

AARP Foundation Tax-Aide

Drop-Off Site Activity Log

Date(s) _____

Page _____

Site ID# _____

	Drop-Off Return Tracking							E-file Tracking				
	Location of Documents							10) Federal / State to be e-filed	11) 8879/14446 signed by all Taxpayers	ERO ONLY		12) 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
	Please insert date and time.									Federal Return Sent/Acknowledged	State Return Sent/Acknowledged	
	1) Awaiting Preparation (Date & Time)	2) Off-Site Preparation (Y or N)	3) (Date, Time & Counselor Initials)	4) Quality Reviewer's Possession (Date, Time & QR Vol Initials)	5) Ready For Return to Taxpayer (Date & Time)	6) Returned to Taxpayer (Date & Time)	7) Checklist Filled (Date & Time)			8) Counselor's Initials	9) Quality Reviewer's Initials	
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
	Total:											

Drop-Off Site Activity Log

The Drop-Off Site Activity Log is used to track the location and status of taxpayer documents and status of the tax returns at a site being prepared with the Drop-Off Model throughout the intake, preparation, QR, return, and ERO process.

General Instructions on How to Complete the Form:

- 1) Enter the site SIDN and activity date.
- 2) Enter the Taxpayers' full names and record all services provided as soon as return is completed.
- 3) Check (√) all applicable boxes to indicate the type of service(s) provided.
- 4) Multiple lines per Taxpayer may be used to facilitate tracking e-filed submissions.

REQUIRED STEPS

- 1) Record the notated information in each location listed (columns 1-7)
- 2) Record Counselor Initials (column 8)
- 3) Record Quality Reviewer Initials (column 9)
- 4) Confirm that all required signatures are on Form 8879/14446 - Column 11
- 5) Printing of final return only at the site
- 6) Contact between taxpayer and preparing counselor or QR via telephone, Google Meet, or Google Meet phone
- 7) Preparing counselor and QR must follow all IRS QSR's