

February 15, 2022

VITA/TCE Quality Site Requirements Alert

QSRA 2022-01 Quality Oversight Reviews

Message for Volunteers and Partners

Due to travel restrictions in 2022, SPEC is continuing alternative plans to perform virtual Quality Oversight Reviews on VITA/TCE sites. During Filing Season 2022, the SPEC Quality Program Office (QPO) will conduct virtual reviews. Using electronic means, QPO reviewers will schedule quality oversight reviews that include a remote site review and reviews of a limited sample of tax returns.

QPO reviewers will only review tax returns where taxpayers have given their consent. Taxpayers will give consent using Form 14446, Virtual VITA/TCE Taxpayer Consent, by completing the section on page three entitled "Request to Review your Tax Return for Accuracy" and checking the box "Yes."

The virtual quality oversight review will include:

- A site review conducted via conference call using Form 6729
- Two virtual return reviews using Form 6729-R

QPO will notify territory managers of the sites selected for these oversight reviews prior to contacting partners to ensure the partner is aware the remote review request is valid.

SPEC Relationship Managers and Remote Site Reviews

These same travel restrictions also mean there will be no travel by SPEC relationship managers. Relationship managers will not be doing face-to-face Field Site Visits but will schedule and conduct Remote Site Reviews.

If you have any questions about reviews conducted this filing season, please contact your relationship manager.

Thank you for your continued commitment to quality and support of the VITA/TCE program.