Advent Get It Card – *The Dirty Dozen*

You have completed the return, the site manager has completed quality review, and the return passes diagnostics. The client wants an Advent Get It Card. Now what?

1. Go fetch an Advent Card Envelope from the back of the Advent Get It Card box. Be sure to write the client's name, your name, and the date on the inventory sheet.

2. Go to www.advent-card.com. Log in. Get your site's user ID and password from your site manager.

   User ID ____________________
   Password ____________________

   You may be asked to download *Silverlight* software. Go ahead and download.

3. Click on the blue *Accounts* tab: *Create/Edit*. Enter the SSN and continue to the next screen.

4. Client Information Screen
   - Always check the box that says: *I certify that the taxpayer has NOT completed IRS Form 8888 and has electronically filed their return.* Check this box even of the client is using the Form 8888 to split the refund.
   - Then complete the rest of the screen. Everything in **bold letters** is required.

5. Client Identification Screen

   The client must have:

   one item from column A

   or

   two items from column B (One of the two must be a photo ID.)

6. Tax Return Information Screen
   - The *Client Total Income* is the amount on Form 1040, line 22. It is *not* adjusted gross income that you see in the refund monitor in the upper left-hand corner of TaxWise screens.
   - IF CLIENT OWES THE IRS or STATE DO NOT ENTER A NEGATIVE AMOUNT. ENTER 0 INSTEAD FOR REFUND AMOUNT.
   - Always answer "No" to the question, *Would you like to provide fee detail?* and enter zero for total fees.

7. Product Options Screen
   - Click *Get It Account* to indicate that the federal refund should go to the Advent Get It card account.
   - If the client wants the state refund to also go to the Advent Get It card account, answer "Yes" to the question: *Does the taxpayer want a State settlement product?*
   - Complete the *Notification Options* at the bottom of the page to indicate if the client wants to receive notification via text message or e-mail.

8. Confirm Client and Product Information Screen
   - Make sure that everything is correct.
   - Click on the box*, I confirm that all information provided is accurate.*

9. Complete Application Screen
   - Enter the Card Envelope Number (twice). It has 13 digits. You can see it through the window of the card envelope.
   - The Card Envelope Number is not is not the Get It Card number.

10. Print and Sign the Application.
   - Uncheck the *Consent to Use* and *Consent to Disclose* boxes. The client should have already signed the Center's consent forms.
   - Click on the *Print Documents* button.
   - Have the client sign and initial both copies of the application.
   - Sign as the witness. Any site staff person or volunteer can sign as the witness.
   - Give the client one copy and keep the other copy in the client file.
   - Document the outside of the client folder by checking the box next to Open Advent Prepaid Debit Card: Check to Indicate Follow-up.

11. Finish with Advent
   - Click the *Confirm Documents Signed* button.
   - Click the *Submit Application and Display Account Information* button.
   - Advent will generate a routing number and the account numbers that need to be entered on the tax return. <u>These are the only Advent numbers that are entered on the tax return.</u>
   - Click on the *Save and Close* button.
   - Give the client the Advent Card Envelope, which contains the card and practical instructions concerning customer service (877-833-4818) and payroll direct deposit. The client must wait 24 hours before activating the card by calling Advent.

12. Finish with TaxWise
   - Minimize the Advent screen and go to TaxWise.
   - Enter the routing number and account numbers into the federal and state returns.
     - Main Information Sheet
     - 1040, page 2 indicate that it is a checking account.)
     - IL-1040, page 2
   - On the IL-1040, page 2, be sure to check box that says that the state refund is going to a different account.
   - After entering the numbers, run TaxWise diagnostics and click the E-file button.

The <u>routing number</u> for both federal and state will always be:

026014135

The <u>federal account number</u> will be provided by the Advent system and have this format:

QX*xxxxxxxxxxxxx*

The <u>state account number</u> will be provided by the Advent system and will have this format:

SX*xxxxxxxxxxxxx*
