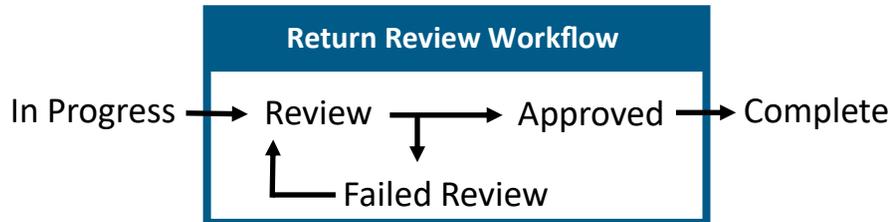# Return Review Workflow

A formalized tax return review process helps catch errors and omissions as well as returns that have been inappropriately prepared. In an office with multiple preparers with varying degrees of experience, this system can help ensure the accuracy and integrity of the return preparation process.

Return Review Workflow is a feature of TaxSlayer Pro that allows the ERO or manager of the tax office to review tax returns before they are marked complete and electronically filed. Before a return is marked complete, it will have one of four statuses: In Progress, Review, Failed Review, or Approved.

To use Return Review Workflow, from the Main Menu of TaxSlayer Pro select **Configuration**:

In the Configuration Main Menu select **Firm / ERO / Preparer Setup**:

In the Company Setup Menu, select **Use Return Review Workflow**, toggling NO to YES:
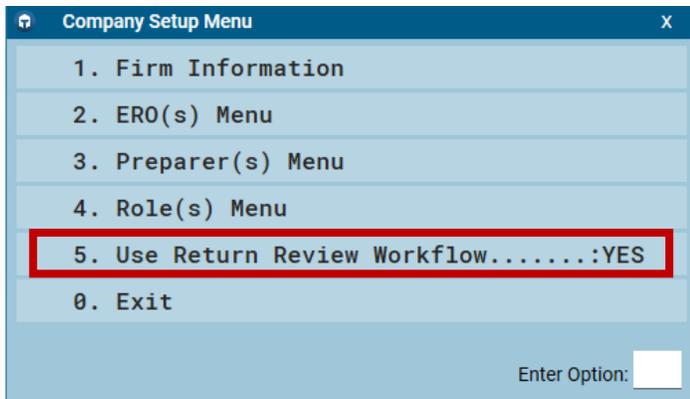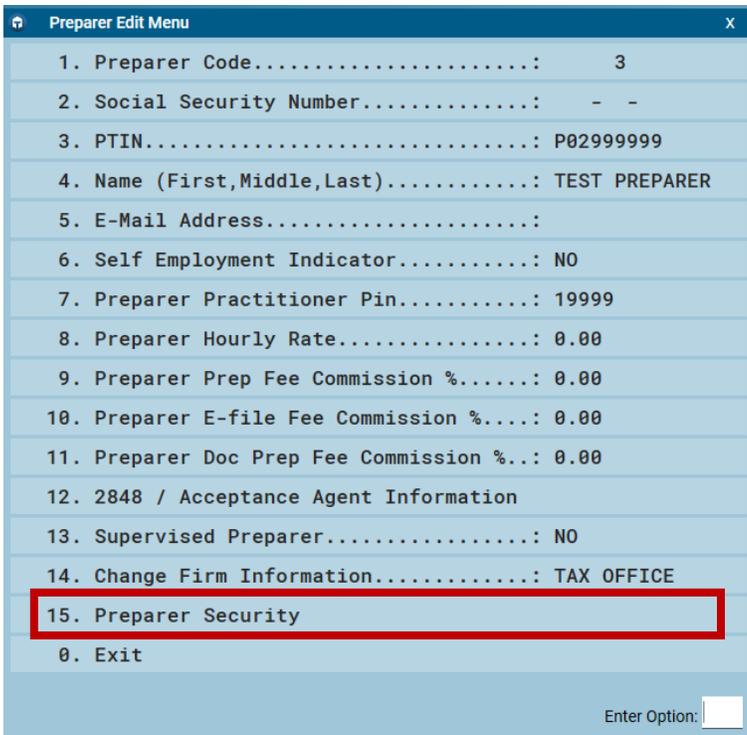

At this point, each preparer's return review settings will need to be reviewed. Select the **Preparer(s) Menu** to display the list of preparers:
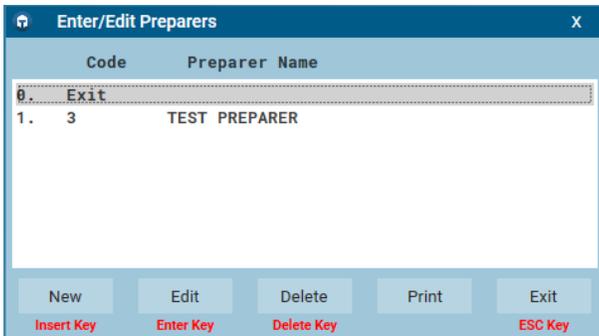
Double-click a preparer or type the corresponding number to open the Preparer Edit Menu.

Select Preparer Security to display the Preparer Security Menu:

Select Return Review Workflow Options:

By default, all options are initially selected.

Uncheck any option you don't want for a given preparer:
  Can Create New Returns – This option allows the preparer to create a new tax return.
 **Can Review Returns** – This option allows the preparer to review and either approve or fail a return that
    has been marked for review.
  Can Mark Returns Complete – This option allows the preparer to mark an approved return complete
   and ready for transmission.

## Example 1: Preparer can only create new returns
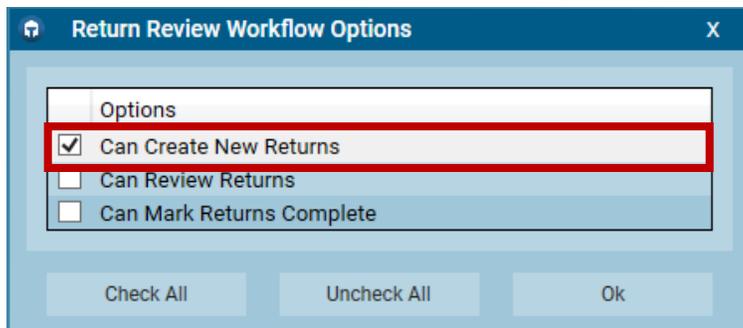
The preparer in this example can only create new returns; they are not able to review the returns or mark them complete. Once the preparer completes a return, upon exiting the Receipt Menu after exiting the return, they will be given the option to mark the return for review. They will not see any other options at this point:
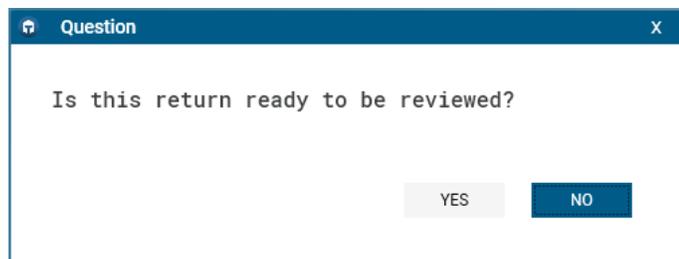

## Example 2: Preparer can create and review returns
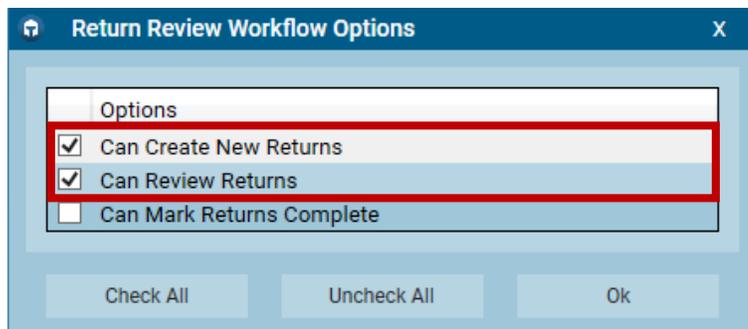
In addition to creating a new return, this preparer can review and either approve or fail a return. Returns that need to be reviewed are in the Returns to Review client list, available by clicking the Review Returns icon in the tool bar at the top of TaxSlayer Pro:
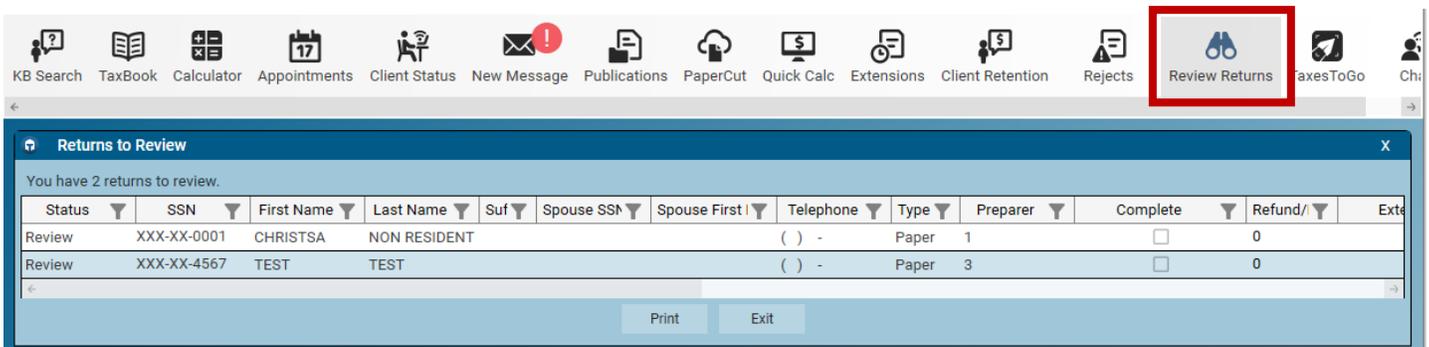
To review a return, double-click the return to open it. After finishing the review, the preparer will exit the return, then exit the Receipt Menu, and will be presented with a question:
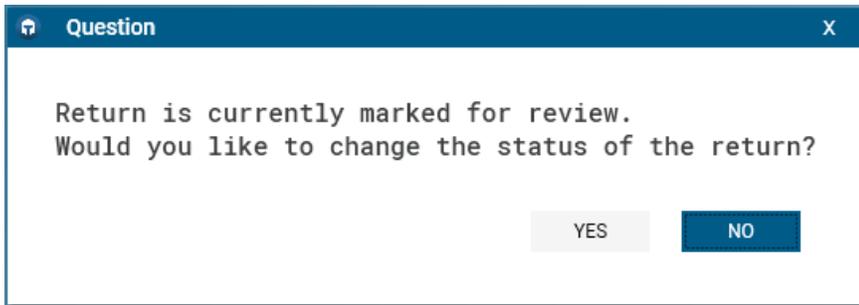
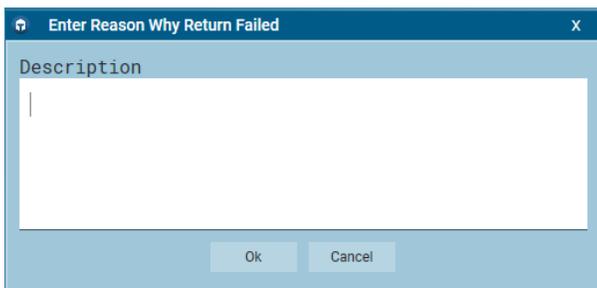Select NO to keep the return in Review status. Select YES to change the status as follows:
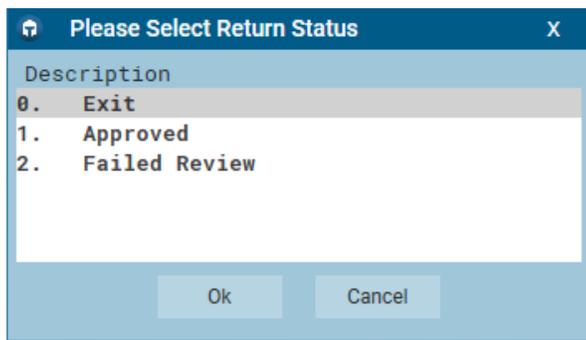
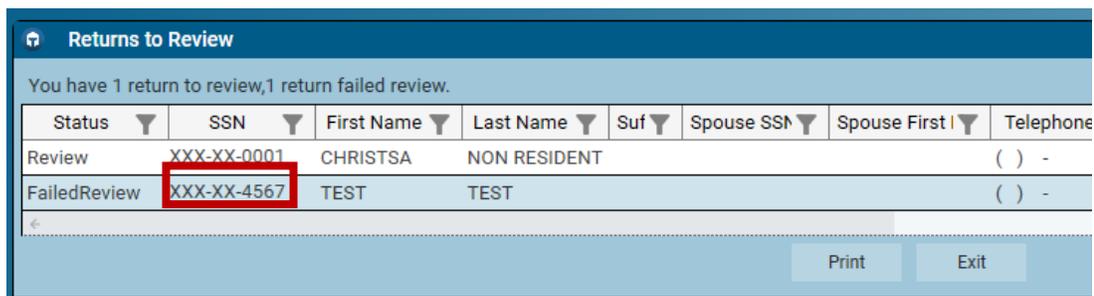**Approved** – the return is ready to be marked complete.
Failed Review – the return needs correction or further work.
Exit or **Cancel** – the return will remain in Review status.

