Form 6729-B (Rev. 10-2012)		Department of the Treasury – Internal Revenue Service Date								of Review:			
		Shopping Review Sheet											
Site	Name:								SIDN:				
Rev	iewer SEID:												
Type of return:								В	□ C				
Purpose of this form: SPEC shoppers will use this form to document the findings from the preparation of a tax return by IRS certified volunteers. No taxpayer or volunteer information will be captured during the process. Do not enter any information that identifies a specific person or taxpayer in the comments box. The comments box includes explanation for items not met.													
	The question in bold will cause the review to pass/fail. Underlined responses will require a comment in the SPECTRM Quality Database.												
	NA/II at the analysis	1-1-1-7-1			ty Proced							Comments	
1	What type of I Form 13614-0 TaxWise Inter Unapprove None	C, Sections rview Form	A&B			Complete Complete Complete Complete		Inco	mplete mplete mplete				
2	Did the certified volunteer review the information on Form 13614-C, Intake/Interview & Quality Review Sheet, with you (conduct an interview) during the preparation of your tax return? Yes - Volunteer reviewed all information on Form 13614-C No - Volunteer did not review all information on Form 13614-C No - Volunteer used unapproved partner developed form No - Volunteer did not conduct an interview												
3	Did the volunt ☐ Yes	teer prepa	rer review	the o	complete	d tax return w	ith you	1?					
4	Was a complete ☐ Yes – A con				on this ret	urn? ☐ <u>No – A comp</u>	lete au	ality revie	ew was no	ŀ			
	conducted					conducted		anty revie	ow was no	<u>-</u>			
5	What is the ce)?						
		☐ In							1.0				
6	What is the hi return? Comm	nent requi	red when	certifi	ication le		an the	level in	Question				
7													
,	What is the hi Comment req in Question 5.	uired if no	t at least	Intern	nediate c	or if lower than	certifi	cation le	evel indica	ated_			
						itary 🗌 Intern							
8	What training		id the volu	unteei	r prepare				1?				
	☐ Link & Lea ☐ IRS Trainir ☐ <u>None</u>		ons			☐ Partner crea	ated ma	aterials					
					Label							Comments	5
9	Were you ask	ced to sho	w photo ic	dentifi	cation?	☐ Yes	<u> </u>	<u> </u>					
10	Were you ask number(s) (IT Yes - Volunt No - Volunt No - No val	TN/SSN) f nteer asked teer did not	or you and for docum ask for pro	d eve	ryone els or everyor	se described in	n your						

44	Filing Status	Comments
11	What is the correct filing status of your return scenario?	
	☐ Single ☐ MFJ ☐ MFS ☐ HOH ☐ QW	
12	Is the filing status on the prepared tax return correct?	
	☐ Yes - Filing Status is correct ☐ No - Should be MFS	
	☐ No - Should be Single ☐ No - Should be HOH ☐ No - Should be MFJ ☐ No - Should be QW	
	Exemptions	Comments
13	Is the number of personal exemption(s) correct?	Comments
	☐ Yes ☐ No	
14	Is the number of dependency exemption(s) correct?	
	☐ Yes – # of dependency exemption(s) correct ☐ No – Ineligible person(s) claimed	
	□ No – Eligible person(s) not claimed □ N/A – Not entitled & none claimed	
	Income/Adjustments	Comments
15	Is the amount of income correct?	
	 ☐ Yes – Income amount correct ☐ No – Wages incorrect ☐ No – Unemployment Income incorrect 	
	No – Investment Income incorrect No – Omitted cash income	
	□ No − Business Income incorrect □ No − Other income incorrect	
16	Is the amount of adjustments to income correct?	
	☐ Yes – Adjustment to income amount correct ☐ No – Student loan interest deduction incorrect incorrect	
	□ No – Self-employment tax incorrect □ No – Other income incorrect	
	□ No – IRA deduction incorrect □ N/A – No Adjustments to income & none claimed	
4=	Tax and Credits	Comments
17	Tax and Credits Is the standard deduction correct?	Comments
17	Is the standard deduction correct? ☐ Yes-Standard deduction correct ☐ No-Should have itemized & did not	Comments
17	Is the standard deduction correct?	Comments
	Is the standard deduction correct? Yes-Standard deduction correctNo-Should have itemized & did notNo-Age/blindness deduction omittedN/A-Itemized deduction claimedNo-Filing Status incorrect	Comments
17	Is the standard deduction correct?	Comments
	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted N/A-Itemized deduction claimed No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed	Comments
	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted N/A-Itemized deduction claimed No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct	Comments
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18	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted N/A-Itemized deduction claimed No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed N/A-Standard deduction claimed	Comments
18	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted N/A-Itemized deduction claimed No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed N/A-Standard deduction claimed Is the Child and Dependent Care Credit amount correct? Yes-CDCC is correct No-Incorrect amount claimed	Comments
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19	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed N/A-Standard deduction claimed Is the Child and Dependent Care Credit amount correct? Yes-CDCC is correct No-Incorrect amount claimed No-Entitled to CDCC but none claimed N/A - Not entitled to CDCC & none claimed Is the amount of Retirement savings contributions credit correct?	Comments
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19	Is the standard deduction correct Yes-Standard deduction correct No-Age/blindness deduction omitted No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed N/A-Standard deduction claimed Is the Child and Dependent Care Credit amount correct? Yes-CDCC is correct No-Incorrect amount claimed No-Entitled to CDCC but none claimed N/A - Not entitled to CDCC & none claimed Is the amount of Retirement savings contributions credit correct?	Comments
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19	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed N/A-Standard deduction claimed Is the Child and Dependent Care Credit amount correct? Yes-CDCC is correct No-Incorrect amount claimed No-Entitled to CDCC but none claimed No-Entitled to CDCC but none claimed N/A - Not entitled to CDCC & none claimed Is the amount of Retirement savings contributions credit correct? Yes-Retirement savings credit is correct No-Incorrect amount claimed No-Entitled to retirement savings credit but none claimed	Comments
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19	Is the standard deduction correct? Yes-Standard deduction correct No-Should have itemized & did not No-Age/blindness deduction omitted No-Filing Status incorrect Is the amount of itemized deductions correct? Yes-Itemized deductions correct No-Incorrect amount itemized deductions claimed Is the Child and Dependent Care Credit amount correct? Yes-CDCC is correct No-Incorrect amount claimed No-Entitled to CDCC but none claimed Is the amount of Retirement savings contributions credit correct? Yes-Retirement savings credit is correct No-Incorrect amount claimed No-Entitled to CDCC but none claimed Is the amount of Retirement savings credit but none claimed No-Entitled to retirement savings credit but none claimed No-Entitled to retirement savings credit & none claimed No-Entitled to retirement savings credit & none claimed	Comments

	lax and Credits (continued)	Comments
22	Are all other credit amounts correct?	
	☐ Yes-Other credit amounts are correct	
	No-Entitled to other credits	
	N/A-Not entitled to other credits & none claimed	
	Other Taxes	Comments
23	Are all Other Taxes correct?	
	☐ Yes- Other Taxes correct	
	No- Other Taxes incorrect	
	☐ N/A-No Other Taxes & none claimed	
	Payments	Comments
24	Is the Federal withholding correct?	
	Yes-Federal withholding correct	
	No-Federal withholding incorrect	
	☐ N/A-No Federal withholding & none claimed	
25	Is the Earned Income Credit amount correct?	
	☐ Yes-Entitled to EIC & correct	
	No-Incorrect amount	
	No-Entitled to EIC but none claimed	
	☐ N/A-Not entitled to EIC & none claimed	
26	Is the Additional Child Tax Credit amount correct?	
	☐ Yes-Entitled to ACTC & correct	
	No-Incorrect amount	
	No-Entitled to ACTC but none claimed	
	□ N/A-Not entitled to ACTC & none claimed	
	Completion of the Return	Comments
27	Was the return prepared using TaxWise ® or other tax preparation software?	
	☐ Yes-TaxWise® software	
	Yes-Other tax preparation software	
	No-Tax preparation software	
28	Did the certified volunteer inform you that you are ultimately responsible for the	
	information on your return? By signing, you are confirming that you have examined the	
	return and to the best of your knowledge, the information is true, correct, and complete.	
	☐ Yes ☐ No	
29	Did the volunteer preparer exercise Due Diligence?	
	☐ Yes ☐ <u>No</u>	
20	Accuracy of Return	Comments This question is the only
30	Does the volunteer prepared tax return match the SPEC shopping tax return?	This question is the <u>only</u> measure for the accuracy
	☐ Yes ☐ No	of the Shopping return.
	Volunteer Standards of Conduct	Comments
31	Was the Volunteer Standards of Conduct (VSC) violated?	
	☐ Yes - VSC #1 ☐ Yes - VSC #4	
	□ No – The Volunteer Standards of Conduct was not violated	
Rem	narks:	1