AARP Foundation
Tax-Aide

ERO Reference Guide Supplement

Record Keeping, Transmitting, and Tracking of Tax Returns at a Tax Site

The purpose of this supplement is to provide guidance to Tax-Aide Volunteers that are new to the role of Electronic Return Originator (ERO) at a site

This is a supplement to the "TSO ERO Reference Guide" which covers many advanced topics that a site LC and ERO should be aware of

For a copy of the "TSO ERO Reference Guide" go to https://bit.ly/43m8yot

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Preface

The "TSO ERO Reference Guide" that is referenced on the cover of this document covers many advanced topics pertaining to the set-up and administration of the TaxSlayer software that site leaders, such as LCs and EROs, should be aware of.

In some Tax-Aide Districts, many if not all of these administrative tasks are handled by the District's Administrative Coordinator (AC). However, there may be times that a Site LC or ERO needs to make adjustments or updates.

A high-level rollup of the topics covered in the "TSO ERO Reference Guide" are:

Login and Passwords

Setting up Security Templates

Adding Preparers

Configuring Printing

Managing Returns

Working with Reports

Running Reports

Working with Amended Returns

Scanned Documents

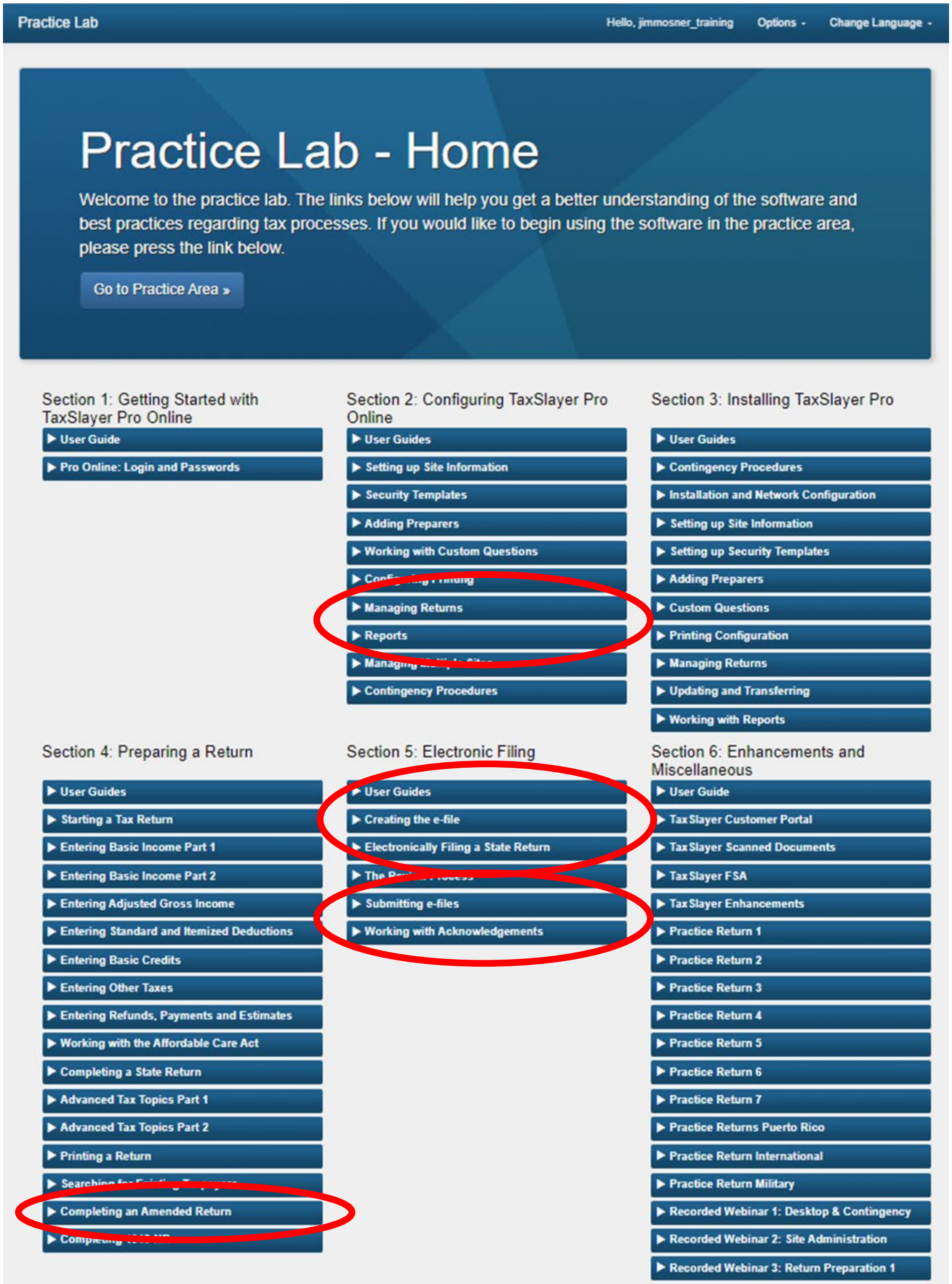
Using the Customer Portal

Purpose of the Customer Portal

Setting Up Customer Portal Access

It is suggested that new EROs download and save to their computers/drives the "TSO ERO Reference Guide". Then when there is a little bit of extra time, you can scan through this document so that when and if the need arises to make some administrative updates, you are cognizant of where to find the pertinent guidance.

In addition to the “TSO ERO Reference Guide”, it is also recommended that new ERO’s watch a few of the TSO Training Videos that are available in Practice Lab. The pertinent videos are circled in the image below:



Definitions of ERO

- Electronic Return Organization (aka the site where returns are prepared and transmitted) – each site has unique Tax-Aide and IRS numbers:
    - SIDN → Tax-Aide Site Identification Number
    - EFIN → IRS Electronic Filing Identification Number
- Electronic Returns Originator (aka the person who transmits and tracks returns at/for a site)

In the remainder of this document, the term ERO will typically refer to the person who keeps records of all tax returns prepared at a site and transmits and tracks the E-filed returns and helps resolve rejected returns.

