

- ◆ Explain Next Steps in VITA Visit Process
- ◆ Receive and Review Taxpayer Documents
- ◆ Review Intake/Interview/Quality Review Form 13614-C
- ◆ Ask More Probing/Clarifying Questions
- ◆ Create Taxpayer Return
- ◆ Include Taxpayer in Completing the Return
- ◆ Review Completed Return
- ◆ Assist Taxpayer with Survey Questions
- ◆ Mark Return Ready for Review
- ◆ Notify Quality Reviewer

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- ◆ Explain Next Steps in VITA Visit Process
- ◆ Receive and Review Taxpayer Documents
- ◆ Review Intake/Interview/Quality Review Form 13614-C
- ◆ Ask More Probing/Clarifying Questions
- ◆ Include Taxpayer in Quality Review
- ◆ Quality Review Name, SS/ITIN, Address and All Items of Review Line by Line
- ◆ Verify Bank Account Information
- ◆ Explain Any Changes Required
- ◆ Mark Return Complete/Approved
- ◆ Explain Taxpayer's Responsibility
- ◆ Explain Split Refund Option – Form 8879
- ◆ Explain Options and Resources if Taxpayer Owes
- ◆ Print Return -Taxpayer Signs Form 1040
- ◆ e-File

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- ◆ Explain Next Steps In VITA Visit Process
 - ◆ Review Intake/Interview/Quality Review Form 13614-C
- ◆ Assess Yes/No/Unsure Checkboxes
 - ◆ Ask Probing/Clarifying Questions
 - ◆ Ensure Completion of Intake/Interview/Quality Review Form 13614-C
- ◆ Determine Filing Status
 - ◆ Explain Form 7216/Global Carry Forward
 - ◆ Explain \$3 to Presidential Campaign Fund

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**How Does a VITA Site Work?
5 Roles/4 Steps**

- ◆ Welcome Taxpayers
 - ◆ Validate Photo IDs and SS/ITIN Cards for Household
 - ◆ Check for Identity Theft
- ◆ Determine Appointment or Walk-In
- ◆ Determine Income/In or Out of Scope
 - ◆ Present Sign-In Sheet/Log Taxpayers
 - ◆ Explain VITA Visit Process
 - ◆ Provide Intake/Interview/Quality Review Form 13614-C
- ◆ Provide Envelope for Documents
 - ◆ Request Survey/Contact Card Completion
- ◆ Organize Taxpayer Documents
 - ◆ Assign Return/Preparer Level (Basic, Advanced, Other)

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