

West Virginia Executive Branch Privacy Tip

Tax Day is almost here! If you've procrastinated, here's a final Tax Time Tip to assist you in your "away from work" life. The IRS provides tips for taxpayers at https://www.irs.gov/uac/IRS-Tax-Tips

Nine Common Filing Errors to Avoid

IRS Tax Tip 2017-24, March 6, 2017

The IRS encourages taxpayers to file an accurate tax return. If a taxpayer makes an error on their return, it will likely take longer for the IRS to process it. This could delay a refund. Avoid many common errors by filing electronically. IRS e-file is the most accurate way to file a tax return. All taxpayers can use IRS Free File at no cost.

Here are nine common errors to avoid when preparing a tax return:

- 1. **Missing or Inaccurate Social Security Numbers.** Be sure to enter each SSN on a tax return exactly as printed on the Social Security card.
- 2. **Misspelled Names.** Spell all names listed on a tax return exactly as listed on that individual's Social Security card.
- 3. **Filing Status Errors.** Some people claim the wrong filing status, such as Head of Household instead of Single. The <u>Interactive Tax Assistant</u> on IRS.gov can help taxpayers choose the correct status. E-file software also helps prevent mistakes.
- 4. **Math Mistakes.** Math errors are common. They range from simple addition and subtraction to more complex items. Transactions like figuring the taxable portion of a pension, IRA distribution or Social Security benefits are more difficult and result in more errors. Taxpayers should always double check their math. Better yet, tax preparation software does it automatically, so file electronically.
- 5. Errors in Figuring Tax Credits or Deductions. Filers can make mistakes figuring their <u>Earned Income Tax Credit</u>, Child and Dependent Care Credit, the standard deduction and other items. Taxpayers need to follow the instructions carefully. For example, if a taxpayer is age 65 or older, or blind, they should be sure to claim the correct, higher standard deduction. The IRS <u>Interactive Tax Assistant</u> can help determine if a taxpayer is eligible for tax credits or deductions.
- 6. **Incorrect Bank Account Numbers.** The IRS strongly urges all taxpayers who have a refund due to choose direct deposit. It's easy and convenient. Be careful to use the right routing and account numbers on the tax return. The fastest and safest way to get a refund is to combine e-file with direct deposit.
- 7. **Forms Not Signed.** An unsigned tax return is like an unsigned check it's not valid. Both spouses must sign a joint return. Taxpayers can avoid this error by filing their return electronically. Sign an e-filed tax return digitally before sending it to the IRS.
- 8. **Electronic Filing PIN Errors.** When e-filing, the taxpayer signs and validates the tax return electronically with a prior-year Self-Select Personal Identification Number. If they do not have or know their PIN, they should enter the Adjusted Gross Income from their 2015 tax return originally filed with the IRS. Taxpayers should keep a copy of their tax return.
 - Beginning in 2017, taxpayers using a software product for the first time may need their Adjusted Gross Income (AGI) amount from their prior-year tax return to verify their identity. Taxpayers can learn more about how to verify their identity and electronically sign tax returns at <u>Validating Your Electronically Filed Tax Return</u>. Do not use the AGI amount from an amended return or a return that the IRS corrected.
- 9. Filing with an expired ITIN. A tax return filed with an expired Individual Tax Identification Number (ITIN) will be processed and treated as timely filed, but will be processed without any exemptions or credits claimed. Taxpayers will receive a notice from the IRS explaining that an ITIN must be current before any refund is paid. Once the ITIN is renewed, exemptions and credits are processed and any allowed refund paid. ITIN expiration and renewal information is available on IRS.gov.

Additional IRS Resources:

- Interactive Tax Assistant
- IRS Free File
- IRS Tax Map
- IRS Tax Trails
- Get Your Electronic Filing PIN

Note: Your agency/bureau/department/division may have specific requirements – always check your policies and procedures. If you have questions, contact your Privacy Officer.