



QSR # 5: Volunteer Agreement (continued)		Comments
9	<b>Did the site meet the components for QSR 5?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
10	Is Publication 4836, VITA/TCE Free Tax Programs (VolTax), properly displayed? (Explain your process for ensuring volunteers and taxpayers know how to report unethical issues.) <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 6: Timely Filing		Comments
11	<b>Are timely filing requirements met? (Explain your process for transmitting returns, obtaining acknowledgements, and correcting rejects. Explain how taxpayers sign their tax return.)</b> <input type="checkbox"/> Yes <input type="checkbox"/> No-Not retrieving acknowledgments timely <input type="checkbox"/> No-Not transmitting timely <input type="checkbox"/> No-Not notifying taxpayers of rejects timely <input type="checkbox"/> No-Form 8879 not signed <input type="checkbox"/> No-Other (use if more than one "No" applies)	
QSR # 7: Civil Rights		Comments
12	<b>Is a current Civil Rights poster displayed at the first point of contact? (Explain your process for ensuring volunteers and taxpayers know how to report Civil Rights issues identified at your site.)</b> <input type="checkbox"/> Yes <input type="checkbox"/> Yes-Using Publication 4454 <input type="checkbox"/> No	
QSR # 8: Site Identification Number		Comments
13	<b>Does the site use the correct Site Identification Number (SIDN)? (What Site Identification Number or SIDN are you using?)</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 9: Electronic Filing Identification Number		Comments
14	<b>Does the site use the correct Electronic Filing Identification Number (EFIN)? (What Electronic Filing Identification Number or EFIN are you using?)</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
QSR # 10: Security		Comments
15	<i>Is there a process to identify everyone who prepares, reviews, or changes a tax return? (Explain the process used to identify who prepares, reviews, corrects, or makes changes to a tax return.)</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	
16	<i>Are adequate security measures taken to protect equipment and safeguard taxpayer data? (Explain measures taken to protect equipment and dispose of taxpayer data.)</i> <input type="checkbox"/> Yes <input type="checkbox"/> No-Taxpayer data not properly disposed <input type="checkbox"/> No-Equipment not secured <input type="checkbox"/> No-Taxpayer data not safeguarded	
17	<i>If Section 7216 is applicable, are consent notices properly secured? (Do you or your partner collect taxpayer information which is used for anything other than preparing tax returns?)</i> <input type="checkbox"/> Yes-Consent notices properly secured <input type="checkbox"/> N/A-Consent notices are not required <input type="checkbox"/> No-Consent notices not properly secured	
18	<b>Did the site meet the components for QSR 10?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
19	Do all volunteers wear or display their name to the taxpayers they assist? (Explain your process for identifying volunteers to taxpayers.) <input type="checkbox"/> Yes <input type="checkbox"/> No	
Site Operations		Comments
20	Is the site operating information in SPECTRM correct? (What are your site operating days and hours?) <input type="checkbox"/> Yes <input type="checkbox"/> No	
Adherence to Quality Site Requirements		Comments
21	What is the overall Quality Site Requirement adherence rating?	The adherence rate is calculated by awarding 10 points for each of the measurement questions marked "Yes". The measurement questions are 1, 3-5, 9, 11-14, and 18.

Remarks