

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"/> Specialty			
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				Comments
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	
4	<b>Are all names on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<b>Is the taxpayer's address on the return correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<b>Are all SSN/ITINs on the return correct?</b>	<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	<b>Is the filing status on the return correct?</b> <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				Comments
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	
9	<b>Is the taxpayer (and/or spouse, if applicable) identified correctly as a dependent of someone else?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	<b>Are dependents identified correctly?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income (Form 1040 & Schedule 1)				Comments
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	
11	<b>In 2020, did the taxpayer or spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	<b>Are wages correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	<b>Is investment income (interest, dividend, capital gains) correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	<b>Is retirement income (IRAs, pensions, annuities, Social Security benefits) correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	<b>Is net business income correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	<b>Is all other income from Schedule 1 correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjusted Gross Income (Schedule 1)				Comments
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	
17	<b>Are adjustments to income correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deductions and Tax (Form 1040 & Schedules 2 & A)				Comments
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	
18	<b>Is the standard deduction correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	<b>Are itemized deductions correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	<b>Is the Qualified Business Income Deduction correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21	<b>Is the tax correct?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Nonrefundable Credits (Form 1040 & Schedule 3)		Yes	No	N/A	Comments
22	Is the Child Tax Credit and Credit for Other Dependents amount correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23	Is the Credit for Child and Dependent Care Expenses correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24	Are the Education Credits correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25	Is the Retirement Savings Contributions Credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26	Are all other nonrefundable credits correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other Taxes (Schedule 2)		Yes	No	N/A	Comments
27	Is the Self-employment Tax correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
28	Is the tax on unreported Social Security and Medicare tax correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
29	Is the additional tax on IRA or other qualified retirement plan distributions correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	Is the repayment of First-time Homebuyer Credit 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 (Form 1040 & Schedule 3)		Yes	No	N/A	Comments
32	Is the federal withholding correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
33	Is the Earned Income Credit (Sch EIC) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
34	Is the Additional Child Tax Credit (Sch 8812) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
35	Is the refundable American Opportunity Credit (Form 8863) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
36	Are the estimated tax payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
37	Is the net Premium Tax Credit (Form 8962) correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
38	Is the Recovery Rebate Credit correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
39	Are all other payments correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40	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
41	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