

# RETURN VISIT GUIDE

## **Your tax return has NOT been completed. We have not sent it to the IRS.**

*To complete your tax return, you must return with the large, white envelope and all of your tax documents.*

### **Your tax return was not started.**

**Please make an appointment for your return visit.**

*At the return visit appointment, the taxpayer will sign in and start the process from the beginning with Intake.*

### **Your tax return has been started but is not complete or quality reviewed.**

**Please make an appointment for your return visit.**

*At the return visit appointment, the taxpayer will sign in, present this slip, and be expedited to the front of the Intake line. Intake will verify that the taxpayer has brought all required documents, attach the Return Visit slip to the taxpayer's Processing Envelope, and then place the Processing Envelope at the back of the tax preparation queue .*

*If the Return Visit slip is not presented, the taxpayer will not be expedited in line.*

### **Your tax return is complete but still needs to be quality reviewed.**

**No appointment is needed to return.**

*The taxpayer will sign in and present this slip. Intake or a tax preparer will briefly verify that the taxpayer has brought all required documents, attach the Return Visit slip to the taxpayer's Processing Envelope, and then place the Processing Envelope at the front of the tax preparation queue .*

*The next available tax preparer will take the client to a station and immediately sign the taxpayer up for QR.*

### **Your tax return is complete and quality reviewed. You are ready to sign for or pick up the tax return. No appointment is needed to return.**

*The taxpayer will sign in and present this slip. The site manager will locate the tax return and add bank information or other as needed before completing the e-file or paper return steps.*