

# Virtual VITA/TCE Taxpayer Consent

This form is required when either the Intake/Interview and/or the Quality Review are not conducted in-person between the taxpayer and the VITA/TCE volunteer. The site must explain to the taxpayer the process used to prepare the taxpayer's return. If applicable, volunteers must advise the taxpayer 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

FC Southeast Health and Wellness

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

2901 Montopolis Dr  
Austin, TX 78741

Site identification number (SIDN)

S33061838

Site coordinator name

Janet Herrgesell

Site contact name

Tax Help Program

Site contact telephone number

512-610-7374

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

- A. Drop Off Site:** This site uses a drop off process which includes the site maintaining personally 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, the taxpayer comes 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 the taxpayer if additional information is needed.
- Note:** Sites where the taxpayer does not leave the site's property, for example waiting in another room or in a vehicle, are NOT considered drop off sites. Since the taxpayer remains at the site, they are not required to complete Form 14446. If the taxpayer leaves their tax documents at the site and then leaves the site's property for any reason, the taxpayer must complete Form 14446.
- B. Intake Site:** This method includes the taxpayer leaving their personally 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-ins or appointments in their location.
- D. Combination Site:** This site prepares returns for other permanent or temporary intake sites and assists walk-ins and appointments in their location.
- E. 100% Virtual VITA/TCE Process:** There is no in-person interaction with the taxpayer and any of the VITA/TCE volunteers in this process, during the intake, interview, return preparation, quality review, and signing the tax return. The site must explain the virtual processes 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.

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**Part II: The Site's Process:**


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Explain how each process will be followed to assist the taxpayer remotely. The questions in parentheses below provide guidance on what to include in the explanation for each process. How will the site manage:

1. Scheduling the appointment (How is the appointment made: by phone, online portal, email, or by other means)

Taxpayers can self-schedule an in-person intake appointment via our scheduling website, can call 512-610-7374 or 211, or can visit the site to request assistance scheduling an appointment.

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2. Securing Taxpayer Consent Agreement (How is the 14446 signed, received, and stored)

Taxpayer consent is secured in person during the intake process. The client will physically sign Form 14446 granting consent to the Virtual VITA process.

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3. Performing the Intake Process - securing all documents (How are the taxpayer's supporting documents received, stored and tracked)

The volunteer collects and reviews the taxpayer's ID verification documents and tax documents. The volunteer reviews the completed Form 13614-C and ensures all questions have been answered and no questions are marked as Unsure. Then the volunteer scans all taxpayer documents and creates a taxpayer file and ticket in the Hub.

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4. Validating taxpayer's authentication - reviewing photo identification and Social Security cards/ITIN letters (What communication channel, either in-person or virtually, is used to validate the taxpayer's identity and which documents are reviewed)

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 taxpayer's ticket in the Hub.

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5. Performing the interview with the taxpayer (What communication channel, either in-person or virtually, is used to conduct the interview)

The volunteer will perform the intake interview with the taxpayer at the site. Then the taxpayer's documents will be scanned and uploaded to the GetYourRefund case management system (The Hub). The client's documentation will be kept secure at all times. This includes protecting client data in electronic form through the use of appropriate methods.

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6. Preparing the tax return (Where is the tax return prepared and how are documents accessed by the preparer)

IRS-certified volunteers will be able to login 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. The volunteer tax preparer will contact the taxpayer any time questions arise or if it is discovered that additional information is needed to complete the return.

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7. Communicating with the taxpayer (Site must explain the method(s) it uses to contact the taxpayer if additional information is needed)

IRS-certified volunteers and/or staff will email, text, or call the taxpayer if additional information is needed or to communicate when the tax return is ready for review with the taxpayer. The taxpayer will be contacted via the GetYourRefund case management system (The Hub) according to the contact method approved by the taxpayer during the intake interview.

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8. Performing the quality review (Where is the tax return reviewed and how are documents accessed by the reviewer)

IRS-certified volunteers will be able to login to the GetYourRefund case management system (The Hub) to access securely stored documents for that client. TaxSlayer will be used for tax preparation and e-filing. Once the quality review is complete, the tax preparer will contact the client to request they come back to the site.

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9. Sharing the completed return (What communication channel, in-person or virtually, is used to share the completed return and how does the volunteer and/or taxpayer access the completed return)

Taxpayers have the option to finish in person or virtually. Taxpayers returning to the site will review the completed tax return with a quality reviewer and ask any clarifying questions as necessary to ensure the return is correct. The taxpayer will then sign Form 8879 and receive a printed copy of the return.

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10. Signing the return (Does taxpayer sign the return in-person or electronically and if electronically, which software is used to sign the return)

Taxpayers returning to the site to review the completed tax return will receive a printed copy and sign Form 8879. The signed Form 8879 will be uploaded to the taxpayer's ticket in the Hub. Taxpayers completing the process virtually will electronically sign Form 8879 from within their secure Hub client portal and will also have access to save and/or print a copy of their tax return.

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11. E-filing the tax return (When is the return e-filed: immediately or at the end of the day)

After Form 8879 has been signed and uploaded to the Hub, the Site Coordinator will transmit the return. The goal is to transmit the tax return within 24 hours of when Form 8879 was signed. If a tax return is rejected, a transmitting specialist will contact the taxpayer within 24 hours of receiving the rejected IRS acknowledgement to resolve the issue.

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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](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 agree to use this site's Virtual VITA/TCE Process <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
Printed name		Printed name (spouse if married filing joint)	
Date of birth	Date	Date of birth	Date
Telephone number		Telephone number	
Email address		Email address	
Signature (electronic)		Signature (electronic)	
<b>OR</b>		<b>OR</b>	
Signature (type/print)		Signature (type/print)	