

Virtual VITA/TCE Taxpayer Consent

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 this site will use to prepare the taxpayer's return. If applicable, taxpayers must also be advised of all procedures and the associated risk if their data will be transferred from one site location to another site location.

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

Site name

Dallas Audelia Library

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

10045 Audelia Rd.
Dallas, TX 75238

Site identification number (SIDN)

S56051516

Site coordinator name

Robert Phillips

Site contact name

Dallas Audelia Library

Site contact telephone number

214-670-1350

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 will explain the method it will use to contact you if additional information is needed to prepare and/or quality review the tax return.
- 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.
- D. Combination Site:** This site prepares returns for other permanent or temporary intake sites as well as assisting walk in and/or 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 taxpayer will be explained the full process and is required to consent to step-by-step process used by the site. 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 may be scheduled or rescheduled by contacting the Audelia Branch Library directly at 214-670-1350.

2. Securing Taxpayer Consent Agreement

Taxpayers will obtain the Consent Agreement in advance electronically if an email address is provided, or will receive a paper copy upon arrival at the library for their appointment. The site intake coordinator will ensure that the agreement has been signed.

3. Performing the Intake Process (*secure all documents*)

A dedicated intake coordinator will verify that the taxpayer has completed the intake form and the consent agreement, and that the taxpayer has brought all required documents to verify his or her identity.

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

The intake coordinator will verify that the taxpayer has brought all required documents to verify his or her identity. The interviewing preparer will double-check these materials and verify that any other IDs required (e.g. dependents' Social Security cards) are present.

5. Performing the interview with the taxpayer(s)

The interviewing preparer will review the taxpayer's intake form and tax documents and ask the taxpayer any questions necessary to ensure that all information required to prepare the return has been captured and documented.

6. Preparing the tax return

The tax return will be prepared using the IRS Taxslayer software by a VITA-certified preparer working at a remote location.

7. Performing the quality review

Once the tax return has been prepared, a second VITA-certified preparer will review the return for completeness, accuracy and quality, using the IRS Taxslayer software at a remote location.

8. Sharing the completed return

The taxpayer will make an appointment to return to the library, where a preparer will review and explain the return to the taxpayer and ensure that all information is correct and that the taxpayer understands he or she is responsible for the information provided.

9. Signing the return

For e-filed returns, the taxpayer will sign Form 8879, IRS e-file Signature Authorization, as part of the final review while at the site.

10. E-filing the tax return

The site coordinator will e-file all completed returns within two business days of the return being completed.

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