

## Virtual VITA/TCE Taxpayer Consent

You are providing your information to the South Plains Community Action (“SPCAA”) Intake Site, which is then faxed to a Volunteer Income Tax Assistance Site (“VITA Site”) operated by the Coalition of Community Assistance Volunteers, Inc. (“CCAV”) located in **Lubbock**, Texas for the preparation of your tax return for tax year **2018**.

### Taxpayer Procedures

You (taxpayer) will:

- Legibly complete pages 1 and 2 of Form 13614-C and provide **original** Social Security cards, or other allowed Social Security verification documents, or proof of your ITIN numbers for you, (if applicable) your spouse and potential dependents.
- Provide all related information/documentation to the Intake Site necessary for the Preparation/Quality Review Site to prepare an accurate tax return.
  - Government-issued photo ID for all taxpayers
  - 2017 Health Insurance coverage information for all taxpayers and dependents
  - Completed Form 13614-C, Intake/Interview and Quality Review Sheet
  - All Forms W-2, 1099 and/or any other income documents
  - Proof of expenses
  - Any other documents required to prepare an accurate return
  - Signed copy of this form
- Review the tax return to ensure the names, birthdates, Social Security numbers, addresses, banking information, income and expenses on the tax return are correct based on your supporting documents. ***You and your spouse (if applicable) are ultimately responsible for all of the information on the tax return.***
- Participate in an interview with the IRS-tax certified volunteers who prepare and quality review your return.
- Return to South Plains Community Action to sign your tax return and Form 8879, *IRS e-file Signature Authorization*. (If this is a Married Filing Joint return, both spouses must sign and date the form.) **Your tax return cannot be e-filed until this form, page 2 of your return and Form 8879 are signed and faxed to the Preparation Site by SPCAA.**

The information above will be **faxed** and provided to an IRS Tax Law Certified volunteer at Preparation Site. Your information may be retained by the Preparation Site until December of the current year.

The Intake Site is required to provide you with the name, address and phone number of the coordinator of the Preparation Site. As your return is being prepared, you will communicate with the IRS Tax Law Certified volunteer at the Preparation Site by telephone.

Preparation Site Coordinators contact information:

Tiffanie Lambrelli, Shari Flynn or Elma Moreno  
Coalition of Community Assistance Volunteers, Inc.  
3212 Avenue Q, Lubbock, Texas 79411  
806.765.0725 (phone)      806.765.5828 (fax)

You will receive a phone call, or other electronic means of communication, from the IRS Tax Law Certified volunteer at the number(s) listed on your Form 13614-C within two business days from the date the information was provided to the Preparation Site.

### Preparation /Quality Review Site Procedures

The IRS-Tax Law Certified volunteer will:

- Call you to conduct an interview based on information included in your supporting documents and the completed Form 13614-C;
- Prepare the tax return, and provide it to you for review;
- Conduct a Quality Review (another IRS-Tax Law Certified volunteer) of your return with you either face to face, via phone, or other electronic communication method.

- Store your information in a safe place until your return is completed and transmitted.

After your return is prepared and quality reviewed, you will be provided a copy of your return, the signed Form 8879, and all your original supporting documentation.

Your information will not be sold or shared with anyone else. **If you do not want your personal information to be handled in this manner, we cannot prepare your tax return.**

**Request to Quality Review your Tax Return**

To ensure you are receiving quality service and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If the site preparing this return is selected, do you consent to having your return reviewed by an IRS employee?  **Yes** or  **No**

IRS does not keep any personal information as part of their quality review. 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 today.

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If you agree to have your federal income tax return prepared and your tax documents handled in the above manner, your signature is required on this document. Signing this document means that you agree to the procedures stated above being used to prepare a federal income tax return for you. *(If this is a Married Filing Joint return, both spouses must sign and date this document.)*

Printed Name \_\_\_\_\_

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

## **Bank Account Authorization**

I request and authorize the Coalition of Community Assistance Volunteers, Inc. to cause my income tax refund to be deposited into the following account:

**Name of Financial Institution** \_\_\_\_\_

**Routing Number** \_\_\_\_\_

**Account Number** \_\_\_\_\_

I certify that the account is in my name, or that I am a legal signer on the account. I further agree to hold harmless the Coalition of Community Assistance Volunteers, Inc., if the information I have provided is incorrect.

\_\_\_\_\_  
Taxpayer's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Taxpayer's Social Security Number