

## QSS Site Review Job Aid

### To be used with Form 6729

SPEC Quality Statistical Sample (QSS) Reviewers use Form 6729, QSS Site Review Sheet, to measure site adherence to the Quality Site Requirements (QSR) and Volunteer Standards of Conduct (VSC) and to monitor site operations.

Use this job aid to complete Form 6729 and refer to these additional resources as needed:

- Publication 1084, VITA/TCE Volunteer Site Coordinator Handbook
- Publication 4012, VITA/TCE Volunteer Resource Guide
- Publication 4299, Privacy, Confidentiality, and Civil Rights - A Public Trust
- Publication 4396A, Partner Resource Guide
- Publication 5166, IRS Volunteer Quality Site Requirements
- Publication 5324, Fact Sheet-Quality Site Requirements for Alternative Filing Models
- Volunteer Tax Alerts (VTA) and Quality Site Requirement Alerts (QSRA)

Note: Employees should refer to Document 13170, Fact Sheet-Quality Site Requirements applicable to AARP Foundation Tax-Aide sites, which gives guidance on alternative procedures approved for use at Tax-Aide sites.

Confirm the information provided by the coordinator (site or local) with what you observe at the site. Clarify the site's processes and/or procedures when there is an inconsistency between what the coordinator tells you and what you observe. Ensure your answers to the questions on Form 6729 reflect any inconsistencies identified. It is preferred that you examine the site's documentation, but oral testimony is acceptable if you are unable to observe a specific process.

When the site is not in compliance, explain to the coordinator the importance and purpose of the QSR. Determine what corrective actions are needed and assist the site with these actions as appropriate. Each question has a Comments field to record notes and any corrective actions taken. If you need additional room, use the Remarks field. All underlined responses require a comment.

Each QSR has one measurement question in bold print. Responses to these questions measure the adherence to the QSR for the VITA/TCE programs. The site's adherence to the QSR is based on the percentage of QSR met and the score appears on the SPECTRM-generated Form 6729.

Remember to enter Form 6729 into the SPECTRM Site Quality Module BEFORE entering Forms 6729-R or 6729-B. Also, do not enter any Personally Identifiable Information (PII) information into SPECTRM.

Complete Form 6729 entity section by entering all the following:

- Date of review
- Site Name
- SIDN
- Reviewer Name or SEID
- Review conducted by
- Type of review
- Advanced notice

