



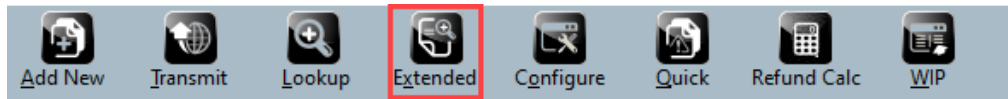
## Run an Expired ITIN Client Report in the Desktop Software

### Creating the Report

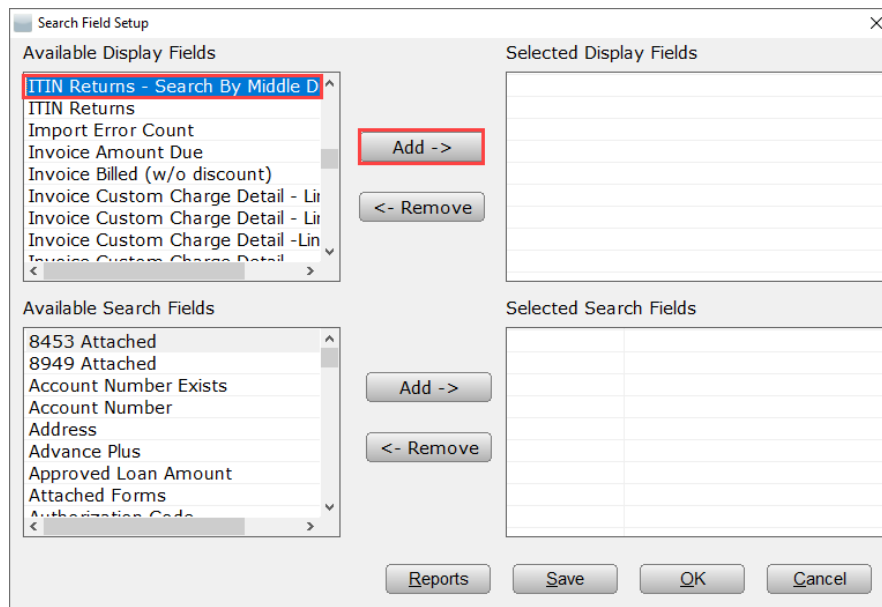
1. Click the **Lookup** icon in the toolbar located on the Work in Progress (WIP) Screen



2. Click the **Extended** icon in the toolbar

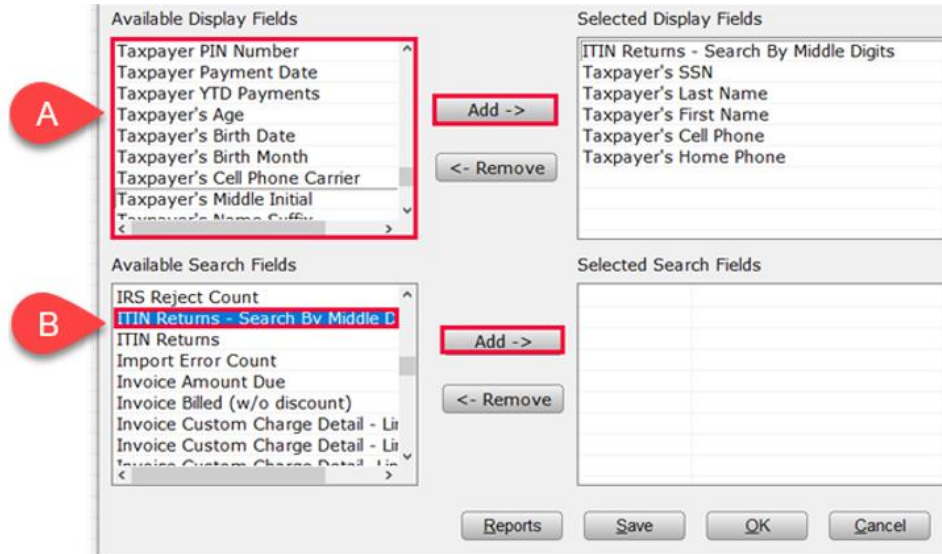


3. In the Available Display Fields box, click on **ITIN Returns - Search By Middle Digits** and then click the **Add** button.



