

Form 6729C (Rev. September 2007)	Department of the Treasury – Internal Revenue Service Quality Return Review Sheet	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"/> Follow-up	Site Type: <input type="checkbox"/> E-file <input type="checkbox"/> Paper Only	Type of Return: <input type="checkbox"/> 1040 <input type="checkbox"/> 1040A <input type="checkbox"/> 1040EZ

Instructions: This form is used to measure the accuracy of return preparation based on all available information. Indicate your answer by marking the appropriate box. Do not enter any information that identifies a specific person, either volunteer or taxpayer in the comments box. The comments box is for general observations and/or feedback from volunteers, site coordinators, or partners.

	Quality	YES	NO	N/A	Comments
1	Was an approved Intake/Interview Sheet used in the preparation of this return?				
2	Was an approved Quality Review Sheet used in the preparation of this return?				
	Label/Identity	YES	NO	N/A	Comments
3	Is the taxpayer's name on the return correct?				
4	Is the taxpayer's SSN/ITIN on the return correct?				
5	Is the spouse's name on the return correct? If no spouse, check N/A and skip to Question 7.				
6	Is the spouse's SSN/ITIN on the return correct?				
	Filing Status				Comments
7	What is the filing status on the return? <input type="checkbox"/> Single <input type="checkbox"/> MFJ <input type="checkbox"/> MFS <input type="checkbox"/> HOH <input type="checkbox"/> QW				
	Filing Status	YES	NO	N/A	Comments
8	Based on the information provided, is the filing status on the return correct? If the filing status is correct, check yes and skip to Question 10.				
9	If the filing status is incorrect on the return what is the correct filing status? <input type="checkbox"/> Single <input type="checkbox"/> MFJ <input type="checkbox"/> MFS <input type="checkbox"/> HOH <input type="checkbox"/> QW				
	Dependents	YES	NO	N/A	Comments
10	Is the dependent's name(s) on the return correct? Check N/A if no dependents and skip to Question 12.				
11	Are all dependent's SSN/ITIN(s) on the return correct?				
12	Based on the information provided, is the number of dependent(s) on the return correct?				
	Income/Adjustments/Deductions	YES	NO	N/A	Comments
13	Is income from Form(s) W-2, 1099 and/or other sources reported on the return correctly?				
14	Are all adjustments to income reported on the return correctly?				
15	Is the standard deduction amount reported on the return correctly?				
16	Are all itemized deductions reported on the return correctly?				

Child & Dependent Care Credit		YES	NO	Comments
17	Does the taxpayer qualify for the Child & Dependent Care Credit?			
18	Is the amount of Child & Dependent Care Credit on the return correct?			
Retirement Savings Contributions Credit		YES	NO	Comments
19	Does the taxpayer qualify for the Retirement Savings Contributions Credit?			
20	Is the amount of Retirement Savings Contributions Credit on the return correct?			
Child Tax Credit		YES	NO	Comments
21	Does the taxpayer qualify for the Child Tax Credit?			
22	Is the amount of Child Tax Credit on the return correct?			
23	Does the taxpayer qualify for Additional Child Tax Credit?			
24	Is the amount of Additional Child Tax Credit on the return correct?			
Earned Income Tax Credit		YES	NO	Comments
25	Does the taxpayer qualify for Earned Income Tax Credit?			
26	Is the amount of Earned Income Tax Credit on the return correct?			
27	Did the taxpayer receive Advanced Earned Income Tax Credit?			
28	Is the amount of Advanced Earned Income Tax Credit on the return correct?			
Other Credits		YES	NO	Comments
29	Were all other credits applied on the return correctly?			
Procedures		YES	NO	Comments
30	Was the return prepared using tax preparation software?			
31	Based on the review of this return and supporting documentation, did the Intake and Interview Sheet reflect the information shown on the return?			
32	Is the DCN included on all taxpayer return copies, Form 8879, <i>IRS e-file Signature Authorization</i> and/or Form 8453, <i>U.S. Individual Income Tax Transmittal for an IRS e-file Return</i> ?			
Return Results		YES	NO	Comments
33	Based on the information provided, was the total tax on the return correct?			
34	Based on the information provided was the tax refund/ balance due on the return correct?			