

TaxSlayer Pro 2019: Status and Return Tags

If the situation is:	Make the status say:	Select this return tag:	Leave a note?
Return is ready to e-file	Complete	E-file - Complete (Transmit)	
Return is a completed paper return	Paper	Paper – Complete (See Note)	Reason it is a paper return
Return was QR'd and just missing bank info.	Paper	Paper – Complete (See Note)	Note that QR done but missing bank info.
Both spouses will come back to sign 8879.	Paper	Waiting for 8879	Note that QR done but waiting on 8879.
The return is ready for a quality review.	Review	Ready for Review-Basic OR Ready for Review-Advanced	
Taxpayer left before the return is marked as "Ready to Review."	In progress	Incomplete (See Note)	Reason return is incomplete.
Taxpayer left while return was being reviewed or after marked as "Ready to Review."	Failed	Incomplete (See Note)	Reason return is incomplete.
Amendment where original return prepared at CTC	Don't change original status (should be Accepted or Paper)	Don't change return tag (should be Paper Complete or E-file – Complete)	Note that it is an amendment and the reason
Amendment where original return prepared elsewhere	Paper	Paper – Complete (See Note)	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)	Don't change return tag (should be Paper Complete or E-file – Complete)	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	Paper – Complete (See Note)	Note that 8962 added to original return prepared elsewhere
Taxpayer <u>did not</u> 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)	Don't change return tag (should be Paper Complete or E-file – Complete)	Note that original return prepared by CTC amended to add 8962 since no IRS letter received
Taxpayer <u>did not</u> 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	Paper – Complete (See Note)	Note that original return prepared elsewhere being amended to add 8962 since no IRS letter received

If the situation is:	Make the status say:	Select this return tag:	Leave a note?
Diagnostic issue (where return complete but software glitch causing calculation error)	Failed	Diagnostic – Admin (See Note)	Note the reason/situation, manager alerts TR team
Return is stuck in “Transmitted” status	Transmitted	Diagnostic – Admin (See Note)	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	Diagnostic – Admin (See Note)	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	Diagnostic – Admin (See Note)	Note what is missing; manager alerts TR team

Status options are:

In progress – The return is in progress but was left incomplete. (It has not yet been selected as ready for review.)

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

Failed – The return was set as ready for review and then failed the review. The return is incomplete in some way.

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.)

Return tag options are:

Ready for Review-Basic – Return is ready for quality review - should not stay in this return tag after the site has closed that day.

Ready for Review-Advanced – Return is ready for quality review - should not stay in this return tag after the site has closed that day.

E-file - Complete (Transmit) – Return is ready to be e-filed (or was e-filed)

Paper – Complete (See Note) – Return is a complete paper return (or any complete return that is not currently ready to e-file).

Waiting for 8879– Return is waiting for signed 8879 to authorize us to e-file the return.

Incomplete (See Note) – Taxpayer has left and return is incomplete.

Diagnostic-Admin (See Note) – Return has some specific issue that needs to be resolved by the Transmitting team.

Rejected Return (See Note) – Return was rejected by the IRS and has not been re-transmitted (and accepted) or set to mailed as a paper return.