

Form 6729B (Rev. February 2009)	Department of the Treasury – Internal Revenue Service Shopping Review Sheet	Date of Review:
Site Name:	SIDN	Scenario Number: <input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three
Reviewer Name:		
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: SPEC shoppers will use this form to document the findings from the preparation of a tax return by volunteers. No taxpayer or volunteer information will be captured during the process. Do not enter any information that identifies a specific person or taxpayer in the comments box. The comments box is for general observations about whether processes are met.

	Intake Procedures	YES	NO	Comments
1	What type of intake and interview sheet was completed to prepare this return? <input type="checkbox"/> Form 13614C <input type="checkbox"/> IRS Approved Partner Developed form <input type="checkbox"/> TaxWise Option <input type="checkbox"/> Unapproved Partner Developed form <input type="checkbox"/> None			
2	Did the certified volunteer discuss the information on the intake and interview sheet with you (have an interview) during the preparation of your tax return?			
3	Were you asked to show proof of identity?			
4	Were you asked for documents to verify the tax identification numbers (TIN/SSN) for you and everyone else described in your scenario?			
Filing Status		YES	NO	Comments
5	Was the correct filing status entered on the return?			
Dependents		YES	NO	Comments
6	Were the correct number of dependents entered on the return?			
Income/Adjustments		YES	NO	Comments
7	Was the correct income entered on the return?			
8	Were you asked about other income not reported on a Form W-2, Form 1099, etc. (i.e. gambling winnings, jury duty)?			
9	Were the correct adjustments to income entered on the return?			
Credits		YES	NO	Comments
10	Was the correct amount of Child & Dependent Care Credit entered on the return?			
11	Was the correct amount of Education Credit entered on the return?			
12	Was the correct amount of Child Tax Credit entered on the return?			
13	Was the correct amount of Additional Child Tax Credit entered on the return?			
14	Was the correct amount of Retirement Savings Contributions Credit entered on the return?			

Credits		YES	NO	Comments
15	Was the correct amount of other credits entered on the return?			
16	Was the correct amount of EITC entered on the return?			
17	Was the correct amount of Advance EITC entered on the return?			
18	Is the amount of the Recovery Rebate Credit on the return correct?			
Completion of the Return		YES	NO	Comments
19	Did the volunteer preparer review the completed tax return with you?			
20	Check which process was used to conduct the Quality Review of the return. <input type="checkbox"/> Self-review <input type="checkbox"/> Designated Review <input type="checkbox"/> Peer Review <input type="checkbox"/> None			
21	What type of Quality Review tool was used on the return? <input type="checkbox"/> Form 8158 or Form 13614C <input type="checkbox"/> IRS Approved Partner Developed form <input type="checkbox"/> None <input type="checkbox"/> Unapproved Partner Developed form			
22	Was the return prepared using tax preparation software?			
Return Accuracy		YES	NO	Comments
23	Does the completed tax return reflect the correct federal refund/balance due?			
Additional Site Information				Comments
24	What is the certification level of the volunteer that prepared the shopping return? <input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> None <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> International			
25	Method certified volunteer (shopping return) was trained in Tax Law? <input type="checkbox"/> Link & Learn Taxes <input type="checkbox"/> IRS training publications <input type="checkbox"/> Partner created training materials <input type="checkbox"/> Other, Please explain <input type="checkbox"/> None			
26	Besides return preparation, what other services are offered at this site? <input type="checkbox"/> Refund Anticipation Loans <input type="checkbox"/> Outreach <input type="checkbox"/> Benefit Screening <input type="checkbox"/> Credit Counseling <input type="checkbox"/> Asset Building/Financial Education <input type="checkbox"/> Other, please explain			
Additional Comments				