

Site name	SIDN	Reviewer's name
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**Instructions:** Use this form to assess the accuracy of returns prepared at your site. A return is accurate when tax law is applied correctly and the return is free from error based on the taxpayer interview, the supporting documentation, and the completed Form 13614-C, Intake/Interview & Quality Review Sheet. Consider all answer options prior to making a selection. A detailed comment may be entered for all underlined answer options. The measurement questions for determining if a return is accurate are **in bold**.

**Ensure Form 13614-C is complete before beginning your review.**

	Quality	Comments
1	Based on what you could determine, did the site follow the necessary steps for the intake and interview process for this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
2	Based on what you could determine, did the site follow the necessary steps for the quality review process for this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
3	What is the certification level needed for this return? <input type="checkbox"/> Basic <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> Other	
4	Was the volunteer tax preparer certified at the level needed to prepare this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
5	Was the quality reviewer certified at the level needed to review this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	

	Label	Yes	No	N/A	Comments
6	Were the names and SSN/ITINs, for everyone on the return, verified using required documentation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7	Were identities of the taxpayer/spouse verified using photo identification?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>8</b>	<b>Are all names on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>9</b>	<b>Is the taxpayer's address on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>10</b>	<b>Are all SSN/ITINs on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Filing Status	Comments
11	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	
12	<b>Is the filing status on the return correct?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No - Should be Single <input type="checkbox"/> No - Should be MFJ <input type="checkbox"/> No - Should be MFS <input type="checkbox"/> No - Should be HOH <input type="checkbox"/> No - Should be QW	

	Exemptions	Yes	No	N/A	Comments
13	<b>Is the number of personal exemption(s) correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	<b>Is the number of dependency exemption(s) correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Income	Yes	No	N/A	Comments
15	<b>Are wages correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16	<b>Is investment income correct (interest, dividend, capital gains)?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17	<b>Is net business income correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18	<b>Is all other income correct? (All income sources not covered by the above questions 15-17)</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Adjusted Gross Income		Yes	No	N/A	Comments
19	Are adjustments to income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tax and Credits		Yes	No	N/A	Comments
20	Is the standard deduction correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21	Are the itemized deductions correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22	Is the child and dependent care credit amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23	Are the education credit amounts correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24	Is the retirement savers contribution credit amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25	Is the child tax credit amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26	Are all other credit amounts correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other Taxes		Yes	No	N/A	Comments
27	Is the self-employment tax correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
28	Is the tax on unreported social security and Medicare income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
29	Is the additional tax on IRA, or other qualified retirement plan, distributions correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	Is the recapture of first-time homebuyer credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
31	Are all other taxes correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payments		Yes	No	N/A	Comments
32	Is the federal withholding correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
33	Are the estimated tax payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
34	Is the earned income credit amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
35	Is the additional child tax credit amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
36	Is the American Opportunity Credit amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
37	Are all other payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
38	Are the bank routing number, account number and account type correct? (Direct deposit or bank draft)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Accuracy of Return		Yes	No	N/A	Comments
39	Is the information on the tax return consistent with the supporting documentation and the completed Form 13614-C?	<input type="checkbox"/>	<input type="checkbox"/>		
40	Based on the information provided, was an accurate return prepared?	<input type="checkbox"/>	<input type="checkbox"/>		Measurement of this question will be determined from questions 8-10 and 12-37.

Remarks