Form **15723**
(March 2026)

Department of the Treasury - Internal Revenue Service

Administrative Review Preparation Checklist

The purpose of this form is to assist you in preparing for the upcoming Administrative Review. Use the checklist below to track requested items and required actions.

1 – Confirm Review Date

- ☐ Confirm availability for the proposed review date and time OR
- ☐ Provide alternative dates within five (5) calendar days of receipt to confirm the review date and time
- ☐ Schedule a minimum of two (2) hours for the virtual review

2 – Confirm Required Review Participants

- ☐ Provide names and ensure availability of individuals who should attend the Administrative Review interview, including
  - Authorized Official / Grant Administrator
  - Financial Coordinator
  - Program Coordinator
  - Other staff responsible for program operations, compliance, or financial management
- ☐ Ensure all required participants are available for the full duration of the review

3 – Submit Requested Documentation from the Administrative Review Template and Document Request Checklist

- ☐ Complete the Administrative Review Template and provide supporting documentation for each section in an organized manner (see summary of items requested below)
- ☐ Submit documents via **Document Upload Tool (DUT)** - www.irs.gov/sendmyreply - no later than the response due date in your notification email
- ☐ Notify your assigned reviewer once documents have been submitted
- ☐ Ensure documents not submitted in advance are available during the review

Documents Needed

Program Documentation

- ☐ Administrative Review Template *(completed and signed certification)*
- ☐ Records used to track return production by site
- ☐ Documentation supporting primary and secondary target audience tracking
- ☐ Site list and site-level production summaries
- ☐ Documentation substantiating Site Coordinator duties
- ☐ Quality control policies and procedures
- ☐ Accuracy rate and reject rate monitoring documentation

Volunteer Documentation

- ☐ Volunteer training and certification records
- ☐ Volunteer timesheets and service hour documentation
- ☐ Documentation supporting volunteer services used as matching funds *(if applicable)*
- ☐ Documentation identifying any staff or site coordinators paid with grant funds

Financial Documentation

- ☐ General ledger excerpts identifying Federal and matching funds
- ☐ Financial records documenting sources and uses of grant funds *(invoices, receipts, payroll records, etc.)*
- ☐ Matching funds documentation *(if applicable)*
- ☐ Payment Management System (PMS) reports and reconciliation documentation
- ☐ Indirect Cost Rate Agreement *(if applicable)*
- ☐ FEAB documentation *(if applicable)*

Policies and Procedures

- ☐ Purchasing policy and procedures
- ☐ Stipend policy and procedures
- ☐ Sub-recipient policy and oversight documentation
- ☐ Sub-recipient agreements or MOUs *(if applicable)*

Equipment *(If Purchased with Grant Funds)*

- ☐ Equipment inventory list
- ☐ Equipment safeguarding procedures
- ☐ Documentation supporting equipment purchases

4 – Prepare for Review

- ☐ Ensure access to all submitted documentation during the review
- ☐ Ensure financial and program staff are available to answer questions
- ☐ Be prepared to provide additional documentation if requested

5 – Participate in Administrative Review Interview

- ☐ Attend the scheduled virtual review meeting
- ☐ Be prepared to discuss
  - Program management and oversight
  - Internal controls
  - Return production and MRE progress
  - Target audience outreach
  - Quality control and accuracy monitoring
  - Budget management and matching funds
  - Cash management and PMS drawdowns
  - Sub-recipient oversight (if applicable)