

## Virtual VITA/TCE Taxpayer Consent

This form is required when any part of the tax return preparation process is completed without in-person interaction between the taxpayer and the VITA/TCE volunteer. The site must explain to the taxpayer the process used to prepare the taxpayer's return. If applicable, volunteers must advise the taxpayer of the associated risk of transferring their data from one site location to another site.

### Part I - To be completed by the VITA/TCE site:

Site name

Goodwill Industries of South Texas, Inc.

Site address (street, city, state, zip code)

4135 Ayers St.  
Corpus Christi, TX 78415

Site identification number (SIDN)

S-57318358

Site coordinator name

Selene Butanda

Site contact name

Rachel V. Loera

Site contact telephone number

361-288-2187, ext. 30105

### This site is using the following Virtual VITA/TCE method(s) to prepare tax returns:

**A. Drop Off Site:** This site uses a drop off process which includes the site maintaining personally 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, the taxpayer comes back to the same site for the quality review and/or signing the completed tax return. The site must explain the method it uses to contact the taxpayer if additional information is needed.

**Note:** Sites where the taxpayer does not leave the site's property, for example waiting in another room or in a vehicle, are not considered drop off sites. Since the taxpayer remains at the site, they are not required to complete Form 14446. If the taxpayer leaves their tax documents at the site and then leaves the site's property for any reason, the taxpayer must complete Form 14446.

**B. Intake Site:** This method includes the taxpayer leaving their personally 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-ins or appointments in their location.

**D. Combination Site:** This site prepares returns for other permanent or temporary intake sites and assists walk-ins and appointments in their location.

**E. 100% Virtual VITA/TCE Process:** There is no in-person interaction with the taxpayer and any of the VITA/TCE volunteers in this process, during the intake, interview, return preparation, quality review, and signing the tax return. The site must explain the virtual processes and consent. 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 the taxpayer remotely. How will the site manage:

1. Scheduling the appointment

Appointments will be scheduled after tax returns are completed. The VITA Coordinator, or designated staff, will contact the Taxpayer to schedule a time to meet and review their taxes. Taxpayers will return to Goodwill site to review and sign and get a copy of their return.

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2. Securing Taxpayer Consent Agreement

When Taxpayer submits all documents the documents will be placed in an envelope and secured in a locked filing cabinet and only the VITA Site Coordinator and Vice President of Mission Services will have access to the keys.

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3. Performing the Intake Process (securing all documents)

Taxpayers will either print the required documents from the Goodwill website or pick up a package to complete at home. The completed intake forms will be dropped off by Taxpayers, and VITA Site Coordinator or volunteers, will verify all documents are submitted. This is considered the initial review. The documents/packages will be dated and numbered in the order received.

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4. Validating taxpayer's authentication (reviewing photo identification & Social Security cards/ITINS)

VITA Site Coordinator or volunteers will validate the Taxpayer's photo identification and social security cards/ITINS, make copies, and return original documents to the Taxpayer.

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5. Performing the interview with the taxpayer

The interview will be conducted in person. An appointment will be set up for the interview by the VITA Site Coordinator or designated staff.

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6. Preparing the tax return

Tax returns will be completed by the VITA volunteers within one to two weeks of the drop off date.

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7. Performing the quality review

VITA Site Coordinator will review the tax returns for quality. Quality review is checking for correct address, names, social security numbers, date of birth, etc.

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8. Sharing the completed return

The Taxpayer returns to Goodwill to review and sign the completed tax return. The Taxpayer must be advised that by signing the form they are responsible for the accuracy of the information shown on the tax return.

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9. Signing the return

Once the return is validated by Taxpayer they will sign Form 8879. The Taxpayer must be advised that by signing the form they are responsible for the accuracy of the information shown on the tax return.

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10. E-filing the tax return

After the form is signed the return is ready to be E-Filed. Once the return is accepted all Taxpayer related documents must be returned to the Taxpayer.

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Page three of this form will be maintained at the site with all other required documents.

### 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 (spouse if married filing joint)	
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 (electronic)		Signature (electronic)	
<b>OR</b>		<b>OR</b>	
Signature (type/print)		Signature (type/print)	