Question 1: Are all volunteers certified in Volunteer Standards of Conduct?	Answer Options
<p>Ask the coordinator to explain the process used to ensure all volunteers are certified in Volunteer Standards of Conduct Training.</p> <p>Use Form 13206 or similar partner-created list containing the same information to confirm VSC certification. If Form 13206 or similar partner-created list does not contain the same information as Form 13615, the coordinator or partner will need to provide an updated Form 13206 or Forms 13615. Tax-Aide's list of volunteers will be available on QPO SharePoint once received from National Partnerships. The Link &amp; Learn Taxes (L&amp;LT) Certification report can be used to verify volunteers certified through L&amp;LT.</p> <p>If these records are not maintained at the site, request the missing information via Post Review Information Request e-mail, to the territory manager. Allow two business days for the territory manager to respond, otherwise indicate "No- unable to verify."</p>	<p>Yes</p> <p><u>No-Not certified</u></p> <p><u>No-Unable to verify</u></p>
Question 2: Are all required volunteers certified in Intake/Interview & Quality Review?	Answer Options
<p>Ask the coordinator to explain the process they use to ensure volunteers, quality reviewers, and coordinators have completed the Intake/Interview &amp; Quality Review Training.</p> <p>If the volunteers certified through L&amp;LT, answer yes, as the volunteer had to complete this training before certifying in tax law.</p> <p>If the volunteers certified using Form 6744, have the coordinator describe how volunteers completed the Intake/Interview and Quality Review Training.</p> <p>Indicate in Comments if you answered "No" because you were unable to verify, or one or more volunteers were not certified.</p> <p>Note: Tax-Aide embeds the IRS Intake/Interview and Quality Review Training in their tax law certifications.</p>	<p>Yes</p> <p><u>No</u></p>
Question 3: Are all volunteers who address tax law issues certified in tax law?	Answer Options
<p>Have the coordinator explain the process they use to ensure all volunteers who answer tax law questions, prepare or correct tax returns, and/or conduct quality reviews are certified in tax law. The process described by the coordinator should include how they confirm the volunteer's level of tax law certification.</p> <p>Ask for a list of volunteers working at the site on the day of the review.</p> <p>Use Form 13206 or similar partner-created list containing the same information to confirm tax law certification. If Form 13206 or similar partner-created list does not contain the same information as Form 13615, the coordinator or partner will need to provide an updated Form 13206 or Forms 13615. Tax-Aide's list of volunteers will be available on QPO SharePoint once received from National Partnerships. The L&amp;LT Certification report can be used to verify volunteers certified through L&amp;LT.</p> <p>If these records are not maintained at the site, request the missing information via Post Review Information Request e-mail, to the territory manager. Allow two business days for the territory manager to respond, otherwise indicate "No- unable to verify."</p>	<p>Yes</p> <p><u>No-Not certified</u></p> <p><u>No-Unable to verify</u></p>
Question 4: Did the coordinator(s) at the site certify by passing the Site Coordinator Test?	Answer Options
<p>New: All Coordinators and alternate coordinators must certify by passing the new Site Coordinator Test with a passing score of 80% or higher prior to performing any site coordinator duties. The Site Coordinator Test is an annual requirement.</p> <p>Identify the coordinator(s) for the site. Once the coordinator is identified, verify the coordinator certified by passing the Site Coordinator Test.</p> <p>Note: Since coordinators are only required to be available to the site, answer "Yes" if you are unable to speak with the coordinator to verify they passed the certification.</p>	<p>Yes</p> <p><u>No</u></p>

Question 5: Did the site meet the components for QSR #1?	Answer Options
<p style="text-align: center;"><b>This is the measurement question.</b></p> <p>Answer "Yes" if you:</p> <p>Verified all volunteers were certified in VSC (Q1), AND</p> <p>Verified all required volunteers completed Intake/Interview and Quality Review certification (Q2), AND</p> <p>Confirmed all volunteers who address tax issues are certified in tax law (Q3), AND</p> <p>Confirmed coordinator and alternate coordinators certified by passing the Site Coordinator Test (Q4).</p>	<p>Yes</p> <p><u>No</u></p>
Question 6: Are all volunteers using a correct Intake/Interview & Quality Review Process?	Answer Options
<p>Answer "No - Not Using Form 14446 (Virtual Site)" if the Virtual VITA/TCE Site is not using Form 14446 or if a site operating under the Contingency Plan is not using Form 14446.</p> <p>Answer "No-Incomplete Quality Review Process" if any incorrect tax return is identified.</p> <p>Answer "No-Other" when more than one 'No' answer applies. Indicate in Comments what components were not met.</p> <p>Note: If the site is not confirming taxpayers' identities and/or SSN/TIN, the site will miss QSR #3, not QSR #2.</p>	<p>Yes</p> <p>No-Not using Form 13614-C</p> <p>No-Not interviewing the taxpayer</p> <p><u>No-Not using Form 14446 (Virtual Site)</u></p> <p><u>No-Does not quality review all returns</u></p> <p><u>No-Incomplete or unapproved Quality Review process</u></p> <p><u>No-Other</u></p>
Question 7: Is there a process which ensures returns are within scope and volunteer preparers and quality reviewers are assigned returns at their certification level?	Answer Options
<p>Have the coordinator explain how they ensure volunteers and quality reviewers have the certification level needed for the returns they prepare and/or quality review.</p> <p>Review Publication 4012, Scope of Service Chart.</p> <p>Volunteers certified with the Federal Tax Law Update Test for Circular 230 Professionals, are authorized to prepare all tax returns within the scope of the VITA/TCE programs. Volunteers with Qualified Experienced Volunteer Certification (QEVC) are authorized to prepare tax returns at the Advanced level.</p> <p>All out-of-scope issues should be identified early in the return preparation process. Enter all out-of-scope issues in Comments.</p> <p>Answer "No-Other" if the site does not have a process for identifying out-of-scope returns AND does not have a process for ensuring volunteers and quality reviewers are only preparing returns that are within their certification level.</p> <p>When more than one "No" answer applies, indicate in Comments what components of QSR 2 were not met.</p>	<p>Yes</p> <p><u>No-Not identifying out-of-scope issues</u></p> <p><u>No-Not identifying volunteer/return certification levels</u></p> <p><u>No-Not identifying reviewer/return certification levels</u></p> <p><u>No-Other</u></p>

