

OPEN QUALITY REVIEW PRINT SET

VERIFY THE CLIENT’S PERSONAL INFORMATION WITH THE CLIENT:

- NAME (FIRST, LAST IN PROPER ORDER), ADDRESS, SSN, BIRTHDATE

COMPARE EVERY DETAIL OF THE W-2 TO THE MOCK UP ON THE NEXT PAGE

AGREE EVERY DETAIL OF THE W-2 WHILE SHOWING THE CLIENT WHAT YOU ARE DOING

“These are your total wages, which agree to your W-2” or “which have been reduced by your treaty”

If treaty was manually applied, explain the note that will be here.			
Wages, salaries, tips, etc. Attach Form(s) W-2	3		25858
Taxable refunds, credits, or offsets of state and local income taxes	4		
Scholarship and fellowship grant This is your taxable scholarship income (agrees to 1042-S)	5		3320
Total income exempt by a treaty from page 2, Item J(1)(e)	6		
Add lines 3, 4, and 5	7		29178
Scholarship and fellowship grant These are your university fees which we are deducting from your taxable scholarship income (agrees to fee bills)	8	1342	
Student loan interest deduction	9		
Subtract the sum of line 8 and line 9 from line 7. This is your adjusted gross income	10		27836
Itemized deductions. See the instructions for limitation	11	Your itemized deduction is equal to your state withholding (point to W-2)	415
Reserved.	12		
Reserved.	13		
Taxable income. Subtract line 11 from line 10. If line 11 is more than line 10, enter zero	14	Therefore, your taxable income is \$27,421 and your tax on that income is \$3,101.	27421
Tax. Find your tax in the tax table in the instructions	15		3101
Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	16		
Add lines 15 and 16. This is your total tax	17		3101
Federal income tax withheld This is your withholding from your W-2 (point to W-2), and this is your withholding from your 1042-S (point to 1042-S)	18	2942	
Federal income tax withheld This is your withholding from your W-2 (point to W-2), and this is your withholding from your 1042-S (point to 1042-S)	19	465	
2018 estimated tax payments and amount applied from 2017 return	20		
Credit for amount paid with Form 1040-C	21		
Add lines 18a through 20. These are your total payments	22		3407
If line 21 is more than line 17, subtract line 17 from line 21. This is your refund	23	Therefore, you are getting a refund of \$306.	306
Amount of line 22 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	23a		306

- MAKE SURE THAT EVERYTHING YOU ARE SAYING ALSO MAKES SENSE TO YOU!
- MAKE NOTE OF ERRORS YOU NEED TO FIX WHEN YOU GO INTO THE RETURN!

IN A SIMILAR FASHION, GO THROUGH THE SCHEDULE OI

- POINT OUT THEIR ENTRY/EXIT DATES AND APPLICABLE TREATIES
- LOOK TO MAKE SURE ALL APPROPRIATE TREATIES ARE INCLUDED!

GO THROUGH THEIR FORM 8843

- VERIFY THEIR PASSPORT NUMBER

GO THROUGH THEIR STATE RETURN

- SHOW HOW IT STARTS WITH THEIR FEDERAL ADJUSTED GROSS INCOME
- EXPLAIN HOW/WHY THEIR TREATY INCOME IS BEING ADDED BACK
- MAKE SURE IT IS NET OF QTRE!
- POINT OUT THE TAX ON THEIR CT AGI, THEIR WITHHOLDING AND TAX REFUND OR AMOUNT DUE.



CLOSE THE PRINT SET AND GO INTO THE RETURN

- GO INTO EACH 1042-S AND MAKE SURE EVERY BIT OF INFO AGREES
- NAVIGATE TO THE E-FILE SECTION
- WHEN THE STATE ERROR COMES UP EXPLAIN THAT IT'S JUST SAYING WE CAN'T EFILE THE STATE AND THAT YOU WILL GIVE THEM INSTRUCTIONS
- ☐ **SEE WHAT TYPE OF FEDERAL RETURN IS BEING FILED (EFILE/PAPER)**
 - ARE THEY MARRIED AND THEIR SPOUSE DOESN'T HAVE A SSN? **PAPER!**
 - IS THEIR AGI LESS THAN THEIR WITHHOLDING? **PAPER!**
 - ARE THEY FILING AN 8833? **PAPER!**
 - EXPLAIN THAT THEIR REFUND WILL BE DIRECT DEPOSITED (OR PAPER CHECK, THEY OWE, ETC.)
- ☐ **SEE WHAT TYPE OF STATE RETURN IS BEING FILED**
 - EXPLAIN THAT THEIR REFUND WILL BE DIRECT DEPOSITED (OR PAPER CHECK, THEY OWE, ETC.)
 - IF THEY OWE, EXPLAIN THAT YOU WILL GIVE THEM PAYMENT INSTRUCTIONS IN YOUR EMAIL
- ☐ **WHEN YOU LEAVE THIS PAGE, IF ANYTHING ELSE IS MISSING/WRONG YOU WILL BE PROMPTED**
- ☐ **ON THE FINAL PAGE, THIS IS WHERE YOU USE THE "PRINT" FUNCTION TO DOWNLOAD THE RETURN**
 - EXPLAIN THAT YOU ARE DOWNLOADING THE RETURN AND WILL SEND IT TO THEM VIA FILELOCKER
 - GET THEIR NETID TO MAKE SURE WE SEND IT TO THE RIGHT PERSON
- ☐ **AGAIN, EXPLAIN THE PAGE AS YOU LOOK AT IT**
- ☐ **INFORM THEM THAT EVERYTHING CONTAINED IN THE RETURN IS BASED ON THE INFORMATION THEY PROVIDED AND IT IS THEIR RESPONSIBILITY**
- ☐ **COMPLETE THE REVIEW CHECKLIST**
- ☐ **IF THEY ARE SATISFIED AND YOU ARE SURE THE FEDERAL IS BEING FILED CORRECTLY, FILE!**
- ☐ **HAVE THEM FILL OUT THE SURVEY WHILE YOU SEND THEM THE EMAIL AND THEIR RETURN**
- ☐ **YOU'RE DONE!**