



RETURN VISIT SLIP
TAX YEAR: _____

GUIDE

DATE _____

SITE _____

Your tax return has NOT been completed, and we have not sent it to the IRS.

You must return with the large, white envelope and all of your tax documents in order to complete your return!

- My tax return was not started. No information has been entered into the tax software.**

The taxpayer will need to sign in and start the preparation process from the beginning. This section is available as a tool to assist the taxpayer to remember what items he/she was missing.

- My tax return has been started but not completed, and a quality review has not been done.**

This taxpayer should sign in and present this slip to be expedited to the front of the intake line. (If this slip is not presented, the taxpayer will not be expedited in line.) Intake should verify the taxpayer brought all missing documents and then place the taxpayer's processing envelope at the back of the tax prep queue with the taxpayer's return visit slip clipped to it.

- My return is complete BUT it needs to be quality reviewed.**

The taxpayer should sign in and present this slip. Intake or a tax preparer will briefly review the taxpayer's documents to make sure he/she brought back all necessary documents.

The taxpayer's processing envelope should then be placed at the front of the tax prep queue with the taxpayer's return visit slip clipped to it. The next available tax preparer will take the client to a station, immediately sign the taxpayer up for QR, and do an informal review of all documents while waiting for the quality reviewer.

- My return is complete and has been quality reviewed. I just need to add bank info and/or sign/pick it up.**

The taxpayer should present this slip upon arrival at the tax site. The manager will need to pull up the return to add bank information and/or complete the e-file or paper return steps.