

This checklist should be completed by the volunteer assistor with the customer after the return is completed.

This checklist is also found on Publication 730, Important Tax Records Envelope.

To help us measure the quality of tax returns, please take a few minutes to review each item below. Please check each appropriate box as you verify an item or leave it blank if the item does not apply to the tax return. If items are incorrect or incomplete please make corrections to the return before the customer leaves the site.

- Is the name and Social Security number of the taxpayer(s), including a spouse and any dependents, correct?
- Is the address correct?
- Is the Presidential Election Campaign box checked?
- Was the taxpayer's filing status validated? Were enough questions asked to correctly determine the taxpayer's filing status?
- Is the income from all taxable sources reported and transferred from all Forms W-2 and other income documents?
- Does the tax withheld agree with Forms W-2 and other source documents?
- For refund returns, was the Direct Deposit information correct?
- For balance due returns, were payment instructions received?
- If applicable, are Forms 8453 signed?
- Was the select PIN information provided?
- Are copies of all Forms W-2 attached and totaled to the return?
- Does the total income on the return include all income from Forms 1099?
- Is the Site Identification Number entered on the tax return? This number should begin with an "S."
- Did the Taxpayer(s) sign the return?