Local Coordinator (LC) Role and ERO Role

- LC and ERO are two distinct roles at a Tax-Aide site – these roles do not need to be filled by the same person
- At some sites the LC also serves as the ERO
- At other sites the ERO is appointed by the LC
- The LC has the overall responsibility for a Site's Operation, including overall record keeping processes and reporting
- The ERO assists with record keeping and reporting by tracking all returns that are prepared at the site (both E-Filed and Paper), transmitting returns to be E-Filed, tracking the acceptance of the E-Filed returns (both Federal and State), and assisting in resolving E-Filed returns that were rejected

ERO Qualifications

- Certified as an AARP Foundation Tax-Aide Counselor
- Knowledge of computers, software, and site procedures
- Proficient with TaxSlayer Online (TSO)
- Proficient with tracking data either by meticulous use of manually kept records or by using spreadsheets or a combination thereof

ERO Responsibilities

- Establish a process to ensure all returns (paper-filed and e-filed) are tracked
- Timely transmitting e-signed Federal and State tax returns after they have been quality reviewed and marked ready for transmittal (typically within 24 hours)
- Receive and review return acknowledgements from Federal and State
- Track status of all returns from creation to acceptance
- Ensure all Rejected returns are promptly corrected, resubmitted and accepted, or converted to paper returns for the taxpayer to mail
- Report statistical accomplishments as required (typically End of Year)
- Answer questions and address anomalies that occur during return preparation and electronic filing
- Do not retain any taxpayer data unless required by the IRS or State law

ERO Must Meet These Timely Filing Requirements

- IRS and State taxing agencies require all returns to be e-filed within three calendar days after the site has all necessary information to e-file the return
- Retrieve acknowledgements timely (preferably within 48 hours of transmission)
- Promptly work rejects that can be corrected by the IRS-certified volunteer
- Timely notify taxpayers (attempted within 24 hours) if rejects cannot be corrected
- Promptly notify taxpayers if any other problems with tax return processing

Track All Returns

- Track all TAXPAYERS, including those whose returns were:
    - Paper filed
    - Out of Scope
    - On Hold
    - Question and Answer

- Prior year returns must be tracked separately from current year returns
- Consider setting up a QR routine for the ERO process to verify that every taxpayer's return has been transmitted and accepted by all agencies
- It is highly recommended to use Return Tags and Notes in TSO and ensure that they are kept up-to-date
- The LC is responsible for putting **Site Activity Log** procedures in place and ensuring all volunteers understand how to implement them → see sample **Activity Reporting & Quality Review Tracking Log** at the Tax-Aide Portal LIBRARIES>TAX-AIDE: SERVICE DELIVERY MODELS>SITE ACTIVITY LOG

AARP Foundation Tax-Aide Site Activity Log
Counselor

Page ______

Date(s)

Site ID#

Service Type:
____ **In-person** ____ **Drop-off**
____ **One Visit Scan** ____ **Two Visit Scan**
____ **No Site Visit**
____ **Multiple Service Types**

DO NOT REMOVE - REQUIRED FOR ALL SITES

		Paper Return Tracking				Activity Reporting				E-File Tracking			ERO Only			Drop-off Return Location of Documents Please insert date unless other entry is requested				Scan Model Return Please insert date		
	Taxpayer Last Name, First Name(s)	Federal Return (Current Year)	Federal Return (Prior Year)	Federal Return (Amended)	State/Local Only Return	Question & Answer Only	Counselor's Initials	Quality Reviewer's Initials	Ready For Return to Taxpayer	Federal / State to be e-filed	MIPR to be e-filed	8879 Signed by all Taxpayers	Federal Sent / Acknowledged	State Sent / Acknowledged	MIPR Sent / Acknowledged	Off-Site Preparation (Y or N)	Returned to Taxpayer	Shredded/Destroyed	Checklist Filed	Scan Files Uploaded to TaxSlayer	Scans Deleted from Chromebook TSO Scans Folder	Comment Examples: Service Type if multiple service types used **NNTF** - No Need to File **OOS - Reason** (why return is Out of Scope) **Amended Tax Year** **Prior Tax Year** (use a separate line for each year) **Federal Only** (no State Return) Reason for Paper Return **8453** - Reason form is attached for mailing **8879 HOLD** - (and/or state equivalent) **Signature(s) Needed** **Taxpayer HOLD** - incomplete return - taxpayer will return
1																						
2																						
3																						
4																						
5																						
6																						
7																						
8																						
9																						
10																						
11																						
12																						
	Totals:																					

CAUTION – Neither paper logs nor electronic logs may contain Taxpayer identifiable data such as SSNs, phone numbers, or any other personal information

- How an ERO uses the Site Activity Logs varies by personal preference, for example:
  - At the end of the day at a site, the ERO collects all the Site Activity Logs from the Tax Counselors and Quality Reviewers, as well as the Check-In list compiled by the welcoming Client Facilitator (Greeter)
  - At home, the ERO compiles a master Daily Activity Log of all the day's activities by copying all the data on the Check-In list and all the individual Activity Logs onto one master Daily Activity Log for the day – this can be

either a spreadsheet or a paper version – see Attachments 1 and 2 for examples of a Daily Log kept on a spreadsheet and a Daily Log kept manually on a paper copy of the log

        - It is HIGHLY recommended to organize the master Daily Activity Log by Last Name and sorted alphabetically

    - When compiling the master Daily Activity Log from all the individual logs received from the Tax Preparers and Quality Reviewers, make sure you understand which Taxpayer's returns are ready to E-file and which are not
    - The master Daily Activity Log is used to track the Transmittals, Acceptance, and Rejection of all e-filed returns
    - The master Daily Activity Log can also be shared with the LC when Activity Reporting needs to be done

