

Form 6729 (Rev. September 2006)	Department of the Treasury – Internal Revenue Service Volunteer Return Preparation Program	Site Review
Site Name:	SIDN:	Date of Review:
Was the review conducted by someone other than the relationship manager? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Type of Review: <input type="checkbox"/> Sample <input type="checkbox"/> Discretionary	Site Type: <input type="checkbox"/> E-file <input type="checkbox"/> Paper Only	

Instructions: This form is to be used by IRS Staff to record whether the Site is using operating standards as outlined in Publication 1084, *IRS Volunteer Site Representative’s Handbook*, Publication 3189, *Volunteer E-file Administrator 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 22.30.1.4. Do not enter any information that identifies a specific person or taxpayer in the comments box. Capture corrective actions in the comments box.

	Site Requirements	YES	NO	N/A	Comments
1	Are all volunteer preparers and quality reviewers at the site today certified?				
2	Is Publication 17, Your Federal Income Tax For Individuals, available for use at the site?				
3	Is Publication 4012, Volunteer Resource Guide, available for use at the site?				
4	Is Title VI, Your Civil Rights Are Protected, information available at the site?				
5	Is the Form 13614 or a partner-developed form being used in the preparation of returns?				
6	Which quality review method does the site use? (Check all that apply.) <input type="checkbox"/> Self-review <input type="checkbox"/> Designated Reviewer <input type="checkbox"/> Peer Review <input type="checkbox"/> None				
7	Is the site using a Quality Review checklist? (Pub. 730, Pub. 4012, Form 8158, or partner developed quality review checklist.)				
8	Is the site receiving all Volunteer Quality Alerts?				
9	Does the site have a process in place to ensure volunteers are receiving all Volunteer Quality Alerts?				
	Site Operations	YES	NO	N/A	Comments
10	Is the site operating information recorded in STARS correct?				
11	Is the correct SIDN recorded on returns filed by the site?				
	Confidentiality	YES	NO	N/A	Comments
12	Is sensitive information disposed of properly (e.g., shredded, burned, or returned to taxpayer)?				

Confidentiality (Continued)		YES	NO	N/A	Comments
13	Is taxpayer information safeguarded?				
14	Is taxpayer data retained for purposes other than preparation of the current year tax return?				
14a	If yes to question 14, does the partners' written notice meet the requirements outlined in Publication 4299, <i>Privacy and Confidentially-A Public Trust</i> ?				
E-File Sites Only		YES	NO	N/A	Comments
15	Is the site using the correct EFIN?				
16	Is the site timely mailing Forms 8453 to the designated submission-processing center?				
17	Does the site have a process to <u>work e-file rejects</u> ?				
18	For e-file rejects that can not be corrected or exceed the dollar limitations, does the site have a process to <u>notify taxpayers</u> within 24 hours?				
19	Are all computers, software, backup media, and passwords protected?				

Remarks: This section should be used to solicit feedback from our Volunteers and Partners. Please record their general observations and comments in regard to the VRPP. Do not enter any information that identifies a specific person or taxpayer in the comments box.

The following information will be used to enhance the quality of customer service and ensure the highest quality training for volunteer tax preparers.