**Question 8: Are volunteers advising taxpayers of their responsibility for the information listed on their return?**

**Answer Options**

Ask the coordinator to explain when/how volunteers advise taxpayers of their responsibility for the information on their tax return after the quality review, but before the taxpayer signs and dates Form 8879, IRS e-file Signature Authorization, or the return.

Volunteers should advise the taxpayer that they are ultimately responsible for the information on the return and explain that by signing and dating Form 8879 or the return, the taxpayer(s) has confirmed that the information is accurate.

If the coordinator doesn't include these steps when describing their process, discuss the steps with them.

Yes  
No

**Question 9: Did the site meet the components for QSR #2?**

**Answer Options**

**This is the measurement question.**

Answer "Yes" if you confirmed:

The site followed all the necessary steps for the Intake/Interview & Quality Review Process (Q6), AND

The site has a process to ensure returns are within scope and assigned to volunteers who have the appropriate certification level (Q7), AND

The site advises taxpayers of their responsibility for the information listed on their return (Q8), AND

All reviewed tax returns were correct.

Answer "No" if the site is not using a correct Intake Interview and Quality Review Process:

Not using Form 13614-C.

Not interviewing the taxpayer.

Not using Form 14446 (Virtual Site).

Does not quality review all tax returns.

Using an unapproved Quality Review Process.

Incorrect returns being prepared at the site.

Not advising taxpayers of their responsibility regarding the information on their return.

Yes  
No

**Question 10: During the return reviews, were all Forms 13614-C you reviewed complete?**

**Answer Options**

Answer "Yes" if the Forms 13614-C you reviewed were complete.

Answer "No" if the Forms 13614-C you reviewed were incomplete:

If all questions are not answered on any Form 13614-C.

If all "Unsure" answers have not been discussed and changed to "Yes" or "No" on any Form 13614-C.

Required shaded areas "To be completed by a Certified Volunteer Preparer" not completed.

Yes  
No

**Question 11: Are volunteers using photo identification to confirm taxpayers' identities?**

**Answer Options**

Have the coordinator explain the process used to confirm taxpayer identities.

The process must include a review of documents including original photo identification (ID) such as valid driver's license (U.S.), employer ID, school ID, state ID (U.S.), Military ID, national ID, visa, or passport.

Exception for validating identity: The site coordinator has the discretion to grant an exception to the requirement to provide a valid form of identification and/or the requirement to provide proof of taxpayer identification number if the taxpayer is known to the site. Refer to Publication 4299 for examples.

