

Site name	SIDN	Reviewer name or SEID
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A. Review conducted by <input type="checkbox"/> QSS Reviewer <input type="checkbox"/> SPEC Shopper <input type="checkbox"/> Other	B. Type of review <input type="checkbox"/> QSS Review <input type="checkbox"/> SPEC Shopping <input type="checkbox"/> Other	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. Do not enter any information that identifies a specific person in the comments box. NOTE: The term "coordinator" includes both site coordinators and local coordinators. Questions used to determine how to answer the measurement question are in *italics*. Comments are required for answer options which are underlined. The measurement questions for determining if a site review is adhering to a QSR are in **bold**. **Note:** Each met measurement question is valued at 10%. If all ten measurement questions are met, the site is rated at 100%.

	QSR # 1: Certification	Comments
1	<i>Are all volunteers certified in Volunteer Standards of Conduct?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No-not certified</u> <input type="checkbox"/> <u>No-unable to verify</u>	
2	<i>Are all required volunteers certified in Intake/Interview and Quality Review?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
3	<i>Are all volunteers who address tax law issues certified in tax law?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No-not certified</u> <input type="checkbox"/> <u>No-unable to verify</u>	
<b>4</b>	<b>Did the site meet the components for QSR #1?</b> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
5	Did the coordinator complete site/local coordinator training? <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
	QSR # 2: Intake/Interview & Quality Review Process	Comments
6	<i>Are all volunteers using a correct Intake/Interview &amp; Quality Review Process for every return?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No-Does not quality review all returns</u> <input type="checkbox"/> <u>No-Not using Form 13614-C</u> <input type="checkbox"/> <u>No-Incomplete Quality Review Process</u> <input type="checkbox"/> <u>No-Not interviewing the taxpayer</u> <input type="checkbox"/> <u>No-Using an unapproved Quality Review Process</u> <input type="checkbox"/> <u>No-Not reviewing Form 13614-C</u> <input type="checkbox"/> <u>No-Other</u> <input type="checkbox"/> <u>No-Not using Form 14446 (Virtual Site)</u>	
7	<i>Is there a process which ensures returns are within scope and volunteer preparers and quality reviewers are assigned returns at their certification level?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No-Not identifying out-of-scope issues</u> <input type="checkbox"/> <u>No-Not identifying volunteer/return certification levels</u> <input type="checkbox"/> <u>No-Other</u> <input type="checkbox"/> <u>No-Not identifying reviewer/return certification level</u>	
8	<i>Are volunteers advising taxpayers of their responsibility for the information listed on their return?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
<b>9</b>	<b>Did the site meet the components for QSR #2?</b> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
	QSR # 3: Confirming Photo Identification and Taxpayer Identification Numbers	Comments
10	<i>Are volunteers using photo identification to confirm taxpayers' identities?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No-Not using photo identification</u> <input type="checkbox"/> <u>No-Spouse/Taxpayer not present/No Power of Attorney</u>	
11	<i>Are volunteers confirming Taxpayer Identification Numbers (TIN) for everyone listed on the return?</i> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
<b>12</b>	<b>Did the site meet the components for QSR #3?</b> <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	

QSR # 4: Reference Materials		Comments
13	<b>Are all required reference materials available at the site?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No-Publication 17 not available <input type="checkbox"/> No-Publication 4012 not available <input type="checkbox"/> No-Neither publication is available	
14	<b>Is there a process which ensures all volunteer alerts are reviewed by all tax law certified volunteers?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 5: Volunteer Agreement		Comments
15	<b>Are all Forms 13615 signed and dated by the volunteer and approving official?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No-Unable to verify <input type="checkbox"/> No-Not signed/dated by volunteer <input type="checkbox"/> No-Form 13206 does not certify Forms 13615 validation <input type="checkbox"/> No-Not signed/dated by approving official	
16	<b>Were any violations to the Volunteer Standards of Conduct identified?</b> <input type="checkbox"/> No violations identified <input type="checkbox"/> Yes-Violation to VSC 3 <input type="checkbox"/> Yes-Violation to VSC 6 <input type="checkbox"/> Yes-Violation to VSC 1 <input type="checkbox"/> Yes-Violation to VSC 4 <input type="checkbox"/> Yes-Violation to VSC 2 <input type="checkbox"/> Yes-Violation to VSC 5	
17	<b>Did the site meet the components for QSR #5?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
18	<b>Is Publication 4836, VITA and TCE Free Tax Programs (VolTax), properly displayed at the site?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 6: Timely Filing		Comments
19	<b>Are timely filing requirements met?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No-Not notifying taxpayers of rejects timely <input type="checkbox"/> No-Not transmitting timely <input type="checkbox"/> No-Form 8879 not signed <input type="checkbox"/> No-Not retrieving acknowledgments timely <input type="checkbox"/> No-Other	
QSR # 7: Civil Rights		Comments
20	<b>Is the current Civil Rights poster displayed at the first point of contact?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 8: Site Identification Number		Comments
21	<b>Is the site using the correct SIDN?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 9: Electronic Filing Identification Number		Comments
22	<b>Is the site using the correct EFIN?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 10: Security		Comments
23	<b>Is there a process which identifies every volunteer who prepares, reviews, or changes a tax return?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
24	<b>Are adequate security measures taken to protect electronic equipment?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
25	<b>Is taxpayer information safeguarded and properly disposed?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
26	<b>If Section 7216 is applicable, are consent notices properly secured and maintained?</b> <input type="checkbox"/> Yes-Consent notices properly secured <input type="checkbox"/> N/A-Consent notices are not required <input type="checkbox"/> No-Consent notices not properly secured	
27	<b>Did the site meet the components for QSR #10?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
28	<b>Are all volunteers wearing or displaying their name to taxpayers they assist?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
Site Operations		Comments
29	<b>Is the site operating information correct in SPECTRM?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
Adherence to Quality Site Requirements		Comments
30	<b>What is the overall Quality Site Requirement Adherence Rating?</b>	Measurement of this question is based on the answers to questions 4, 9, 12, 13, 17, 19-22, and 27.