If Failed Review is specified, the reviewer can enter information regarding why the return failed the review:

In the Returns to Review client list the return will now indicate that it has failed the review:

When a return that has failed review is opened, the reviewer's notes will show to let the preparer know what needs to be done. After making the corrections, upon exiting the return the preparer will be prompted to change the return's status:
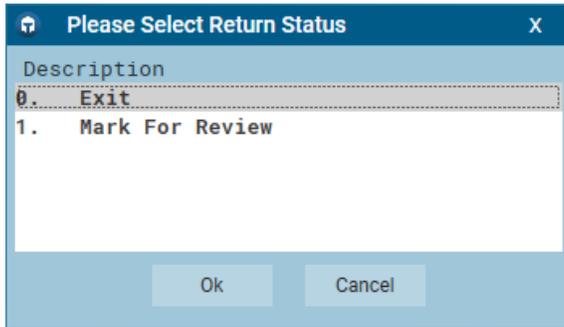
Mark For Review – revert the status to Review.
Exit or **Cancel** – exit the return and leave it in Failed Review status.

The reviewer, after reviewing and exiting the return, will once again be given the option to approve or fail the return:
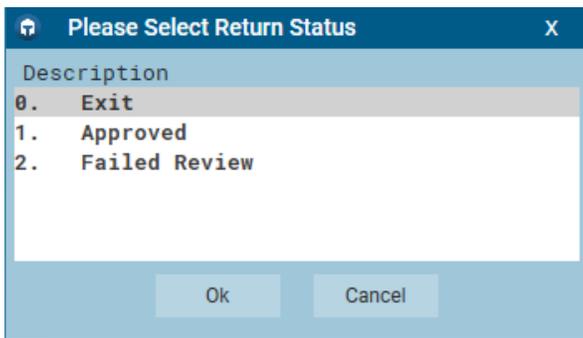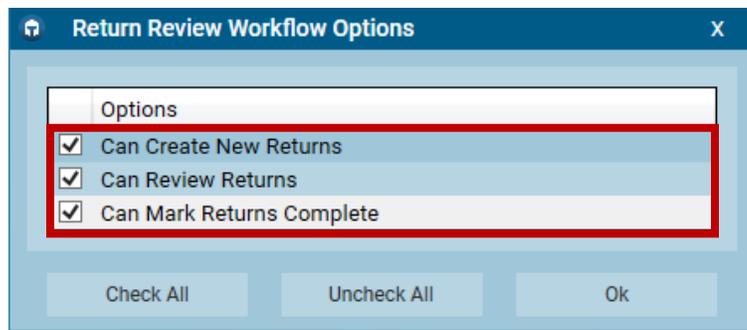

If the reviewer selects Approved, the return will now show a status of Approved in the Returns to Review client list:

A preparer who has permission to mark returns complete will need to open and exit the return to mark it complete.

Example 3: Preparer can create and review returns and mark them complete

These settings give a preparer the ability to create, review, and mark returns complete. (These are the default settings when Return Review Workflow is initially enabled.) When a return in Approved status is exited from the Receipt menu, the preparer will be prompted to mark it complete:
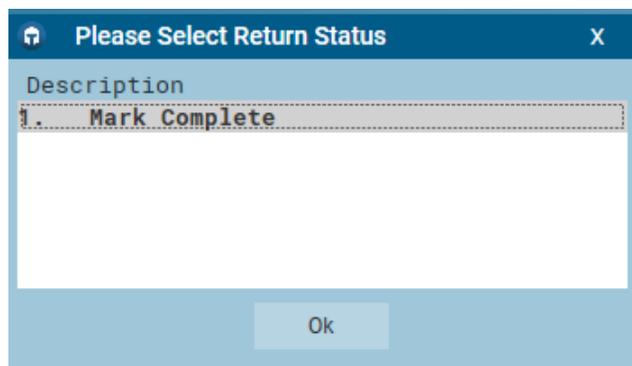
Caveats:

- After enabling Return Review Workflow, be sure to review every preparer's Return Review Workflow Options as all are enabled by default.

- If more than one computer is preparing tax returns and the computers are networked, enabling Return Review Workflow and setting the preparer options must be done on the computer designated as the File Server. After making the changes, the program will need to be restarted on the Workstations.

- Returns with the status In Progress and returns that are marked Complete don't show in the Returns to Review client list.

- Once a return has been marked Review, its status cannot be reverted to In Progress. It will show in the Returns to Review client list with one of three statuses: Review, Failed Review, or Approved.

- Once a return has been marked Approved, it cannot be reverted to Review status.

- Once a return has been marked Approved, the next time it is opened and exited it must be marked Complete.