

Form 6729-P (October 2014)	Department of the Treasury - Internal Revenue Service Partner Return Review Sheet	Date of review
Site name	SIDN	Reviewer's name

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. The measurement questions for determining if a return is accurate are **in bold**.

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

	Quality	Comments
1	Based on what you could determine, were the necessary steps for the intake and interview process followed for this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
2	Based on what you could determine, were the necessary steps for the quality review process followed for this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
3	What is the certification level needed for this return? <input type="checkbox"/> Basic <input type="checkbox"/> Advanced <input type="checkbox"/> Military <input type="checkbox"/> Other	
4	Was the volunteer tax preparer certified at the level needed to prepare this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
5	Was the quality reviewer certified at the level needed to review this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	

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

	Filing Status	Comments
9	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	
10	Is the filing status on the return correct? <input type="checkbox"/> Yes <input type="checkbox"/> No - Should be Single <input type="checkbox"/> No - Should be MFJ <input type="checkbox"/> No - Should be MFS <input type="checkbox"/> No - Should be HOH <input type="checkbox"/> No - Should be QW	

	Exemptions	Yes	No	N/A	Comments
11	Is the number of personal exemption(s) correct?	<input type="checkbox"/>	<input type="checkbox"/>		
12	Is the number of dependency exemption(s) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Income	Yes	No	N/A	Comments
13	Are wages correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	Is investment income (interest, dividend, capital gains) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15	Is net business income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16	Is all other income correct? (All income sources not covered by the above questions 13-15)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Adjusted Gross Income	Yes	No	N/A	Comments
17	Are adjustments to income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Tax and Credits		Yes	No	N/A	Comments
18	Is the standard deduction correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19	Are itemized deductions correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20	Is the excess advance premium tax credit repayment correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21	Is the child and dependent care credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22	Are the education credits correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23	Is the retirement savings contributions credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24	Is the child tax credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25	Are all other credits correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other Taxes		Yes	No	N/A	Comments
26	Is the self-employment tax correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
27	Is the tax on unreported social security and Medicare income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
28	Is the additional tax on IRA, or other qualified retirement plan, distributions correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
29	Is the recapture of first-time homebuyer credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	Is the individual shared responsibility payment correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
31	Are all other taxes correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payments		Yes	No	N/A	Comments
32	Is the federal withholding correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
33	Are the estimated tax payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
34	Is the earned income credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
35	Is the additional child tax credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
36	Is the American Opportunity Credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
37	Is the net premium tax credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
38	Are all other payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
39	Are the bank routing number, account number and account type correct? (Direct deposit or bank draft)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Accuracy of Return		Yes	No	N/A	Comments
40	Based on the information provided, was an accurate return prepared?	<input type="checkbox"/>	<input type="checkbox"/>		Measurement of this question will be determined from questions 6-8 and 10-38.

Remarks