## PREPARER TRANSMITTAL TO QUALITY REVIEW

Taxpayer Name:	Preparer ID:
	Purple folder should include:
I believe this Taxpayer is:	This gold form, completed
☐ Ready to File	2. Intake Form, marked-up in red pen
-	3. Blue Residency Form
□ NOT ready to File. Explain why. ————————————————————————————————————	4. Tan Additional Question (Education/Iowa) form
	5. Gray Federal Adjustment for Iowa return
	6. One copy detached from each set of W-2's
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	NOTE: Be sure you have marked-up the Intake form in red
	pen. If the taxpayer has income amounts not on
	the W-2 or expenses that affect the return, record them as comments on the Intake form.
	them as comments on the intake form.
ist any outstanding issues you want our quality reviewe	ers to look at:
Common Items:	Other items:
□ Scholarships/Fellowships/Education Credits	
☐ Missing Bank account information	
<ul><li>Missing Federal Return from last year</li><li>State Residency Status</li></ul>	
State residency Status	
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11.15 11.1. <del></del>	Purple folder should include:
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Common Items:	pen. If the taxpayer has income amounts not on the W-2 or expenses that affect the return, record them as comments on the Intake form.
Common Items:  Scholarships/Fellowships/Education Credits	pen. If the taxpayer has income amounts not on the W-2 or expenses that affect the return, record them as comments on the Intake form.
Common Items:  Scholarships/Fellowships/Education Credits  Missing Bank account information	pen. If the taxpayer has income amounts not on the W-2 or expenses that affect the return, record them as comments on the Intake form.
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