Yes - Photo ID's checked or exception applies

No-Not using photo identification

No-Spouse/Taxpayer not present/No Power of Attorney

Question 12: Are volunteers confirming Taxpayer Identification Numbers (TIN) for everyone listed on the return?	Answer Options
<p>Have the coordinator explain the process used to confirm Taxpayer Identification Numbers (TIN) using appropriate documentation.</p> <p>Volunteers must review original or copies (paper or electronic) of Social Security Administration issued documents such as social security cards, letter, Form SSA-1099, and/or any other verification issued from the SSA Office. SSA verification documents with a truncated SSN, (i.e., ***-**-1234), can be used at the site coordinator’s discretion.</p> <p>For taxpayers or dependents who do not qualify for SSN, their IRS-issued Individual Taxpayer Identification Number (ITIN) document(s) will be required.</p> <p>Exception for validating identity: The site coordinator has the discretion to grant an exception to the requirement to provide a valid form of identification and/or the requirement to provide proof of taxpayer identification number if the taxpayer is known to the site. Refer to Publication 4299 for examples.</p> <p>For questions on ITINS, please refer to Publication 5259 Fact Sheet, Expiring ITINS.</p>	<p>Yes</p> <p><u>No</u></p>
Question 13: Did the site meet the components for QSR #3?	Answer Options
<p style="text-align: center;"><b>This is the measurement question.</b></p> <p>Answer “Yes” if you confirmed:</p> <p>The site uses photo identification to verify the identity of the taxpayer and spouse (Q11), or if the coordinator approves an exception to providing photo identification, AND</p> <p>The site confirms Taxpayer Identification Numbers (TIN) using appropriate documentation or the coordinator approved an exception to providing appropriate documentation (Q12).</p>	<p>Yes</p> <p><u>No</u></p>
Question 14: Are all required reference materials available at the site?	Answer Options
<p style="text-align: center;"><b>This is the measurement question.</b></p> <p>Check that the site has at least one copy of Publications 4012, 4299 and 17 available. You may be able to see these at a workstation or a centralized area.</p> <p>If the site does not have paper copies available, have the coordinator explain how they access them electronically, if appropriate.</p> <p>Publications 17, 4012 and 4299 are available for download on IRS.gov or by opening the VITA/TCE Publications and User Guides option on the Navigation Bar when signed into TaxSlayer Pro.</p>	<p>Yes</p> <p>No-Publication 4012 not available</p> <p>No-Publication 17 not available</p> <p>No-Publication 4299</p> <p>No-Other (use if more than one “No” applies)</p>
Question 15: Is there a process which ensures all volunteer alerts are reviewed by all tax law-certified volunteers?	Answer Options
<p>Have the coordinator explain the process they use to ensure all Volunteer Tax Alerts (VTA) and Quality Site Requirement Alerts (QSRA) or AARP Tax-Aide CyberTax Alerts have been received by all volunteers within five days of issuance.</p> <p>Alerts are available through TaxSlayer Pro, GovDelivery e-mails, Site Coordinator Corner. CyberTax Alerts are available on the AARP Foundation Tax-Aide website.</p> <p>If the review is conducted prior to any alerts being issued, answer “Yes”.</p>	<p>Yes</p> <p><u>No</u></p>

**Question 16: Is the volunteer’s identity confirmed using government-issued photo ID, and are Forms 13615 signed and dated by the volunteer and approving official?**

**Answer Options**

All partners must have a process in place for the partner or partner-designated approver to sign each Form 13615 after confirming the identity of the volunteer.

By signing the form, the volunteer indicates they have read and understand the agreement and agree to adhere to the Volunteer Standards of Conduct. The partner’s signature validates the information on the form, confirms the partner checked the volunteer’s government-issued photo ID, and confirmed volunteer certifications.

Form 13615 is no longer required to be held at the site/partner level. Form 13206 or a similar partner-created form containing the same information can be used to verify all Forms 13615 were received and signed/dated by the volunteer and partner if it contains the same information as Form 13615. The box on Form 13206 must be checked.

If these records are not maintained at the site, request the missing information via Post Review Information Request e-mail, to the territory manager. Allow two business days for the territory manager to respond, otherwise indicate “No- unable to verify.”

Note: If the volunteer is requesting CE credit then the signed and dated Form 13615 must be retained.

- Yes
- No-Not signed/dated by volunteer
- No-Not signed/dated by approving official
- No-Unable to verify
- No-Form 13206 does not certify Forms 13615 validation
- No-Not requiring government-issued photo ID
- No-Other

**Question 17: Were any violations to the Volunteer Standards of Conduct (VSC) Identified?**

**Answer Options**

If you identify violations of the VSC, use the comments box to indicate what standard was violated. If more than one standard was violated, check the box for the most egregious violation. Use Comments and/or Remarks to indicate all violations identified.

