

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. 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	Were the necessary steps followed for the Intake/Interview & Quality Review Process for this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	
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"/> Other	
3	Were both the tax preparer and quality reviewer certified at the level required to prepare and review this return? <input type="checkbox"/> Yes <input type="checkbox"/> No	

	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				
8	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				

	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 (Form 1040 & Schedule 1)	Yes	No	N/A	Comments
11	Are wages correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12	Is investment income (interest, dividend, capital gains) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13	Is retirement income (IRAs, pensions, annuities, social security benefits) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	Is net business income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15	Is all other income from Schedule 1 correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Adjusted Gross Income (Schedule 1)	Yes	No	N/A	Comments
16	Are adjustments to income correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Deductions and Tax (Form 1040 & Schedules 2 & A)	Yes	No	N/A	Comments
17	Is the standard deduction correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18	Are itemized deductions correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19	Is the qualified business income deduction correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20	Is the tax correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Nonrefundable Credits (Form 1040 & Schedule 3)		Yes	No	N/A	Comments
21	Is the child tax credit and credit for other dependents amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22	Is the credit for child and dependent care expenses correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23	Are the education credits correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24	Is the retirement savings contributions credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25	Are all other nonrefundable credits correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other Taxes (Schedule 2)		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 tax 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 repayment of first-time homebuyer credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	Are all other taxes correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payments (Form 1040 & Schedule 3)		Yes	No	N/A	Comments
31	Is the federal withholding correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
32	Is the earned income credit (Sch EIC) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
33	Is the additional child tax credit (Sch 8812) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
34	Is the refundable American opportunity credit (Form 8863) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
35	Are the estimated tax payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
36	Is the net premium tax credit (Form 8962) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
37	Are all other payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
38	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
39	Based on the information provided, was an accurate return prepared?	<input type="checkbox"/>	<input type="checkbox"/>		A No answer for any bold question means the return is considered inaccurate.

Remarks