



IRS



# Tax Counseling for the Elderly (TCE) Grant Award Notification

**Required Actions  
and Other Information**

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# Required Actions

In order to properly establish your grant account, the Grant Program Office requires your organization to take the actions below. Return the completed forms, revised program plan and budget within **20 calendar days from the date of grant notification**.

Please retain a copy of all documents for your records. The preferred method for communicating with the Grant Program Office is via e-mail. The e-mail address of your assigned grant officer is provided in the letter announcing the award.

Failure to return the requested information by the due date or receive an **approved** exception **will result** in non-consideration for future grant opportunities. Any questions should be directed to your assigned grant officer.

Item	Actions	Method	Due
1	<b><u>Form 9661, Cooperative Agreement</u></b> Review the Form 9661, Cooperative Agreement, with <b><u>Publication 5245, TCE Terms and Conditions</u></b> , and Grant Reporting Requirements. <b>Confirm the number of projected returns</b> . Any change to projected returns must be approved by the Chief of the Grant Program Office prior to grant acceptance. <b>Sign the Form 9661</b> .	E-mail to your assigned grant officer	20 calendar days from date of grant notification
2	<b><u>Form 13533, Sponsor Agreement</u></b> Review <b><u>Publication 4299, Privacy and Confidentiality – A Public Trust</u></b> . You must become familiar with the safety and security requirements contained in this publication. <b>Complete and sign Form 13533, Sponsor Agreement</b> .	E-mail to your SPEC Territory Office	20 calendar days from date of grant notification
3	<b>Program/Budget Plan Revisions</b> Review and revise your Program/Budget Plan Narrative <b>if</b> significant changes are required due to the reduction in funds. Please do not rewrite your narrative but provide a summary list of the changes or highlight in yellow what was revised from your initial submission.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
4	<b><u>Form 8653, Application Plan Revisions</u></b> Revise your Form 8653, Application Plan, to identify line item changes due to the reduction in funds.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
5	<b>Payment Management System Access</b> New users must request access to the Payment Management System by completing the on-line Request Access to PMS found under User Access on the <b><u>PMS website</u></b> (pms.psc.gov)	On-line PMS website	20 calendar days from date of grant notification

# Required Actions (cont'd)

Item	Actions	Method	Due
6	<p><b><u>Standard Form 1199A, Direct Deposit Sign-up Form</u></b></p> <p>Complete recipient portion of the Standard Form 1199A, Direct Deposit Sign-up Form, and have your financial establishment complete their portion. The form will be uploaded to Payment Management Services (PMS) for account establishment. Due to the problems experienced in completing this form correctly, line-by-line instructions are on the <a href="https://pms.psc.gov">PMS website</a> (pms.psc.gov) for grantees to complete the form properly.</p> <p><b>Note:</b> If you are a previous TCE Grant recipient, you are <b>only</b> required to submit a SF 1199A if the banking information has changed since your previous submission. Save Form 1199A as a PDF before uploading it to PMS.</p>	<p>Forms must be uploaded to the PMS. Original signatures <b>ONLY!</b></p> <p>See the PMS liaison contact information below.</p>	20 calendar days from date of grant notification
7	<p><b><u>Form 14335, Primary Contact Form Revisions</u></b></p> <p>Complete Contact Form – This Contact Form is <b>ONLY</b> required if changes have occurred since the application was submitted.</p> <p><b>Note:</b> If no changes are required please advise the grant officer via e-mail.</p>	E-mail to your assigned grant officer	20 calendar days from date of grant notification
8	<p><b><u>Form 15272, VITA/TCE Security Plan</u></b></p> <p>Site Coordinators complete this form to provide information on the procedures used at the VITA/TCE site location to help maintain the security of taxpayer information and adherence to security requirements.</p>	Site coordinators must sign the form and e-mail their SPEC territory manager (or local SPEC designee) for approval prior to the site opening. Sites and the territory office must maintain a (physical or electronic) copy of the SPEC approved security plan.	December 31
9	<p><b><u>Form 13715, Site Information</u></b></p> <p>Provide a listing of sites established for this program period. Be sure to include site name, site address, SIDN and EFIN.</p> <p><b>Note:</b> If no changes are required please advise the grant officer via e-mail.</p>	E-mail to your assigned grant officer AND to SPEC Territory Office via Form 13715, Volunteer Site Information Sheet	January 15



# Other Information

## Payment Management System (PMS) Account Establishment

The IRS will authorize Payment Management Services (PMS) to release grant funds after all required documents and forms are received, approved and processed. It normally takes 1–2 weeks for PMS to establish your account. The primary contact person will receive an e-mail from PMS with the electronic login and password to access and withdraw funds using the [PMS](#) at pms.psc.gov. We will notify your organization when the account is established.

For general questions about payments, access requests or banking information, contact [PMS Support](#) @ <mailto:PMSSupport@psc.hhs.gov> or 877-614-5533.

Additional instructions for completion of the SF 1199A and PMS Access follow.

## Completion of Payment Management System Access

**All recipients** must complete the on-line Payment Management System Request Access. Refer to the [PMS Website](#) (pms.psc.gov) under **Grant Recipients – Request Access to PMS**.

**Note:** If multiple individuals are responsible for quarterly report submission or payment requests, separate requests must be completed and submitted for each individual. Refer to the [PMS website](#) (pms.psc.gov) and follow the same instructions in the above paragraph to request access.

## Completion of Standard Form (SF) 1199A, Direct Deposit Sign-Up Form

All recipients must complete the on-line Payment Management System Request Access. Refer to the [PMS Website](#) (pms.psc.gov) under User Access and banking.

**Note:** If you are a previous TCE Grant recipient and your information changed (name, address, account number, financial institution), you must submit a SF 1199A with the revised information on-line at the PMS Website. Be sure to get all original signatures on the form and upload it to the PMS website as a PDF file.

# Additional Resources

You may find the following documents on [www.irs.gov](http://www.irs.gov).

- **Form 13614–C, Intake/Interview & Quality Review Sheet**
- **Publication 1101, Application Package & Guidelines for Managing a TCE Program**
- **Publication 4299, Privacy and Confidentiality – A Public Trust**
- **Publication 4883, Grant Programs Resource Guide**
- **Publication 5166, VITA/TCE Quality Site Requirements**
- **Publication 5683, VITA/TCE Handbook for Partners and Site Coordinators**

