

## How We Can Help

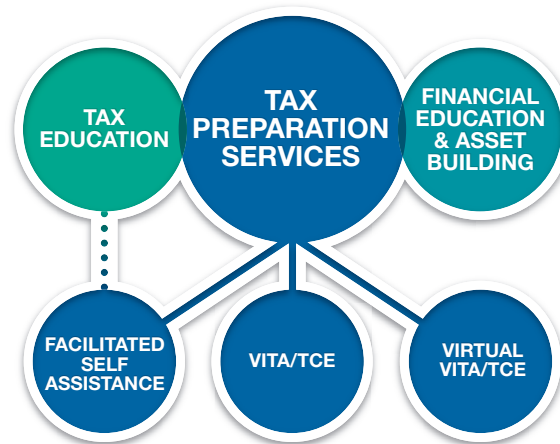
To assist with expanding access to taxpayers who are eligible for free tax preparation, SPEC has developed Alternative Filing Options for partners that include Facilitated Self Assistance (FSA). As part of our effort and commitment to promote FSA, SPEC can provide you with the information, support and guidance that you need to launch a successful FSA site in your community. Our Tax Consultants live and work in the communities that they serve and are ready to help.

Stakeholder Partnerships, Education and Communication (SPEC) has been working hand-in-hand with community-based partners like yours for over a decade to provide free tax preparation, and outreach to millions of low-and moderate-income individuals and families.

## SPEC can assist your FSA efforts in the following ways

- Identify underserved locations based on filing data (potential FSA sites)
- Provide loaner laptops to your FSA sites
- Discuss ways to successfully market FSA
- Promote the use of FSA nationally
- List FSA locations on the VITA locator tool
- Discuss FSA site and software options
- Provide customized URL for tracking accepted FSA returns
- Assist with site setup as needed
- Ensure accepted returns are counted and credited toward program goals
- Provide overall guidance and support

## SPEC Business Model



Please contact your local SPEC Tax Consultant or Territory Manager for additional information, or if you have any questions.

For more information, you may email [partner@irs.gov](mailto:partner@irs.gov)



## IRS Offers

# Facilitated Self Assistance FSA

A concept designed to provide increased taxpayer access to free tax preparation services.



Wage & Investment

**STAKEHOLDER PARTNERSHIPS,  
EDUCATION & COMMUNICATION**

## Consider the Facts

- Through FREE volunteer return preparation programs, organizations like yours help more than 3 million people file their taxes each year
- The IRS estimates that 16 million additional taxpayers would seek FREE tax help if it were readily available
- Organizations are asked to do more with less
- A growing number of people are conducting business online

Preparing taxes electronically seems like the logical next step for many taxpayers.

## Here's what you can do

Consider adding FSA to your volunteer tax program and assist more taxpayers to do their own taxes.

## Taxpayers will have

- A computer to input returns
- Access to interview-based software
- And guidance from a IRS-certified volunteer

## You'll receive

- FREE federal and state return software\* (provided by the Free File Alliance and other participating partners)
- FSA return reporting (accepted return counts will be credited towards your program goals)

**Choose FSA today!**

\*available offers vary by state

## Self-Service – A Way of Life

People pump their own gasoline, use automatic bank tellers, and print boarding passes at airline kiosks. They even scan, pay and bag their own groceries. Self-service is a widely accepted way of providing more services with fewer resources. With just a little help, people can perform many tasks for themselves.

Adding a self-service option expands on the IRS' current tax assistance programs. Previously, volunteer tax preparation sites used one volunteer to assist one taxpayer at a time. FSA allows one volunteer to facilitate and help many taxpayers at once. This not only increases efficiency in sites, but also teaches people about their taxes.

You can expand your reach to taxpayers by adding an FSA option at your existing sites or open a new site specifically dedicated to FSA.

## Benefits

### Benefits to VITA/TCE Partners

- Prepare and e-file more tax returns
- Identify those who really need one-on-one help
- Reduce lines at peak times
- Offer more volunteer opportunities
- Increase options for taxpayers
- Receive credit for accepted returns

## Access + Assistance = Accomplishment

People who prepare their own tax returns are among the fastest growing segments of taxpayers. Step-by-step interview questions in the tax software make it easier than ever for people to prepare an accurate return.

However, access to computers and fast Internet connections remains a major barrier for many individuals. And, although tax software programs are fairly simple to navigate, questions may come up and it's always helpful to have some guidance. By providing a certified volunteer to answer questions, FSA gives taxpayers the confidence they need to prepare their own return today – and enables them to file future returns on their own.

## Benefits

### Benefits to Taxpayers

- Free tax preparation and e-filing of federal and state return
- Brand-name interview-based software helps taxpayers file more accurately
- Leverages existing computer skills
- Assistance from IRS-certified volunteers as needed
- Reduced wait time for tax prep
- Expanded free tax help options
- Increased education and understanding about their tax return
- Builds confidence to file without assistance