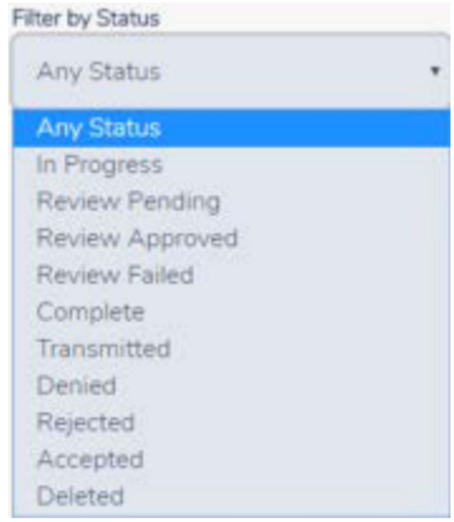
- ***It is HIGHLY recommended that new EROs get guidance from one or two experienced EROs to learn best practices and methods for tracking returns***

Using TSO Return Tags

- Tags are typically defined by the District's Administrative Coordinator (AC) and can be selected for use by the Site's LC and/or ERO
    - If a site desires to have site-specific Tags, the LC/ERO should coordinate with the AC to set up such Tags
- Tax Counselors apply (or remove) a Tag to define return's status
- Returns can be filtered according to the Tags applied to them
- Examples of Tags: Ready for Review, Hold for More Info, Amended Return, 8879 not signed, State-only return, etc.

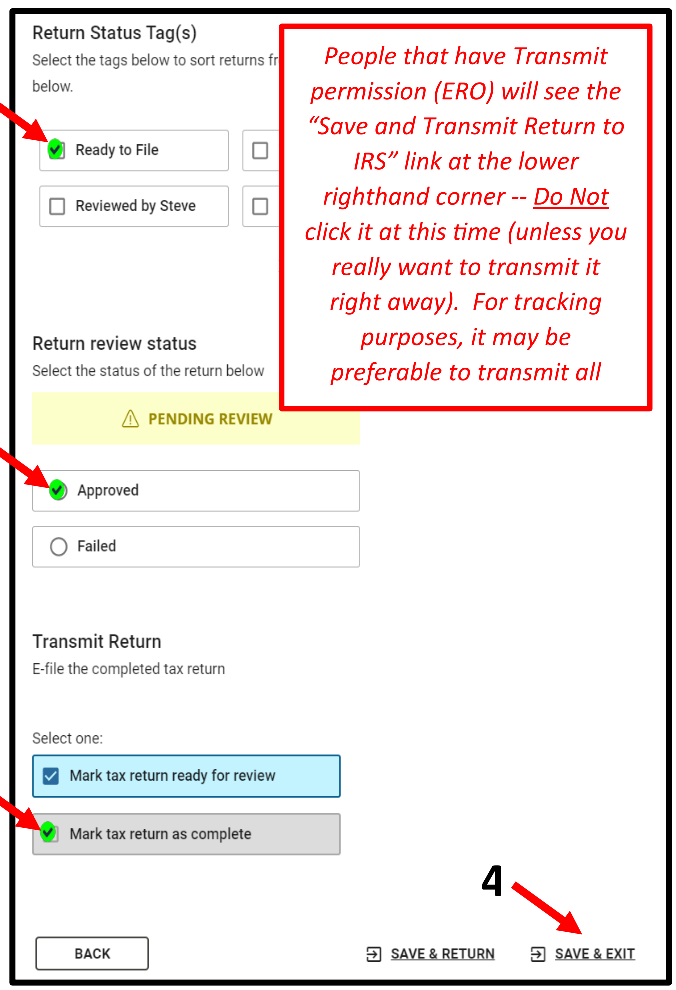
Using TSO Paperless Tracking

- To quickly see the status of various returns at the Site, TSO has filters that can be used to get a quick picture of which returns are at certain stages of completion
- A return's current status is automatically changed by TSO at each stage
- All returns of the same status can be grouped together
- Filter the client list by a specific status, or click on the Status column to sort the client list



How to Indicate Return is Ready to E-File after QR

- Typically, this step is done by the QR person after they print the taxpayer's copy of the return
    1. The "Mark Complete" must be checked
    2. The "Approved" link must be clicked
    3. Optional, but highly recommended is to use a "Ready to E-file" return tag
    4. Then click on the "Save & Exit" link – see the note in the illustration

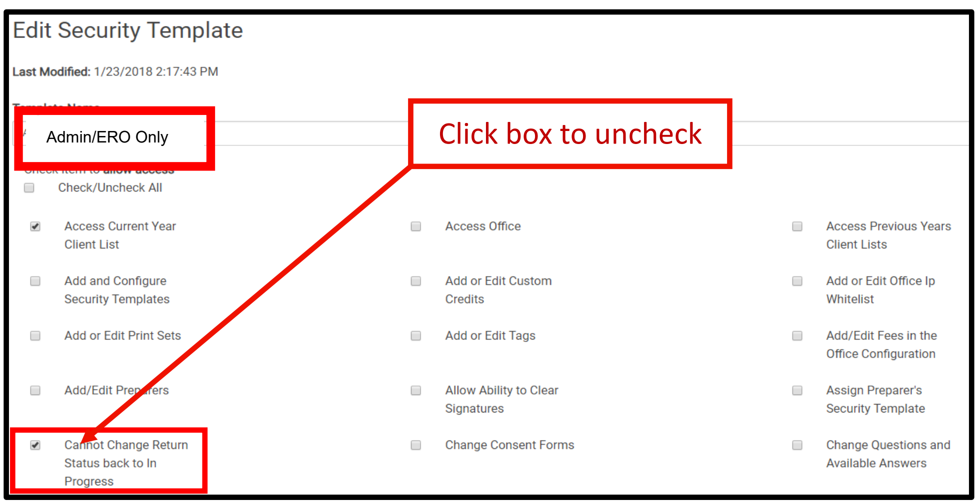


Changing Return Status Back to "In Progress" to Fix an Error in a Completed Return

