

# AARP Foundation Tax-Aide

## Activity Reporting, Quality Review & ERO Tracking Log

Page \_\_\_\_\_

Date(s) \_\_\_\_\_

Site ID# \_\_\_\_\_

Taxpayer Name (also list those helped with questions and answers only)  Last Name, First Name(s)		Activity Reporting					E-file Tracking						
		Type of Service					6) Counselor's Initials	7) Quality Reviewer's Initials	ERO ONLY		10) 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 - Signature(s) Needed (and/or state equivalent) Client HOLD - incomplete return - client will return		
		Check for PAPER FILED ONLY				5) Question & Answer Only			8) Federal / State to be e-filed	9) 8879 signed by all Taxpayers		Federal Return Sent/Acknowledged	State Return Sent/Acknowledged
		1) Federal Return (Current Yr)	2) Federal Return (Prior Yr)	3) Federal Return (Amended)	4) State/Local Only Return								
1	Andy Archer						EA	MM					Fed/State Returns ready for efile
2	Bob Baker	✓					EA	LC					Fed/State Returns ready to be paper filed
3	Gil and Gladys Goldberg	✓					EA	MM					Fed/State Returns ready to be paper filed
4	Cindy Coolidge						EA	LC					State Return ready for efile
5	Denise Daly				✓		EA	MM					State Return ready to be paper filed
6	Earl and Emily Ethridge		✓				EA	LC					Prior Year Returns to be paper filed
7	Frank and Francine Fitzgerald	✓		✓			EA	MM					Fed/State Returns and Amended Year Returns to be paper filed
8	Harry and Helen Holden						EA	LC					2nd Signature Needed
9	Kay Koffman						EA						Add'l Info needed to complete return
10	Ingrid and Ian Illiano						MB	MM					Fed Return ready for efile
11	John Jones				✓		EA						No Return prepared
12	Jose Fuentes						MB	LC					Fed Return ready for efile; State Return to be paper filed
13													
14													
15													
ACTIVITY TOTALS:		3	1	1	1	1							

Only Paper-Designated Sites report QR Totals

Site Activity Reporting Instructions are on the OneSupport Help Center > Portal and VMIS Support > Site Activity

DI9597 (1113)

