

Site Name:

SIDN:

Date of Review:

Type of Review:

Site Type:

Sample Discretionary

E-file Paper Only

Instructions: This form is used by IRS staff 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 or taxpayer in the comments box.

	Label/Identity	YES	NO	N/A	Comments for Q1 through Q4
1	Is the taxpayer's name on the return correct?				
2	Is the taxpayer's SSN/ITIN on the return correct?				
3	Is the spouse's name on the return correct? If no spouse, check N/A and skip to Q5.				
4	Is the spouse's SSN/ITIN on the return correct?				
Filing Status		Comments for Q5 through Q7			
5	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	
6	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 8.				
7	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 for Q8 through Q10
8	Is the dependent(s) name on the return correct? Check N/A if no dependents and skip to Question 10.				
9	Is the dependent(s) SSN/ITIN on the return correct?				
10	Based on the information provided, is the number of dependents on the return correct?				

	Income/Deductions	YES	NO	Comments
11	Is income from Forms W-2, 1099 and other sources reported on the return correctly?			
12	Are adjustments to income and the standard/itemized deduction(s) reported on the return correctly?			
	Child & Dependent Care Credit	YES	NO	Comments Q13 & Q14
13	Does the taxpayer qualify for the Child & Dependent Care Credit?			
14	Is the amount of Child & Dependent Care Credit on the return correct?			
	Child Tax Credit	YES	NO	Comments Q15 & Q16
15	Does the taxpayer qualify for the Child Tax Credit?			
16	Is the amount of Child Tax Credit on the return correct?			
	Earned Income Tax Credit	YES	NO	Comments Q17 & Q18
17	Does the taxpayer qualify for Earned Income Tax Credit?			
18	Is the amount of Earned Income Tax Credit on the return correct?			
	Completion of the Return	YES	NO	Comments
19	Based on the information provided, was the total tax on the return correct?			
20	Based on the information provided was the tax refund/balance due on the return correct?			
	Procedures	YES	NO	Comments
21	Was the return prepared using tax preparation software?			
22	What type of intake/interview sheet was used to prepare this return? <input type="checkbox"/> IRS Form 13614 <input type="checkbox"/> Partner developed			
23	Which quality review process was used to quality review the return? <input type="checkbox"/> Self-review <input type="checkbox"/> Designated Reviewer <input type="checkbox"/> Peer Review <input type="checkbox"/> None			

Remarks: This section is to solicit feedback from our Volunteers and Partners. Please record their general observations and comments in regard to VRPP. Do not enter any information that identifies a specific person or taxpayer in the comments box. The comments box is for general observations and/or feedback from volunteers, site coordinators, or partners.