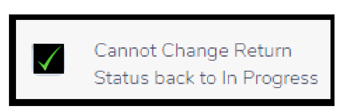
- There may be situations when it becomes necessary to move a return from "Complete" back to "In Progress" in order to correct an error
- Limit this feature only to EROs and LCs
- It is accomplished via the security template that is assigned to them
- Default in the security templates is set to NOT allow this change
- The Site Admin (typically the AC) must configure security template to allow this change

Edit Security Template

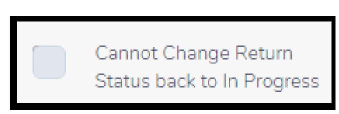
- Go to the Welcome screen in TSO, then click "Select" on the Configuration line, then click "Select" on the Security Templates line, then TSO displays the Security Templates page
- Click Edit for the security template you want to change (i.e., Admin/ERO Only), then TSO displays the Edit Security Template page



- Default setting which prohibits the user from changing the return status:



- New setting to give permission to make a change:



Changing Return Status back to “In Progress”

- Example of a return from the client list that has the status of “Complete”

- The user with the appropriate Security Template, will “Select” the return and navigate to the Submission page in the E-file section of the return. This is an example of what the screen will look like

- Click Yes to change the status back to “In Progress”. This is an example of what the screen will look like after clicking Yes:

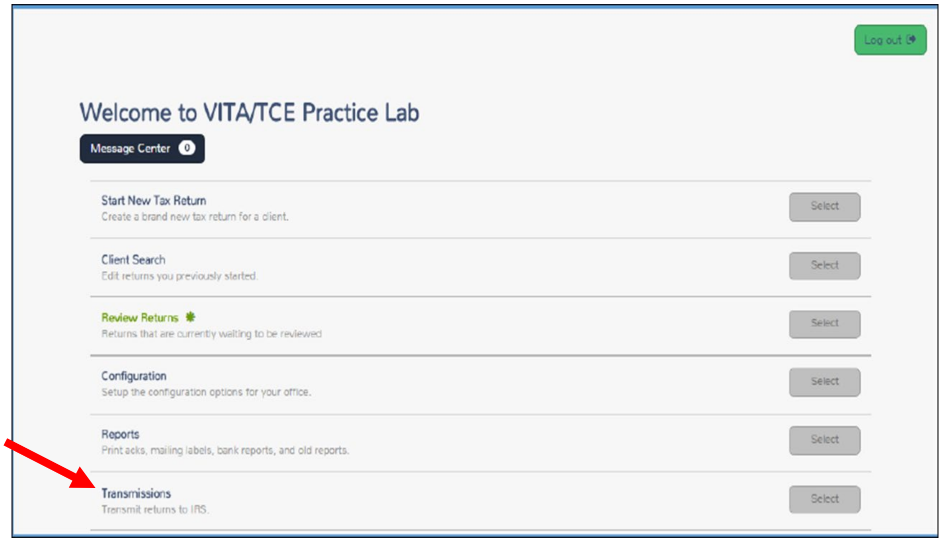
- Save and Exit the return
- This is an example from the client list after the status has been changed

- Once the status of the return has been changed back to “In Progress” the error needs to be corrected, and the return then continues the process of being checked and marked “Complete”

E-Filing Completed Returns

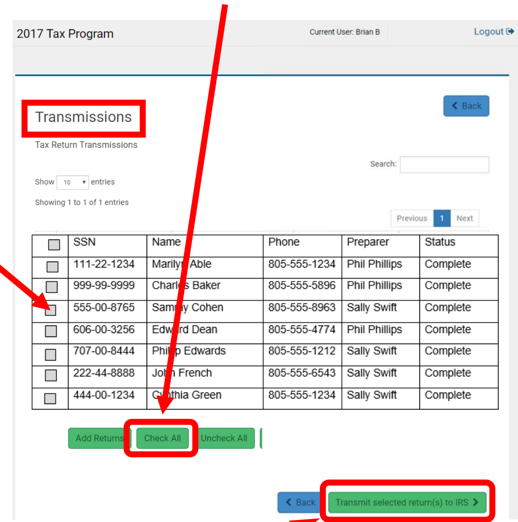
- Select "Transmissions" from the TaxSlayer welcome page

1



- At the Transmissions page *(see the illustration on the following page)*, click on the heading of the "Name" column to sort alphabetically by last name
  - If you are keeping a spreadsheet master Daily Activity Log or if you created a paper master Daily Activity Log, it is a good idea to sort the day's list of taxpayers on your Log alphabetically by last name, then you can compare it to the alphabetized listing on the Transmissions page to ensure that all that need to be sent are listed in the queue of returns to be transmitted
  - If you see that your Log either contains names that are not on the Transmission page or that the Transmission page has names that you don't have on your Log, then you need to figure out the cause of the discrepancies before you go any further
    - If a return is missing from the list, go back into the return to be sure the Complete box was checked
      - Only those that have been marked "Complete" in TSO will appear in the Transmissions page list
    - If a return should NOT be submitted, then uncheck the Complete box on the return E-file page

