



Get It Prepaid MasterCard: Account Opening Guide

The account opening system (AFS) website is:

www.advent-card.com

Log in using the User ID and Password assigned to your site

Click on Accounts Tab

- Create/Edit Accounts (to open a new account or to modify an already existing non-submitted application)
- View/Search Accounts (to view already submitted accounts)

Client Information Screen:

- On the top of the screen it states that the user must certify that Form 8888 has not been filed. You will need to check this for all cardholders, but **can file Form 8888** for refund splits (for savings bonds, etc).
- All fields in **BOLD and Filing Status and Application Type are required**. Filing Status and Application Type do not have to be tied to the client's return. Answering Single & Individual is fine for account opening purposes.

Client Identification Screen:

- The tax preparer is required to verify the identity of the taxpayer and spouse by reviewing documents from the lists provided. Group A IDs are official, government issued forms of identification. If the taxpayer has a valid Group A ID, only one form of ID is required. If the customer does not have a valid Group A ID, then they can still qualify for an ADVENT product with two alternative forms of ID from Group B, **one of which must be a photo ID**.
- A non-US passport is also considered a valid Group A ID.

Tax Return Information Screen:

- If you will be opening accounts at intake, Tax Return Information can be all 0s.
- If you are completing the client's return please provide the following:
 - **Client Total Income** - Enter the amount from the taxpayer's federal return – 1040 EZ line 4, 1040A line 15, or 1040 line 22.
 - **Federal Refund Amount** - Enter the amount from the taxpayer's federal return – 1040 EZ line 12a, 1040A line 45, or 1040 line 73a.
 - **Total State Refund Amount** - Enter the refund amount from the taxpayer's state income tax return. IF CLIENT OWES THE IRS or STATE DO NOT ENTER A NEGATIVE AMOUNT, ENTER 0 INSTEAD FOR REFUND AMOUNT.
 - **First Time Homebuyer Credit** - Enter the amount from the taxpayer's return – 1040 line 67.
- **Tax Return Preparation Fee Summary** the system restricts users from entering fees, but the user must click on No for "would you like to provide fee detail" and enter 0s for Federal Tax Preparation Fees.

Product Options:

- **Does the taxpayer want a state settlement product?** Clicking yes allows the taxpayer to receive their state refund via the same method they are receiving their federal refund. If the taxpayer is having their federal refund deposited on the Get It Card, they can do the same thing with their state refund.
- **Notification Options** - These options provide the taxpayer with notification of Get It Card account activity, including when the initial deposit is made as well as spending alerts when the account is used. Client can opt for text message, email alerts, or both. **Please note: client will be charged by their cellular carrier for texts in accordance to their cellular plan.**

Confirm Client and Product Information Screen:

- This screen is for reviewing the client information entered on the previous screens. Scroll down to view all the information. Next to each header on this screen is a green **edit>> link**. Clicking on this link will take you directly to the input screen for that section. Use this link if any of the information needs to be changed / updated.
- Before exiting this screen, you must confirm that you have reviewed the information and it is correct. At the bottom of the screen, click on the check box by **“I verify that all information provided is accurate.”**

Complete Application:

- **Take a Card Envelope from the back of the Get It Card box at your site. On the card inventory sheet next to the Card Envelope number write down the client name, date, and your name.**
- **Card Envelope Number** - This is the 13 digit number visible through the window in the card envelope.
 - For security reasons, it is not the Get It Card number.
 - Enter the number twice time to confirm the input was correct.
- **Select the relevant documents to print for the taxpayer**
 - The Application for Refund Deposit is required to be printed for & signed by all applicants.
 - **Uncheck the Consent to Use and Consent to Disclose boxes.** CEP has these pre-printed.
 - Obtain the client’s signatures on the Consent Forms before printing and submitting the application.
Keep one copy of the Consent forms for CEP’s client files.
- **Click the ‘Print Document’ button** - The print documents button will display the documents to be printed. From that display, print the required paperwork. After retrieving the documents from the printer, close the window and return to the AFS system screen.
 - The client should sign both copies of the Application and the staff member/volunteer witnessing the signature **MUST** sign the Application as the witness.
Keep one copy of the Application for CEP’s client files.
- **Confirm Documents Signed button** - Once the taxpayer and spouse have signed the documents, click on the signature confirmation button. The application is now ready to submit.
- **Submit Application and Display Account Information button** - To submit the application, click on this button.
 - The program will confirm the Get It Card Envelope Number. Only card numbers assigned to your site will be accepted.
 - Once the Application has been submitted and the card number verified, the routing number and the account numbers for both the federal and state deposits will display.
- **Enter the routing and account number into the federal and state returns.** - The routing number and the account numbers must be entered in the Direct Deposit information fields of the TaxWise Software for every client receiving a Refund Deposit on the Get It Card.
 - The routing number and account number must be entered on the federal return and can carryover to the state return.
 - To insure accuracy, click on the “Copy to Clipboard”, minimize AFS system, go to the tax return MAIN INFO screen and paste the number into the routing number field and on 1040 Page 2. Repeat the steps to copy and paste the deposit account number onto the MAIN INFO page and Federal 1040 Page 2.
 - Routing: RTN # for both Federal and State Deposits is **026014135**
 - Federal Account Number varies by taxpayer. It starts with **QX** and 15 digits which include the site’s EFIN as the first six digits and the taxpayer’s SSN as the last nine digits.
 - **NOTE: In TaxWise you can have the Federal Account Number carryover to the State 1040.**

Final Step: After entering the routing number and account numbers into the client’s tax return, click the “Save and Close” button to save the application and return to the Home Page.

PLEASE LET THE CLIENT KNOW THAT THEY WILL BE ABLE TO ACTIVATE THEIR GET IT CARD 24 HOURS AFTER THE CLIENT’S RETURN HAS BEEN E-FILED.