

Site name	SIDN	Reviewer's name
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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. A detailed comment must be entered for all underlined answer options.

Ensure Form 13614-C is complete before beginning your review.

	Quality	Comments
1	Was Form 13614-C, Intake/Interview & Quality Review Sheet, completed and corrected, if necessary? <input type="checkbox"/> Yes <input type="checkbox"/> <u>No</u>	
2	What is the certification level needed for this return? <input type="checkbox"/> Basic <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> <u>Specialty</u>	
3	Were both the tax preparer and quality reviewer certified at the level required to prepare and review this return? <input type="checkbox"/> Yes - Both were certified at the level needed <input type="checkbox"/> <u>No - Preparer was not certified at the level needed</u> <input type="checkbox"/> <u>No - Quality reviewer was not certified at the level needed</u> <input type="checkbox"/> <u>No - Neither were certified at the level needed</u> <input type="checkbox"/> No - Other	

	Label	Yes	No	N/A	Comments
4	Are all names on the return correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	Is the taxpayer's address on the return correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6	Are all SSN/ITINs on the return correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Filing Status	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 <input type="checkbox"/> Other	
8	Is the filing status on the return correct? <input type="checkbox"/> Yes - Filing status correct <input type="checkbox"/> <u>No - Should be Single</u> <input type="checkbox"/> <u>No - Should be MFJ</u> <input type="checkbox"/> <u>No - Should be MFS</u> <input type="checkbox"/> <u>No - Should be HOH</u> <input type="checkbox"/> <u>No - Should be QW</u> <input type="checkbox"/> No - Other	

	Dependents	Yes	No	N/A	Comments
9	Is the taxpayer (and/or spouse, if applicable) identified correctly as a dependent of someone else?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10	Are dependents identified correctly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Income	Yes	No	N/A	Comments
11	In 2021, did the taxpayer or spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12	Are wages, salaries, tips (Form 1040, line 1) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13	Are interest and dividends (Form 1040, lines 2b and 3b) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	Are IRA, pension and annuity income (Form 1040, lines 4b and 5b) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15	Is income from Social Security benefits (Form 1040, line 6b) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16	Are capital gains or losses (Form 1040, line 7) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17	Is net business income (Schedule 1, line 3) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18	Is all additional income on Schedule 1 correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Adjustments		Yes	No	N/A	Comments
19	Are adjustments to income (Schedule 1, line 26) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tax and Credits		Yes	No	N/A	Comments
20	Is the standard deduction (Form 1040, line 12a) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21	Are itemized deductions (Schedule A) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22	Is the Qualified Business Income Deduction (Form 1040, line 13) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23	Is the tax (Form 1040, line 16) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24	Is the Nonrefundable Child Tax Credit (CTC) and Credit for Other Dependents (Form 1040, line 19) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25	Are nonrefundable credits (Schedule 3, line 7) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26	Are all other taxes (Schedule 2, line 21) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payments		Yes	No	N/A	Comments
27	Is federal income tax withheld (Form 1040, line 25d) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
28	Are refundable credits (Form 1040, line 32) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
29	Are other payments (Schedule 3, line 14) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	Are the bank routing number, account number, and account type (Form 1040, lines 35b and 35d) correct? (Direct deposit or bank draft)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Accuracy of Return		Yes	No	N/A	Comments
31	Based on the information provided, was an accurate return prepared?	<input type="checkbox"/>	<input type="checkbox"/>		A No answer for any question means the return is considered inaccurate.

Remarks