

Quality Site Requirement Alert (QSRA) 2012- 01

February 15, 2012

We are out and about: IRS - Stakeholder Partnerships, Education, and Communication is now making visits to VITA and TCE sites in your neighborhood. These visits are made for the following purpose:

- SPEC Field Site Visits – Partner/Site Coordinator assistance visits,
- SPEC QSS Reviews – Identifies SPEC' overall accuracy rate for 2012, and
- SPEC Shopping Reviews – Determines the taxpayer experience

We will be looking for consistent site operations and reviewing returns for accuracy. In addition to these reviews, the Treasury Inspector General for Tax Administration (TIGTA) will be conducting their annual shopping reviews.

We hope your season is off to a fine start and that you have embraced the collective quality processes that have proven to promote the preparation of accurate tax returns.

This year, every site is required to use *Form 13614C, Intake, Interview and Quality Review Sheet*. Remember; make sure you have current intake sheets with a revision date of October 2011. Discuss the content of the completed intake sheet with the taxpayer to ensure you have captured all of their income and expenses before entries are input into TaxWise. Please make sure you review each Form 13614-C during return preparation and again during your site's quality review process. Most importantly, Form 13614-C is an excellent tool but it does not take the place of a thorough interview with the taxpayer. The combination of the tool and the interview promotes accuracy.

You and your volunteers are the best, period!

Remember, you are not obligated to prepare all tax returns for all taxpayers. Denying service is not easy but if you feel the taxpayer is:

- providing misleading information;
- the return is out of scope; or
- you just aren't comfortable with the return,

Don't do the return. Never feel pressured to do a questionable return. Your training is solid, your instincts are good, IRS SPEC stands by you, and you have the support of other volunteers at your site. Use it all!

Year after year we work together to achieve great things for our clients and our taxpayers. A free and accurate return provided with a smile from a dedicated hard serving volunteer surely makes their day!

Have a great season **and thanks for all you do!**

If you have any questions, please discuss them with your site coordinator, contact your local IRS SPEC relationship manager, or e-mail partner@irs.gov.

Thank you for volunteering to serve your community and for your dedication to providing top QUALITY service!