

Guidance for Promoting Voter Registration at VITA/TCE Sites

for SPEC Partners

Background

An **Executive Order on Promoting Access to Voting** was issued by President Joseph R. Biden in March of 2021 and requires government agencies to expand citizens' educational opportunities related to registering to vote, the electoral process, and updated procedures for mailing local absentee (vote-by-mail) ballots. Agencies will, as appropriate and consistent with applicable law, promote voter registration and voter participation.

Based on the Voter Registration Executive Order 14019, SPEC's requirement includes encouraging SPEC Partners to provide the following information to taxpayers at their local VITA/TCE sites either during the filing season or throughout the year:

- How and where to register to vote (including voting policies and procedures).
- How and where to vote (including in person voting, early voting & absentee voting).
- How to engage in other non-partisan efforts (such as outreach campaigns) that promote voter participation.

Note:

- Participating in voter registration activities is not a requirement for SPEC partners.
- Providing voter registration materials at volunteer sites does not impact their 501(c)(3) status.
- If a site is already involved in supporting taxpayers with voter education activities at any time during the year, no additional information is needed. The partner will mark the voter registration question on Form 13715, Site Information Sheet as "yes".

SPEC is encouraging partners who voluntarily elect to work with their local voting registration office and participate in any of the above voter registration activities to:

- Offer voter registration services to taxpayers outside of the normal tax return preparation process (i.e., either before starting the return preparation process or after they have received a final signed version of their tax return).

- Advise taxpayers that each state makes its own voting and election rules, including when and how to register. If you are interested in supporting taxpayers with voter registration, check with your state or local election office to get the most detailed and up-to-date information for where you live.
- Share appropriate outreach messages from your local registration office and/or online on the voter registration process with interested taxpayers before or after return preparation services.

At a minimum, partners can support by referring taxpayers to the voter registration links on Publication 730 (en-sp), Important Tax Records Envelope (VITA/TCE), or similar products with the links.

Note: Taxpayers are not required to participate in voter registration, educational opportunities and/or receive any materials related to voter registration, to receive free tax return preparation services.

What's New for 2023

- Publication 730 (en-sp), Important Tax Records Envelope (VITA/TCE), includes voter registration links (how to register, how to vote and voting deadlines).
- Publication 1084, Volunteer Site Coordinator Handbook, provides guidance from the Executive Order and Publication 730 (en-sp) voter registration links.
- Publication 4396-A, Partner Resource Guide, provides guidance from the Executive Order, best practices and Publication 730 (en-sp) voter registration links.
- Publication 5088, Site Coordinator Training, provides guidance from the Executive Order, best practices, links from Publication 730 (en-sp), how to answer the voting question on Form 13715 and how to refer taxpayers to Publication 730 (en-sp) voter registration links.
- Form 13614-C, Intake/Interview & Quality Review Sheet, includes a question to identify taxpayers interested in voter registration information: **Would you like information on how to vote and/or how to register?**
- Form 13715, Volunteer Site Information Sheet, question now captures sites offering voter registration throughout the year: **Does your site offer voter registration assistance to customers/taxpayers at any time during the year? Yes or No?**

How Will Territories Assist Partners:

- Conduct and/or attend partner meetings to explain the executive order, how to support partners and share best practices from partners already involved.
- Educate interested partners on how to answer the voter registration question on Form 13715.
- Educate partners on how to support taxpayers if they mark “yes” to the voter registration question on Form 13614-C by referring them to Publication 730 (en-sp)

or similar products that includes the voter registration links.

- Explain and/or answer questions on this executive order during individual partner's Site Coordinator training.

How Can SPEC Partners Assist: (If they choose to support)

- Work with your site coordinators/facilitators to establish plans on how they can support voter registration.
- Advise site coordinator/facilitator when to mark "yes" on the voter registration question on Form 13715.
- Educate volunteers on what they need to do if a taxpayer marks "yes" on the voter registration question on Form 13614-C. At a minimum, if Publication 730 (en-sp) or similar product with the same information is used, they can refer taxpayers to the links that will answer their questions regarding how, when, and where to register and/or vote. Advise taxpayers to specifically look for their current state in each link for accurate information.

SPEC Site Coordinator/Facilitator's Responsibility (if they choose to support)

- Work with your partner to establish a plan on how you will support.
- Mark "yes" on the voter registration question on Form 13715, if:
 - Taxpayers are offered voter registration assistance at any time during the year
 - Interested taxpayers are referred to the links on Publication 730 (en-sp) or similar products with the voting links
 - Outreach messages are shared with interested taxpayers from your online or local registration office at any time during the year
- Educate your volunteers on what they need to do if a taxpayer marks "yes" on the voter registration question on Form 13614-C. Before or after return preparation, this could include:
 - Passing out products obtained from on-line or at the site's local voter registration's office.
 - Referring taxpayers to volunteers at the site from the local voting registration's office for updates on how and where to register and/or vote.
 - Referring taxpayers to the voter registration links on their tax return envelope Publication 730 (en-sp). These links provide state specific information regarding how, when, and where to register and/or vote.

Note: This request should be completely non-partisan, only providing information on how and where to vote and/or how and where to register to vote.

Voting Registration Educational Websites:

- www.usa.gov/register-to-vote – This website provides information on how to register, how to change your voter registration, how to confirm you are registered and how to get a voter registration card.
- www.usa.gov/how-to-vote – How, where, and when to vote
- www.usvotefoundation.org/vote/eoddomestic.htm – This website has useful voter information including:
 - Local election office and contact information
 - Address, telephone, and email for local election offices
 - Upcoming federal election dates and deadlines
 - Upcoming state election dates and deadlines
 - Eligibility requirements
 - Identification requirements
 - Voter materials transmission options
 - State lookup tools – Am I registered? Where's my ballot?