Volunteer Tax Preparation Site Visitation Report



Site Name/Address				Date					
Territory/Area			Si	ite Type: (VITA or TCE)					
Name of Reviewer			N	ame of Volunteer Reviewed					
QUESTIONS	Yes	No	N/A	QUESTIONS	Yes	No	N/A		
1 Training and Development				Do you have a volunteer publicity coordinator for this site?					
Did all volunteers attend training?				6 Tax Forms and Supplies					
Are technical and procedural updates provided to volunteers regularly?				Are sufficient tax forms and supplies available?					
Did all volunteers pass VITA/TCE test?				Are volunteers using overprinted VITA/TCE forms or marking completed returns with appropriate acronym?					
Were training needs met to support the site? f no, please explain	-			7 Procedures					
				Were overprint instructions provided and explained?					
2 Planning and Recruitment				Is the fact that all VITA/TCE tax assistance is					
Was site coordinator involved in recruitment efforts? How?				"Free" being emphasized at the site? Is the site number being placed under the					
Are recruitment brochures displayed?				acronym on all returns?					
3 Site Coordination				Are copies of returns being given to taxpayers for their records?					
Does site coordinator have a list of volunteers scheduled to work?				Are volunteers familiar with IRS toll-free numbers: 1-800-829-1040, 1-800-829-VITA, and 1-800-829-FORM					
Has site coordinator been provided with names of local IRS management?				8 E-file Activities					
s site open as scheduled?				Is site equipped for TeleFile?					
s site coordinator or alternate present?				Are taxpayers inquiring about the new self-select PIN?					
s IRS communications with coordinator imely and applicable? How				Have volunteers attended e-file training?					
s the site adequately staffed by				Are the advantages of e-file explained to taxpayers at the site?					
volunteers? 4 Site Selection				Does site have a sufficient number of computers, printers, paper and ink cartridges, etc., available?					
s site easily accessible to taxpayers and volunteers?				Does the site coordinator and/or volunteers know the correct EFIN number?					
s adequate space and privacy available to axpayers?				Does the site coordinator and/or volunteer know how to report computer hardware and software					
5 Publicity				problems? Was a contact name provided? Are taxpayers advised that they will receive					
Are posters identifying site displayed in prominent location?				an e-file acknowledgment letter? Are Forms 8453 sent to IRS Territory office					
s site adequately publicized?				and correct Submission Processing Campus (service center) timely?					
Have site coordinator and volunteers been nstructed on how to handle media inquiries?									

8	E-file Activities (continued)	Yes	No	N/A	10 Quality Review	Yes	No	N/A
Are taxpayers being provided a copy of e-file return? If no, why not?				Has an on-site quality review system been established?				
Are rejected return provisions being				If applicable, have you received quality review feedback from IRS throughout this filing season?				
explained to taxpayers? How, When?					Are volunteers using quick reference guides?			
9	Security/Disclosure				Are volunteers using the VITA/TCE hot line for technical back up?			
	unteers reminded not to discuss er information with others?				11 Coordinator Reporting			
	unteers using their personal ters to transmit returns?				Are completed Form 13206, Volunteer Assistance Summary Reports, forwarded to			
How is data with taxpayer information disposed of?				the IRS VITA Tax Specialist monthly? Do you have sufficient pre-paid postage labels to send in reports to IRS?				
How are computers containing taxpayer data on the hard drive protected?			12 Miscellaneous					
			Are volunteers wearing VITA/TCE badges?					
How is computer equipment safeguarded when site is not open?				Does site offer any special services (e.g., Spanish or sign-language interpreters)? Please specify				
					Does site display special emphasis information (such as Title VI Civil Rights poster)? If applicable, does site provide information in a language other than English?			
Rema	rks							