How to clean up Taxslyer from Rejects within 24 hours?

1. Every morning the site coordinator should check tax years 2019, 2020, and 2021 in Taxslayer for rejects. Clients whose return has been rejected should be contacted twice within 24 hours.

2. If they answer, explain and resolve the issue. Turn the return to paper and let them know that if they do not show up their return will not be filed. If the client comes with enough information to E-file, make sure you change the return type on the E-file page and on QB as well.

3. If they don't answer, leave a message, including your name and extension. Explain that their return is rejected and it will not be filed until they call you back.

4. Mail the client a letter using the address provided on their tax return to let them know that we attempted to reach them by phone 2 times, but no answer. See below for a sample letter.

5. Turn the return into paper in both Taxslayer and Quickbase with a detailed explanation of what you have done. The note should include the reason it was rejected and if the client picked up the return or not. Make sure when the client picks up the return to add another note.

6. Check your "Go To Connect" or your office voicemail daily for messages and call the client back ASAP.

SAMPLE LETTER

Date

Dear Ms.(Client Name)

We were unable to reach you by phone. **Your tax returns will not be submitted unless you call us so we can take care of the issue.**

We would like to thank you for entrusting us to complete your tax returns this year and look forward to seeing you next year. Contact us at (313) 556-1920 ext.(your extension).

Thank you,

Your Name
Tax Site Coordinator

AccountingAidSociety
We use taxes to build relationships.
And relationships to build futures.

How to use Stamps.com to print stamps for mailing?

1. Go to: https://print.stamps.com/SignIn/Default.aspx

2. Sign in using the username: **Aastaxcenter**
   Password: **Sent out in the email**

3. Once you sign in you will see this page below:
   a. Print on: Stamps
   b. Serial #: available on the top of the page on the stamps label
      i. Select calculate Postage amount
   c. Mail From: Accounting Aid Society -Detroit, MI
   d. Mail To: United States
   e. Weight: Use the scale available at your site to weigh the envelope.
      *The scale is on ounces when you weigh the envelopes.
   f. Carrier: USPS
   g. Service: Post card, Letter, and Large envelope Flat. Letters are most common to use.
   h. Quantity: enter the number of labels you want to print
   i. Reference #: available on the stamp ex: B88091.01
   j. Cost Code: Your site name
   k. Print stamps

4. If you are using the Brother's printer, make sure to face the stamp labels face down with the top of the arrow toward you. You can always print a sample page, If you do that make sure to use the "Reprint" option since the money is already deducted from the balance amount.

* Screenshot of Stamps.com page

*Screenshot of stamp labels: