FINISHING THE RETURN

As Preparer,

1. E File page: Enter all the information required to complete the E File screen. If you are not sure who the QR is going to be, you can enter any initials, and the QR will change it. Hit “Save” .
2. Submission page: scroll to the very bottom. Check “Ready to Review”. Then press “Save and Exit Return”. Never hit ”Save and Transmit” if you have that Security Template.
3. Activity site log report: Mark each client as Ready to E file or on Hold and why. Finished TS returns should have a status of Complete, or be In Progress with a Hold Tag.

As Quality Reviewer,

1. Select client name from Review Returns or the Office Client List.
2. Complete your QR as you would normally do.
3. Check that the QR initials are correct in the e-File screen and Save.
4. Submission page:
    a. click on the “complete” box, which is halfway down the page under the section titled Form 8879. If this is not done, the return will not be transferred to the transmission page, even if the tag “ready to E File” is checked.
    b. Check the Ready to E File tag. (un-check any other tags if needed)
    c. Click on the Approved Button (If no Approved Button, then continue)
    d. “Save and exit” return and allow the counselor to print from the Office Client List by clicking on the small printer icon next to the client’s name.
    e. Alternate method: you can print the return at the top of the submission page using the FL1 Print Set 1040. But you must “Save & exit” when done printing.

As ERO,

1. Collect Activity site logs from all Preparers.
2. Calculate number of returns to be transmitted.
3. Sort Client List by Status “Complete” and by Preparer to identify all returns to be transmitted.
4. Search for “In Progress” returns to maintain a list of all returns on Hold.
5. Confirm there are no returns with status “Approved” “Rejected” not accounted for.