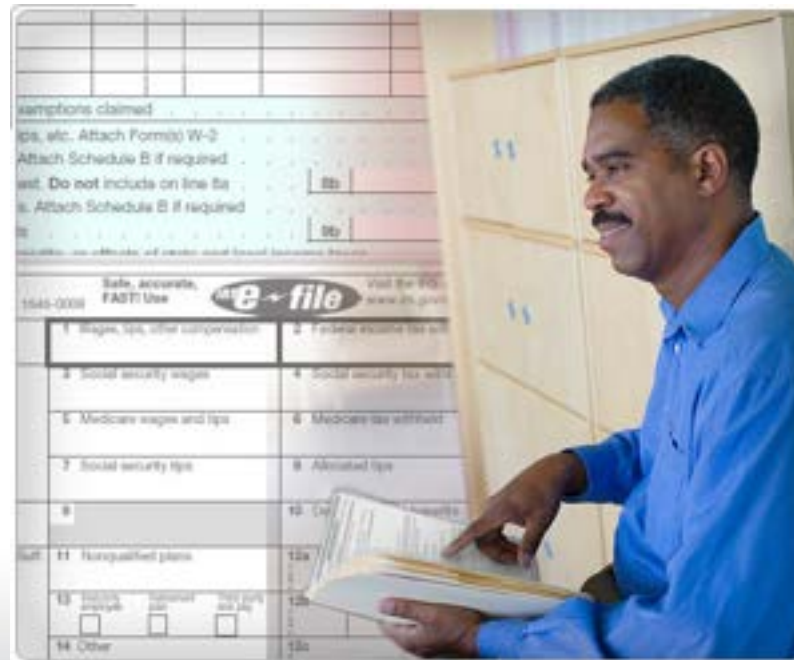




# Completing the Return





# About Completing the Return

- Additional resources listed in L&LT “References” tab
- Review all tips and cautions in the lesson
- Read all examples and sample interviews
- We will review answers to each exercise



# Objectives – Completing the Return

This lesson helps tax preparers understand how to:

- Assemble the taxpayer's copy of the tax return
- Identify the records the site maintains
- Explain to taxpayers which records they should maintain
- End the interview
- Time Required: 15 minutes

# Topics



- Printing and Storing Returns
- Recordkeeping
- Closing the Contact



# Key Terms

Definitions are always available in the L&LT online Glossary.

- Electronic Filing (e-file)

# Printing and Storing Returns

- Taxpayers must receive a copy of their tax return. To prepare the taxpayer's copy of the tax return:
  - Print the entire return using TaxSlayer
  - Ensure names and Social Security numbers are legible on every sheet
  - Assemble the taxpayer's copy starting with Form 1040, followed by each schedule, form, and attachment, based on the sequence number
  - Show the taxpayer the printed copy of the return, and verify the key information is correct
- Advise taxpayers to keep tax-related documents for at least three years
- Review [Pub 4012](#), Tab K, Finishing the Return, and Tab O, Using TaxSlayer Pro Online:
  - Summary/Print Page
  - Printing the Tax Return
  - Distributing Copies of the Return

# Closing the Contact

- Explain how the e-file process works
- Final steps:
  - Ask if taxpayer has any questions
  - Explain where taxpayer can get answers later
  - Encourage taxpayer to consider volunteering for VITA/TCE, if appropriate
  - Ensure you have taxpayer's contact information
  - Sincere "Thank you"
  - Remind taxpayers to take all of their tax records with them





# Summary

This lesson explained:

- How to assemble the tax return and conclude the interview
- Taxpayers should leave with:
  - Complete record of the return
  - Understanding of what happens next
  - Knowledge of where to get answers for questions later
- Taxpayers should know:
  - Which documents they should keep
  - What documents and information the site will maintain