

Project Routing Sheet

Client: Jones, Ron & Jenny (JONESRJ)

Control # _____

Project: Individual Income Tax Return (491)

Update Contact Information: Yes
Prepare Updated Financial Statement: Yes

Project Information	
Biller:	
Entity:	Individual Entity
Current Balance:	\$0.00
Current WIP:	\$0.00

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

Type of Return:

Individual Income Tax Return	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	
_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

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

Additional Notes:

Disposition of Return:

Mailing	<input type="checkbox"/>
Client Pickup	<input type="checkbox"/>
Fed Ex	<input type="checkbox"/>
Hold for F/S	<input type="checkbox"/>

Client Records:

None	<input type="checkbox"/>
Vault	<input type="checkbox"/>
Attached	<input type="checkbox"/>

Client Contact for Pick up:

Date	_____
Initials	_____
2nd Date	_____
2nd Initials	_____

E-File Status:

Form 8879 Signed	<input type="checkbox"/> Yes	<input type="checkbox"/> No
E-File Rejected	<input type="checkbox"/> Yes	
E-File After Rejection	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Paper Copy Printed:	<input type="checkbox"/> Yes	
Form 9325 Confirmed	<input type="checkbox"/> Yes	
* Signs Declaration	<input type="checkbox"/> Yes	

Order	Activity	Assigned	Initials	Date
1	Conferences			
2	Preparation			
3	Review			
4	Copying/Collating/Processing			
5	Depreciation Update			