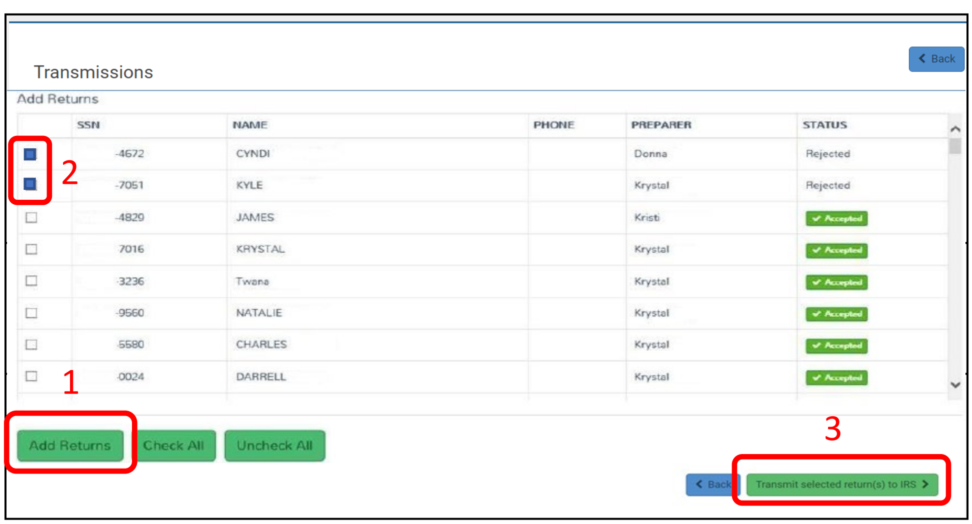
- After verifying against your master Daily Activity Log which returns are to be transmitted, select each return to submit (or, "Check All")



- Click "Transmit selected return(s) to IRS"
- Taxpayer's tax return status automatically changes after transmitting

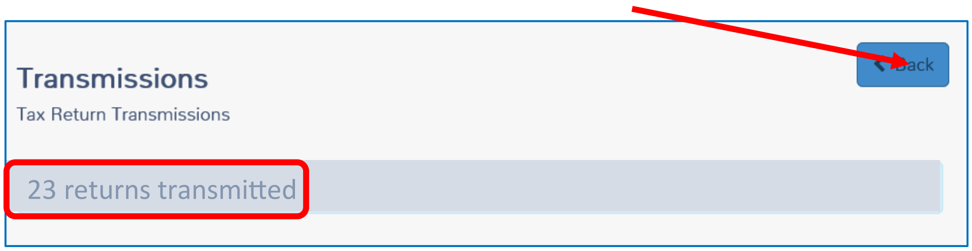
E-Filing Previously Rejected Returns

1. Select "Add Returns"
2. Select the returns to retransmit
3. Click "Transmit selected return(s) to IRS"



After Transmitting

- After transmitting return(s), the “Tax Return Transmissions” page shows the number of returns submitted



- After E-filing the day’s returns, immediately generate and save a copy** of the transmitted returns – REPORTS>FEDERAL TRANSMISSION REPORTS>RETURNS TRANSMITTED – and save as an Excel / Google Sheets file
    - This must be done before IRS generates an Acknowledgment Report
- Open the downloaded and saved report, sort the file alphabetically by Last Name, and save the file
- Use this report to verify that all the returns that needed to be transmitted were in fact transmitted, and then later when the IRS acknowledgement report is created, verify that all transmitted returns received an IRS Acknowledgment
- Click “Back” to return to the Welcome page

*** CAUTION – If you download and save reports from TSO, keep in mind that no Taxpayer identification information, such as full SSN, can be saved to local computers. Thus, if a report has the full SSN, it cannot be downloaded and saved. If it has only the last four digits of the SSN, it can be used, but it should be controlled at all times and deleted/destroyed once it is no longer needed.*

Prior Year Returns

- After transmitting all of the current year returns (Federal and State), repeat the transmittal processes for all prior tax years (if necessary)
- For each of the prior tax years, you will also need to repeat the following steps for Acknowledgments, Validation, and Rejects

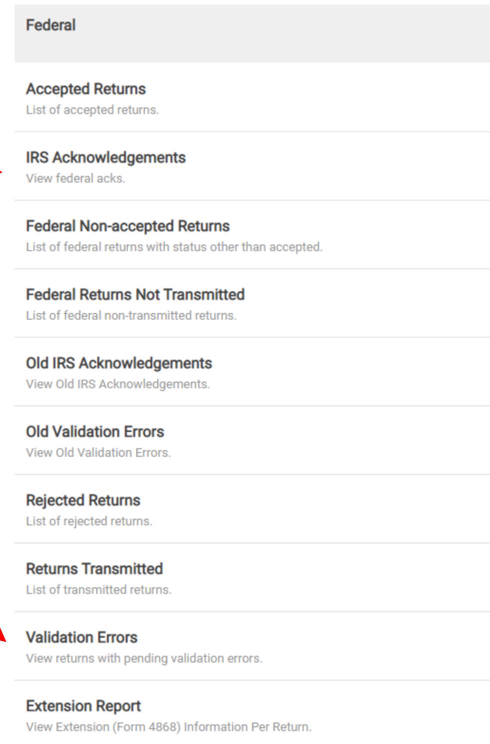
Acknowledgements

- Acknowledgements from the IRS typically take a couple of hours
- Acknowledgements from the State typically take overnight
- Because of the different timeline for these acknowledgements, you may want to wait 24 hours or so after transmitting to check the status of acknowledgements
- TSO automatically changes return's status as it is accepted or rejected
- Acknowledgement Reports also shows the status of returns
- Review reports for Rejected returns to be corrected and resubmitted
- Save IRS Acknowledgement report ** to and Excel / Google Sheets file
- Sort alphabetically by Last Name
- Compare with Transmittal Report to verify that all returns transmitted received an acknowledgement

*** CAUTION – If you download and save reports from TSO, keep in mind that no Taxpayer identification information, such as full SSN, can be saved to local computers. Thus, if a report has the full SSN, it cannot be downloaded and saved. If it has only the last four digits of the SSN, it can be used, but it should be controlled at all times and deleted/destroyed once it is no longer needed.*

