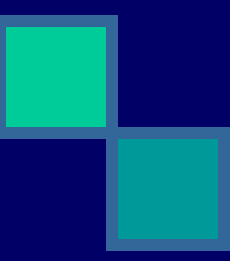
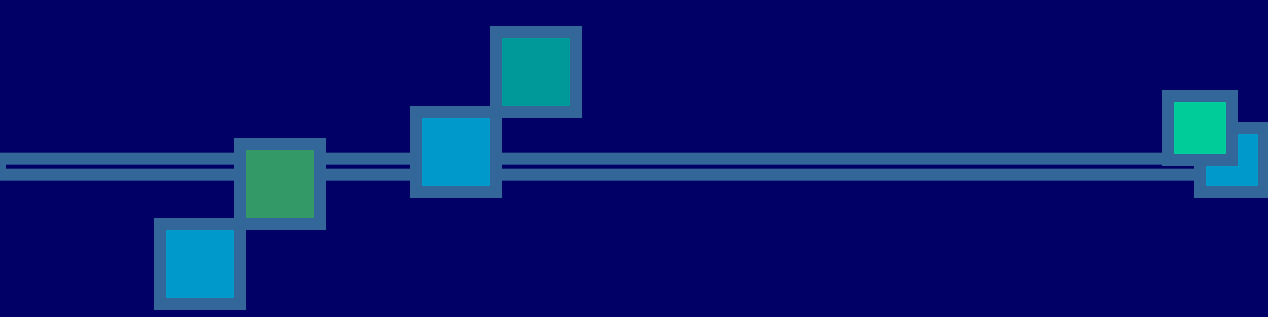


QUALITY REVIEW

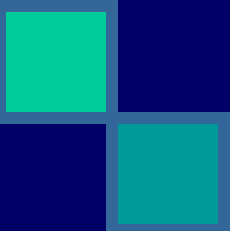





A Good QR
is not *just*
Proofreading!

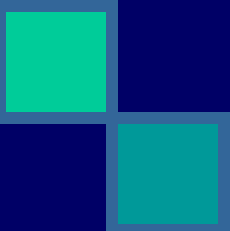



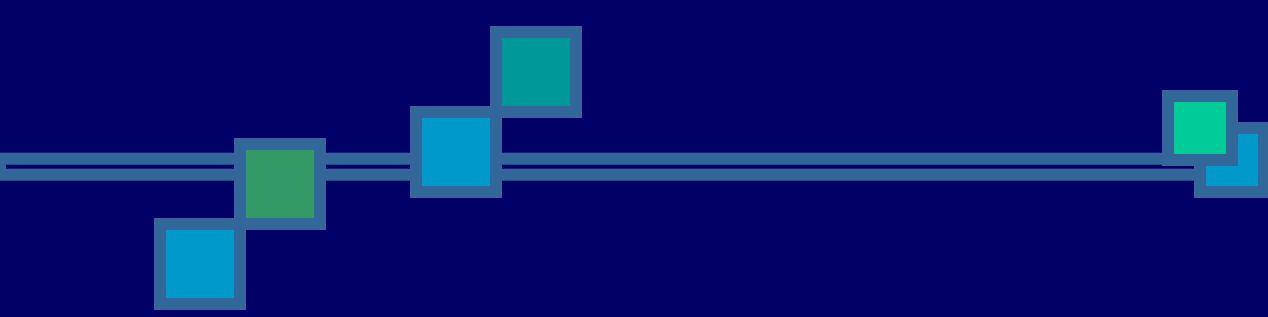
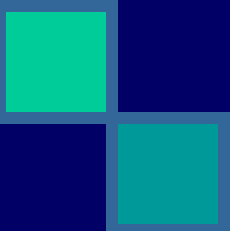

References for a *Quality* Review

- 
- AARP TAX-AIDE INTAKE AND INTERVIEW FORM (FORM #D18445)
 - FORM 8158 - QUALITY REVIEW CHECKLIST (BACK PAGE OF PUB 4012)
 - SOURCE DOCUMENTS
 - THE TAXPAYER!
- 



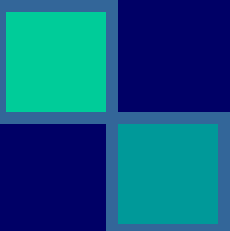

FOR EVERY QR ---

- BEFORE you begin the QR on the computer.....
 - Greet the Taxpayer
 - Review supporting documents with the taxpayer
 - Intake Form
 - SSN's and DOB's
 - Addresses
 - Previous Year's Return
 - Sort and Review Source Documents
- 
- 

- 
- 
- 
- “Build” the return in your mind
 - Filing status?
 - Dependents?
 - Worksheets and Schedules?
 - Complicated Issues?

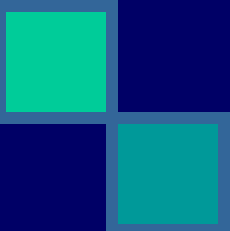



Now to the computer.....

- 
- Run Diagnostics First to identify any trouble spots (overrides)
 - Verify all entries on the Main Info sheet
 - Check the tree
 - Any red marks?
 - Which forms are active?
 - Are there any scratchpads?
- 



Then to the source documents...

- Verify ALL of the source documents matching them to entries in the return
 - Group the documents by type and then check them in the order they appear on the Tree
 - Pay special attention to –
 - The year of the documents
 - EIN numbers and employer addresses & zips
 - Employee Addresses
 - Taxpayer name matches document
 - “Scattered” Reporting Info (Broker Stmts)
- 
- 




When all documents are verified...

Back to the Tree Again!




Still No Red Marks ?!

- Open and Review each Active Form
 - Check for unnecessary Scratchpads
 - Open 1040 pages 1 and 2
 - Do the amounts on each line make sense to you?
 - If you need to recalculate source documents, DO IT
 - Review the Summary Page
- 




“Close” the QR –

- Back to the Main Info Sheet
 - Check Practitioner PIN
 - Verify Direct Deposit Info
 - Add your Initials in the QR Field
 - Check the Return Stage
 - Run Diagnostics
 - Warnings and Overrides
 - E – FILE !!!!!!!
- 

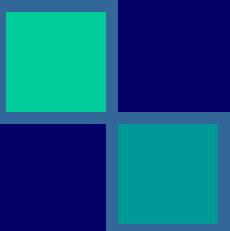



QR'ing a Printed Return

- In order to fully QR a printed return you will need
 - the FILE COPY of Return with ALL SCHEDULES AND FORMS including
 - W2 AND 1099 DETAIL REPORTS
 - INTEREST AND DIVIDEND WORKSHEETS (IF TOTALS ARE LESS THAN \$1500)
 - SCRATCH PADS If any
- 

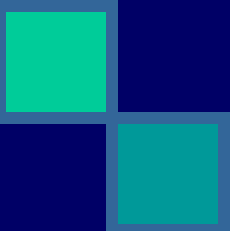



QR COURTESY

- 
- Engage the Taxpayer in the QR
 - Tactfully review any questions you may have or discrepancies you find with the Counselor who prepared the return *before* making any changes
- 



QUALITY IS JOB 1!

- 
- No Rewards for Speed
 - EVERY Taxpayer deserves the best service we are capable of providing
- 



Even the IRS has a QUALITY REVIEW PLAN

- SITE REVIEWS
 - RETURN REVIEWS
 - SHOPPING REVIEWS
- 