

TaxSlayer Pro 2020: Selecting the Correct Return Status

If the situation is:	Make the status say:	Leave a note?
Return is ready to e-file	Complete	
Return is a completed paper return	Paper	Reason it is a paper return
Return was QR'd and just missing bank info.	Paper	Note that QR done but missing bank info.
Both spouses will come back to sign 8879.	Paper	Note that QR done but waiting on 8879.
The return is ready for a quality review.	Review	
Taxpayer left before the return is marked as "Ready to Review."	In Progress	Reason return is incomplete and that QR not done.
Taxpayer left while return was being reviewed or after marked as "Ready to Review."	In Progress (uncheck the "Ready to Review" button)	Reason return is incomplete and that QR not done.
Amendment where original return prepared at CTC	Don't change original status (should be Accepted or Paper)	Note that it is an amendment and the reason
Amendment where original return prepared elsewhere	Paper	Note that it is an amendment and the reason
Taxpayer presents IRS letter about missing 8962 for MP insurance and <u>we prepared original return</u>	Do not change original status (should be Accepted or Paper)	Note that original return prepared by CTC altered to add 8962 at later date
Taxpayer presents IRS letter about missing 8962 for MP insurance and <u>original return prepared elsewhere</u>	Paper	Note that 8962 added to original return prepared elsewhere
Taxpayer did not receive IRS letter but needs to submit missing 8962 for MP insurance and <u>we prepared original return</u> – WE PREPARE THIS AS AN AMENDMENT	Do not change original status (should be Accepted or Paper)	Note that original return prepared by CTC amended to add 8962 since no IRS letter received
Taxpayer did not receive IRS letter but needs to submit missing 8962 for MP insurance and <u>original return prepared elsewhere</u> – WE PREPARE THIS AS AN AMENDMENT	Paper	Note that original return prepared elsewhere being amended to add 8962 since no IRS letter received
Diagnostic issue (if return complete but software glitch causing calculation error)	Failed	Note the reason/situation, manager alerts TR team
Return is stuck in "Transmitted" status	Transmitted	Make a note if applicable, manager alerts TR team
Discover documents missing after QR but before e-filing <u>and realize return is incorrect</u> (e.g. incorrect 8879, incorrect filing status)	Failed	Note what is missing; manager alerts TR team
Discover documents missing after QR but before e-filing (e.g. missing 8879 or other doc) <u>and return is correct</u>	Paper	Note what is missing; manager alerts TR team

Status options are:

In progress – Any return where the quality review has not been completed.

Review – ready for QR - should not stay in this status after the site has closed that day.

Failed – The return is incomplete in some way. (There are only a few scenarios in which this status would be selected.)

Approved – The return was set as ready for review and passed the quality review. Likely the reviewer forgot to also check “Is Complete” on the e-file screen. This button needs to be checked to change the status to Complete or Paper.

Complete – intending to be e-filed

Paper – a complete paper return

Transmitted – Return has been e-filed

Accepted – Return was e-filed and accepted by the IRS

Rejected – Return was e-filed and at some point rejected by the IRS. (Look in the notes to see if the return was later mailed in as a paper return. If it was corrected and re-transmitted, the status will change to Accepted if it is accepted by the IRS.)