

Form 6729C (Rev. October 2008)	Department of the Treasury – Internal Revenue Service Accuracy Return Review Sheet	Date of Review:
Site Name:	SIDN:	Site Review ID:
Review conducted by: <input type="checkbox"/> SOI Cadre <input type="checkbox"/> TC non-RM <input type="checkbox"/> TM <input type="checkbox"/> RM <input type="checkbox"/> Partner <input type="checkbox"/> Other		
Type of Review: <input type="checkbox"/> SOI <input type="checkbox"/> Criteria	Site Type: <input type="checkbox"/> E-file <input type="checkbox"/> Paper Only	Type of Return: <input type="checkbox"/> 1040 <input type="checkbox"/> 1040A <input type="checkbox"/> 1040EZ

Instructions: This form is used to measure the accuracy of return preparation based on all available information. Indicate your answer by marking the appropriate box. Do not enter any information that identifies a specific person, either volunteer or taxpayer in the comments box. The comments box should include identified errors and corrective actions.

Quality	Comments
1 Prior to the review, what type of Intake/Interview Sheet was completed to prepare this return? <input type="checkbox"/> Form 13614C <input type="checkbox"/> TaxWise Option <input type="checkbox"/> None <input type="checkbox"/> IRS Approved Partner Developed Form <input type="checkbox"/> Unapproved Partner Developed Form	

2 What type of Quality Review tool did you observe the site completing to review this return? <input type="checkbox"/> Form 8158 or 13614C <input type="checkbox"/> None <input type="checkbox"/> IRS Approved Partner Developed Form <input type="checkbox"/> Unapproved Partner Developed Form	
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Label/Identity	YES	NO	N/A	Comments
3 Is the taxpayer's name on the return correct?				
4 Is the taxpayer's SSN/ITIN on the return correct?				
5 Is the spouse's name on the return correct? If no spouse, check N/A and skip to Question 7.				
6 Is the spouse's SSN/ITIN on the return correct?				

Filing Status	YES	NO	N/A	Comments
7 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				
8 Based on the information provided, is the filing status on the return correct? If the filing status is correct, check yes and skip to Question 10.				
9 If the filing status is incorrect on the return what is correct filing status? <input type="checkbox"/> Single <input type="checkbox"/> MFJ <input type="checkbox"/> MFS <input type="checkbox"/> HOH <input type="checkbox"/> QW				

Dependents	YES	NO	N/A	Comments
10 Are the dependent's names on the return correct? Check N/A if no dependents and skip to Question 12.				
11 Are all dependent's SSN/ITIN(s) on the return correct?				
12 Based on the information provided, is the number of dependent(s) claimed on the return correctly?				

Income/Adjustments/Deductions	YES	NO	N/A	Comments
13 Is income from Form(s) W-2, 1099 and/or other sources reported on the return correctly?				
14 Are all adjustments to income reported on the return correctly?				
15 Is the standard deduction amount reported on the return correctly?				
16 Are all itemized deductions reported on the return correctly?				

Child & Dependent Care Credit		YES	NO	Comments
17	Does the taxpayer qualify for the Child & Dependent Care Credit?			
18	Is the amount of Child & Dependent Care Credit on the return correct?			
Education Credit		YES	NO	Comments
19	Does the taxpayer qualify for the Education Credit?			
20	Is the amount of Education Credit on the return correct?			
Child Tax Credit		YES	NO	Comments
21	Does the taxpayer qualify for the Child Tax Credit?			
22	Is the amount of Child Tax Credit on the return correct?			
23	Does the taxpayer qualify for Additional Child Tax Credit?			
24	Is the amount of Additional Child Tax Credit on the return correct?			
Retirement Savings Contributions Credits		YES	NO	Comments
25	Does the taxpayer qualify for the Retirement Savings Contributions Credit?			
26	Is the amount of Retirement Savings Contributions Credit on the return correct?			
Other Credits		YES	NO	Comments
27	Were all other credits applied on the return correct?			
Earned Income Tax Credit		YES	NO	Comments
28	Does the taxpayer qualify for Earned Income Tax Credit?			
29	Is the amount of Earned Income Tax Credit on the return correct?			
30	Did the taxpayer receive Advanced Earned Income Tax Credit?			
31	Is the amount of Advanced Earned Income Tax Credit on the return correct?			
ESP Credit		YES	NO	Comments
32	Did the taxpayer qualify for the Recovery Rebate Credit (ESP)?			
33	Is the amount of the Recovery Rebate Credit on the return correct?			
Procedures		YES	NO	Comments
34	Based on the review of this return and supporting documentation, did the Intake and Interview Sheet reflect the information shown on the return?			
Return Results		YES	NO	Comments
35	Based on the information provided, was an accurate return prepared?			Measurement of this question will be determined from questions: 3, 4, 5, 6, 8, 10, 11, 12,13 14, 15,16, 18, 20, 22, 24, 26, 27, 29, 31, 33.

