

H&R Block Second Look(R) Can Turn IRS Notice Into Extra Refund

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Missing Affordable Care Act Tax Form Can Trigger Notice, Missed Premium Tax Credit

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Author's note: This feature is one of a series of success stories generally describing tax situations routinely reviewed when H&R Block takes a look at prior year tax returns new clients either prepared themselves or had someone else file.

Story 1 - [Gambler Hits Jackpot](#)

Story 2 - [He's Not Heavy, He's My Brother](#)

Story 3 - [Education on Overlooked Tax Breaks](#)

When a taxpayer receives what no taxpayer wants -- an IRS notice in the mail -- it may be best to take the notice to H&R Block (NYSE: HRB). For taxpayers who didn't have H&R Block prepare their prior year return, its tax professionals can provide a free Second Look to determine next steps for that IRS notice. Often, H&R Block tax professionals discover that taxpayers who leave their health insurance information off of their tax returns, just may trigger an IRS notice and could be missing portions of the advance premium tax credit.

"The intersection of health care and taxes is complex. Taxpayers receive health care benefits through the tax return but if they make a mistake, they could miss out on money to help them pay their premiums or even jeopardize their entire premium tax credit in the future," said Kathy Pickering, executive director of [The Tax Institute](#) at H&R Block. "A qualified tax professional can help in multiple ways: applying for an exemption from the penalty, figuring out their premium tax credit or even choosing the right insurance plan to maximize their tax benefit."

Tax compliance new requirement for APTC eligibility

The advance premium tax credit (APTC) helps taxpayers pay their premiums for health insurance purchased through a state or federal exchange or marketplace. Those who received the APTC in 2014 and either did not file a 2014 return or who did not include the [reconciliation form](#) would not only get an IRS notice, but they would not qualify for the APTC when they tried to enroll in marketplace coverage for 2016.

It can be to the taxpayer's advantage to file a tax return with the reconciliation form, not only to remain eligible for the APTC, but also to receive any additional PTC they are entitled to or any other credits or deductions.

H&R Block, the world's largest consumer tax services provider, offers a [free Second Look](#) to taxpayers who may have left money on the table in their 2012, 2013, 2014 or even 2015 returns. Taxpayers who prepared their returns themselves or had others prepare them can visit any of [H&R Block's approximately 10,000 U.S. offices](#) for a free review of the three prior year returns. Those who already filed a 2015 return with someone else can also bring in their 2015 return for the free review. Taxpayers can see if a Second Look is right for them with a free [online assessment](#) and [schedule an appointment online](#) or by calling 1-800-HRBLOCK.

*Results vary. All tax situations are different.

About H&R Block

H&R Block, Inc. (NYSE: HRB) is the world's largest consumer tax services provider, with revenues of \$3.1 billion in fiscal year 2015. More than 680 million tax returns have been prepared worldwide by and through H&R Block since 1955, including 24.2 million tax returns in fiscal year 2015. Tax return preparation services are provided by professional tax preparers in approximately 12,000 company-owned and franchise retail tax offices worldwide, and through H&R Block tax software products. H&R Block also offers adjacent Tax Plus products and services. For more information, visit the H&R Block Newsroom at <http://newsroom.hrblock.com/>.

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