

Minimum Quality Site Requirements for Relationship Managers for use in Partner Sessions

September 2006

Key Messages:



- The Minimum Quality Site Requirements ensure consistent operation of sites. Each taxpayer using the services offered through volunteer return preparation program should be confident they are receiving accurate return preparation and quality service
- Your leadership is **critical** to the success of our quality efforts. One of our roles in SPEC is to be able to assist all partners understand their role in the quality process and adherence to the Minimum Quality Site Requirements
- The Minimum Quality Site Requirements must be communicated with partners and site coordinators to ensure our mutual objectives are met to provide accurate return preparation and quality service
- The Minimum Quality Site Requirements are located on The Quality Section of *The Point* under Policy and Guidance, in Publication 1084, *IRS Volunteer Site Coordinator Handbook*

These talking points were developed to give SPEC Employees the guidance to be able to communicate the Minimum Quality Site Requirements with all Partners.

Why are the Minimum Quality Site Requirements so Important?

Our partners and volunteers are the most valuable resources we have in the volunteer return tax preparation program. The establishment of Minimum Quality Site Requirements ensures consistent operation of all sites. It is SPEC's responsibility to provide the site with the tools and support necessary to comply with each quality requirement.

The partner version of the Minimum Quality Site Requirements must be communicated with partners and site coordinators to ensure our mutual objectives are met to provide accurate return preparation and quality service.

What is an Accurate Return?

A return is accurate when the tax law is applied correctly and the return is free from error based on the taxpayer interview and all supporting documentation.

Where are the Minimum Quality Site Requirements Located?

The Minimum Quality Site Requirements are also located in:

- VRPP-QIP Training Materials
- Publication 1084, *IRS Volunteer Site Coordinator Handbook*
- The Quality section of *The Point* under Policy and Guidance, (can be printed and share with partners)
- On the Partner Resource Page (by November)

What are the Minimum Quality Site Requirements?

There are nine practices that have been identified as necessary to ensure taxpayers visiting volunteer return preparation sites receive quality service and accurate return preparation. These nine practices are considered "Minimum Quality Site Requirements". They are:

1. All volunteers who answer tax law questions, instruct tax law, prepare tax returns and/or conduct quality reviews of tax returns must be certified.

2. All volunteer return preparers must use an Intake and Interview Process including the completion of an intake and interview sheet. All volunteer quality reviewers must use the intake and interview documentation for the quality return review.
3. All sites must have the following reference materials available for use by every volunteer return preparer and quality reviewer; preferably at each workstation.
 - Publication 4012, *Volunteer Resource Guide*
 - Publication 17, *Your Federal Income Tax for Individuals*
4. Title VI of the Civil Rights Act of 1964 information is displayed at the site or provided to the taxpayer.
5. Privacy, Confidentiality and Security guidelines are being followed.
6. A quality return review process is in place and being used.
7. E-File rejects are worked timely.
8. Correct Site Identification Number (SIDN) is shown on ALL returns prepared.
9. Correct Electronic Filing Identification Number (EFIN) is used.