

<b>Electronic Version Form F6729:10-2024</b>		<b>Department of the Treasury - Internal Revenue Service Form 6729 QSS Site Review Sheet 2025</b>			<b>Date of Review  02/22/2025</b>	
<b>Site Name</b>		<b>Program Group</b>		<b>SIDN</b>	<b>Review Conducted by SEID</b>	<b>Review Conducted by Category</b>
University of La Verne VITA		VITA		S70011038	ZW0LB	QSS Reviewer
<b>Type of Review</b>	<b>Site Type</b>	<b>Advanced Notification Reason</b>	<b>Type of Return</b>	<b>Scenario</b>	<b>Review ID</b>	<b>Overall Rating</b>
QSS Remote	Efile	Unannounced	NA	NA	53522	100%

### QSR #1: Certification

Question		Answer	Comment
1	Are all volunteers certified in Volunteer Standards of Conduct?	Yes	Confirmed list of volunteers with Link and Learn.
2	Are all required volunteers certified in Intake/Interview and Quality Review?	Yes	
3	Are all volunteers who address tax law issues certified in tax law?	Yes	
4	Did the coordinator(s) at the site certify by passing the Site Coordinator Test?	Yes	
5	Did the site meet the components for QSR #1?	Yes	
6	Are all volunteers certified using Link and Learn Taxes?	Yes	

### QSR #2: Intake/Interview and Quality Review Process

Question		Answer	Comment
7	Are all volunteers using correct Intake/Interview and Quality Review Processes?	Yes	
8	Is there a process which ensures returns are within scope and volunteer preparers and quality reviewers are assigned returns at their certification level?	Yes	
9	Did the site meet the components for QSR #2?	Yes	
10	During the return reviews, were all Forms 13614-C you reviewed complete?	Yes	Coached the coordinator on Form 13614-C at the end of the review.

### QSR #3: Confirming Photo Identification and Taxpayer Identification Numbers (TIN)

Question		Answer	Comment
11	Are all volunteers using photo identification to confirm taxpayers identities?	Yes-Photo IDs checked or exception applies	
12	Are all volunteers confirming taxpayer identification numbers (TIN) for everyone listed on the return?	Yes	
13	Did the site meet the components for QSR #3?	Yes	

#### QSR #4: Reference Materials

Question	Answer	Comment
14 Are all required reference materials available at the site (electronic or paper)?	Yes	
15 Is there a process which ensures all volunteer alerts are reviewed by all IRS tax law-certified volunteers?	Yes	There is a morning meeting prior to the site opening.

#### QSR #5: Volunteer Agreement

Question	Answer	Comment
16 Is the volunteers identity, name, and address confirmed using government-issued photo ID, and are Forms 13615 signed and dated by the volunteer and approving official?	Yes	
17 Were any violations to the Volunteer Standards of Conduct (VSC) identified?	No violations identified	
18 Did the site meet the components for QSR #5?	Yes	
19 Is the latest revision of Publication 4836, VITA/TCE Free Tax Preparation Site Info, available to all taxpayers who seek services at the site?	Yes	

#### QSR #6: Timely Filing of Tax Returns

Question	Answer	Comment
20 Are timely filing requirements met after securing taxpayer consent?	Yes	

#### QSR #7: Civil Rights

Question	Answer	Comment
21 Is the current Civil Rights poster made available to all taxpayers who seek services at the site?	Yes	

#### QSR #8: Correct Site Identification Number (SIDN)

Question	Answer	Comment
22 Is the site using the correct site identification number?	Yes	

#### QSR #9: Correct Electronic Filing Identification Number (EFIN)

Question	Answer	Comment
23 Is the site using the correct electronic filing identification number?	Yes	

## QSR #10: Security, Privacy, and Confidentiality

Question		Answer	Comment
24	Are the site computers and internet connection encrypted and password protected?	Yes	
25	Are adequate security measures taken to protect computers, printers, and all other equipment during and after site operating hours?	Yes	
26	Does the site protect, safely store and properly dispose of personally identifiable information (PII)?	Yes	
27	If Section 7216 is applicable, are consent notices obtained and properly secured?	N/A-Consent notices are not required	
28	Did the site meet the components for QSR #10?	Yes	
29	Does the site use the tax software features to generally limit volunteer access to tax returns?	Yes	
30	Do all volunteers identify themselves to the taxpayers they assist?	Yes	

## Site Operations

Question		Answer	Comment
31	Is the site operating information correct in SPECTRM?	Yes	

Remarks