

# Project Routing Sheet

## Client Records:

<b>Client:</b> Jones, Ron & Jenny (JONESRJ)	<b>Due Date:</b> _____
<b>Project:</b> Individual Income Tax Return (491)	<b>Update Client Information</b> <input type="checkbox"/>

Project Information	
Responsible:	Rogers, Melissa (MHR)
Assigned:	Rogers, Melissa (MHR)
Biller:	
Last Pmt Date:	10/31/2013
Current Balance:	<b>\$0.00</b>
Current WIP:	<b>\$0.00</b>

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

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

**INVOICE MUST BE PAID ON PICKUP**

**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

**Type of Return (cont.)**

E FILE RETURN		
_____	<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

Disposition of Return:	Client Records:
Mailing <input type="checkbox"/>	None <input type="checkbox"/>
Client Pickup <input type="checkbox"/>	Scan <input type="checkbox"/>
Email 8879 <input type="checkbox"/>	Date _____
Fed Ex <input type="checkbox"/>	Initials _____
Hold for F/S <input type="checkbox"/>	

## Additional Information:

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Initials	Address on tax return agrees with billing records
_____	If not E-File- Is copy B of W-2s attached to tax return?
_____	Does the social security number on W-2s agree with ones on the tax return?
_____	Do all dependents have social security numbers?
_____	If an amount is owed, is a 1040V printed?
_____	Is the tax return signed and dated?
Date	Gave client consent form (For e-file)
_____	Received signed consent form from client
_____	Validate and send electronic return
_____	Print & Mail IRS Acceptance for client (also print to file cabinet)
_____	Scanned 8453 (if necessary) and appropriate forms sent to IRS

I REVIEWED PRIOR YEAR TAX RETURN	<input type="checkbox"/>
I REVIEWED FILE CABINET	<input type="checkbox"/>
I REVIEWED GOFILE ROOM	<input type="checkbox"/>
SIGNATURE	_____
Date	_____

Order	Activity	Assigned	Initials	Date
1	Preparation	Rogers, Melissa		
2	Review	Wilson, Jeff		
3	Delivery	Rogers, Melissa		