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 2018 and prior, although these tax returns are prepared by 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 TY22

AMY AVOCADO TY20 TY21 TY22

TINA TOMATO TY20+NY

PETER PEPPER TY21 TY22 +ITIN

CARL CARROT TY21+MFS TY22

LARRY LETTUCE TY21+AMEND TY22

BARRY BANANA TY21+MIL +IP PIN

CAROL CUCUMBER TY18+EdCr TY19 TY20 +INT

Modifiers

+EdCr	(Education Credit) The tax year includes an education credit.
+IP PIN	The taxpayer has been issued an IP PIN by the IRS.
+AMEND	(Amendment) The tax year is for an amendment .
+MFS	(Married Filing Separately) The tax year will be filed as MFS.
+ITIN	The taxpayer or a tax household member is applying for or renewing an ITIN.
+MIL	(Military) The tax year requires Military certification (or includes rental income).
+INT	(International) The tax year requires International certification.
+NR	(Non-Resident) Taxpayers with an F, J, M, or Q visa or Form 1042-S who are referred to the FSS program.
+OOS	(Out of Scope) The return is out of scope for VITA. The taxpayer may have been referred to STS or another preparer. The ticket should be moved to Final Steps: Not Filing.
+ASL	(American Sign Language) The taxpayer requires ASL interpretation.
+*state-abbreviation*	The tax year includes a tax return for the designated state, eg, +NY, +OK.
+PAPER	The tax return must be paper for any qualifying reason.
+IRS LTR	(IRS letter) The taxpayer has an IRS letter that may impact the tax return or require assistance from the Tax Help Program.
+NOTES	For Drop-Off tickets and others when there are especially critical notes to read before preparation, quality review, or client review.
+INCOMP	(Incomplete) When the Intake is incomplete. Incomplete intakes for these programs are to be used sparingly and at the discretion of the Site Manager.
+SIG ONLY	(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.
+*site-name*	(Originating Site) For Drop-Off tickets, the "home" or originating site of a newly-created ticket, eg, +GW, +NO, +TR, etc..
This modifier is not in use for the TY22 season.	
+STS	(Special Tax Services) The tax year has been referred to STS.