

Form 6729 (Rev. 12-2012)	Department of the Treasury – Internal Revenue Service Site Review Sheet	Date of Review:
Site Name:	SIDN:	Reviewer Name or SEID:

A. Review conducted by: <input type="checkbox"/> QSS Reviewer <input type="checkbox"/> TC <input type="checkbox"/> Other <input type="checkbox"/> SPEC Shopper <input type="checkbox"/> Partner	B. Type of Review: <input type="checkbox"/> QSS Review <input type="checkbox"/> Field Site Visit <input type="checkbox"/> Other <input type="checkbox"/> Shopping <input type="checkbox"/> Partner Review	C. Advanced Notice: <input type="checkbox"/> Announced <input type="checkbox"/> Unannounced
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Instructions: This form is used to measure the site's adherence to the Quality Site Requirements (QSR), Volunteer Standards of Conduct (VSC), and to monitor site operations for Volunteer Income Tax Assistance/Tax Counseling for the Elderly Programs. The QSR are provided in Publication 1084, *IRS Volunteer Site Coordinator's Handbook*. The VSC are provided in Publication 4299, *Privacy, Confidentiality, and the Standards of Conduct*. More information on QSR and VSC is available at www.irs.gov. Do not enter any information that identifies a specific person in the comments box. Comments are required for answer options which are underlined. The measurement questions for determining if a site review is adhering to the QSR are in bold.

QSR # 1: Certification		Comments
1	Are all volunteers at the site today certified in the Volunteer Standards of Conduct? <input type="checkbox"/> Yes-verified at the site <input type="checkbox"/> Yes-verified after leaving the site <input type="checkbox"/> No-unable to verify	
2	Are all volunteers who answer tax law questions, prepare or correct tax returns, and/or conduct quality reviews at the site today certified in tax law? <input type="checkbox"/> Yes-verified at the site <input type="checkbox"/> Yes-verified after leaving the site <input type="checkbox"/> No-unable to verify	
3	Are out-of-scope returns prepared at site? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site	
4	How did the site coordinator receive site coordinator training? <input type="checkbox"/> None <input type="checkbox"/> Interactive <input type="checkbox"/> Link and Learn Taxes <input type="checkbox"/> PowerPoint <input type="checkbox"/> FSA Only Site	
5	Based on the returns selected during the QSS review, were the IRS-certified volunteers and quality reviewer(s) certified at or above the level needed for returns prepared at this site? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A - No returns reviewed	

QSR # 2: Intake and Interview Process		Comments
6	Did the site use a correct intake/interview process for all tax returns during this review? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site	

QSR # 3: Quality Review Process		Comments
7	Did the site conduct a complete quality review on all returns prepared at the site? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site	
8	Which method does the site generally use to conduct quality reviews? <input type="checkbox"/> Designated Review <input type="checkbox"/> Peer Review <input type="checkbox"/> FSA Only Site <input type="checkbox"/> Unapproved Method <input type="checkbox"/> None	

QSR # 4: Reference Materials			YES	NO	N/A	Comments
9	Is Publication 4012, <i>Volunteer Resource Guide</i> , available for use at the site?					
10	Is Publication 17, <i>Your Federal Income Tax For Individuals</i> , available for use at the site?					
11	Is Publication 3189, <i>Volunteer e-file Administration Guide</i> , available for use at the site?					
12	Does the site have a process in place to ensure volunteers have reviewed all Volunteer Tax Alerts and/or AARP Cyber Tax Messages?					

QSR # 5: Volunteer Agreement		Comments
13	Have all volunteers working at the site today signed Form 13615, <i>Volunteer Standards of Conduct Agreement – VITA/TCE Programs</i>, and has the partner signed and dated the form indicating all are in compliance? <input type="checkbox"/> Yes-verified at the site <input type="checkbox"/> Yes-verified after leaving the site <input type="checkbox"/> No-unable to verify	
14	Did you identify any violations to the Volunteer Standards of Conduct? <input type="checkbox"/> No, Standard of Conduct was not violated <input type="checkbox"/> Yes, Standard #1 <input type="checkbox"/> Yes, Standard #2 <input type="checkbox"/> Yes, Standard #3 <input type="checkbox"/> Yes, Standard #4 <input type="checkbox"/> Yes, Standard #5 <input type="checkbox"/> Yes, Standard #6	
15	Is VolTax information displayed at the site? <input type="checkbox"/> Yes <input type="checkbox"/> No	

QSR # 6: Timely Filing				Comments		
16	Does the site take reasonable steps to transmit completed returns within 3 calendar days? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site					
17	Does the site take reasonable steps to retrieve e-file acknowledgments within 2 calendar days after return transmission? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site					
18	For e-file rejects that cannot be corrected: Does the site take reasonable steps to notify taxpayers within 24 hours? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site					
QSR # 7: Title VI			YES	NO	N/A	Comments
19	Is Title VI, <i>Your Civil Rights Are Protected</i> , information available at the point of contact between the volunteer and taxpayer at the site?					
QSR # 8: Site Identification Number			YES	NO	N/A	Comments
20	Is the site using the correct SIDN?					
QSR # 9: Electronic Filing Identification Number				Comments		
21	Is the site using the correct EFIN? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> FSA Only Site					
QSR # 10: Security, Privacy and Confidentiality				Comments		
22	Does the site ask for photo identification for all primary and secondary taxpayers? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site					
23	Does the site have a process to identify every volunteer who prepares, corrects or changes the tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A					
24	Does the site take adequate security measures to protect electronic equipment, including IRS loaned computers? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A					
25	Is the site properly backing-up all returns? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A					
26	Are all portable data media (e.g. flash drives, etc.) containing taxpayer data protected? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site					
27	Is the site properly obtaining taxpayer signatures on Forms 8879, <i>IRS e-file Signature Authorization</i> ? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FSA Only Site					
28	Is sensitive information being properly disposed of (e.g. shredded, burned, or returned to taxpayer), as defined in Publication 4299, <i>Privacy, Confidentiality, and Standards of Conduct - A Public Trust</i> ? <input type="checkbox"/> Yes <input type="checkbox"/> No					
29	Is taxpayer information disclosed or used for purposes other than return preparation (IRC 7216)? <input type="checkbox"/> Yes <input type="checkbox"/> No					
30	Based on IRC 7216, are consent notices properly secured from required taxpayers prior to return preparation? <input type="checkbox"/> Yes -Consent notices properly secured <input type="checkbox"/> No -Consent notices not properly secured <input type="checkbox"/> N/A - TP info not used for other purposes					
Site Operations			YES	NO	N/A	Comments
31	Is the correct site operating information recorded in SPECTRM?					
Adherence to Quality Site Requirements				Comments		
32	Does the site adhere to all of the Quality Site Requirements?					Measurement of this question is based on the answers to questions 1-10, 13-14, 16, 18-24, 26-28, and 30.

Remarks: