	orm 6729-D	·	artment of the Treasury - In	ternal Revenue Service Review Sheet		Date of review
	(October 2023)	V117	VICE SILE IN	sidn	Poviowor	ame or SEID
Site	ename			SIDIN	Reviewer	lame of SEID
	Review conducted by RM [y B. Partner	Type of review Field Site Visit Remote Site Review	☐ Partner review☐ Other	C. Advance Annour Unannour	
(VS ente and ans mea sho emp	C), and to monitor sign any information the local/district coordinates options which are asurement question and use Publication 5	ite operations for Volunte at identifies a specific pe nators. Open-ended inter re underlined and can be are in italics. The measu 5140, VITA/TCE Site and	eer Income Tax Assistance rson in the Comments be view questions are provice used to indicate correcting rement questions for detections are provided. Return Reviews Job Aid	uality Site Requirements (QS ce/Tax Counseling for the Elox. NOTE: The term "coordin ded in parentheses, when ap ve actions taken. Questions ermining if a site is adhering I for SPEC Partners, for assisew Resource Guide for SPEC	derly (VITA/TC ator" includes propriate. Con used to deterr to a QSR are stance in com	E) programs. Do not both site coordinators nments are required for nine how to answer the in bold . Partners bleting this form. SPEC
		QSR # 1	: Certification		(Comments
2	volunteer certifica Yes No-Unable to ver No-Not certified in of Conduct	ation.)	No-Other (use if more than	ss Site Coordinator Test nterview and Quality Review		
_	Yes	ortinod doing Link did i	No			
	Q	SR # 2: Intake/Interview	and Quality Review P	rocess	(Comments
3	Review Process u Yes No-Not using For No-Not interviewi No-No process to	m 13614-C ing the taxpayer o identify out-of-scope issue o assign returns based on	No-Not using For No-Does not qual No-Incomplete or Process No-Not advising t	ke/Interview and Quality m 14446 (Virtual Site) lity review all returns unapproved Quality Review axpayers of responsibility more than one "No" applies)		
	QSR # 3: Conf	irming Photo Identific	ation and Taxpayer Ide	ntification Number	(Comments
4	jointly) and Taxpa (Explain the proce Yes No-Not reviewing	yer Identification Numess used to confirm ta photo identification ayer not present/No Power	ibers (TIN) for everyone xpayer identity and TIN No-Not confirming number of No-Other (use if r			
QSR # 4: Reference Materials					(Comments
5	materials you use Yes No-Publication 40 No-Publication 42	e at the site.) 212 not available 7 not available 299 not available	Alerts/CyberTax A No-Other (use if r	299 not available Alerts/Quality Site Requirements lerts not available more than one "No" applies)		
6			eer alerts are reviewed bing volunteer alerts with the No	by all IRS-tax law certified your volunteers?)		

	QSR # 5: Volunteer Agreement	Comments
7	Is the volunteer's identity, name and address confirmed using government-issued photo ID, and are Forms 13615 signed and dated by the volunteer and approving official? (Tell me the process for securing signed volunteer agreements.) Yes No-Not signed/dated by volunteer or approving official No-Unable to verify No-Form 13206 does not certify Forms 13615 validation No-Not requiring government-issued photo ID	
8	Were any violations to the Volunteer Standards of Conduct (VSC) identified? No violations identified Yes-Violation to VSC #1 - Follow all Quality Site Requirements (QSR) Yes-Violation to VSC #2 - Do not accept payment, ask for donations, or accept refund payments for federal or state tax return preparation from customers Yes-Violation to VSC #3 - Do not solicit business from taxpayers you help or use the information you gained about them (taxpayer information) for any direct or indirect personal benefit for yourself, any other specific individual or organization Yes-Violation to VSC #4 - Do not knowingly prepare false returns Yes-Violation to VSC #5 - Do not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct considered to have a negative effect on the VITA/TCE programs Yes-Violation to VSC #6 - Treat all taxpayers in a professional, courteous, and respectful manner	
9	Did the site meet the components for QSR # 5? Yes No	
10	Is Publication 4836 (en-sp), VITA/TCE Free Tax Programs (VolTax), made available to all taxpayers who seek services at the site? (Explain your process for ensuring volunteers and taxpayers know how to report unethical issues.) Yes No	
	QSR # 6: Timely Filing	Comments
11	Are timely filing requirements met? (Explain your process for transmitting returns, obtaining acknowledgements, and correcting rejects. Explain how taxpayers sign their tax return.) Yes No-Not retrieving acknowledgments timely No-Not transmitting timely No-Form 8879 not signed No-Other (use if more than one "No" applies)	
	QSR # 7: Civil Rights	Comments
12	Is a current Civil Rights poster made available to all taxpayers who seek services at the site? (Explain your process for ensuring volunteers and taxpayers know how to report Civil Rights issues identified at your site.) Yes No	
	QSR # 8: Site Identification Number	Comments
13	Does the site use the correct Site Identification Number (SIDN)? (What Site Identification Number (SIDN) are you using?) Yes No	
	QSR # 9: Electronic Filing Identification Number	Comments
14	Does the site use the correct Electronic Filing Identification Number (EFIN)? (What Electronic Filing Identification Number (EFIN) are you using?) Yes No	
	QSR # 10: Security	Comments
15	Does the site have a security plan and is the plan available at the site? (Please share a copy of your security plan.) Yes No-Site does not have a security plan No-Other	
16	Are the site's computers all password protected and internet connection either hard-wired or wireless connection is password protected? (Explain measures taken to password protect computers and internet connections.) Yes No-Wireless without password No-Other	

17	Are adequate security measures taken to protect computers, printers and all other equipment during and after site operating hours? (Explain measures taken to protect computers and all equipment used by the site.)	
	☐ Yes ☐ <u>No</u>	
18	Does the site protect, safely store and/or properly dispose of Personally Identifiable Information (PII)? (Explain the process you use to protect, store and dispose of taxpayer data.) Yes No-PII not protected No-Other	
19	If Section 7216 is applicable, are consent notices properly secured? (Do you or your partner collect taxpayer information which is used for anything other than preparing tax returns? If yes, explain the process for the consent or denial of the use and/or disclosure.) Yes-Consent notices properly secured No-Consent notices not properly secured N/A-Consent notices are not required	
	QSR # 10: Security (continued)	Comments
20	Did the site meet the components for QSR #10? ☐ Yes ☐ No	
21	Does the site use the tax software features to generally limit volunteer access to tax returns outside of site operating hours? (Explain the processes used to limit volunteer access to tax returns in the tax software during and after site hours.) Yes No	
22	Do all volunteers identify themselves to the taxpayers they assist? (Explain your process for identifying volunteers to taxpayers.) Yes No	
	Site Operations	Comments
23	Is the site operating information in SPECTRM correct? (What are your site operating days and	
20	hours?) No	
	Adherence to Quality Site Requirements	Comments
24	What is the overall Quality Site Requirement adherence rating?	The adherence rate is calculated by awarding 10 points for each of the measurement questions marked "Yes". The measurement questions are 1, 3, 4, 5, 9, 11, 12, 13, 14, and 20.

Remarks