

# Partner Return Review Sheet

Date of Review: \_\_\_\_\_

Site Name: \_\_\_\_\_

SIDN: \_\_\_\_\_

Reviewer's Name: \_\_\_\_\_

**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
<b>1</b>	What type of intake/interview sheet was used to prepare this return? Form 13614-C, Sections A&B <input type="checkbox"/> Complete <input type="checkbox"/> <u>Incomplete</u> TaxWise Form 13614-C <input type="checkbox"/> Complete <input type="checkbox"/> <u>Incomplete</u> Unapproved Process <input type="checkbox"/> <u>Complete</u> <input type="checkbox"/> <u>Incomplete</u> <input type="checkbox"/> <u>None</u>	
<b>2</b>	Was a complete quality review conducted on this return? <input type="checkbox"/> Yes - A complete quality review was conducted <input type="checkbox"/> No - A complete quality review was not conducted	
<b>3</b>	What is the certification level needed for this return? <input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> International <input type="checkbox"/> <u>Specialized Training</u>	
<b>4</b>	What is the highest certification level of the volunteer preparer of this return? (See Question 3) <input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> International <input type="checkbox"/> <u>Specialized Training</u> <input type="checkbox"/> <u>None</u>	
<b>5</b>	What is the highest certification level of the volunteer quality reviewer of this return? (See Question 3) <input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> International <input type="checkbox"/> <u>Specialized Training</u> <input type="checkbox"/> <u>None</u>	

Label	YES	NO	N/A	Comments
<b>6 Are all names on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>7 Is the taxpayer's address on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>8 Are all SSN/ITINs on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>9 Were identities verified using photo identification?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>10 Were the names and SSN/ITINs validated using proper documentation?</b>				
	<input type="checkbox"/> Yes - Proper documentation was used to validate <input type="checkbox"/> <u>No - No validation done</u> <input type="checkbox"/> <u>No - Proper documentation was not used to validate</u>			

Filing Status	Comments
<b>11</b> 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	
<b>12 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
<b>13 Is the number of personal exemption(s) correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>14 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	Are wages correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16	Is investment income correct (interest, dividend, capital gains)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17	Is net business income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18	Is all other income correct? (All income sources not covered by the above questions 15–17)	<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	Based on the review of this return, did the supporting documentation and completed Form 13614-C support the information shown on the return?	<input type="checkbox"/>	<input type="checkbox"/>		
40	Based on the information provided, was an accurate return prepared?				Measurement of this question will be determined from questions 6-8, 12-37.

Remarks: