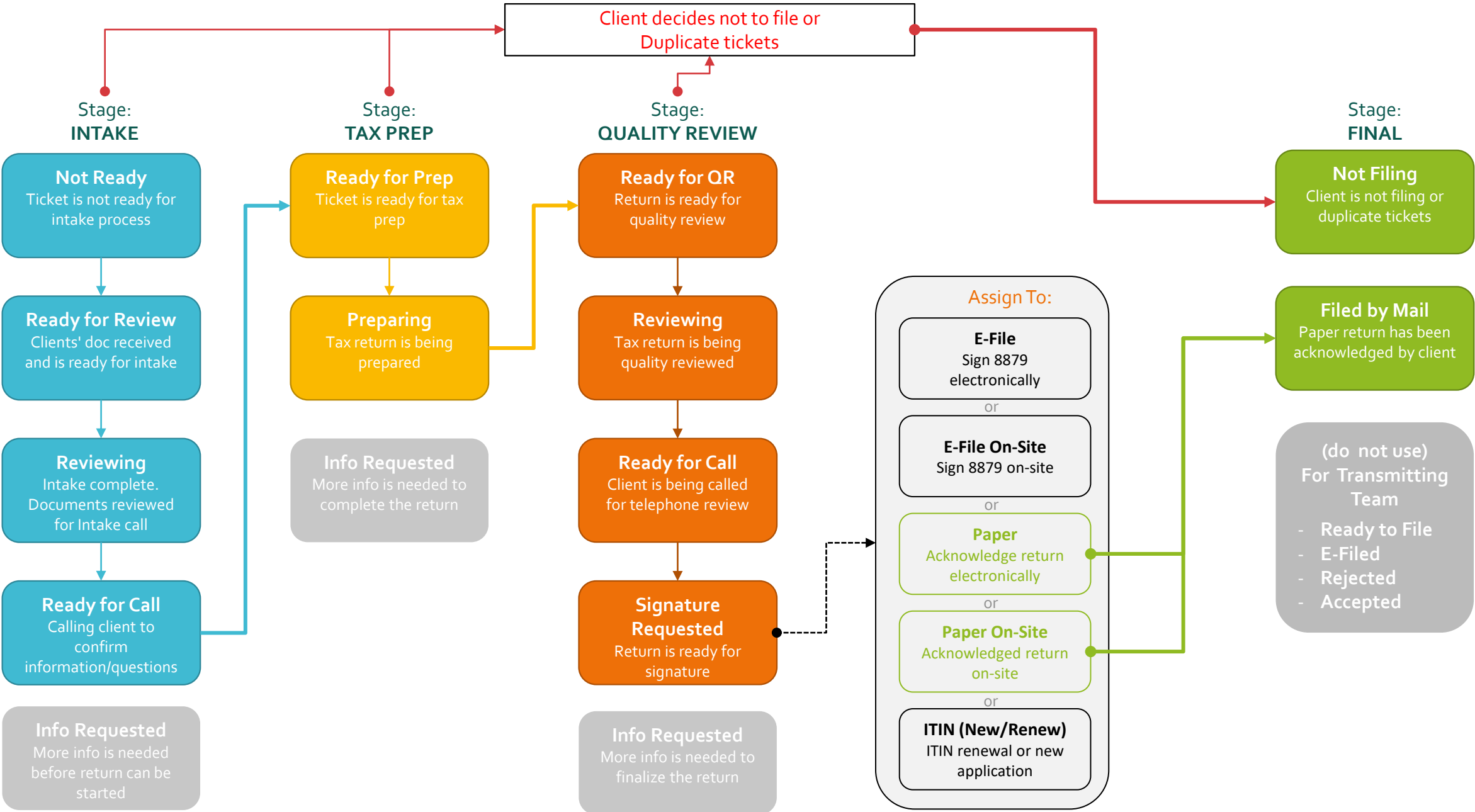


HUB Status Update



Stage:
INTAKE

Stage:
TAX PREP

Stage:
QUALITY REVIEW

Stage:
FINAL

Not Ready
Ticket is not ready for intake process

Ready for Review
Clients' doc received and is ready for intake

Reviewing
Intake complete. Documents reviewed for Intake call

Ready for Call
Calling client to confirm information/questions

Info Requested
More info is needed before return can be started

Ready for Prep
Ticket is ready for tax prep

Preparing
Tax return is being prepared

Info Requested
More info is needed to complete the return

Ready for QR
Return is ready for quality review

Reviewing
Tax return is being quality reviewed

Ready for Call
Client is being called for telephone review

Signature Requested
Return is ready for signature

Info Requested
More info is needed to finalize the return

Assign To:

- E-File**
Sign 8879 electronically
- or
- E-File On-Site**
Sign 8879 on-site
- or
- Paper**
Acknowledge return electronically
- or
- Paper On-Site**
Acknowledged return on-site
- or
- ITIN (New/Renew)**
ITIN renewal or new application

Not Filing
Client is not filing or duplicate tickets

Filed by Mail
Paper return has been acknowledged by client

(do not use)
For Transmitting Team

- Ready to File
- E-Filed
- Rejected
- Accepted

Client decides not to file or Duplicate tickets