

## PREPARER TRANSMITTAL TO QUALITY REVIEW

Taxpayer Name: \_\_\_\_\_

Preparer ID: \_\_\_\_\_

I believe this Taxpayer is:

- ☐ Ready to File
- ☐ NOT ready to File. Explain why.

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Purple folder should include:

1. This gold form, completed
2. Intake Form, marked-up in red pen
3. Blue Residency Form
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

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.

List any outstanding issues you want our quality reviewers to look at:

Common Items:

- ☐ Scholarships/Fellowships/Education Credits
- ☐ Missing Bank account information
- ☐ Missing Federal Return from last year
- ☐ State Residency Status

Other items:

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