

Form <b>6729</b> (Rev. September 2007)	Department of the Treasury – Internal Revenue Service <b>Quality Site Review Sheet</b>	Date of Review:
Site Name:	SIDN:	SPEC Projects: <input type="checkbox"/> EQ <input type="checkbox"/> PBT
Review conducted by: <input type="checkbox"/> Relationship Mgr <input type="checkbox"/> Territory Mgr <input type="checkbox"/> Other SPEC Staff <input type="checkbox"/> Partner		
Type of Review: <input type="checkbox"/> QIP <input type="checkbox"/> Post Shopping <input type="checkbox"/> Follow-up	Site Type: <input type="checkbox"/> E-file <input type="checkbox"/> Paper Only	

**Instructions: Use this form to record whether the site is following operating standards as outlined in Publication 1084, IRS Volunteer Site Coordinator's Handbook, Publication 3189, Volunteer E-file Administrator's Guide and/or Publication 1101, Application Package and Guidelines for Managing a TCE Program. Additional information may be found in SPEC Site review guidelines and in IRM 22.30. Do not enter any information that identifies a specific person in the comments box. Detail corrective actions in the comments box.**

Return Preparation	YES	NO	N/A	Comments
<b>1</b> Are all volunteers who are preparing/correcting tax returns, conducting Quality Reviews and/or addressing tax law questions at the site <b>today</b> certified?				
<b>2</b> Is Publication 4012, <i>Volunteer Resource Guide</i> , available for use at the site?				
<b>3</b> Is Publication 17, <i>Your Federal Income Tax For Individuals</i> , available for use at the site?				
<b>4</b> Did you observe copies of completed returns being provided to the taxpayers?				
<b>5</b> Which method does the site generally use to conduct <b>Quality Reviews</b> on all returns? <input type="checkbox"/> Self-review <input type="checkbox"/> Designated Review <input type="checkbox"/> Peer Review <input type="checkbox"/> None				
<b>6</b> What type of Quality Review tool does the site use to review returns? <input type="checkbox"/> Form 8158 <input type="checkbox"/> None <input type="checkbox"/> IRS Approved Partner <input type="checkbox"/> Unapproved Partner Developed Form                      Developed Form				
<b>7</b> What type of <b>intake and interview sheet</b> does the site use to prepare returns? <input type="checkbox"/> Form 13614 <input type="checkbox"/> TaxWise Option <input type="checkbox"/> None <input type="checkbox"/> IRS Approved Partner <input type="checkbox"/> Unapproved Partner Developed Form                      Developed Form				

Site Operations	YES	NO	N/A	Comments
<b>8</b> Is Title VI, <i>Your Civil Rights Are Protected</i> , information available at the site?				
<b>9</b> Is the site operating information recorded in STARS correctly?				
<b>10</b> Is the site using the correct SIDN?				
<b>11</b> Are all volunteers receiving all 2008 Volunteer Quality Alerts?				
<b>12</b> Are all volunteers receiving all 2008 Quality Site Requirement Alerts?				
<b>13</b> Which Administrative Resource materials are available at the site? (Check all that apply.) <input type="checkbox"/> Publication 3189 <input type="checkbox"/> Publication 4299				

E-File Sites Only		YES	NO	N/A	Comments
14	Is the site using the correct EFIN?				
15	Generally, how long after preparation does it take to transmit a completed return? <input type="checkbox"/> within 24 hours <input type="checkbox"/> within 48 hours <input type="checkbox"/> within 72 hours <input type="checkbox"/> Longer				
16	Generally, when does the site retrieve e-file acknowledgments after return transmission? <input type="checkbox"/> within 24 hours <input type="checkbox"/> within 48 hours <input type="checkbox"/> within 72 hours <input type="checkbox"/> Longer				
17	For e-file rejects not requiring taxpayer contact, how long does the site take to correct them? <input type="checkbox"/> within 24 hours <input type="checkbox"/> within 48 hours <input type="checkbox"/> within 72 hours <input type="checkbox"/> Longer				
18	For e-file rejects that cannot be corrected, does the site take reasonable steps to notify the taxpayers within 24 hours?				
19	Is the site properly retaining or forwarding Forms 8879, <i>IRS e-file Signature Authorization</i> and supporting documents?				
20	Is the DCN included on all taxpayer return copies, Forms 8879, <i>IRS e-file Signature Authorization</i> , and/or Forms 8453, <i>U. S. Individual Income Tax Transmittal for an IRS e-file Return</i> ?				
Privacy & Confidentiality		YES	NO	N/A	Comments
21	Have all volunteers working at the site today, signed Form 13615, <i>Volunteer Agreement</i> ?				
22	Is sensitive information disposed of properly (e.g. shredded, burned, or returned to taxpayer), as defined in Publication 4299, <i>Privacy and Confidentiality - A Public Trust</i> ?				
23	Are all computers, software, and backup media used by the site password protected?				
24	Is taxpayer data retained for purposes other than preparation of the current year tax return?				
24a	If yes to question 24, does the partner's written notice meet the requirements outlined in Publication 4299, <i>Privacy and Confidentiality - A Public Trust</i> ?				
25	Is taxpayer information safeguarded as defined in Publication 4299, <i>Privacy and Confidentiality - A Public Trust</i> ?				

**Remarks:** This section should be used to solicit feedback from Volunteers and Partners. Please record their general observations and comments in regard to the volunteer programs. Do not enter any information that identifies a specific person in the comments or remarks boxes.