



IRS Refund Information Guidelines for the Tax Preparation Community

Key Message

- The IRS issues more than 9 out of 10 refunds in less than 21 days.

Use Where's My Refund? to Check the Status of Your Refund

Where's My Refund? gives you personalized refund information based on the processing of your tax return.

Encourage taxpayers to use the IRS2Go app or [IRS.gov](https://www.irs.gov). Both are available 24 hours a day, 7 days a week. Taxpayers can start checking on the status of their return within 24 hours after we have received their e-filed return or 4 weeks after they mail a paper return. *Where's My Refund?* includes a tracker that displays progress through 3 stages::

1. Return Received
2. Refund Approved
3. Refund Sent

To use *Where's My Refund?* taxpayers need to provide their Social Security number, filing status and the exact whole dollar amount of their refund.

Where's My Refund? provides a personalized refund date as soon as the IRS processes the tax return and approves the related refund. *Where's My Refund?* is updated no more than once every 24 hours, usually over night. So taxpayers don't need to check the status more often. Also, our phone and walk-in employees can only research the status of a refund if it's been 21 days or more since taxpayers filed electronically, more than six weeks since they mailed a paper return, or if the *Where's My Refund?* tool directs them to do so. Taxpayers claiming the Earned Income Tax Credit or the Additional Child Tax Credit should only call if *Where's My Refund?* directs them to do so.

Claiming the Earned Income Tax Credit or the Additional Child Tax Credit

If a taxpayer is claiming the EITC or the ACTC, they can file their return any time after the filing season begins. However, by law, the IRS cannot issue refunds before mid-February for tax returns that claim the *Earned Income Tax Credit* (EITC) or the *Additional Child Tax Credit* (ACTC). Keep in mind that only a small percentage of total filers will fall into this situation.

While the IRS will process taxpayer returns when they are received, it cannot issue related refunds before mid-February. The IRS expects most EITC/ACTC related refunds to be available in taxpayer bank accounts or on debit cards by the first week of March, if they chose direct deposit and there are no other issues with their tax return. Check *Where's My Refund* for your personalized refund date.

Caution

Urge taxpayers not to count on getting their refund by a certain date to make major purchases or pay bills. Even though the IRS issues most refunds in less than 21 days, it's possible their tax return may require additional review and take longer.

Where's My Refund? on IRS.gov and the IRS2Go app will be updated with projected deposit dates for most early EITC/ACTC refund filers by February 22. So EITC/ACTC filers will not see an update to their refund status for several days after Feb. 15. The IRS, tax preparers and tax software will not have additional information on refund dates, so *Where's My Refund?* remains the best way to check the status of a refund.

Take These Steps to Help Your Clients File an Accurate Tax Return and Get Their Refund Fast

Using e-file is the best way to file an accurate tax return, and combining e-file with direct deposit is the fastest way for a taxpayer to get their refund. Take these steps to ensure the tax return is processed as quickly as possible.

- file electronically,
- submit an accurate, complete, error-free return,
- verify the correct Social Security number or Taxpayer Identification Number for the taxpayer, their spouse and their dependents,
- provide the correct mailing address in case we need to mail the refund check,
- use the correct bank account and routing number if choosing direct deposit.

Direct Deposit

The IRS urges you to use direct deposit for refunds. Eight out of 10 taxpayers receiving refunds opt for direct deposit. It's the safest, fastest way to receive refunds. All you need is an account number and routing number. Use Form 8888 to make direct deposits in up to three accounts.

Two reminders:

1. Preparers cannot use *Form 8888* to collect fees;
2. There is a limit of three refunds into a single account.

Some Refunds take Longer to Process

The IRS works hard to issue refunds as quickly as possible, but some tax returns take longer to process than others for many reasons, including when a return:

- includes errors, is incomplete, or needs further review.
- includes a claim filed for an Earned Income Tax Credit or an Additional Child Tax Credit.
- is impacted by identity theft or fraud.

Reminder. Any claims by Providers concerning faster refunds by virtue of electronic filing must be consistent with the language in official IRS publications. Per the advertising standards in Publication 3112, IRS e-file Application and Participation, and Publication 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns, providers must not use improper or misleading advertising in relation to IRS e-file, including the time frames for refunds or other financial products.

This reminder serves as the IRS's request to the tax preparation community to follow these messaging guidelines. The IRS will monitor Industry practice during filing season, but anticipates and expects voluntary compliance from its partners in support of this important effort to help taxpayers understand their refund status.