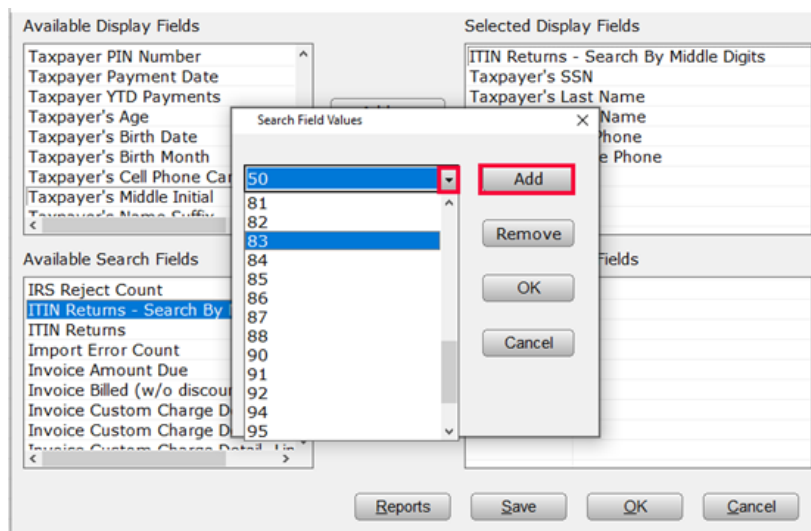
- A:** Add the applicable taxpayer related fields to the report using the same method described in Step 3 above. In the Available Display Fields box, simply scroll down to “T” options to make your selection(s) and then click the Add button for each.

**B:** In the Available Search Fields box, click on **ITIN Returns - Search By Middle Digits** and then click the **Add** button.

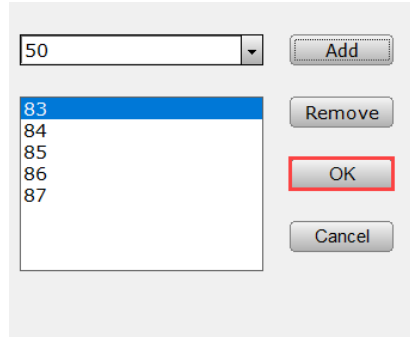


- Find and double-click **ITIN Returns - Search By Middle Digits** in the **Available Search Fields** box. Double-click on **83** and then click the **Add** Button. Double-click on **84** then click the **Add** button. Follow the same steps for **85**, **86** and **87**.

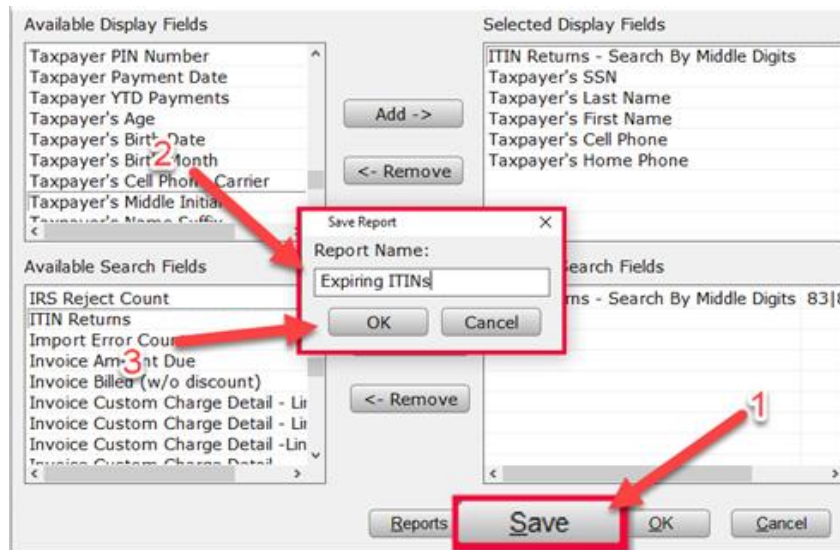
**Note:** For TY2019 individual returns filed in 2020, all ITINs not used on a federal tax return at least once in the last three years expired on December 31, 2019. Additionally, all ITINs issued before 2013 with middle digits of **83**, **84**, **85**, **86**, or **87** (Example: (9XX-83-XXXX)) also expired at the end of the year.



