

E-file Order of papers for check-out/quality review

E-File Returns

1. Colored Taxpayer Data sheet-complete bottom portion
2. Copy of Form 8879-signed
3. Taxpayer Info sheet – Form 13614-complete pg 3
4. One copy of W-2(s)
5. Diagnostic Report
6. Main Information sheet
7. Vouchers if needed – loose - Items 1-6 are official packet
8. Complete Copy of Federal and State for Client
 - Federal should have all official forms in order (note numbers on upper right of Forms. (Letters then numbers)) Include copy of Payment Voucher.
 - All statements and worksheets follow official forms
 - Main Info sheet last
 - Full copy of NC including TC forms if required and Payment Voucher
9. All backup for the return with Social Security Card for EVERYONE on the return on top. Followed by W-2s and 1099Rs, etc. It is not necessary to separate the W-2s or 1099Rs UNLESS there is federal and/or state withholding. Then we need Copy B for Federal . The other copies will be attached to the client copy by QR.
10. Assemble the return as above keep the required items for “HQ” separately. Staple the Taxpayer copy together with W-2s attached. Assemble the “HQ” papers according to the Tax Return Packet Procedure established for TY2009.

Mail-In Order of papers for check-out/quality review

Mail In Returns

1. Colored Taxpayer Data Sheet – Complete bottom portion
2. Taxpayer Info sheet – Form 13614-C – Complete page
3. Diagnostic
4. Main Info sheet
5. Complete Copy of Federal and State Returns for filing. These should include ONLY the official forms and necessary statements for both State and Federal, including Payment Vouchers if required. Attach Copy B & State W-2s where indicated on return.
6. Complete Copy of Federal and State for Client
 - Federal should have all official forms in order -note numbers on upper right of Form. Include a copy of Payment voucher.
 - All statements and worksheets following the official forms
 - Full copy of NC including TC forms if required. And copy of Payment voucher.
7. All backup for the return with Social Security Cards on top, and followed by W-2s, 1099Rs, etc. and all in a plastic folder. It is not necessary to separate the W-2s or 1099Rs UNLESS there is federal and/or state withholding. Then we need Copy B for Federal and Copy 2 for State.