

How to Client-Review and Close Drop-Off Returns

Drop-Off clients whose tax returns are through Quality Review have options for how to finish the tax preparation process.

Options	Description	Hub Ticket Modifier
IN PERSON	In Person Review & Signature at the Tax Centers	+IN PERSON
HYBRID	Telephone Review & In Person Signature at Tax Centers	+SIG ONLY
VIRTUAL	Telephone review & E-signature through the Hub	+E-SIGN

In many cases, taxpayers who are completing the process **in person** will have an appointment with a Drop-Off Team Member who will assist the taxpayer. In other cases, the taxpayer will meet with the Site Manager (or Tax Specialist if available).

Prepare to Assist the Taxpayer

1. Confirm the identity of the taxpayer. Ask to see a photo ID for the primary taxpayer (and for spouse, if applicable).
2. Ask if the taxpayer brought the Client Envelope they may have received during in-person Intake. If not, you will need to prepare a new one to hold their copy of the completed tax return.
3. Locate the client's ticket in the Hub.
4. Confirm that the status of the Hub ticket is **Quality review: Signature requested** and that the ticket is assigned to **Waiting**.
5. Look at the Hub ticket modifiers to confirm whether you are completing a review and signature or just obtaining signature(s) or providing a printed copy of the tax return to mail.

Hub Ticket Modifier	Description
+IN PERSON	In Person Review & Signature at the Tax Centers
+SIG ONLY	Telephone Review & In Person Signature at Tax Centers

6. Look at the Hub modifiers. Does the return include a state income tax return? Education credit? If you see the **+NOTES** modifier, take special care to read the Hub notes.

Use caution! Remember that the client can see the content of your screen (including notes and comments as well as tax return information) on the monitor that faces them.

7. In TaxSlayer, navigate to the client's return.
8. From the **Client Status** screen, verify that the return status is **Complete** and review any TaxSlayer Notes.

Review the Tax Return with the Taxpayer (if applicable)

1. Be sure that you have confirmed the identity of the taxpayer.
2. Review the return with the taxpayer(s).
 - a. Review all of the basic information on the return (e.g., primary, secondary, dependents, filing status).
 - b. Review income, taxes, and credits.
 - c. Review the final outcome: tax due, refund owed and discuss the timeline for e-filing/ mailing and IRS processing
 - d. For state returns, take note of whether the state tax return may be e-filed or must be a Paper return that is mailed to the IRS.
 - e. Answer any questions.

Finalize the Return: E-FILE Returns

1. Print the federal tax return using "**FC EFILE PRINT SET.**"
2. If there is a state return, print the return using the **ONE COPY - STATE ONLY** print set.

Note: Alternately, the **State** section of the return in TaxSlayer has a print icon that offers the same print set.
3. **Save** and **Exit** the return in TaxSlayer.
4. Advise the taxpayer that they are responsible for the information on the tax return(s).
5. Obtain client signatures on BOTH copies of **Form 8879 and any state tax return e-file authorizations.**

6. Prepare the Client Envelope:

- a. Place one copy of all printed federal and/or state tax returns, one copy of the signed **Form 8879** or other e-file authorizations, and any other client tax documents in the envelope.
- b. Give the Client Envelope to the client.

7. Explain the next steps in the process to the client: transmitting, notification of Acceptance or Rejection (and follow up), payment or refund timing, etc.

8. Prepare the Hub ticket for transmitting:

- a. Upload the signed **Form 8879** and any state e-file authorization forms to the Hub ticket.
- b. Change the status of the ticket to **Final steps: Ready to file** and assign the ticket to **“DO Manager”**. Add a note in the ticket that the return was reviewed with the client (along with any other pertinent notes about steps taken or information confirmed) and which forms were signed and uploaded.
- c. Store the signed **Form 8879** and any state e-file authorization forms in the “Drop-Off” file folder in the tax site file cabinet.

Finalize the Return: PAPER Returns

Take Note!

- If the return is Married Filing Separately (MFS), do NOT print the return from the Hub. Look for an uploaded final tax document in the Hub. Drop-Off will have prepared the final tax document and uploaded it to the Hub ticket. Review [this document](#) to understand MFS tax returns.
- If the return is for an ITIN applicant, review [this document](#) for instructions on preparing the return for the ITIN referral and appointment.

1. Print the federal tax return using **“FC PAPER PRINT SET.”** This will print two (2) sets of the tax return.
2. If there is a state return, print the return using the **ONE COPY - STATE ONLY** print set. Be sure to print two (2) copies of any state return - one to be mailed to the IRS and one for the taxpayer’s records.

Note: Alternately, the **State** section of the return in TaxSlayer has a print icon that offers the same print set.

3. **Save** and **Exit** the return in TaxSlayer.

4. Advise the taxpayer that they are responsible for the information on the tax return.
5. Prepare the printed federal tax return for mailing to the IRS:
 - a. Instruct the taxpayer(s) to sign one copy of the printed return. (If MFJ, both parties must sign before mailing.)
 - b. Staple one copy of all **Form W-2s** (and any **Form 1099s** showing federal withholding) to the left-hand side of the first page of **Form 1040**. (For 2018 returns only, staple to the second page.)
 - c. Fold the tax return and place it within a pre-addressed envelope to the IRS. Be sure to select an envelope with the correct address if the taxpayer will include a payment for taxes due.
 - d. Remind the taxpayer to add postage before mailing.
6. Prepare any printed state tax returns for mailing:
 - a. Instruct the taxpayer(s) to sign one copy of the printed return. (If MFJ, both parties must sign before mailing.)
 - b. Staple one copy of all **Form W-2s** (and any **Form 1099s** showing state withholding) to the left-hand side of the first page of the state return.
 - c. Fold the tax return and place it within an envelope. Check the ticket Notes or the state tax return itself for the correct mailing address.
 - d. Remind the taxpayer to add postage before mailing.
7. Prepare the Client Envelope:
 - a. Place one copy of the final federal tax return and any state tax return(s) in the Client Envelope.
 - b. Give the Client Envelope to the client.
8. Explain the next steps in the process to the client: mailing the return, payment or refund timing, etc.
9. Close out the Hub ticket:
 - a. Change the status of the ticket to **Final steps: Filed by mail** and assign the ticket to “**DO Manager.**”
 - b. Add a note in the ticket that the return was reviewed with the client (along with any other pertinent notes about steps taken or information confirmed) and which returns were released to the client.

Finalize the Return: Taxpayer Will Not File and the Tax Return Has Been Completed

If the taxpayer decides not to proceed with a completely prepared and quality reviewed return, follow these steps.

1. In the Hub, change the status of the ticket to **Final steps: Filed by mail** and assign the ticket to **“DO Manager.”**
2. Make a note in the Hub ticket that the client decided not to file and give a brief explanation why.
3. Add a TaxSlayer note in the tax return that the client decided not to file and give a brief explanation why
4. Verify that the TaxSlayer return type is **Paper**.
5. Return all printed tax and identity documents to the client, if applicable.

Finalize the Return: Taxpayer Will Not File and the Tax Return Is In Progress

In cases when the client decides not to file a federal or state tax return partially prepared by Drop-Off, follow these steps.

1. Change the status of the Hub ticket to **Final steps: Not filing** and assign the ticket to **“Complete.”**
2. Add a note in the Hub ticket that the return is in progress and the client chose not to proceed. Provide a brief explanation.
3. Add a TaxSlayer note in the tax return that the client decided not to proceed and give a brief explanation why
4. Verify that the TaxSlayer return type is **In Progress**.