IRS

January 2020

Fact Sheet for SPEC Partners

VITA/TCE Scope and Product Change Requests

Background

As you know, the VITA Program offers free tax help with basic tax returns for low- to moderate-income taxpayers (defined as those within the EITC threshold), senior citizens, persons with disabilities, those with limited English proficiency and Native Americans. The TCE Program also offers free tax help, generally to individuals who are 60 or older. The Stakeholder Partnerships, Education and Communication's (SPEC) current guidelines indicate that volunteers only prepare returns for which they are certified to prepare, i.e. Basic, Advanced, etc. and that are within the tax law scope of the VITA/TCE Programs. See Scope of Service Chart in Publication 4012, VITA/TCE Resource Guide.

VITA/TCE training materials are reviewed every year to determine if updates are needed due to new tax laws and other pertinent changes. Our current guidelines allow partners to submit informal product change requests through their relationship managers. Occasionally issues arise where there may be a need to consider changing the scope of the programs. There are also instances where changes or corrections are needed in the VITA/TCE training material. The following information provides the guidance on how to submit requests for suggested changes.

VITA/TCE Programs Scope Change Request Process

Partners can submit proposed changes to the scope of the VITA/TCE program to their local IRS-SPEC contact. The local IRS-SPEC contact will coordinate the due date for submitting the request.

VITA/TCE Programs Product Change Request Process

This process allows SPEC employees and partners to submit recommendations, corrections or requests to clarify information in the VITA/TCE training materials. VITA/TCE training materials include publications and forms used specifically for training.

- Complete the Product Change Request spreadsheet. **Note:** Partners can request a copy of the spreadsheet from their IRS-SPEC contact.
- Attach all documents that are relevant to the change. **Note**: **Incomplete requests will not be considered.**
- Send the completed spreadsheet back to the IRS-SPEC contact.
- Partners should work with their IRS-SPEC contact to obtain the due date for submitting the requested change.

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