



## Facilitated Self-Assistance (FSA) Sponsorship Growth Model

### FSA Remote – Self-Prep Tax Benefit

# Partner Guide



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## Introduction

Many current and/or potential partners would like to assist their community with much needed tax return preparation services but may not have enough volunteers, space, or may have limited time available. Like Partners, Stakeholder Partnership, Education, & Communication (SPEC) also has a vested interest in increasing access to return preparation services, expanding taxpayer education, and promoting self-sufficiency.

The Facilitated Self Assistance (FSA) Remote model has been available to SPEC Partners for many years; and it offers taxpayers guided do-it-yourself tax preparation. Through the Sponsorship Growth Model, we focus on tax preparation as a benefit that can be offered through businesses or unions to their employees or members. Implementation of this model into your organization's return preparation program can be used to leverage limited Partner resources or supplement production and taxpayer access at existing sites. The Sponsorship Growth Model efficiently promotes education, customer service, and tax benefits to all taxpayers.

If you're looking to expand your reach, make valuable use of your volunteer resources, and increase your production, then consider the FSA Remote – Sponsorship Growth Model.

Unlike traditional VITA/TCE (where the certified volunteer prepares the tax return for the taxpayer), FSA Remote empowers the taxpayer to prepare their own return. Using this self-prep model, volunteers are still available to answer the taxpayer's in-scope questions during the process of completing and filing returns. This model can effectively be marketed as a benefit for free tax preparation, through employers or union organizations. The Sponsorship Growth Model provides an opportunity for partner organizations such as yours to build

relationships with local employers and unions. You sponsor this

free tax preparation benefit for the organization (members/employees) increasing access to tax preparation

services and building your leveraged outreach

network. You work with the organization to market

your FSA Remote program as a valuable service

and build on community partnerships for

leveraged outreach about other programs,

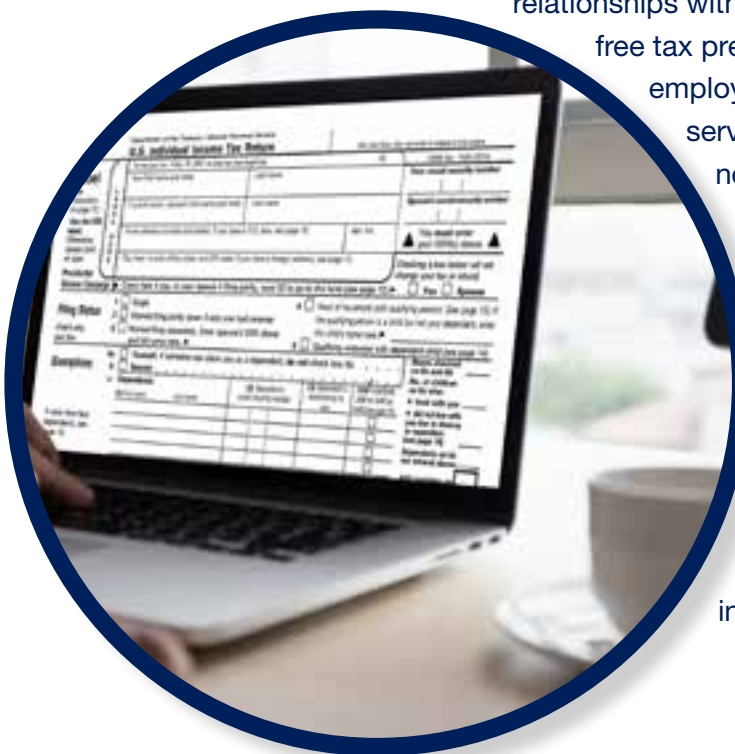
products, and financial services offered by your organization.

Marketing tax preparation as a benefit can be

used as a way to connect more taxpayers to

free self-prep tax software through employer

or union organizations as an employee/member incentive.



This model component improves efficiency and versatility for Partners, increases taxpayer availability and awareness to free filing options, and decreases both taxpayer and Partner burden by allowing flexibility as to when and where to prepare a tax return and how assistance and support is provided.

Implementation of the Sponsorship Growth model is easier than you think! An FSA Remote model does not require in-person resources, allows volunteers to manage their time effectively, promotes tax preparation education, and it's available to taxpayers 24 hours a day.

