

CORE Tax Process



Thank you for trusting CORE to prepare your tax return(s). We try to complete individual tax returns within 10 business days starting from when all information is received. Returns with businesses can be more complicated and take longer. Please review our process and let us know if you have questions.

Documents Received – There are two main ways to get tax documents to CORE.

- 1) Bring the documents in during office hours: Monday - Friday, 8:00 am - 5:00 pm
- 2) Send the documents through our secure link, which can be found on our website: www.corecpa.net “Send Us A File”

Enter – Once all tax documents are received, one of our enterers will begin entering the information for the tax return. If there are any questions and/or additional information needed, the enterer will email you from the office email. The tax return will not continue through the process until the enterer has **all the requested information** from you.

Peer Review – After all information is entered, the tax return will then go to one of our peer reviewers to be checked for accuracy. If there are any additional questions and/or missing information, expect an additional email or phone call.

Finalize – Once the return has been peer reviewed and completed for accuracy, the return will go to your CPA for final review. If there are any final questions and/or needed information, the CPA will call or email you.

Signing – The tax return will be prepped for signature once the CPA has emailed or called with your results. You then have a choice to come in and sign the form 8879 in person or you can sign it electronically. Both spouses must sign. You will get an electronic or paper copy of your return at this time. Please review the return BEFORE signing. This is the form that allows CORE to file your state and federal tax return(s) electronically.

Returning Documents – After you have signed the form 8879, the process is complete, and your tax documents for that year are ready to go home. You can pick up your tax documents and a paper copy of your return at any time during the office hours stated above.

Mailing Vouchers – If you owe you will get a payment voucher for each tax agency due. Please mail the voucher with a personal check by the due date to the agency address shown on your tax letter.