QR ALLSTARS
QUALITY REVIEW CHEATSHEET

1. Verify Client Identity and Basic Information

- Confirm Social Security Numbers (SSN) for taxpayer, spouse, and dependents.
- Verify names are spelled correctly as shown on Social Security cards.
- Confirm filing status is accurate (Single, Married Filing Jointly, Head of Household, etc.).

2. Review Income Documents

- Ensure all income sources are reported, including:
  - **W-2s:** Verify wages, federal and state taxes withheld.
  - **1099s:** Interest, dividends, self-employment, unemployment compensation, etc.
  - **Other Income:** Social Security benefits, gambling winnings, or any miscellaneous income.

3. Check Adjustments and Deductions

- Confirm adjustments to income are documented, including:
  - Student loan interest
  - Educator expenses
  - Retirement contributions (IRA or self-employed plans)
- Verify standard or itemized deductions are applied correctly.

4. Confirm Credits and Qualifications

- **Earned Income Tax Credit (EITC):**
  - Verify earned income and AGI limits.
  - Confirm qualifying child requirements are met.
- **Child Tax Credit and Additional Child Tax Credit:**
  - Confirm eligibility and SSN requirements for dependents.
- **Education Credits (American Opportunity Credit, Lifetime Learning Credit):**
  - Confirm student eligibility and Form 1098-T details.

5. Cross-Check Source Documents and TaxSlayer Entries

- Compare all entries in TaxSlayer with original source documents.
- Confirm all supporting documents are scanned and saved in the system.
- Verify any manually entered amounts for accuracy.

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6. Confirm Taxpayer Review and Approval

- Review the completed tax return with the taxpayer.
- Address any questions or discrepancies before proceeding.
- Ensure taxpayer e-signature is obtained for e-filing.

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7. Final Review Before E-Filing

- Verify all forms are completed and required schedules are included.
- Confirm bank information for direct deposit (if applicable).
- Double-check e-filing readiness in TaxSlayer.

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8. Common Pitfalls to Avoid

- **Incorrect SSNs or Names:** Double-check against source documents.
- **Missing Income Sources:** Confirm with taxpayer if any documents seem absent.
- **Overlooked Credits or Deductions:** Ensure all eligible credits/deductions are considered.
- **Inaccurate Bank Information:** Confirm account and routing numbers.

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9. Escalation and Assistance

- If complex issues arise (e.g., nonresident returns, rental income, multiple state returns), consult the Site Manager.
- Use the IRS VITA/TCE training resources for guidance on complex scenarios.

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10. Final Checklist

- All entries verified with source documents.
- Taxpayer approved the return.
- Return is signed and ready for e-filing.
- All supporting documents are scanned and saved.