

TAXSLAYER NOTES

Select one of the following options:

[INCOMPLETE](#)

[AMENDMENT](#)

[PAPER](#)

[FORM 8962](#)

[TP \(TAXPAYER\) RETURNED](#)

[DROPOFF](#)

INCOMPLETE

Title:

TY2018 INCOMPLETE

Body:

TP WAS MISSING [DOCUMENTS TP IS MISSING]. WILL RETURN WITH DOCS AT A LATER TIME.
1234AB, 2/1/19

Title:

TY2018 INCOMPLETE

Body:

TP HAD TO LEAVE. WILL RETURN AT A LATER TIME. TP LEFT DURING [STEP IN THE PROCESS
THEY LEFT AT]. 1234AB, 2/1/19

PAPER

Title:

TY2018 PAPER

Body:

TP DECIDED NOT TO FILE TAXES DUE TO REFUND AMOUNT. QR WAS COMPLETED. 1234AB,
2/1/19

Title:

TY2018 PAPER

Body:

TP DECIDED NOT TO FILE TAXES DUE TO AMOUNT OWED. QR WAS COMPLETED. 1234AB,
2/1/19

Title:

TY2018 PAPER

Body:

PAPER RETURN DUE TO MFS STATUS. 1234AB, 2/1/19

Title:

TY2018 PAPER

Body:

TP IS MISSING BANKING INFO. WILL RETURN WITH INFO. QR IS COMPLETE. 1234AB, 2/1/19

Title: TY2018 PAPER
Body: PAPER RETURN DUE TO TP'S PREFERENCE. 1234AB, 2/1/19

Title: TY2018 PAPER
Body: PAPER RETURN DUE TO \$0 AGI. 1234AB, 2/1/19

Title: TY2018 PAPER
Body: PAPER RETURN DUE TO ITIN APPLICATION/RENEWAL. 1234AB, 2/1/19

TP RETURNED

Title: TY2018 TP RETURNED
Body: TP RETURNED WITH MISSING DOCS. WILL BE CONTINUING [PROCESS WHERE THE TP LAST LEFT AT]. 1234AB, 2/1/19

Title: TY2018 TP RETURNED
Body: TP RETURNED TO COMPLETE RETURN. WILL BE CONTINUING [PROCESS WHERE THE TP LAST LEFT AT]. 1234AB, 2/1/19

AMENDMENT

Title: TY2018 AMENDMENT
Body: TP RETURNED TO COMPLETE AMENDMENT. RETURN ORIGINALLY PREPARED BY US. WILL BE CORRECTING [CHANGES BEING MADE]. 1234AB, 2/1/19TP

Title: TY2018 AMENDMENT
Body: TP ORIGINALLY CREATED RETURN ELSEWHERE. WILL BE CREATING AMENDMENT. WILL BE CORRECTING [CHANGES BEING MADE]. 1234AB, 2/1/19

COMPLETING FORM 8962

Title: TY2018 FORM 8962
Body:

COMPLETED FORM 8962 FOR TP. [SPECIFY IF ORIGINAL RETURN WAS PREPARED BY US OR NOT]. 1234AB, 2/1/19

DROPOFF

Title:

TY2018 SIGNED 8879

Body:

CLIENT PICKED UP DROPOFF RETURN AND SIGNED 8879. SENT SCAN OF 8879 TO DROPOFF.
1234AB, 2/1/19

Title:

TY2018 PAPER PU

Body:

CLIENT PICKED UP DROPOFF RETURN. GAVE TWO COPIES. 1234AB, 2/1/19

Title:

TY2018 SCANNED DOC

Body:

CLIENT RETURNED WITH [MISSING DOCUMENTS REQUESTED BY DO]. SCANNING TO DROPOFF.
1234AB, 2/1/18