Tax Center _____	**RED TRACKING SHEET**
Manager _____	
Tax Year(s) _____	**Used to Correct Rejected Return Errors** **Check Notes for Description of the Reject Reason**

SSN _____-____-_____   Taxpayer _____   Date _____

<center>Last Name, First Name</center>

Corrections Made to Return:

- ❏ Name or SSN/ITIN changed *Circle: Primary / Spouse / Dependent*
- ❏ Dependent removed (Name:_____)
- ❏ New 8879 needed to be signed
- ❏ IP PIN provided
- ❏ Other_____

Items Attached (DO NOT CREATE A NEW ENVELOPE):

- ❏ Signed 8879
- ❏ W2
- ❏ Other_____

Please enter all changes you make to the return in the Client Notes and describe below:

_____
_____
_____
_____
_____

Enter the following in the Client Notes and the above description:

1. Start the entry with the tax year of the return to minimize confusion. Entries for all years are contained in the same file.
2. Describe the original entry.
3. Describe the new information, its source, and what change was made to correct the error.
4. End the entry with your initials, name, or volunteer ID.

NOT helpful: Changed last name to Rodriguez Hernandez.

What we need: 2022 – TP name entered as Joseph M. Rodriguez. SS Card shows Joseph Michael Rodriguez Hernandez. Changed last name from Rodriguez to Rodriguez Hernandez. KB

NOT helpful: Changed birthdate to 6/6/11.

What we need: 2022 - Susan Smith (dependent) birthdate entered as 6/6/10. Ann Smith (mother) said the correct birthdate is 6/6/11. Changed Susan's birthdate to 6/6/11. KB

Updated 11/01/23