

Quality Review Tips

Exercise due diligence. Ask questions. Be friendly!

1. Review the intake sheet.

- Make sure it is completely filled out (*especially the shaded areas!*) and change any answers not previously changed from “unsure” to “yes” or “no.”
- Confirm that the intake sheet is consistent with the return (e.g. following up if you notice the taxpayer answered “yes” to having retirement income but none was entered in the software).

2. Navigate TaxSlayer to confirm all entries are correct.

- Verify names, SSN/ITINs, DOBs, address, etc.**
- Pay close attention to the **W2 EIN and verification code**.
- Are any documents present but unaccounted for in the software?
- Does the return accurately show all health insurance coverage, exemptions, and/or penalty?

The screenshot shows the 'Verify Your Household Members' screen in TaxSlayer. The sidebar on the left includes options like 'Basic Information', 'Federal Section', 'Health Insurance', 'State Section', 'Summary/Print', 'e-File', '2017 Amended Return', 'Save & Exit Return', 'Help & Support', and 'Save & Exit Return'. The main content area has a search bar and a table of household members. A right sidebar shows a Federal Refund of \$4,497 and a Refund Amount of N/A.

Name	SSN	Date of Birth
QUINCY PIKE	317-00-1234	1/10/1945
MARIAN PIKE	310-00-1234	6/26/1961
LUCAS PIKE	316-00-1234	2/3/2001

3. Does the return reflect all credits and deductions the taxpayer is eligible for? If not, investigate!

- Likewise, does the return show a credit that the taxpayer is not eligible for?
- Check twice for the EITC, CTC, and Credit for other Dependents!

4. Print the return and get signatures.

For an e-file return:

- Print the return using “FC EFILE PRINT SET.”** *Think: should it actually be a paper return?*

A note on consents:

Required to print both consent to use & disclose tax information to Foundation Communities

Not required: Consent to disclose tax return information to VITA/TCE Tax Prep Sites

- Advise the taxpayer that he/she is responsible for the information on his/her tax return.**

Have the client sign both copies of the 8879. Give the client the copy of (1) the tax return (2) the consents (3) a signed 8879. (MFJ taxpayers must both sign the 8879.)

3. Put all other client documents (including copy of return and other signed 8879) inside client envelope.
4. Verify the processing envelope is correct, especially that it (1) includes the volunteer IDs and taxpayer SSN/ITIN, (2) is marked as an e-file return, and (3) includes notes for any other relevant information.
5. Place inside the processing envelope (1) a signed 8879, (2) all W-2s, (3) copies of the photo IDs for the primary and second taxpayer, and (4) copies of the SSN/ITINs for all individuals listed on the return.
6. Click to (1) **mark the return “Is Complete,”** (2) **“approve” the return,** (3) **change the return tag to Complete – E-file,** and **save and exit the return.** Don’t forget to log out of TaxSlayer!

For a paper return:

1. **Make sure the return has been completed through the end of the e-file section,** even though it is a paper return. This is very important; it ensures we can correctly collect all necessary data for these returns. (The status should be “Paper” and return tag “Paper – Complete.”)

2. **Print the return using “FC PAPER PRINT SET.”**

A note on consents:

Required to print both consent to use & disclose tax information to Foundation Communities

Not required: Consent to disclose tax return information to VITA/TCE Tax Prep Sites

3. **Print the paper return print set. It will include two copies of the return.**

For MFS, check the laminated tip sheet to know what hand edits to make to the return once printed!

4. **Advise the taxpayer that he/she is responsible for the information on his/her tax return.**

Have the client sign the other copy of the return. (MFJ taxpayers must both sign the tax return.)

Staple all W2s (and any 1099s showing federal withholding) to the left-hand side of the second page for 2018 returns; staple to first page of the 1040 for prior year returns.

5. Place inside the client envelope the signed return and a pre-addressed envelope, along with the other copy of the return and all other client documents. (We recommend you write COPY at the top of the return the taxpayer will keep for his/her records.) **If the taxpayer is sending in a payment, see “Where to mail the return” on CTC Resources to find the correct address.**
6. Verify the processing envelope is correct, especially that it (1) includes the volunteer IDs and primary taxpayer SSN/ITIN, (2) is marked as a paper return, and (3) includes notes for any other relevant information (including the reason it is a paper return). *The processing envelope stays empty!*
7. Click to (1) **mark the return “Is Complete,”** (2) **“approve” the return,** (3) **change the return tag to Paper - Complete,** and **save and exit the return.** Don’t forget to log out of TaxSlayer!

5. Offer kind, constructive feedback to the volunteer.

Complete the QR Feedback Form! This is an important step in providing constructive feedback so we can all learn from our mistakes and improve as preparers. (The learning process never ends!)