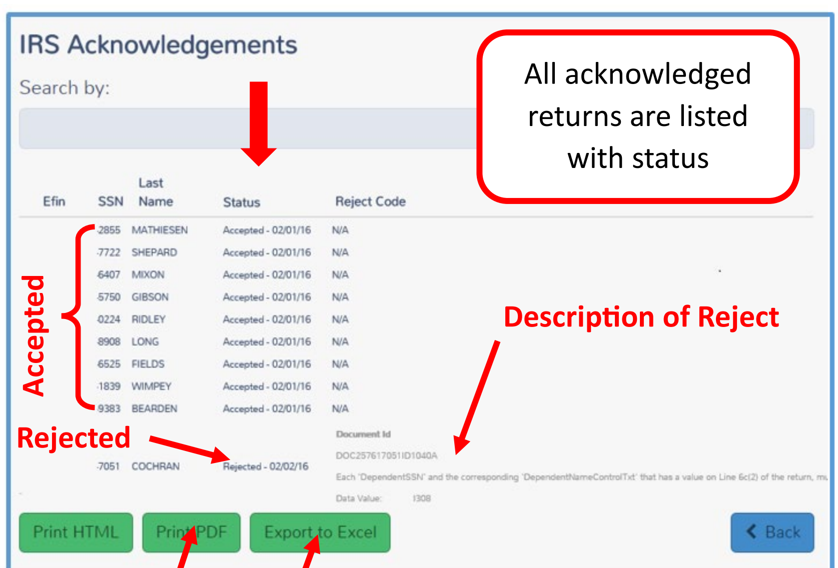
Acknowledgement Reports

- Select “Reports”
- View:
  - IRS Acknowledgements
  - State Acknowledgements
    (on a separate report screen)
  - Rejected Returns
  - Validation Errors



IRS Acknowledgements

- Review each acknowledged return
  - If accepted – Accepted and Date shown in Status Column
  - If rejected – Rejected and Date shown in Status column and reason shown in Reject Code column
- Print PDF for more information
- Export to Excel to build a Tax Year log



State Acknowledgements

- Follow the same procedures as outlined above for the IRS Returns for reviewing State Return Acknowledgements and Rejections

Validation Issues

- A Validation issue is where the return is rejected by TSO for some reason – it has not even made it to the IRS yet – it got stopped at TSO due to some type of error
    - To search for returns rejected by TSO, click select on Validation Errors line for list
    - Review each return rejected from the TSO Processing Center.
        - If the TSO Processing Center rejected the return, a reason for the validation error will be displayed in the Help column.
    - To print your Validation Errors report, click "Print PDF".

- If a validation issue only affects a State Return, once the issue is resolved then only the State Return should be retransmitted

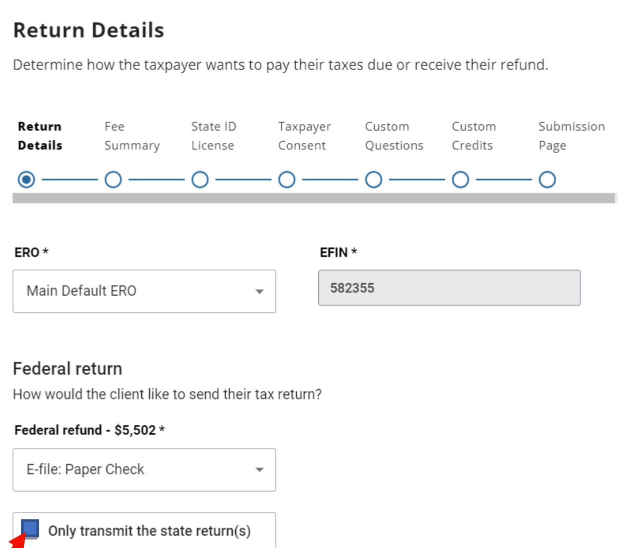
Reject Issues

- A Reject issue is where the return was rejected by either the IRS or the State for a reason – ALL reject issues MUST be resolved by the site leadership (LC / ERO)
- Identify error and correct it
- New Form 8879 signatures if:
  - SSN or name changed, or
  - >$50 change in total income or AGI, or
  - >$14 change in total tax, federal tax withheld, refund or amount due
- Advise taxpayer of changes and provide a corrected copy
- If it cannot be E-filed, convert to paper – the taxpayer must then mail the return
- Provide feedback to Counselor/QR *(Note: TSO Messaging is secure)*
- If a reject issue only affects a State Return, once the issue is resolved then only the State Return should be retransmitted

IRS matches the first four letters of the last name with the SSN as stored in the IRS database – if there is a disparity in the E-Filed return, the return will be rejected

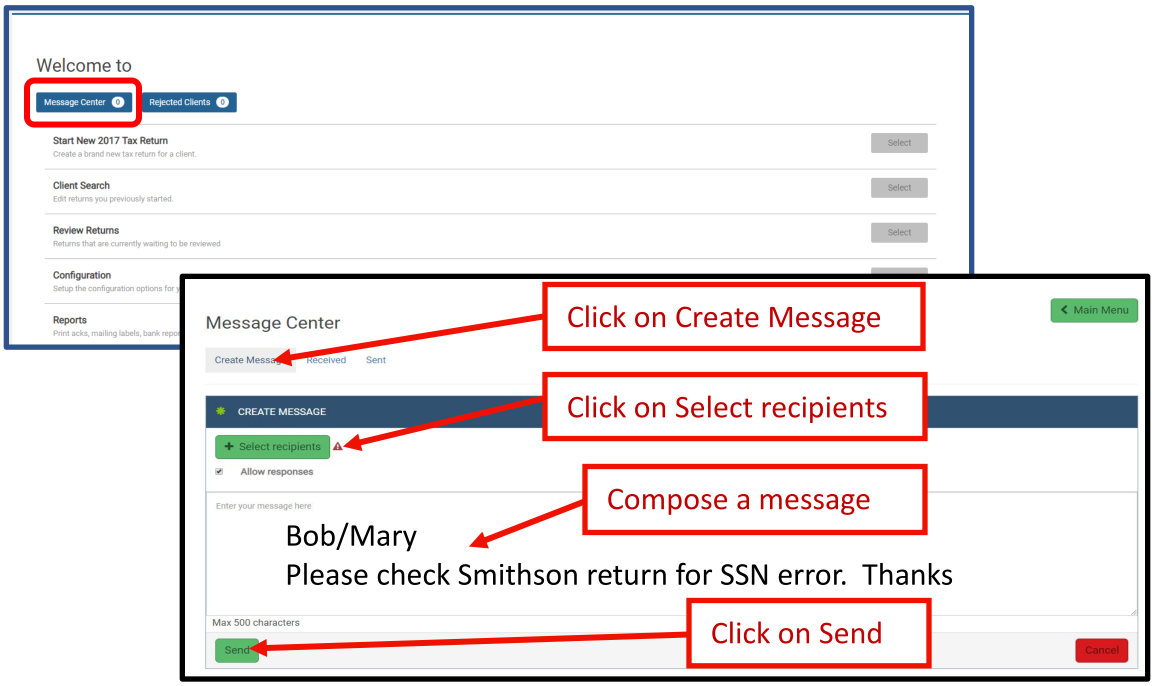
State Returns – Unlinking from IRS Returns for Transmittal

