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A Grant Program Office Communication

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Division of Payment
Management

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VITA Grant Reporting Guidelines Updated

We've updated the VITA Grant Reporting Guidelines to include additional instructions for completing the Federal Financial Report (Standard Form 425) on the Payment Management System. Reports covered in the guidelines include the:

1. Financial Cash Transaction Report (FCTR) – Quarterly reporting required 30 days after the end of the quarter (Due dates: Jan. 30, April 30, July 30, and Oct. 30)
2. Financial Status Report (FSR) – Final reporting required 90 days after the end of the project period (Due Sept. 30)

Please take time to review the [instructions](#) and confirm you have individuals with permissions to prepare and certify the report.

Changes in Key Personnel

Remember to notify your assigned grant analyst within 10 business days of any changes in key personnel involved in the program. We must verify they are not debarred, suspended, or otherwise excluded from or ineligible for a federal award. Update PMS user information as well to avoid delay in funds management and reporting.

Use of Funds

Improper use of funds continues to be a finding during administrative and financial reviews. TCE and VITA grant funds cannot be used to pay individuals for tax return preparation, screening, or quality review. The timesheet for a site coordinator that performs these duties must capture their time performing SC activities, return preparation, screening or quality review. Recordkeeping must clearly distinguish the portion of payment from federal or nonfederal sources when the SC serves in a dual role.

VITA Grant Matching Funds Recordkeeping

Volunteer services continue to be a key source of matching funds for the VITA Grant Program. Don't jeopardize its use by incomplete recordkeeping. Because of the nature of VITA site operations, individual or site specific timesheets can be used. Both should capture the individual's name, number of hours at work, types of activity performed, and whether it is a paid position. You'll need this information to help determine the value of the services provided. Volunteer services for clerical assistance are not valued at the same rate as services provided by persons performing quality review. Recordation in your ledger need only be the value determined; however, back-up information – including the individuals, number of hours, valuation method, and final value – must be kept to support the entries. Just a reminder, time spent by volunteers in training is not allowable for match.