Quality Review Techniques

- Check Taxpayer Data Sheet for signatures and that Form 8879 if E-filing is in return for review as well as 2 copies of the voucher(s) if tax due.
- Compare Names, Address and other data to information in the plastic folder and on the Main Information Sheet and Form 13614-C. Be sure to check for notes on page 4. Pay special attention to SSNs and names – our biggest error on returns.
- Review Page 2 & 3 of Form 13614-C. Consider the preparer's decisions based upon info on Page 1 & 2. Look at info in plastic folder as you review.
- Double check the backup data as to withholding, itemized deductions, especially Real Estate Tax & new car for Federal and Charity for NC return. Be sure that NC shows credits for Form 2441, Child Tax Credit and EIC (refundable) if on the Federal Return.
- Eyeball the numbers for any obvious omissions especially withholding. Also for numbers that seem unusually large or small relative to the info at hand.
- Complete Page 3 of the Form 13614-C and initial.

Assembly Guidelines

- Ask client to fill out the survey(s) while QR is reviewing and collating the return(s).
- Follow Packet Procedures for setting up & ordering Client Copy (ies). Staple W-2s and organize material to be returned. Prepare VITA Envelope w/name and year. Give them pre-addressed envelopes for payments and/or for paper returns.
- Return SSN cards first. Review the entire return with the taxpayer before they leave. Give them official VITA envelope to save their copy and remind them to bring it next year. Include all backup for return in the envelope and caution them to save TOGETHER in case of an IRS Notice.
- Go over payments due/refund with the client. Give labeled envelopes for mailing. Offer Form 9465 Installment Agreement Request. Avoid credit card use. Affix “sticky” with Due Date for filing/making payments.
- Ask them to tell friends about VITA and encourage them to use our services.

Updated 1/24/10