- There are times when only the State return needs to be transmitted, such as after correcting a validation/reject issue or when transmitting a Property Tax Refund Return after the Federal and State returns have already been E-Filed
- To do this, the State return needs to be "unlinked" from the IRS return
- On the last E-file screen, check the box to "Only transmit the state return"



TSO Messaging

- To send a secure message to a Counselor, QR or LC click on “Message Center” on the Welcome screen



What’s Next?

- In some Districts or Sites, the ERO person has additional responsibilities in TaxSlayer to administer the following:
    - Creating Return Tags
    - Managing Security Templates
    - Assigning volunteers to certain Security Templates
- The ERO person should not assume that they have permission to administer these aspects without receiving explicit direction and training from the District’s AC
- At some point – for situational awareness - you may want to review the “TSO ERO Reference Guide” that is referenced on the front page of this document, it covers the advanced tasks that need to be performed by District AC or by a knowledgeable site ERO

End of Season

- Tax Counselors and Quality Reviewers will be deactivated at the end of the Tax Season to prevent access to TSO
- Exceptions:
    - District Administrative Coordinator (AC)
    - Local Coordinator
    - Depending upon District policy, the ERO could remain activated throughout the off-season to assist with resolving return issues that may arise

LC Responsibilities

- Everything!
- Answer questions and address anomalies that occur during return preparation and electronic filing
- Report statistical accomplishments as required
- Be sure no taxpayer data has been retained unless required by the IRS or State law
- Verify that all returns started in TSO are accounted for monthly and at the end of the season

Remember → Security of taxpayer data is everyone's responsibility

AARP Foundation Tax-Aide Activity Log for TY22

17 March 2023 Date

Counselor

Merriam Park Site

Page ____

Each Counselor (whether Preparer or Quality Reviewer) tracks their activities on their daily sheet and turns it in to the LC at the end of their shift.

Service Type on this day:

____ In-Person *(Taxpayer remained with the Preparer/Reviewer)*

__X__ Drop-off *(Taxpayer was separated from their tax documents)*

#	Taxpayer (include people who were helped with questions and answers only) Last Name, First Name(s)	1) Preparer's Initials	2) Question & Answer ONLY	3) Federal Return (Current Year)	4) Federal Return (Prior Year)	5) Federal Return (Amended)	6) State/Local Return ONLY	7) Quality Reviewer's Initials	8) 8879 Signed by all Taxpayers	9) Documents Returned to Taxpayer	10) Federal / State to be e-filed	11) M1PR to be e-filed (enter 0 if none)	12) Comment Examples: NNTF - No Need to File; OOS and Reason why return is Out of Scope; Amended Tax Year; Prior Tax Year (use a separate line for each year); Federal Only (no State Return); Paper Return and Reason; 8453 and Reason form is attached for mailing; 8879 HOLD - Signature(s) Needed (and/or state equivalent); Taxpayer HOLD (e.g., Incomplete Return or Taxpayer Will Return)	Federal -- Sent / Acknowledged	State – Sent / Acknowledged	M1PR – Sent / Acknowledged	Returned to Taxpayer	Shredded / Destroyed	Checklist Filed
		Return Tracking for In-Person or Same-day Drop-Off		Paper Return Tracking				Quality Review Tracking						E-file Tracking ERO ONLY			Disposition of Documents LC or ERO ONLY (Insert Date unless other entry is requested)		
1	Ab[redacted] Carole	SW						GK	X	X	X	4/14	M1PR Later	S/A	S/A	4/15			
2	Al[redacted] Geneveve	MP						CS	X	X	X	0	She does her own M1PR	S/A	S/A				
3	Al[redacted] Thomas	SW						AP	X	X	X	0		S/A	S/A				
4	B[redacted] Katie	MP						GK	X	X	X	X		S/A	S/A	S/A			
5	Ba[redacted] Richard & Christina	CS						SW	X	X	X	0		S/A	S/A				
6	C[redacted] Pearl	MP						GK	X	X	X	X	Taxpayer Deceased	S/A	S/A	S/A			
7	C[redacted] Kevin & Sarice	AP	X										OOS - Some type of mortgage credit						
8	D[redacted] Dealla	AP						NH	X	X	X	0		S/A	S/A				
9	E[redacted] Bonnie	TF						NH	X	X	X	4/14	M1PR Later	S/A	S/A	4/15			
10	G[redacted] Dana	KP						TF	X	X	X	X		S/A	S/A	S/A			
11	G[redacted] Lisa	CS						KP	X	X	X	X		S/A	S/A	S/A			
12	G[redacted] Janice	SW						CS	X	X	X	3/31	M1PR Later	S/A	S/A	4/1			
13	H[redacted] Barbara	CS						NH	X	X	X	0		S/A	S/A				
14	J[redacted] Frances	SW						KP	X	X	X	X		S/A	S/A	S/A			
15	L[redacted] Jody	TF						JM	X	X	X	3/31	Reject -- IND-517-01 Incorrect Data: A Dependendent SSN in the return must not be the same as the Primary or Spouse SSN on another return. M1PR on 3/31	Paper	Paper	4/1			

AARP Foundation Tax-Aide Activity Log for TY22

17 March 2023 Date

Counselor

Merriam Park Site

Page ____

Each Counselor (whether Preparer or Quality Reviewer) tracks their activities on their daily sheet and turns it in to the LC at the end of their shift.