**Standards of Conduct:** As a volunteer in the VITA/TCE Programs, you must:

- |  |  |
|--|--|
| 1) Follow the Quality Site Requirements (QSR).   | 4) Not knowingly prepare false returns.  |
| 2) Not accept payment, solicit donations, or accept refund payments for federal or state tax return preparation from customers.  | 5) Not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct deemed to have a negative effect on the VITA/TCE Programs. |
| 3) Not solicit business from taxpayers you assist or use the information you gained about them for any direct or indirect personal benefit for you or any other specific individual. | 6) Treat all taxpayers in a professional, courteous, and respectful manner.  |

Remember the distinction between QSR noncompliance and a violation to VSC 1. A VSC violation relating to the QSR only occurs if the volunteer REFUSES to comply with the QSR and/or if the volunteer intentionally violates the QSR and refuses to change this behavior after being counseled. If the volunteer begins adhering to the QSR, they have not violated the VSC.

Note: If you answer “Yes”, you must initiate the Internal Referral Process by completing Form 14511, Volunteer Standards of Conduct Violation Report.

- No-Violations were not identified
- Yes-Violation to VSC 1
- Yes-Violation to VSC 2
- Yes-Violation to VSC 3
- Yes-Violation to VSC 4
- Yes-Violation to VSC 5
- Yes-Violation to VSC 6

**Question 18: Did the site meet the components for QSR #5?**

**Answer Options**

**This is the measurement question.**

Answer “Yes” if you:

Verified all Forms 13615 were signed/dated by the volunteer/partner (Q16), AND

Did not identify any violations to the Volunteer Standards of Conduct (Q17).

- Yes
- No

<p><b>Question 19: Is Publication 4836, VITA/TCE Free Tax Programs (VolTax), made available to all taxpayers who seek services at the site?</b></p>	<p><b>Answer Options</b></p>
<p>Confirm the latest version of Publication 4836, VITA/TCE Free Tax Programs, is displayed in a visible location at the site.</p> <p>When reviewing 100% virtual sites, ensure the poster was made available to all taxpayers seeking services.</p> <p>Tax-Aide sites will use their current D143 poster, which includes all required SPEC language, including the VolTax external referral information. Tax-Aide sites will not use Publication 4836.</p>	<p>Yes</p> <p><u>No</u></p>
<p><b>Question 20: Are timely filing requirements met?</b></p>	<p><b>Answer Options</b></p>
<p><b>This is the measurement question.</b></p> <p>Ask the site coordinator to explain the process used to:</p> <p>Transmit the tax returns (within 3 days).</p> <p>Retrieve acknowledgements (within 48 hours).</p> <p>Notify a taxpayer if a reject cannot be corrected (within 24 hours).</p> <p>Ask the coordinator to explain how the site handles Form 8879. The coordinator should explain the taxpayer is asked to sign Form 8879 prior to the return being transmitted and that the signed Form 8879 is given to the taxpayer with a copy of their tax return.</p> <p>Use good judgment when answering the question, especially when the site is only open one day a week.</p> <p>Answer "No – Other" when more than one "No" answer applies.</p> <p>Note: Select the answer option "Yes" if the site is only preparing paper returns.</p>	<p>Yes</p> <p>No-Not transmitting timely</p> <p>No-Not retrieving acknowledgment s timely</p> <p>No-Not notifying taxpayers of rejects timely</p> <p>No-Form 8879 not signed</p> <p><u>No-Other</u></p>
<p><b>Question 21: Is the current Civil Rights poster made available to all taxpayers who seek services at the site?</b></p>	<p><b>Answer Options</b></p>
<p><b>This is the measurement question.</b></p> <p>Observe the location of the civil rights poster, which should be visible at the first point of contact between the taxpayer and volunteer.</p> <p>When reviewing 100% virtual sites, ensure the poster was made available to all taxpayers seeking services.</p> <p>Confirm the site is using a current Publication 4053 (EN/SP), Your Civil Rights are Protected.</p> <p>Publication 4053 is also available in Chinese (CN), Korean (KR), Russian (RU), and Vietnamese (VN). The site should use the appropriate language version that best reflects the taxpayers served as applicable.</p> <p>Tax-Aide sites will use their current D143 poster, which includes the updated Civil Rights language required for all free tax preparation sites. Tax-Aide will also use Publication 4053 in Spanish (SP), Chinese (CN), Korean (KR), Russian (RU) and/or Vietnamese (VN), when appropriate, based on clients served at an individual Tax-Aide site.</p> <p>Answer "Yes" if the site is using Publication 4454, an optional product designed to notify taxpayers of their civil rights when tax preparation services cannot be offered.</p>	<p>Yes</p> <p><u>No</u></p>
<p><b>Question 22: Is the site using the correct Site Identification Number (SIDN)?</b></p>	<p><b>Answer Options</b></p>
<p><b>This is the measurement question.</b></p> <p>Review the SIDN shown on the tax return when conducting the return review, to confirm the site is using the correct SIDN.</p> <p>Review production reports prior to conducting the review for any indications that the site may be using an incorrect SIDN.</p>	<p>Yes</p> <p><u>No</u></p>

