

# Hub Ticket Naming and Modifiers

## Naming New Hub Tickets

The **Preferred Name** field of the **Client Profile** tab is used as the display name of a Hub ticket. The tax years included on a ticket are also included for easy reference, along with any special characteristics of the return (the so-called “modifiers”).

1. Enter the **Preferred Name** as **FIRST NAME LAST NAME**.
  - Use all caps!
  - If the taxpayer is Married Filing Jointly, do **not** include the name of the secondary taxpayer (spouse) in the ticket name.
  - Do not include middle names or initials.
2. Add any applicable modified tax year as **TY###**, where **##** is the last 2 digits of the tax year.

**Note:** This is especially important because the Tax Program will prepare more tax years than the Hub currently allows. You will not be able to create a tax year tab in the Hub for tax years 2017 and prior, although these tax returns are prepared in STS and Drop-Off.
3. Add any applicable **modifiers** ([see below](#)). If the modifier is only for one tax year on the ticket, place it immediately after that tax year in the display field.

## Sample Ticket Names

ELLE EGGPLANT TY21

AMY AVOCADO TY19 TY20 TY21

TINA TOMATO TY20+NY

PETER PEPPER TY20 TY21 +ITIN

CARL CARROT TY20+MFS TY21

LARRY LETTUCE TY20+AMEND TY21

BARRY BANANA TY21+MIL +IP PIN

CAROL CUCUMBER TY18+EdCr TY19 TY20 +INT

## Modifiers

<b>+EdCr</b>	(Education Credit) The tax year includes an education credit.
<b>+IP PIN</b>	The taxpayer has been issued an IP PIN by the IRS.
<b>+AMEND</b>	(Amendment) The tax year is for an amendment .
<b>+MFS</b>	(Married Filing Separately) The tax year will be filed as MFS.
<b>+ITIN</b>	The taxpayer or a tax household member is applying for or renewing an ITIN.
<b>+MIL</b>	(Military) The tax year requires Military certification (or includes rental income).
<b>+INT</b>	(International) The tax year requires International certification.
<b>+NR</b>	(Non-Resident) Taxpayers with an F, J, M, or Q visa or Form 1042-S who are referred to the FSS program.
<b>+STS</b>	(Special Tax Services) The tax year has been referred to STS.
<b>+ASL</b>	(American Sign Language) The taxpayer requires ASL interpretation.
<b>+<i>state-abbreviation</i></b>	The tax year includes a tax return for the designated state, eg, +NY, +OK.
<b>+PAPER</b>	The tax return must be paper for any qualifying reason.
<b>+IRS LTR</b>	(IRS letter) The taxpayer has an IRS letter that may impact the tax return or require assistance from the Tax Help Program.
<b>+NOTES</b>	For Drop-Off tickets and others when there are especially critical notes to read before preparation, quality review, or client review.
<b>+INCOMP</b>	(Incomplete) For Drop-Off, FSS or STS tickets when the Intake is incomplete. Incomplete intakes for these programs are to be used sparingly and at the discretion of the Site Manager.
<b>+SIG ONLY</b>	(Signature Only) For Drop-Off tickets <u>when a client review has been completed</u> over the phone and only the client signature is needed on Form 8879 and any state e-file authorizations for e-file tax returns.
<b>+<i>site-name</i></b>	(Originating Site) For Drop-Off tickets, the “home” or originating site of a newly-created ticket, eg, +GW, +NO, +TR, etc..