

VITA/TCE SITE SETUP

Physical Site: location hours

Supplies

Laptop/computer.
Printer for every 3-4 laptops
Shredder or secure bin
At each workstation – Pens – pencils – staple remover – scissors – note paper – paper clips -
Current year & Prior year reference materials (Pub 4012 and Pub 17) as well as current tax year
Clipboard for clients if there are not tables for clients to complete intake sheet
Binder/storage of form 13615 (electronic storage is acceptable)

Site Coordinator

If site coordinator is seasonal or temporary, partnering agency must have a contact person available and responsible year-round. The EFIN will be registered in their name. Outside of tax season, they will act as a point of contact for compiling and submitting forms; volunteer and client advertising, etc.
Designated site assistants if necessary
Form 13533 and 13715 submitted to UWGN by October 31 of each year
Form 13206 submitted by Feb 3 to IRS and UWGN. Updates submitted March 3, April 3 of each year
Submit required reports to IRS SPEC including OPI use
Updated/changed 13715 must be submitted to IRS and UWGN as well as 2-1-1.
Rejects must be worked within 72 hours of transmission of return
Conduct pre-season meeting for volunteers
Attend quarterly site coordinator meetings and IRS/TaxSlayer trainings if possible
Attend the Annual Site Coordinators Training held prior to the opening of the sites or complete the IRS mandatory training online
Obtain the Volunteer Standards of Conduct; Intake Interview and Quality Review; Site Coordinator; and, Advance certifications.

Follow IRS Guidelines and Requirements as per Form 6729

All paid staff and volunteers are required to be certified
Intake/Interview & Quality Review Process used for 100% of returns
Confirm photo id and taxpayer identification number before completing the return
Keep Reference Materials at site and at workstation
Timely filing of Tax Returns
Civil Rights
Correct Site Identification Number used on returns
Correct Electronic Filing Identification Number used on returns

Follow Security requirements

Correct signage must be displayed

Staff and Volunteers must wear a name badge identifying their level of certification

All returns must be quality reviewed

Staff and Volunteers must read Tax Alerts

All returns must be in scope and prepared by volunteer certified at the necessary level

All returns must be completed on site. Volunteers cannot have access to live software when not actively volunteering

Post Season

Provisions for post-season inquiries for returns filed at the site. For example - a Taxpayer needs a copy of a return filed at the site, or they need to amend a return filed at the site

Address client needs in addition to tax preparation

Provide a comfortable waiting area with activities for children. Have resources for handicapped and disabled. Have available community resources and/or United Way resources available addressing financial security and financial literacy. Have 2-1-1 cards for clients to pick up.