If you identify an incorrect SIDN:

Determine if the site is using an incorrect SIDN and request the Administrator correct the SIDN in the TaxSlayer Pro Office set-up and ensure that all preparers have the correct SIDN attached to their profile.

Determine if the preparer who completed the return used the correct login and password for the site. Preparers who volunteer at more than one site have multiple logins and passwords.

**Question 23: Is the site using the correct Electronic Filing Identification Number (EFIN)?**

**Answer Options**

**This is the measurement question.**

Review the EFIN on Form 8879 when conducting the return review, to confirm the site is using the correct EFIN.

Review production reports prior to conducting the review for any indications that the site may be using an incorrect EFIN.

E-file administrators should set the tax software defaults to ensure the correct EFIN automatically appears on Form 8879, IRS e-file Authorization.

For sites using TaxSlayer, the software is populated with the EFIN that was included in the software order from SPEC. Sites should not be making changes to this EFIN without guidance from SPEC. If the site is an Ad Hoc Site, then a second Electronic Return Originator (ERO) account is set up, but the EFIN of the main site will continue to be used.

If you identify the site has been using an incorrect EFIN, the coordinator should contact TaxSlayer immediately for instructions on re-setting the EFIN on tax returns which have not yet been submitted.

Yes

No

**Question 24: Does the site have a security plan and is the plan available at the site?**

**Answer Options**

Request a copy of the site's security plan. The security plan must be completed and signed by the site coordinator. Sites can use [Form 15272, VITA/TCE Security Plan](#), or a similar document that captures the same information. A copy of the security plan must be maintained at the site.

Answer "No-Not available at the site" if the plan was not at the site to review.

Answer "No-Site does not have a security plan" if the site has not developed a security plan.

Answer "No-Other" if more than one answer applies and use the Comments to provide an explanation.

Yes

No-Not available at the site

No-Site does not have a security plan

No-Other

**Question 25: Are the site's computers all password protected and internet connection either hard-wired or password protected wireless connection?**

**Answer Options**

Have the coordinator explain the site's policy for computer and internet passwords.

Answer "No-Computers without passwords" if equipment is not properly secured with passwords.

Answer "No-Wireless without password" if the internet connection is not passworded.

Answer "No-Other" if more than one answer applies and use the Comments to provide an explanation.

Yes

No-Computers without passwords

No-Wireless without password

No-Other

**Question 26: Are adequate security measures taken to protect computers, printers and all other equipment during and after site operating hours?**

**Answer Options**

Have the coordinator explain what steps are taken to protect computers, printers and all equipment during and after site operating hours.

If the security measures are adequate to protect the equipment and meet the guidelines provided in Publication 4299, answer "Yes."

If additional security measures are needed, answer "No."

