

## **Gold Standards for Quality Review**

*A second set of eyes and ears for every return*

### **Quality Review will be done on every return by second certified Counselor**

- Done with the taxpayer, using the computer;
  - Intake/Interview Sheet reviewed with taxpayer
  - Additional probing questions are asked to ensure accuracy and completeness
  - Notes made on sheet of new or different information; TW diary done if appropriate
  - QR results reviewed with preparing counselor for training purposes
1. **COMPARE** Intake/Interview Sheet and supporting documents with return:
    - Review Intake/Interview Sheet for possible dependents and compare with return
    - Verify most advantageous filing status is selected
    - Verify dependent coding on Main Info Sheet, e.g., EIC
    - Verify adjustments
    - Verify deductions (Schedule A)
    - Verify credits – including required forms
    - Verify correct entry of withholding and any estimated payments
    - Verify direct deposit information
  2. **CHECK Input Items**
    - Look for typos, transposed digits, missing information, misspellings, etc.
  3. **ASK** “Is there any other income?”
  4. **COMPARE**
    - If returning client, review Summary Form in TaxWise to compare year-over-year changes; otherwise, compare past year return (if available) to current return
    - Verify differences are reasonable and taxpayer understands reasons for any “significant” changes
  5. **CHECK TaxWise**
    - Remove unnecessary overrides
    - Verify no red fields or incomplete forms
    - Verify input done for Field 11 (language) and Field 12 (disability)
    - Verify preparing counselor’s initials in field 13; add QR initials in field 14

***Remind the taxpayer that the accuracy and completeness of the return are the taxpayer’s responsibility!***