

**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

Reinvestment Partners

Site address (*street, city, state, zip code*)110 East Geer Street  
Durham NC 27701

Site identification number (SIDN)

S 23012441

Site coordinator name

Cara M. Williams

Site contact name

Cara M. Williams

Site contact telephone number

(919) 286-1822 --- (919) 286-1TAC

**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

Appointments may sometimes be scheduled for follow-up of intake process and will always be scheduled for review. Taxpayer will be contacted via telephone by VITA personnel to schedule appointments for review.

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### 2. Securing Taxpayer Consent Agreement

Taxpayer consent is obtained either through physical drop off of signed forms, or by client upload through secure-share program verifyle to send forms electronically.

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

Taxpayer can either

1. drop off completed intake documents (all tax forms and required site forms) in Pub 730 envelope at site during specified hours (Complete intake packets and/or empty Pub 730 envelopes can be obtained at the site drop-off window)
  2. request a tax-prep virtual account and upload required documents through secure file sharing application Verifyle
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### 4. Validating taxpayer's authentication (*Reviewing photo identification & Social Security Cards/ITINS*)

Copies of ID documents and all social security cards/ITIN letters should be included in the dropped off and/or scanned documents at intake. For clients dropping off their materials in pub730 envelope, VITA personnel can make copies at the site.

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### 5. Performing the interview with the taxpayer(s)

Brief interviews will be conducted at drop-off window. Complete interviews will be conducted via telephone and/or through video conference if warranted.

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### 6. Preparing the tax return

Tax preparation will be done remotely in the absence of the taxpayer in most cases

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### 7. Performing the quality review

Quality review will be completed in 1 or 2 stages. Initial review may be conducted in absence of taxpayer, however formal review will be conducted via video conference and/or telephone with taxpayer and VITA personnel

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### 8. Sharing the completed return

Clients participating in video review will be able to view return as it is being reviewed. Once complete, taxpayers will receive a digital copy of the return via verifyle secure share. Clients participating in phone review will be given a hard copy of their return at the drop-off window upon returning to the site.

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### 9. Signing the return

Clients with verifyle access will be able to provide e-signature of the form 8879. Clients without verifyle access will be asked to provide a "wet signature" on the form 8879 upon return to the site to pick up final materials and return copy

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### 10. E-filing the tax return

Upon receipt of signed & authorized form 8879, site will e-file the taxpayer's Federal and State returns. Taxpayer will only be contacted if there is an error in filing the return.

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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

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>	