

Virtual VITA/TCE Site Model Taxpayer Consent

You are providing your information to a volunteer located in _____
City and State

for the preparation of your tax return for the _____ (date).

The following information is needed to prepare and quality review your tax return:

- Copies of Social Security Cards
- Completed Form 13614-C, Intake/Interview and Quality Review Sheet
- 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

The above information will be (check one) e-mailed Faxed Mailed Scanned
and sent to an IRS-certified volunteer at a **Preparation Site** or **Quality Review Site**. Your information may be retained by the **Preparation Site** until 12/31 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** or **Quality Review Site**. As your return is being prepared, you will communicate with the IRS-Certified volunteer at the Preparation or Quality Review site by: Telephone Video Conference

Preparation/Quality Review Site's Coordinator name	Address

Phone number	_____

Additional comments

You will receive a phone call from the IRS-certified volunteer at the number(s) listed on your Form 13614-C within _____ days from the date the information was received by fax, mail or e-mail at the **Preparation Site** or **Quality Review Site**.

Preparation/Quality Review Site Procedures

The 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 send it to you for review.
- Call you to conduct a Quality Review (another IRS-certified volunteer).
- Store your information in a safe place until your return is completed and transmitted.
- After your return is prepared, a copy of your return, Form 8879, *IRS e-file Signature Authorization*, your supporting documents, and your Form 13614-C will be sent/provided to you.

Taxpayer's Procedures

You (taxpayer) will:

- Complete the Form 13614-C
- Provide all related information to the **Intake Site** or **Preparation/Quality Review Site** necessary to prepare an accurate tax return.
- Review the return to ensure the names, social security numbers, address; banking information, income and expenses on the return are correct based on your supporting documents.
- Respond to questions asked by the IRS-certified volunteer who prepared or quality reviewed your return.
- Sign Form 8879, *IRS e-file Signature Authorization* and send it back to the address listed above or as designated.

Your information will not be sold or shared with anyone else. **If you do not want us to handle your personal information in this manner, we can not 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.

If you agree to have your 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 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.)*

Printed name	Printed name
Signature	Signature
Date	Date