Please note that although the primary focus of this Partner guide is the FSA Remote Sponsorship model using the primary tax software for the VITA/TCE program, other FSA software models/options with differing criteria may also be selected by partners/taxpayers. Those differences will be highlighted in this guide when applicable.

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## **What is Facilitated Self Assistance (FSA) Remote**

Facilitated Self Assistance (FSA) Remote is a concept that's part of SPEC's volunteer return preparation program designed to provide increased taxpayer access to free self-prep tax services at their convenience. No appointment required! FSA Remote combines the computer skills of the taxpayer, the intuitive programming of tax software, and the expertise of certified volunteers when/if needed to produce an accurate, self-prepared tax return.

FSA Remote combines the convenience of preparing a return at home or in the office with the availability of a certified assistor in case the taxpayer has a question. Assistance may be provided by email, phone, or web chat. Partners are provided with a unique hyperlink (web link) that is shared (upon the taxpayer's request) via email or posted to an internal facing website\* which provides access to the free tax preparation software. This allows taxpayers access and the ability to prepare their returns at a location convenient to them while providing assistance in a remote environment. FSA Remote allows taxpayers to file both a free federal and state tax return (up to three state returns). Taxpayers can prepare their own return from anywhere they have access to technology and an internet connection.

\*Other FSA software options may be posted externally.

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## **How Does FSA Remote Work**

The IRS provides a unique hyperlink to the Partner for FREE income tax self-prep software (both Federal and State) which may be shared by email or posted to an internal facing website \* for taxpayers to access.

Taxpayers express interest in receiving the self-prep software hyperlink from the Partner. The hyperlink is then provided to the taxpayer via email. The email should include the available partner contact channels (email, chat, and/or phone) as well as service hours and dates for asking tax related questions and links to Publication 4836, VITA/TCE Free Tax Programs, and Publication 4053, Your Civil Rights are Protected Poster for IRS Assisted Programs (VITA/



TCE/LITC). Taxpayers can log in remotely to access the software through the hyperlink that has been embedded with the Partner's Site Identification Number (SIDN). Assistance is provided by the Partner's certified volunteers via telephone, web chat, or email as requested. Taxpayers prepare their own return (with all available forms/schedules and up to three different states\*\*) from home or wherever they choose with or without assistance.

The SIDN embedded in the hyperlink enables the Partner to receive one-for-one return production counts for tax returns prepared utilizing the hyperlink, regardless of whether the taxpayer requests assistance or not. Partners should only post the link for taxpayer use during the dates of operation, while taxpayer support can be provided. In the event that the site no longer can provide taxpayer support, a contingency plan should be implemented to redirect support to an affiliated partner while the site is still active. All returns completed utilizing the hyperlink continue to count towards the production numbers for the Partner for the filing season.

The FSA Remote Model may be expanded beyond your current customer base by collaborating with local businesses and/or unions who could offer free self-prep tax software to their employees/members as an additional employment/membership benefit.

The business or union organization shares your dedicated FSA email address for interested employees/members to request your free self-prep tax software hyperlink. This dedicated FSA email address to request additional information can be shared on public facing platforms or through internal communications (i.e. newsletters, bulletin boards, paystub stuffer, email, etc.).

Tax preparation as a benefit presents growth opportunities for your organization by broadening your outreach within your community without requiring any additional usage of your critical resources such as time, space, volunteers and at NO cost to the local businesses.



Why expand to employers and/or unions instead of taxpayers directly?

FSA Remote (and your dedicated volunteer support) provide a valuable and beneficial taxpayer product to these organizations. This product is an employee/member benefit which employers/unions may offer to employees/members at no cost to them. This is a benefit which supports the working family, supports your organizational goals, supports SPEC, and expands overall levels of service and outreach of the VITA/TCE program.

\*Other FSA software options may be posted externally.

\*\*Available forms/schedules/states may vary for other FSA software options

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## How to Get Started with FSA Remote

Contact your local relationship manager and complete Form 13533-A, (only if you are not required to complete Form 13533) FSA Remote Sponsor Agreement, and Form 13715, Volunteer Site Information Sheet, to request FSA Remote as an alternate filing method to complement your current service delivery model(s) and to receive your unique hyperlink.

