



## TAXPAYER ACTION FORM

Date: \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_ Tax Preparer Affiliate: \_\_\_\_\_

☐ Please Check and Send to E-File

Checked by: \_\_\_\_\_

☐ Please Check and Return to Tax Preparer Affiliate (use back for more space)

**Tax Preparer Affiliate Notes:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Need to call Taxpayer for pickup:**

☐ Yes

☐ No

Date Called: \_\_\_\_\_

**Need Signature on Documents:**

Federal 8879's \_\_\_\_\_

State 8453's \_\_\_\_\_

1040/760 \_\_\_\_\_

ERC/ERD Forms \_\_\_\_\_

**Need to Collect Payments:** \_\_\_\_\_ Amount: \_\_\_\_\_

Collected by: \_\_\_\_\_ on \_\_\_\_\_

**Payment by:** ☐ Cash ☐ Check ☐ Credit Card ☐ ERC

**After Collection:** ☐ Paper Return ☐ E-File ☐ ERC

**Give Copies to Taxpayer:** \_\_\_\_\_

**Documents Scanned:** ☐ Yes ☐ No

**Additional Comments:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Federal Filed on** \_\_\_\_\_

**Accepted:** \_\_\_\_\_

**State Filed on** \_\_\_\_\_

**Accepted:** \_\_\_\_\_