

QUALITY REVIEW CHECKLIST

TaxSlayer:

- Log into [TaxSlayer](#), locate the client under Review Returns or Client Search, click Select.
- Check that all tax documents are for the corresponding year.

Basic Information:

- Confirm that Filing Status, Personal Information, Dependents/Qualifying Person, IRS Identity Protection PINs, and pages are accurate.

Federal Section:

- Review each section Income, Deductions, Other Taxes, Payments & Estimates, and Miscellaneous Forms for accuracy.

Health Insurance:

- Marketplace Insurance (Form 1095-A), If YES, check answers and verify that the amounts in APTC section match the bottom of the client's form.

State Section:

- Click Edit icon  to enter State information. Review each section as needed.

Summary/Print: Tax Return Summary – DO NOT print return yet. Click Continue.

Warnings on Tax Return: Fix any errors on the tax return, if necessary. Review FLAGGING from TaxSlayer if the tax preparer is missing 1095-A and IP-PIN. Click Continue.

E-File Section:

- Return Details – Verify Federal and State Return and refund type, click Continue.
 - Fee Summary – Verify all fees are set to \$0. Click Continue.
 - Bank Account – Verify Direct Deposit information. (Split Refund – Use Form 8888)
 - Optional: Enter taxpayers State ID/License information
 - Taxpayer Consent – Verify the Accept option is selected for both sections.
 - Custom Questions – Verify all questions are answered accurately, click Continue.
 - Submission Page – Print the client's return.
- o Select TAXPAYER COPY PRINT, then Print, then select SIGNATURE DOCUMENTS, then Print. • Client (and Spouse) must sign both copies of IRS Form 8879 and NY Form 579.

Reviewing Tax Return:

- Use the printed copy to review the tax return with the client verifying:
 - Personal Information (Names, SSN/ITINs, mailing address and bank account information)
 - How the return is being processed: E-file vs. Paper file – Direct Deposit vs. Paper Check (mailed)
 - How to pay any due amounts.
 - How to check return status on IRS Website “Where’s My Refund” (www.irs.gov/wheresmyrefund)

E-File Continued:

- Once the tax return is signed, update the Tags, select Approved Status, and mark the return Complete.
- Save and Exit Return.

Final Steps:

- Fill out the Tax Record envelope and return all the taxpayer's documents along with a copy of their tax return.
- Gather paperwork and staple it together (keep original signatures):
 - Signed E-File Signature Pages