Once you've received an FSA Remote Hyperlink it cannot be shared on a public facing website\* but information regarding the program or benefit you are offering may be freely promoted. For example, you may wish to: establish a separate email address for interested taxpayers to request your free self-prep tax software hyperlink using a naming convention such as **MyTaxPrepBenefit@example.org**. This email address can be shared on public facing platforms which allows taxpayers to request your FSA Remote Hyperlink (access to free tax self-prep software).

Email auto-response functions are common, and you most likely have the feature available to you. In lieu of an auto-response this is sometimes referred to as an "Away Message", "Out of Office Message", or "Automatic Reply". Employing this method would significantly reduce both the time and burden of having someone individually respond and provide the FSA Remote hyperlink and the required publications and assistor contact information for each individual inquiry. You can also use this feature to communicate information about your organization, tips for filing, frequently asked questions, etc. The auto response email would be unique to your organization and ensures that information is only being provided to those taxpayers interested in the product or service.

Partners can broadly advertise information about their free FSA self-prep tax software and direct interested parties to a dedicated FSA email (i.e. **MyTaxPrepBenefit@example.org**). This would be a no reply email address with an auto-response or away message feature turned on.

Once the taxpayer sends an email to request the free self-prep tax software, they would receive an auto-response from your organization, which would include:

### Mandatory Items:

- Hyperlink to Publication 4836, VITA/TCE Free Tax Programs
- Hyperlink to Publication 4053, Your Civil Rights are Protected Poster for IRS Assisted Programs (VITA/TCE/LITC).
- Customized FSA Link (Vendor Link)
- Contact information for asking tax return questions (customer support email address (i.e. **MyTaxQuestions@example.org**), phone number, or link to chat options with service hours)

### Optional Items:

- Information about your Organization
- Tip Sheet



- Information on what is needed to file (i.e. W-2, 1099, etc.)
- Frequently Asked Questions

This method helps to prevent “bottle-necks” of emails for initial information, fulfills the requirements for sharing the FSA information, and gives the taxpayer the link they need to file their return immediately – no wait time.

You can further capitalize on the email auto-response feature if you are providing tax return assistance via email by setting up a second email address using a naming convention such as **MyTaxQuestions@example.org**. This would act as the email address for the assistance/tax help portion of FSA. If a taxpayer sends a question to this address you can use auto-response or an away message that immediately acknowledges the inquiry while the taxpayer waits for their question to be officially answered within 24-48 hours. This is the email address that would be monitored by volunteers on a regular basis during your established site operating schedule.

\*Other FSA software options may be posted externally.

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## Supporting FSA Remote

Taxpayers prepare their own tax return at a time and place convenient to them. However, if the taxpayer has a question about their return, they can contact the Partner for assistance during the Partner’s established schedule for providing assistance. The Partner will provide taxpayers at least one of the following resolution channel(s) in case of questions:

- **By telephone:** The Partner provides a contact phone number on their website to allow the taxpayer to call and seek resolution to their questions in real time with the volunteer’s assistance. Service hours should be posted.
- **By web chat:** The Partner includes a link on their website to allow the taxpayer to click and ask their questions in an interactive online format.
- **By email:** The Partner has an email established for responding to taxpayer questions to allow taxpayer flexibility to ask questions outside of the Partners assistance operating hours, or to ensure that a taxpayer can provide a more detailed question for the volunteer to resolve. This offers the greatest flexibility for Partners as they must respond to taxpayers’ questions within 24-48 hours.

Partners should consider this timeline to be a minimum standard for all support channels, and volunteers must make every effort to contact the taxpayer as soon as possible to resolve their issue. This will increase taxpayer confidence in the FSA Remote model by removing bottlenecks to return completion and e-filing.

Partners must identify the days and hours of assistance on their website for the taxpayer to utilize the assistance method provided (phone, chat, email, or a combination of methods). Partners may use one or more channel(s) listed above to provide assistance to taxpayers but should ensure that taxpayers can use at least one of these channels to ask questions during their posted hours of assistance throughout their established site operating schedule.

