

Interactive Worksheet Pt. 1

1. The READY status indicates the return has been uploaded and is ready to be processed.

True False

Client Info

2. What is required before you can deliver a return?

Email Address Mobile Phone Number

3. On a joint return, emails for both taxpayer and spouse are essential before you can deliver the return.

True False

Transmittals & Vouchers

4. What are the types of vouchers/ES we cannot recognize? Select all that apply.

Automatic Withdrawal Online Payment Required

5. What are the benefits of manually adding vouchers - Select all that apply.

Automated Reminders Generated Image of Voucher Access to SafeSend Steve

Paper File

6. Paper File Tab: When manually adding a paper file, what type of file needs to be uploaded?

Client Copy Government Copy Accountant Copy

Additional E-Sign Docs

7. Select examples of Additional E-Sign Documents.

Bank Authorization Engagement Letter Power of Attorney

8. To make a signature required on an Additional E-Sign Document, you must drag & drop Signature controls to the appropriate area. True False

Invoice

9. To ensure the 'Pay Now' button/link is included for the client, you must type the amount due into the 'Invoice Amount' box. True False

Delivery Options

10. Prior to delivery, to remove the 'Message from Preparer' click the 'X' in the drop-down.

True

False

11. When delivering a joint return, can you choose who receives it first? Yes No

Other

12. When are you charged for a return? On Upload On Delivery On Recall

13. To contact support while processing a return, click the bullhorn at the top right of the page.

True

False

Additional Notes:

Answers:

1. T	2. Email Address
3. F	4. Automatic Withdrawal and Online Payment Required
5. Automatic Reminders	6. Government Copy
7. All three are correct	8. T
9. T	10. T
11. Yes	12. On Delivery
13. T	