

Project Routing Sheet

Client: Jones, Ron & Jenny (JONESRJ)	Control# _____
Project: Individual Income Tax Return (491)	Update Client Information <input type="checkbox"/> Prepare Updated Financial Statement: <input type="checkbox"/>

Project Information	
Biller: _____	
Last Pmt Date:	10/31/2013
Last Pmt Amt:	-\$1,750.00
Current Balance:	\$0.00
Current WIP:	\$0.00

Client Information	
Contact Name:	Ron Jones
Home #:	(210) 854-5255
Business #:	_____
Mobile #:	_____
Email:	jenjonesr@com.cast.net
Address:	321 Lane Apartment 123 Bad Axe, MI 48111

Type of Return:

E FILE RETURN	
<u>Individual</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Income Tax</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Return</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No

	PROCESSING			SCANNING		
	Date	Initials	Time	Date	Initials	
Preparation:				Documents:		
Review:				Project Route Sheet:		
Collating:				Signed 8879:		
Rerun:				9325		

Additional Notes: Changes in status, address or dependents from prior year?

Disposition of Return:

Client Pickup	_____
Deliver to Client	_____
Mail to Client	_____
Mail Fed Ex	_____
Mail UPS	_____
Mail to IRS	_____

E-File Status:

E-Filed _____
Form 8879 Signed: _____
E-File Accepted: _____
E-File Ext: _____
Form: 4868 <input type="checkbox"/> 7004 <input type="checkbox"/>
Ext. Accepted: _____

Billing Information

From Billing Run at Month End	<input type="checkbox"/>
Bill with Return from UltraTax	<input type="checkbox"/>
Amount \$ _____	

Logged _____

Banking Information:	Type of Account:
Check in Mail <input type="checkbox"/>	Checking <input type="checkbox"/>
Direct Deposit <input type="checkbox"/>	Savings <input type="checkbox"/>
Bank Name: _____	
Routing #: _____	
Account #: _____	

Client Contact for Pick up:	Date	Initials
1st		
2nd		
3rd		