Quality & Oversight Updates for the 2022 Filing Season for SPEC Partners & Employees

This fact sheet provides updates to prepare employees, partners, site coordinators and volunteers for the 2022 filing season.

Background

Stakeholder Partnerships, Education & Communication (SPEC) encourages consistent site operations and effective communication to improve the quality of the Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE) programs. The following updates are effective for the 2022 filing season.

New for 2022

Form 15272, VITA/TCE Security Plan, Revised

Form 15272, VITA/TCE Security Plan, adds Section II, Virtual VITA/TCE Process, to capture the virtual return preparation process used by a site. Any site using a virtual process must complete this section.

The coordinator must sign Form 15272 and submit a copy to their local SPEC territory office. The form must be submitted annually prior to opening the site, but no later than December 31. The SPEC territory manager or designee must approve the security plan. Sites and the territory office must maintain a (physical or electronic) copy of the approved security plan.

Why: To reduce partner burden and provide VITA/TCE partners a streamlined form to outline security and virtual processes at sites, while adhering to security requirements at VITA/TCE sites.

Form 15273, Virtual VITA/TCE Plan, Obsolete

Form 15273, Virtual VITA/TCE Plan, is obsolete. The information shown on Form 15273 has been added to a new section in Form 15272, VITA/TCE Process. All sites operating a Virtual VITA/TCE Model must complete the section and the virtual plan must be approved by the local territory office prior to implementation. For additional information on the virtual models see Publication 5450, VITA/TCE Site Operations.

Why: To reduce partner burden and provide VITA/TCE partners a streamlined form to outline security and virtual processes at sites.

Over-the-Phone Interpreter Service (OPI)

To help Limited English Proficient (LEP) taxpayers comply with their federal tax obligations and prepare their tax returns accurately, SPEC is now offering free over-the-phone translation (OPI) services at every VITA/TCE return preparation site. OPI offers real-time interpretation services for 121
languages. The OPI service is free to all VITA/TCE sites. For more information on the OPI service see new **Publication 5547**, SPEC Over-the-Phone Interpreter (OPI) Service for SPEC Partners, Site Coordinators and Employees.

**Why:** To reduce partner burden and help individuals with Limited English Proficiency (LEP) comply with their tax obligations.

**TaxSlayer® Updates**

TaxSlayer® Pro Online and Desktop software now allows sites to prepare federal, state, and local individual tax returns for the previous five tax years (TY2020, TY2019, TY2018, TY2017, and TY2016). Sites can electronically file federal and participating state individual tax returns for the previous two years (TY2020 and TY2019).

The Scanned Document Program is now a standard part of the TaxSlayer® software. It does not have to be ordered separately.

TaxSlayer® added a Customer Portal to their software. The portal provides a secure communication channel between the taxpayer and preparer. It will allow:

- The taxpayer to upload documents
- The preparer to share a copy of the return for quality review
- The taxpayer(s) to sign documents
- The preparer to share a copy of the signed return
- The taxpayer to check the IRS status of the tax return

TaxSlayer® will provide more details on their blog and additional training during their pre-season webinars and the Practice Lab recorded trainings. For more complete information on TaxSlayer® updates see **Publication 5361**, Filing Season 2022: TaxSlayer® Procedural Updates for SPEC Partners and Employees.

**Why:** To reduce partner and taxpayer burden when using virtual services to prepare tax returns and provide VITA/TCE partners with a secure channel to facilitate the exchange of documents between a taxpayer and volunteer.

**Form 1040 Schedule LEP, Request for Change in Language Preference**

**New:** Sites must ensure that the Schedule LEP question is addressed during the intake/interview process. Individuals can use the Form 1040 Schedule LEP, Request for Change in Language Preference, to state a preference to receive written communications from the IRS in a language other than English. The Schedule LEP is available in the TaxSlayer® software as a dropdown menu in the Personal Information page. Taxpayer(s) may select the language that they wish to receive communication from the IRS.

**Why:** To comply with requirements to ensure that Limited English Proficient (LEP) taxpayers receive assistance at VITA/TCE sites based on recommendations resulting from the Treasury Inspector General for Tax Administration (TIGTA) audit.
Key Changes and Updates:

Form 13206, Volunteer Assistance Summary Report

Form 13206 is updated to include a new field for the volunteers’ email addresses.

Why: To improve IRS-SPEC volunteer recruitment and volunteer retention. The volunteer email addresses are a datapoint SPEC can use to monitor our recruitment efforts. SPEC is also working on an improved communication strategy with our volunteers.

Form 13614-C, Intake/Interview & Quality Review Sheet

Form 13614-C is updated to add a new question which allows a taxpayer to request that written communications from IRS be sent in a language other than English. When the program is fully funded IRS notices will be available in 23 languages.

The intake sheet will be translated into 23 languages and will be available online at IRS.gov. The English and Spanish language intake sheets will be printed for partner use at their tax sites.

Why: To comply with requirements to ensure that Limited English Proficient (LEP) taxpayers receive assistance at VITA/TCE sites based on recommendations resulting from the Treasury Inspector General for Tax Administration (TIGTA) audit.

Form 13715, Volunteer Site Information Sheet

Form 13715 is updated to include a two new questions to identify the following:

- systems the site uses to support virtual return preparation. A site can select more than one option if it applies.
- sites offering voter registration to taxpayers.

Why: To assist SPEC in identifying the systems used to support virtual return preparation at VITA/TCE sites and capture data relating to voter registration activities in support of Executive Order 14019.

Publication 5450, VITA/TCE Site Operations

Publication 5450 is updated to include information about TaxSlayer® program enhancements including the scanned document program and customer portal. It also includes changes to the return preparation stages in the Virtual VITA process. See “Virtual VITA/TCE Volunteer Return Preparation Models” for more information.

Why: To reduce partner and taxpayer burden when using virtual services to prepare tax returns.