6. Click the **OK** button.

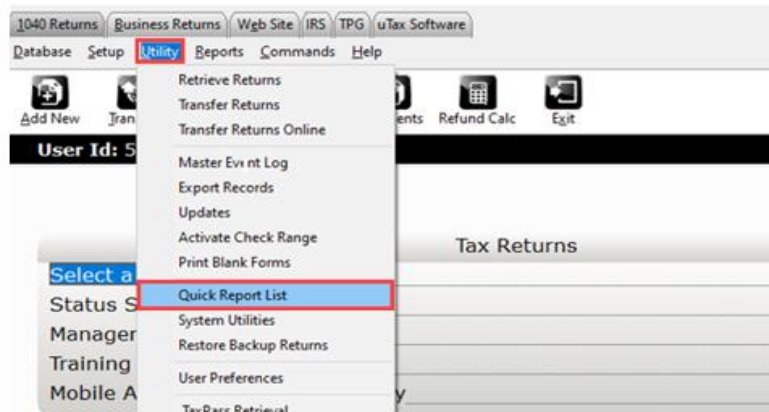


7. (1) Click the **Save** button, (2) type a name for your report, (3) then click **OK**.

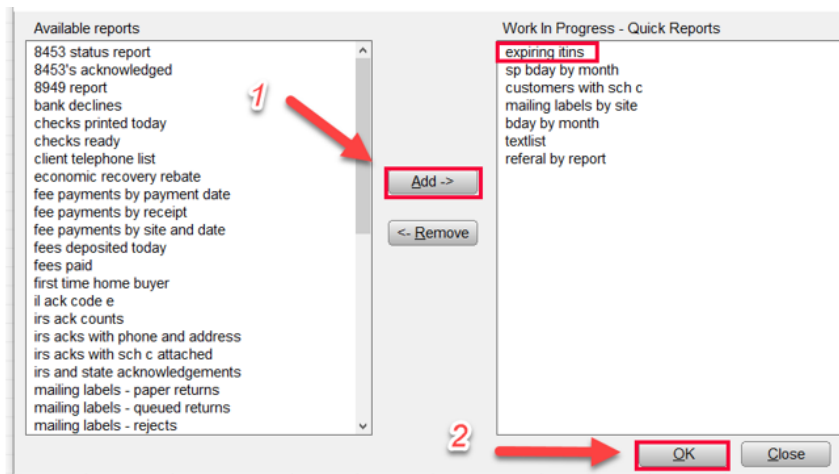


### Adding the Report to the Quick Reports List

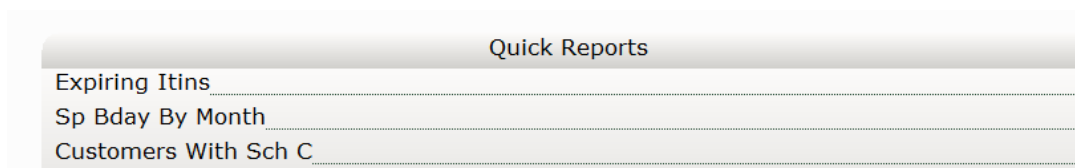
1. Click **Utility** from the menu located on the Work in Progress (WIP) Screen, then click **Quick Report List**.



2. Scroll to the name of your report (created in step 7 above), then (1) click the Add button, (2) then click OK.



3. The report now appears on the Quick Reports list > Work in Progress (WIP) Screen.



If you have additional questions about these instructions, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at [support@utaxsoftware.com](mailto:support@utaxsoftware.com).

For ITIN renewal forms, common FAQs and other information and guidance, be sure to check out the helpful [ITIN Fact Sheet](#) and the [ITIN Resources](#) page available at IRS.gov.