Client: Jones, Ron & Jenny (JONESRJ) Contact # Update Contact Information: Yes Yes Project: Individual Income Tax Return (491) Prepare Updated Financial Statement: Yes Project Information Yes Mobile #: (210) 854-5255 Ron # (210) 854-5255 Ron Ron * (210) 854-5255 Ron	roject Rou	uting S	Sheet		INVO	ICE MUST	T BE PAID O	N PICKUP	
Project:	Client:	Jones	, Ron & Jenny (J	NESRJ)			Control #		
Biller:	Project:	Individ	dual Income Tax	Return (491) Pre	-			_
Car # Mobile #:	Project Info	ormation		Contact Name	e: Ron Jones		Billing Informa	ition:	
Mobile #: Business #:	Biller:				(210) 854-5255		_		
Current MP: \$0.00 Balance: Current WIP: \$0.00 Email: jenjonesr@com.cast.net Address: 321 Lane Apartment 123 Bad Axe, MI 48111 Fyep of Return: FILE RETURN	Entity:	Individ	ual Entity	Mobile #:					
Address: 321 Lane		\$0.00			ienionesr@com cast	net	An		Initials
Apartment 123 Bad Axe, MI 48111 Review: Collating: Rerun:		•				.net	Preparation:		
Type of Return: FILE RETURN		Ψ0.00			Apartment 123				
Type of Return: E FILE RETURN					Dau Axe, MI HOIII				
Individual	Type of Retu	rn:					Refull:		
Income Tax			E FILE RETURN		PAYMENTS				
Income Tax	Individu	al \square	Yes □ No 🔽	PAYM	IENT VOUCHER	ESTIMAT	ES		
Yes No EFTPS/ATA ESTIMATES: EFTPS/CLIENT Yes No PAYMENT VOUCHER ESTIMATES If Yes to Payment Voucher: Yes No PAYMENT VOUCHER ESTIMATES Client Mail Yes No PAYMENT VOUCHER ESTIMATES Call April 1st Yes No PAYMENT VOUCHER ESTIMATES ATA Mail ATA MAIL	Income Ta	<u>ax</u>				 ☐ ESTIMAT	ES: EFT/ATA		
Yes No PAYMENT VOUCHER ESTIMATES If Yes to Payment Voucher:	Retui	<u>rn</u> _	Yes No			<u> </u>			
				_		<u> </u>		es to Payment V	oucher:
Yes No PAYMENT VOUCHER ESTIMATES Call April 1st Yes No PAYMENT VOUCHER ESTIMATES ATA Mail K-1s E-File Status: Name Individual File Mail Enclose/Return Form 8879 Signed Yes No E-File Rejected Yes E-File After Rejection Yes No Paper Copy Printed: Yes Form 9325 Confirmed Yes				_		_			
Yes No PAYMENT VOUCHER ESTIMATES ATA Mail				<u>—</u>					
Name Individual File Mail Enclose/Return Form 8879 Signed Yes No E-File Rejected Yes E-File After Rejection Yes No Paper Copy Printed: Yes Form 9325 Confirmed Yes Signs Declaration Yes		— ⊔ _ П				<u>—</u>		_	
Name Individual File Mail Enclose/Return Form 8879 Signed Yes No E-File Rejected Yes E-File After Rejection Yes No Paper Copy Printed: Yes Form 9325 Confirmed Yes Signs Declaration Yes	K-1e					E-File Sta	atus:		
E-File Rejected Yes E-File After Rejection Yes No Paper Copy Printed: Yes Form 9325 Confirmed Yes Signs Declaration Yes		1	Individual File	Mail	Enclose/Return			☐ Yes ☐	No
E-File After Rejection Yes No Paper Copy Printed: Yes Form 9325 Confirmed Yes Signs Declaration Yes	Name	•	Tridividual File	Maii	Liciose/Return		•		1.0
Paper Copy Printed: Yes Form 9325 Confirmed Yes								□ Yes □	No
Form 9325 Confirmed Yes									
Signs Declaration Yes									
Additional Notes:									
	Additional Not	es:				~ 3 3			
	Disposition of	Return:	Client Contact for P	Pick up:	Client Records:	Sc	canned Document	:s:	
Disposition of Return: Client Contact for Pick up: Client Records: Scanned Documents:	Mailin	g 🔲	Date		Shred		Scanned By		
					Vault				
Mailing Date Shred Scanned By		_			Attached		Date _		
Mailing Date Shred Scanned By Client Pickup Initials Mattached Date			2nd Date		None				
Mailing Date Shred Scanned By Client Pickup Initials Attached Date Ped Ex Date None		•							