Tips For Success

Advanced Preparers

1. Clock-in upon arrival
2. Name-tag (first & last name)
3. Let Admin Director know you are ready to begin a review
4. Make sure docs have been scanned and uploaded into TaxSlayer
5. If client docs are reviewed from client phone and not scanned, be sure to make a note in TaxSlayer indicating such
6. Be sure to discuss health care coverage with client – we need to make sure that the info from form 1095-A, if required, has been entered into the return
    a. Many clients are confused about this issue
    b. Medicare coverage does not require 1095-A
    c. Medicaid coverage does not require 1095-A
    d. Employer provided healthcare does not require 1095-A
7. If you are reviewing the return in the preparers log-in, make a note that you (include your name) reviewed the return in TaxSlayer
8. Review completed returns with the client
9. Complete and attach client cover sheet to the client copy of the returns
    a. Review the cover sheet with the client – point out results and how they can contact us with questions
    b. Point out our web address and let them know the website has links to check on refunds, etc.
10. Have clients sign our copy of the e-file authorization forms for the federal and state returns
11. Walk the client to the check-out station
12. When shift is finished, please assist in facility clean-up