



QSR # 5: Volunteer Agreement		Comments
7	<p>Is the volunteer's identity, name and address confirmed using government-issued photo ID, and are Forms 13615 signed and dated by the volunteer and approving official? (Tell me the process for securing signed volunteer agreements.)</p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No-Not signed/dated by volunteer or approving official  <input type="checkbox"/> No-Unable to verify           <input type="checkbox"/> No-Form 13206 does not certify Forms 13615 validation  <input type="checkbox"/> No-Not requiring government-issued photo ID         </p>	
8	<p>Were any violations to the Volunteer Standards of Conduct (VSC) identified?</p> <p> <input type="checkbox"/> No violations identified  <input type="checkbox"/> Yes-Violation to VSC #1 - Follow all Quality Site Requirements (QSR)  <input type="checkbox"/> Yes-Violation to VSC #2 - Do not accept payment, ask for donations, or accept refund payments for federal or state tax return preparation from customers  <input type="checkbox"/> Yes-Violation to VSC #3 - Do not solicit business from taxpayers you help or use the information you gained about them (taxpayer information) for any direct or indirect personal benefit for yourself, any other specific individual or organization  <input type="checkbox"/> Yes-Violation to VSC #4 - Do not knowingly prepare false returns  <input type="checkbox"/> Yes-Violation to VSC #5 - Do not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct considered to have a negative effect on the VITA/TCE programs  <input type="checkbox"/> Yes-Violation to VSC #6 - Treat all taxpayers in a professional, courteous, and respectful manner         </p>	
9	<p><b>Did the site meet the components for QSR # 5?</b></p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No         </p>	
10	<p>Is Publication 4836 (en-sp), VITA/TCE Free Tax Programs (VolTax), made available to all taxpayers who seek services at the site? (Explain your process for ensuring volunteers and taxpayers know how to report unethical issues.)</p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No         </p>	
QSR # 6: Timely Filing		Comments
11	<p><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></p> <p> <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)         </p>	
QSR # 7: Civil Rights		Comments
12	<p><b>Is a current Civil Rights poster made available to all taxpayers who seek services at the site? (Explain your process for ensuring volunteers and taxpayers know how to report Civil Rights issues identified at your site.)</b></p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No         </p>	
QSR # 8: Site Identification Number		Comments
13	<p><b>Does the site use the correct Site Identification Number (SIDN)? (What Site Identification Number (SIDN) are you using?)</b></p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No         </p>	
QSR # 9: Electronic Filing Identification Number		Comments
14	<p><b>Does the site use the correct Electronic Filing Identification Number (EFIN)? (What Electronic Filing Identification Number (EFIN) are you using?)</b></p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No         </p>	
QSR # 10: Security		Comments
15	<p><i>Does the site have a security plan and is the plan available at the site? (Please share a copy of your security plan.)</i></p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No-Site does not have a security plan  <input type="checkbox"/> No-Not available at the site           <input type="checkbox"/> No-Other         </p>	
16	<p><i>Are the site's computers all password protected and internet connection either hard-wired or wireless connection is password protected? (Explain measures taken to password protect computers and internet connections.)</i></p> <p> <input type="checkbox"/> Yes           <input type="checkbox"/> No-Wireless without password  <input type="checkbox"/> No-Computers without passwords           <input type="checkbox"/> No-Other         </p>	

17	<p>Are adequate security measures taken to protect computers, printers and all other equipment during and after site operating hours? (Explain measures taken to protect computers and all equipment used by the site.)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
18	<p>Does the site protect, safely store and/or properly dispose of Personally Identifiable Information (PII)? (Explain the process you use to protect, store and dispose of taxpayer data.)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No-PII not properly disposed  <input type="checkbox"/> No-PII not protected <input type="checkbox"/> No-Other</p>	
19	<p>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? If yes, explain the process for the consent or denial of the use and/or disclosure.)</p> <p><input type="checkbox"/> Yes-Consent notices properly secured <input type="checkbox"/> No-Consent notices not properly secured  <input type="checkbox"/> N/A-Consent notices are not required</p>	
<b>QSR # 10: Security (continued)</b>		<b>Comments</b>
20	<p><b>Did the site meet the components for QSR #10?</b></p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
21	<p>Does the site use the tax software features to generally limit volunteer access to tax returns outside of site operating hours? (Explain the processes used to limit volunteer access to tax returns in the tax software during and after site hours.)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
22	<p>Do all volunteers identify themselves to the taxpayers they assist? (Explain your process for identifying volunteers to taxpayers.)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<b>Site Operations</b>		<b>Comments</b>
23	<p>Is the site operating information in SPECTRM correct? (What are your site operating days and hours?)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<b>Adherence to Quality Site Requirements</b>		<b>Comments</b>
24	<p>What is the overall Quality Site Requirement adherence rating?</p>	<p>The adherence rate is calculated by awarding 10 points for each of the measurement questions marked "Yes". The measurement questions are 1, 3, 4, 5, 9, 11, 12, 13, 14, and 20.</p>

Remarks