

Ordering Procedures for VITA/TCE Training and Site Materials

for SPEC Partners and Volunteers

Background

This document provides guidance for VITA/TCE partners and volunteers who order VITA/TCE training and site materials.

Note: *Please only order quantities in the amount needed.*

Methods for Ordering Training Products

There are three ways to order Training Products

1. Electronic Form 2333-V, Order for VITA/TCE Program
2. Request through an IRS SPEC Relationship Manager
3. Pre-Populated Spreadsheets

Method #1: Electronic Form 2333-V (preferred method)

Every October, the CAPS system emails Form 2333-V to each VITA program account with a valid email address. The form is pre-populated with the partner's contact and account information.

CAUTION: *Never share the electronic Form 2333-V. The form encodes the account number on the PDF file. Changing the address on the form will update the embedded account number.*

Review and update contact information, if needed, and enter order quantities on the order form. Refrain from cutting and pasting data when completing the order form and use only the following characters:

- Upper- or lower-case letters: A-Z, a-z
- Numbers: 0-9
- Special characters: <>| \ } ^ _ ` ! ; : " ' ~ ! @ # \$ % ^ & * () _ + = ' &

Save a copy of the completed form, then email it as an attachment to pdf.orders@eforms.enterprise.irs.gov for processing.

You will receive an order acknowledgement unless the submitted form has errors. In that case, you will receive a notification explaining why the order rejected and what information to correct.

CAPS will generate another email notification when the order ships from the National Distribution Center (NDC).

Note: *If you lose or misplace the order form, your relationship manager can email you another electronic Form 2333-V.*

Ordering Method #2: Request through an IRS SPEC Relationship Manager

If you don't have a CAPS account, your relationship manager can manually input an order into CAPS. Provide a list of the products needed, the quantity requested and the recipient's name and address. The relationship manager may choose to create an account and then send you an electronic Form 2333-V.

Ordering Method #3: Pre-Populated Spreadsheet

The pre-populated spreadsheet saves time inputting existing account information for regional coordinators who serve a large population of partners or volunteers. Any products listed on the spreadsheet are available to order. Relationship managers can send the pre-populated spreadsheet and instructions to their partners.

Troubleshooting Orders

If you have not received your product order:

- Contact your SPEC relationship manager to confirm your order was placed, or
- Contact the ordering distribution department at vita.administrator@irs.gov. Include your account number (if known) and copy your SPEC relationship manager.

Note: *Only send issues related to troubleshooting orders to the ordering distribution department. Contact your relationship manager with any other questions.*

Training materials delivered via UPS require a valid street address. Common omissions that cause delays or undeliverable orders include:

- **Missing or incomplete street suffixes such as Avenue (AVE), Court (CT), Street (ST), Road (RD), etc.** – Maple Street and Maple Court could have the same house numbers.
- **Missing directionals such as North (N) or South (S)** – The post office that delivers to Monument Blvd E could be different than the one that delivers to Monument Blvd W, for example.
- **Missing secondary indicators such as Apartment (APT), Building (BLDG), Floor (FL), Suite (STE), Room (RM), etc.**

Note: *UPS delivery drivers will not search for a recipient when delivering a package to a building with multiple floors, suites, etc. UPS will return packages with an incomplete address back to the terminal. This will cause a delay or return to the National Distribution Center (NDC) and is subject to extra charges. Be sure to provide complete addresses.*

- **Abbreviation of city names** – Don't use "shorthand" when writing the name your city. LA might mean Los Angeles, but what if the letter really belongs in Los Alamitos or Los Alamos? Always spell out the complete city.
- **Missing state** – Remember to include the state, using the Postal Service two-character state abbreviation.
- **Incorrect or no ZIP code** –You can find complete ZIP codes at <https://www.usps.com>.
- **Using both a PO box and street address** – List only one address in CAPS. A street address is preferred for delivery.