Yes

No



<p><b>Question 27: Does the site protect, safely store and/or properly dispose of Personally Identifiable Information (PII)?</b></p>	<p><b>Answer Options</b></p>
<p>Ask the coordinator to explain if they keep any physical and/or electronic Personally Identifiable Information (PII) for any reason during and after the filing season.</p> <p>Ask the coordinator how they dispose of sensitive information, including PII.</p> <p>Answer "No-Other" if more than one negative answer applies and use the Comments to provide an explanation.</p>	<p>Yes</p> <p>No-PII not protected</p> <p>No-PII not properly disposed</p> <p><u>No-Other</u></p>
<p><b>Question 28: If Section 7216 is applicable, are consent notices properly secured?</b></p>	<p><b>Answer Options</b></p>
<p>Ask the coordinator if they secure Section 7216 consents. If they do, have the coordinator explain the process used.</p> <p>Answer N/A if taxpayer information is not used for other purposes or consent notices are not required based on the exception.</p> <p>See Publication 4299 for a definition and explanation of a Relational EFINs, Use and Disclose Consents, and Global Carry Forward Consents.</p>	<p>Yes-Consent notices are properly secured</p> <p>N/A-Consent notices are not required</p> <p><u>No-Consent notices are not properly secured</u></p>
<p><b>Question 29: Did the site meet the components for QSR #10?</b></p>	<p><b>Answer Options</b></p>
<p style="text-align: center;"><b>This is the measurement question.</b></p> <p>Answer "Yes" if you confirmed the site:</p> <p>Has a security plan at the site (Q24), AND</p> <p>Secures all computers and internet connections with passwords (Q25), AND</p> <p>Takes adequate security measures to protect equipment (Q26), AND</p> <p>Properly protects PII (Q27), AND</p> <p>Properly secures Section 7216 consent notices, if appropriate (Q28).</p>	<p>Yes</p> <p><u>No</u></p>
<p><b>Question 30: Does the site use the tax software features to generally limit volunteer access to tax returns outside of site operating hours?</b></p>	<p><b>Answer Options</b></p>
<p>Have the coordinator explain how they identify everyone who assisted in a tax return's preparation process and how they limit after-hours access to the software.</p> <p>For sites using TaxSlayer, request the coordinator provide the User Name Report and review to determine the access volunteers have at the site. The User Name Report, will show all users (active, inactive &amp; Archived) and the security template assigned to each user. To access this report: from home screen; select Reports, Other Data Report, then User Name Reports.</p> <p>Answer "No" if the site allows volunteers unnecessary access after-hours and explain the reason why in the Comments.</p>	<p>Yes</p> <p><u>No</u></p>
<p><b>Question 31: Are all volunteers wearing or displaying their name to taxpayers they assist?</b></p>	<p><b>Answer Options</b></p>
<p>Confirm all volunteers are identified.</p> <p>If one or more volunteers are not wearing/displaying their name, have the coordinator explain the process used to identify volunteers to the taxpayers they serve.</p> <p>If all volunteers are wearing or displaying their name, answer "Yes". If not, answer "No".</p>	<p>Yes</p> <p><u>No</u></p>

Question 32: Is the site operating information correct in SPECTRM?	Answer Options
<p>Ask the coordinator to verify days and hours of operation and language services offered.</p> <p>If the information in SPECTRM is incorrect, answer “No” and instruct the coordinator to provide an updated Form 13715, SPEC Volunteer Site Information Sheet, to their relationship manager.</p> <p>For Tax-Aide sites, request the coordinator provide the corrected information to Tax-Aide for updating in their system. Their system should update the correct information into SPECTRM.</p>	<p>Yes</p> <p><u>No</u></p>
Question 33: What is the overall Quality Site Requirement Adherence Rating?	
<p>Auto-filled field</p> <p><b>Remarks Section:</b> Include any general comments and/or required comments if there was insufficient space in an individual question’s comment field.</p>	<p>Measurement of this question is based on the answers to questions 5, 9, 13, 14, 18, 20, 21, 22, 23 and 29.</p>