

**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

Prosper Center South Drop Off

Site address (*street, city, state, zip code*)2900 S IH 35  
Austin, TX 78704

Site identification number (SIDN)

S58061893S

Site coordinator name

Janet Herrgesell

Site contact name

Janet Herrgesell

Site contact telephone number

512-610-7374

**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.

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## Part II: The Sites Process:

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

1. Scheduling the appointment

No appointment is necessary. The summer season is walk-in only. Clients can walk in to do intake at Prosper Center North and Prosper Center South.

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2. Securing Taxpayer Consent Agreement

We will explain the Drop Off service (that utilizes GetYourRefund.org to store taxpayer data and communicate with the taxpayer during the process), including that they will need to receive an email or phone call and, if they choose to opt out, the client will not be able to proceed with the Drop Off service. The client will physically sign Form 14446 granting consent to the Virtual VITA process.

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

The client's documents will be scanned at the site and uploaded to the GetYourRefund case management system (The Hub). Client documentation will be kept secure at all times between intake, input and preparation, and quality review. This includes protecting client data in electronic form through the use of appropriate methods including secure password access and encryption.

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

The volunteer will review the taxpayer's Social Security card or ITIN letter, original and valid photo ID, and make a visual comparison of the taxpayer with their ID. The client's identification documents will then be uploaded to The Hub.

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5. Performing the interview with the taxpayer(s)

The volunteer will perform the intake interview with the taxpayer at the site. When the interview is complete, the taxpayer's documents will be scanned and uploaded to the GetYourRefund case management system (The Hub). Client's documentation will be kept secure at all times between intake, input and preparation, and quality review. This includes protecting client data in electronic form through the use of appropriate methods including secure password access and encryption.

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6. Preparing the tax return

IRS-certified volunteers will log in to the GetYourRefund case management system (The Hub) and select an intake packet that is assigned to them and can access securely stored documents for that client. TaxSlayer will be used for tax preparation and e-filing. The majority of tax preparation is conducted at the tax sites. Volunteers working remotely undergo a Virtual Security Guidelines training to learn the required steps to ensure their home setup is secure and protects taxpayer confidentiality.

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7. Performing the quality review

When client cases are marked as "ready for QR," a volunteer or staff member will call the client to ask them to come back into one of the tax sites. The tax return will be reviewed with the client onsite, and a Form 8879 will be physically signed by the taxpayer.

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8. Sharing the completed return

The client will be provided with a physical copy of their completed return at the end of the tax return process.

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9. Signing the return

The client will physically sign the tax return or Form 8879 in person at one of the tax sites.

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10. E-filing the tax return

After Form 8879 has been signed, we will retain a physical copy of the signed Form 8879 (as well as a few other documents required by our funders). The Transmitting Manager will then closely inspect those saved documents and verify that the tax return can be electronically filed. The goal is to transmit the tax return within 24 hours of when Form 8879 was signed.

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**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](mailto: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

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| 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>                        |  |
| <b>OR</b>                     |  | <b>OR</b>  |  |
| Signature <i>(type/print)</i> |  | Signature <i>(type/print)</i>                        |  |