

This form is required whenever the taxpayer's tax return is completed and/or quality reviewed in a non-face-to-face environment. The site must explain to the taxpayer the process used to prepare the taxpayer's return. If applicable, volunteers must advise taxpayers of the associated risk of transferring their data from one site location to another site.

Part I - To be completed by the VITA/TCE site:

Site name

United Way of Adams County, Inc.

Site address (street, city, state, zip code)

936 Broadway, Suite F
Quincy, IL 62301

Site identification number (SIDN)

S40019727

Site coordinator name

Regina Freel

Site contact name

Regina Freel

Site contact telephone number

217-222-5020

This site is using the following Virtual VITA/TCE method(s) to prepare your tax return:

A. Drop Off Site: This site uses a drop off process which includes the site maintaining personal identifiable information (social security numbers, Form W-2, etc.) to prepare the tax return at the same site but at a later time. In this process, you will come back to the same site for the quality review and/or signing the completed tax return. The site must explain the method it uses to contact you if additional information is needed.

B. Intake Site: This method includes the taxpayer leaving their personal identifiable information (social security numbers, Form W-2 and other documents) at the site in order to prepare and/or quality review the tax return at another location. In this process, the taxpayer's tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. The taxpayer may come back to the intake site for the quality review or to review and sign the completed tax return.

C. Return Preparation and/or Quality Review Only Site: This site may receive returns from one or more intake sites to prepare and/or quality review returns. This site generally does not take walk-in or appointments from other taxpayers in their location.

x **D. Combination Site:** This site prepares for other permanent or temporary intake sites as well as assisting walk in and appointment only taxpayers within their location.

E. 100% Virtual VITA/TCE Process: This method includes non face-to-face interactions with the taxpayer and any of the VITA/ TCE volunteers during the intake, interview, return preparation, quality review, and signing the tax return. The site must explain the process and consent. This includes the virtual procedures to send required documents (social security numbers, Form W-2 and other documents) through a secured file sharing system to a designated volunteer for review.

Part II: The Sites Process:

Explain how each process will be followed to assist taxpayers remotely. How will the site manage:

1. Scheduling the appointment

Appointments are scheduled either by phone or by using an online scheduling application. Instructions and link for appointments are provided on UWAC's website and Facebook pages.

2. Securing Taxpayer Consent Agreement

Consent documents are provided to the taxpayer via link on the appointment app, UWAC website, email, and printed copy available at the site. Signed forms are submitted at the beginning of the intake process.

3. Performing the Intake Process (secure all documents)

All taxpayer documents, phone number, social security cards and government issued IDs are gathered by volunteer greeter while the taxpayer is in their vehicle. The greeter volunteer determines the level of interviewer skills required based on the 13614-C responses, then forwards the documents to the appropriate intake interviewer volunteer inside the building. An intake interviewer volunteer certified at the appropriate level will then review the documents and call the taxpayer to answer additional questions as needed. Volunteers will wear name badges and provide their name over the phone. Tax preparer certification level is printed on their name badge.

4. Validating taxpayer's authentication (Reviewing photo identification & Social Security Cards/ITINS)

Prior to starting interview with taxpayer, greeter volunteer will compare government issued photo ID to make sure the taxpayer matches the ID. ID's and SS cards will be collected to be scanned once intake interview is complete. All scanned documents will be uploaded to TaxSlayer Online and then deleted from the computer.

5. Performing the interview with the taxpayer(s)

Accept forms 14446, consent to disclose, consent to use, 13614-C, government issued photo ID(s), SS Card(s), and taxpayer documents. Original copies are used by the Intake Interviewer during a phone call to the taxpayer where all questions will be resolved. Taxpayer remains in their vehicle while the Intake Interviewer is inside the building. Once interview is complete all documents are scanned, and the originals are returned to the taxpayer. Taxpayer then leaves the site. Scanned documents will be stored in TaxSlayer Online and deleted from the uploading computer.

6. Preparing the tax return

Process is assigned to tax preparer with appropriate certification level. Using scanned documents, tax preparers will complete process using TaxSlayer Online. This can occur anytime within 7 business days of the appointment. Tax preparers may be located on site or at their homes. All tax preparers must have a password protected network. Tax preparers will call the taxpayer if they have questions.

7. Performing the quality review

A few experience tax preparer volunteers will be assigned the role of quality reviewing all tax returns. The tax prepare volunteers assigned to review shall review all scanned documents (including intake forms, SS Cards, and Photo IDs) and the tax return for accuracy. Once reviewed and printed, taxpayer will be notified to schedule an exit interview to review and sign the tax return. The Site Coordinator, Program Coordinator or other experienced and certified volunteer will complete the exit interview with the client.

8. Sharing the completed return

When client comes to exit appointment, they are supplied a printed copy of their return at their vehicle. A volunteer with the proper certification located inside the office will call the client in their vehicle and review the documents over the phone. They will inform client of their responsibility. Volunteer will obtain client(s)' signature(s) for e-filing, and keep that signed copy secured at the site The taxpayer will receive another copy for their records.

9. Signing the return

The taxpayer will sign one copy of Form 8869 IRS e-file Signature Authorization while in office of certified volunteer who will perform an exit interview. At that time, the form will be submitted to the volunteer at the site at the end of the Quality Review (exit interview). Signed copy of form 8879 will be stored in a locked file cabinet on site with the tax return and signed consent forms. After one year, documents will be shredded.

10. E-filing the tax return

Once returns are reviewed and signed by the taxpayer, they will be transmitted to the IRS and relevant states, at least once per day. Rejects will be checked each day and steps will be taken to timely resolve any issues.

Page three of this form will be maintained at the site with all other required documents.

Part III: Taxpayer Consents:

Request to Review your Tax Return for Accuracy:

To ensure you are receiving quality services and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If errors are identified, the site will make the necessary corrections. IRS does not keep any personal information from your reviewed tax return and this allows them to rate our VITA/TCE return preparation programs for accurately prepared tax returns. If you do not wish to have your return included as part of the review process, it will not affect the services provided to you at this site. If the site preparing this return is selected, do you consent to having your return reviewed for accuracy, by an IRS employee?

Yes No

Virtual Consent Disclosure:

If you agree to have your tax return prepared and your tax documents handled in the above manner, your signature and/or agreement is required on this document. Signing this document means that you are agreeing to the procedures stated above for preparing a tax return for you. (If this is a Married Filing Joint return both spouses must sign and date this document.) If you chose not to sign this form, we may not be able to prepare your tax return using this process. Since we are preparing your tax return virtually, we have to secure your consent agreeing to this process. If you consent to use these non-IRS virtual systems to disclose or use your tax return information, Federal law may not protect your tax return information from further use or distribution in the event these systems are hacked or breached without our knowledge. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov. While the IRS is responsible for providing oversight requirements to Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs, these sites are operated by IRS sponsored partners who manage IRS site operations requirements and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal Property.

I am agreeing to use this site's Virtual VITA/TCE Process

Yes No

Printed name		Printed name (spouse if married filing joint)	
Date of birth		Date of birth	Last four digits Social Security/ITIN number
Last four digits Social Security/ITIN number			
Date	Telephone number	Date	Telephone number
Email address		Email address	
Signature (electronic)		Signature (electronic)	
OR		OR	
Signature (type/print)		Signature (type/print)	