Service Type on this day:

____ In-Person *(Taxpayer remained with the Preparer/Reviewer)*

__X__ Drop-off *(Taxpayer was separated from their tax documents)*

#	Taxpayer (include people who were helped with questions and answers only) Last Name, First Name(s)	Return Tracking for In-Person or Same-day Drop-Off: 1) Preparer's Initials	2) Question & Answer ONLY	Paper Return Tracking: 3) Federal Return (Current Year)	4) Federal Return (Prior Year)	5) Federal Return (Amended)	6) State/Local Return ONLY	Quality Review Tracking: 7) Quality Reviewer's Initials	8) 8879 Signed by all Taxpayers	9) Documents Returned to Taxpayer	10) Federal / State to be e-filed	11) M1PR to be e-filed (enter 0 if none)	12) Comment Examples: NNTF - No Need to File; OOS and Reason why return is Out of Scope; Amended Tax Year; Prior Tax Year (use a separate line for each year); Federal Only (no State Return); Paper Return and Reason; 8453 and Reason form is attached for mailing; 8879 HOLD - Signature(s) Needed (and/or state equivalent); Taxpayer HOLD (e.g., Incomplete Return or Taxpayer Will Return)	E-file Tracking ERO ONLY: Federal – Sent / Acknowledged	State -- Sent / Acknowledged	M1PR – Sent / Acknowledged	Disposition of Documents LC or ERO ONLY (Insert Date unless other entry is requested): Returned to Taxpayer	Shredded / Destroyed	Checklist Filed
16	[redacted] Temesgen	SW						GK	X	X	X	X		S/A	S/A	S/A			
17	[redacted] Larry & Junella	MP						GK	X	X	X	Mailed	M1PR Later	S/A	S/A	S/A			
18	[redacted] Colleen	GK						TF	X	X	X	X		S/A	S/A	S/A			
19	[redacted] Fatiulla	MP						NH	X	X	X	0	REJECT - R0000-500-01: PrimarySSN and PrimaryNameControl must match the E-File Database Returned to site on Fri Mar 31, flipped names, retransmitted and accepted	S/A	S/A				
20	[redacted] Mary	JM						JM	X	X	X	X	FNF	S/A	S/A	S/A			
21	[redacted] Richard	JM					Paper	JM			X		Amended 2022	S/A	Paper File				
22	[redacted] Daniel	AP						NH	X	X	X	X		S/A	S/A	S/A			
23	[redacted] Gordon	CS						AP	X	X	X	X		S/A	S/A	S/A			
24	[redacted] Javier	AP						GK	X	X	X	0		S/A	S/A				
25	[redacted] Edward	SW						KP	X	X	X	4/7	M1PR Later	S/A	S/A	4/8			
26	[redacted] Carol	KP						CS	X	X	X	4/14	M1PR Later	S/A	S/A	4/15			
27	[redacted] Yolanda	JM	X										No documentation of SSN | Returned on 3/24						
28	[redacted] Theresa	TF						AP	X	X	X	X		S/A	S/A	S/A			
29																			
	Totals:		2	0	0	0	1							26	26	18			

AARP Foundation Tax-Aide Site Activity Log

Page 1

Peggy S. QR

Date(s) 2-29-24

Site ID# SP Library

Service Type:
- ✓ In-person
- ___ One Visit Scan
- ___ No Site Visit
- ___ Multiple Service Types
- ___ Drop-off
- ___ Two Visit Scan

DO NOT REMOVE - REQUIRED FOR ALL SITES

#	Taxpayer Last Name, First Name(s)	Paper Return Tracking: Federal Return (Current Year)	Federal Return (Prior Year)	Federal Return (Amended)	State/Local **Only** Return	Activity Reporting: Question & Answer **Only**	Counselor's Initials	Quality Reviewer's Initials	Ready For Return to Taxpayer	E-File Tracking: Federal / State to be **e-filed**	MIPR to be e-filed	8879 Signed by all Taxpayers	ERO Only: Federal Sent / Acknowledged	State Sent / Acknowledged	MIPR Sent / Acknowledged	Comment Examples: **NNTF** - No Need to File; **OOS - Reason** (why return is Out of Scope); Amended **Tax Year**; Prior **Tax Year** (use a separate line for each year); **Federal Only** (no State Return); Reason for Paper Return; **8453** - Reason form is attached for mailing; **8879 HOLD** - (and/or state equivalent); **Signature(s) Needed**; **Taxpayer HOLD** - incomplete return - taxpayer will return; **Service Type** if multiple service types used
1	Lundahl, Jim							PS		X	X	X	X	X	X	
2	Buck, Diane							PS		X	X	X	X	X	X	
3	Johnson, Cindy							PS		X	O	X	X	X	O	
4	Bacon, J+S							PS		X	O	X	X	X	O	
5	Ericson, Albert							PS		X	X	X	/			Reject IP Pin
6	Ulser, Bev							PS		X	X	O	—	—	—	hold for signature
7	Moss, Nancy							PS		X	X	X	X	X	X	
8	Moss, Nancy							PS		X	X	X	X	X	X	2022
9	Stewart, Paul						PS									
10																
11																
12	Bates	X				X										
	Totals:															

— verified as complete