CPA

Practice **Advisor**

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Isaac M. O'Bannon • Jan. 29, 2024



The Internal Revenue Service opened the 2024 tax season on January 29, 2024, accepting and processing federal individual tax returns, and announcing that it expects more than 146 million individual tax returns for 2023 to be filed this filing season. The final regular day of the 2024 tax season is April 15, 2024, although almost all tax filers can receive an automatic six-month extension if they apply for one.

• 2024 Tax Refund Calendar: How to Estimate When You May Receive Your Refund

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service."

The IRS reminds taxpayers the deadline to file a 2023 tax return and pay any tax owed is Monday, April 15, 2024. Taxpayers living in Maine or Massachusetts have until April 17, 2024, due to the Patriot's Day and Emancipation Day holidays. If a taxpayer resides in a federally declared disaster area, they may have additional time to file.

Nearly 250 Taxpayer Assistance Centers expand hours; "Where's My Refund?" updates

Taxpayer Assistance Center hours expanded. As part of expanded taxpayer service efforts, nearly 250 IRS TACs around the country will extend their weekly office hours to give taxpayers additional time to get the help they need during the filing season.

The extended office hours will run through Tuesday, April 16. To see if a nearby TAC is offering extended hours, taxpayers can visit Contact your local office to access the IRS.gov TAC Locator tool. The site lists services offered, including extended hours and directions to each office. Taxpayers can call 844-545-5640 to make an appointment or walk in to get help at designated TACs offering the additional time. Normally, TACs are open from 8:30 a.m. to 4:30 p.m., Monday through Friday, and operate by appointment.

Special Saturday hours available. In addition to extended hours during the work week, the IRS will again offer special Saturday hours at many TACs across the country February through May. On these special Saturdays, taxpayers can walk in to receive all services routinely provided at participating offices, except for cash payments.

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clearer and more detailed updates, including whether the IRS needs them to respond to a letter requesting additional information. The new updates will reduce the need for taxpayers to call the IRS for answers to these basic questions. The IRS plans to continue expanding the information available on Where's My Refund? later this year.

Taxpayers will also see other improvements this tax season, including:

- **Phone service.** Increased help available on the toll-free line and an expanded customer call back feature designed to significantly reduce wait times.
- Paperless processing. Enhanced paperless processing that will enable taxpayers to submit all correspondence, non-tax forms, and responses to notices digitally and will be able to e-File nine additional tax forms with 11 more planned. Achieving this milestone will enable up to 125 million paper documents to be submitted digitally per year.
- Online Account. An enhanced IRS Individual Online Account that includes chat, the option to schedule and cancel future payments, revise payment plans and validate and save bank accounts. Individuals with a Social Security number or an Individual Taxpayer Identification number can log-in or sign-up for an IRS Individual Online Account to securely access information about their federal tax account, view balance and payment options, view and approve authorizations from their tax professional, view digital copies of select IRS notices and get information on their most recently filed return that includes their Adjusted Gross Income.

Get free help preparing and filing taxes electronically

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missing information.

The IRS offers free online and in-person tax preparation options for qualifying taxpayers through the IRS Free File program and the Volunteer Income Tax Assistance and Tax Counseling for the Elderly programs.

Taxpayers with income of \$79,000 or less last year – and that's most taxpayers – can use IRS Free File Guided Tax Software now through Oct 15. IRS Free File Fillable forms, a part of this program, is available at no cost to any income level and provides electronic forms that people fill out and e-file themselves, also at no cost.

The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$64,000 or less, persons with disabilities and taxpayers whose preferred language is not English. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals.

In addition to VITA, the Tax Counseling for the Elderly (TCE) program offers free tax help for all taxpayers, particularly those who are 60 and older, specializing in questions about pensions and retirement-related issues unique to seniors.

MilTax, a Department of Defense program, generally offers free return preparation and electronic filing software for federal income tax returns and up to three state income tax returns for all military members, and some veterans, with no income limit.

Another option is the Direct File pilot program. This program gives eligible taxpayers a new choice to file their 2023 federal tax returns online, for free, directly with the IRS. It will be rolled out in phases and is expected to be widely available in mid-March. Find more about Direct File pilot eligibility, scope and the 12 participating states on Direct File.

Sign and validate electronically filed tax returns

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Use IRS.gov to find a reputable tax professional

The IRS also reminds taxpayers that a trusted tax professional can prepare their tax return and provide helpful information and advice. People can use the IRS Directory of Federal Tax Return Preparers with Credentials and Select Qualifications to find a preparer who is skilled in tax preparation and accurately files income tax returns.

Most tax return preparers provide outstanding and professional tax service. However, choosing the wrong tax return preparer hurts taxpayers financially every year. Be sure to check tips for choosing a tax preparer and how to avoid unethical "ghost" return preparers.

Questions about refunds? EITC, ACTC available for many by Feb. 27

Although the IRS issues most refunds in less than 21 days, the IRS cautions taxpayers not to rely on receiving a refund by a certain date, especially when making major purchases or paying bills. Some returns may require additional review and may take longer. The easiest way to check a refund's status is by using Where's My Refund? on IRS.gov or the IRS2Go app.

Most Earned Income Tax Credit (EITC) and Additional Child Tax Credit (ACTC) related refunds should be available in bank accounts or on debit cards by Feb. 27 if taxpayers chose direct deposit and there are no other issues with their tax return. Taxpayers can check Where's My Refund? for their personalized refund date. Where's My Refund? will be updated with projected deposit dates for most early EITC and ACTC refund filers by Feb. 17.

Know the signs of identity theft

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businesses, payroll and tax professionals. Check out the latest consumer alerts and read more about the most recent tax related scams identified by the IRS.

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