The support assistor(s) must be certified at VITA Basic or a higher level in order to answer any in-scope tax law questions. Since a wider variety of returns are likely to be prepared using the remote assistance model, Advanced VITA certification should be encouraged. All FSA Remote volunteers staffing the customer service line must also complete the Volunteer Standards of Conduct exam and sign the Form 13615, Volunteer Standards of Conduct Agreement - VITA/TCE Programs. This would include individuals whose role involves assisting the taxpayer with issues of navigating the computer software screens, printing, and other technical questions.

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## **Marketing FSA Remote – Tax Preparation as a Benefit**

Providing access to free tax preparation services supported by IRS certified volunteers is a tangible benefit that can be advertised and offered to fellow employer or union organizations within your community. Access to free self-prep tax software is a filing benefit that the employer or union can then offer to their employees with no costs associated and with no employer contributions or administrative paperwork. Marketing efforts may be a collaborative process between the Partner and the employer/union organizations to ensure a cohesive and broad-based messaging campaign. Having an on-going marketing dialogue between the Partner and the employer/union is imperative to ensure effective communication channels are being utilized.

Make connections to employers, unions, and other organizations within your community to support and offer free self-prep tax software or we can assist with making connections for you with an employer or union organization. Some marketing materials developed by SPEC that could be utilized to advertise your FSA Remote model include the following:

- Publication 4974, File Your Taxes Yourself for FREE
- Publication 5071, Filing Your Taxes Costs Less than 1 Cent
- PowerPoint Presentations for Employers/Unions
- Direct Mailing Letter Templates
- Flyers
- Social media platforms (i.e., Facebook, SnapChat, Twitter, TikTok, YouTube, etc.)

The organizations can advertise this free self-prep tax software benefit to its employees/members by using any/all of the following methods:

- Employee/Company newsletters
- Intranet – New Opportunity!
- Posters/Flyers/Signs in common areas/breakrooms or posted on bulletin boards
- Stuffers/filler with W-2/1099 mailings
- Social media platforms (i.e. Facebook, SnapChat, Twitter, TikTok, YouTube, etc.)





The FSA Remote Hyperlink cannot be shared on a public facing website\* however you can advertise and promote free-filing/no-cost filing on any platform: public facing websites, newsletters, presentations, seminars, and via email.

\*Other FSA software options may be posted externally.

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## Benefits to VITA/TCE Partners

- Prepare and e-file more tax returns utilizing minimal resources and dedicated volunteer time
- Provide assistance to more taxpayers from a broader range
- Identify those who really need one-on-one help
- Reduce lines at peak times
- Offer more volunteer opportunities
- Increase options for taxpayers
- Receive credit for all taxpayer self-prepared returns – increased production
- Volunteer flexibility – volunteers aren't required to work from a tax site
- Multiple taxpayers can be assisted at one time by each volunteer
- Less paperwork - Taxpayers prepare their own tax return, therefore, the Form 13164C, Intake/Interview and Quality Review Sheet, and the IRS intake and interview process are not required.

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## Benefits to Taxpayers

- Free tax preparation and e-filing of federal and state return
- Offers flexibility to prepare a tax return at their convenience
- Brand-name interview-based software helps taxpayers file more accurately
- Leverages existing computer skills
- Assistance from IRS-certified volunteers as needed
- Reduced wait time for tax preparation
- Expanded free tax help options
- Increased education and understanding about their tax return
- Builds confidence to file without assistance and promotes tax compliance
- Helps taxpayer keep all their tax refund and encourages savings

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## Appendix

- Frequently Asked Questions
- Template – Email auto-response tool
- Publication 5552, Promotional/Introductory employer flyer: Provide a benefit to employees at no cost to you!
- Publication 5553, Promotional/Introductory union flyer: Provide a benefit to members at no cost to you!
- Facilitated Self-Assistance (FSA) Quality Site Requirements
- Publication 5505, FSA Advertisement – used to advertise remote services within traditional sites
- Publication 5047, FSA Brochure – explains different FSA models and capabilities
- Publication 4974, FSA Flyer – can be printed or sent electronically to advertise different FSA services and offerings
- Publication 5071, FSA Flyer – can be printed or sent electronically to advertise different FSA services and offerings
- Publication 4836, VITA/TCE Free Tax Programs – required publication to be provided with FSA services.
- Publication 4053, Your Civil Rights are Protected – required publication to be provided with FSA services

You can find many of the above items here: <https://www.irs.gov/individuals/site-coordinator-corner>.

