflected in your PTIN account. IRS is in the process of launching a new system for IRS CE Providers. The system is expected to be operational soon. We apologize for the extended delay. Please continue to check your PTIN account periodically for updates.

CE credits are not required to renew a PTIN. Tax return preparers should continue to renew their PTINs.

Similarly, enrolled agents can self-attest to their CE credits and renew their EA status.

Validating Your Electronically Filed Tax Return

Español

When self-preparing your taxes and filing electronically, you must sign and validate your electronic tax return by entering your prior-year Adjusted Gross Income (AGI) or your prior-year Self-Select PIN. Using an electronic filing PIN is no longer an option. Generally, tax software automatically enters the information for returning customers. If you are using a software product for the first time, you may have to enter the information yourself.

There are several ways to find your prior-year AGI:

Preferred Method

You should always retain a copy of your tax return.

- On your 2015 tax return, your AGI is on line 37 of the Form 1040; line 21 on the Form 1040-A or line 4 on the Form 1040-EZ.
- If you used a paid preparer last year, you might obtain a copy of last year's tax return from that preparer.
- If you are using the same tax preparation software that you used last year, that software will likely have your prior-year tax return for you to access.
- If you're not using the same tax preparation software as last year, you may be able to return to your prior-year software and view an electronic copy of your prior-year return.

If you have been issued an Identity Protection (IP) PIN (via a CPO1A), you should enter it when prompted by your software. It will serve to verify your identity.

- If you are a first-time filer over the age of 16 enter zero as your AGI.

Alternative Methods

If you do not have a copy of your 2015 tax return, you may use a Get Transcript self-help tool to get a **Tax Return Transcript** showing your AGI.

Use Get Transcript Online to immediately view your AGI. You must pass the Secure Access identity verification process. Select the **Tax Return Transcript** and use **only** the "Adjusted Gross Income" line entry.

Use Get Transcript by Mail or call 800-908-9946 if you cannot pass Secure Access and need to request a **Tax Return Tran-**

New York State Electronic Filed Amended returns

When submitting an amended return where an original return has already been processed and had a payment that has already been processed, be sure to remove any ACH data that had been previously submitted or adjust if an additional payment should be debited. If the ACH data is exactly the same on the subsequent filing, the filing will reject.

Please remember that the Independent Association of Accountants of New York, Inc. does provide scholarships annual to members and their families.

INDEPENDENT ASSOCIATION OF ACCOUNTANTS OF NEW YORK, INC.
4043 MAPLE RD BOX 100A, AMHERST, NY 14226
iaaofny@msn.com
SCHOLARSHIP APPLICATION

Return your complete application to: Independent Association of Accountants of New York, Inc.
4043 Maple Rd box 100A, Amherst, NY 14226

PERSONAL DETAILS

Student Name: _____

Address: _____

Date of Birth: _____

CURRENT STUDY STATUS AND STUDY INTENTIONS

Current High School Status: _____

Current College/Business School: _____

Degree Program: _____

College Entrance Date: _____

College Graduation Date: _____

You intend to Study

- Part Time
- Full Time

Please List Any Academic Awards or Scholarships that you are currently receiving

Personal Statement:

Briefly state your purpose for college and your goals

Certification: I certify that the information provided is complete and accurate to the best of my knowledge. Falsification of information will result in termination of any scholarship awarded.

Signature _____ Date _____

Monthly Meeting : January 25, 2017
6:00 PM SHARP

Round Table Discussion

Where: Russell's Steaks, Chops & More
6675 Transit Road
Williamsville, NY
(Transit Road North of Thruway Exit 49)

Cost: \$32 Members \$42 Non-Members

*****Includes wine, salad, dinner, dessert*****

Reservations:

Audrey Sorrento

852 Kenmore Avenue

Buffalo, New York 14216

Telephone: (716) 816 - 6779

Payments to: I.A.A. of NY Inc.

Please furnish names of guests when making your reservations.

IAA's Mission Statement

To promote, assist, educate, protect and defend the accounting practitioner within the State of New York; to aid the progress of the profession of accountancy, without limiting the foregoing; to advance the theory and practice of accountancy and its allied fields; to enhance the status of the accounting practitioner within the State of New York to endeavor to maintain technical and cultural standards

IAAOFNY.COM

Visit our web site for the latest and most updated information on your society.

Download membership applications, seminar information, registration forms, renew your membership.

Membership listing with phone numbers and links to member's websites.

The quarterly newsletter and other information.

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Signature _____ Date _____