

FACT SHEET

2017 Filing Season: VITA/TCE Training & Site Products

October 2016



This document provides information regarding 2016 volunteer training and site materials for the 2017 filing season.

Background

IRS offers technically accurate, timely, and relevant electronic and printed products for internal and external use. This also ensures more accurate return preparation in our volunteer program.

SPEC has implemented an eMigration Strategy to convert training products to electronic and ePublication formats. These products are accessible on most mobile and tablet devices.

- Pub 4491-W, last printed in 2013.
- Pub 4961, last printed in 2014.
- Pub 4491, last printed in 2015.
- Form 6744, will no longer be printed after 2016.
- Pub 4012 (*Volunteer Resource Guide*) and Pub 4011 (*Foreign Student and Scholar Volunteer Resource Guide*) will no longer be printed after 2017.

Note: *We plan to print Pub 4011 and Pub 4012 if funds are available. Final print decisions will always be based on our budget.*

Volunteers are encouraged to begin using electronic products as soon as possible.

Available Training & Site Products for 2017 Filing Season include: (*denotes electronic product)

- **Pub 4480**, *VITA/TCE Link & Learn Taxes Training Kit*, which contains:
 - Pub 4836 (EN/SP), *VolTax Poster*
 - Pub 4012, *Volunteer Resource Guide*
 - Form 6744, *VITA/TCE Volunteer Assistor's Test/Retest*
 - Pub 5157-A, *Affordable Care Act - Taxpayer Scenarios*

Note: *Pub 4480 will be the only training kit offered. Form 6744 can only be ordered with the kit. Pub 4836 (EN/SP), VolTax Poster, is printed on the back of the Pub 4480 cover sheet. Please do not discard as the poster should be visible at all VITA/TCE sites.*
- **Pub 4012**, *Volunteer Resource Guide* (standalone).

Note: *This product comes shrink wrapped, unbound, 3 hole punched with tabs to fit in any 1" ring binder.*
- **Pub 4491***, *VITA/TCE Training Guide* (standalone). This product is electronic only.
- **Pub. 5051 (CD)***, *VITA/TCE Electronic Training Materials* (standalone). This CD-Rom will contain:
 - **Form 13614-C (EN & SP)**, *Intake/Interview & Quality Review Sheet*
 - **Form 13614-NR**, *Non-Resident Alien Intake/Interview Sheet*
 - **Form 6744**, *Test/Retest*
 - **Pub 1084**, *Volunteer Coordinator's Guide*
 - **Pub 1345**, *Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns*
 - **Pub 3112**, *IRS e-file Application and Participation*
 - **Pub 4011**, *Foreign Student and Scholar Volunteer Resource Guide*
 - **Pub 4012**, *Volunteer Resource Guide*
 - **Pub 4396-A**, *Partner Resource Guide*

- **Pub 4491**, *VITA/TCE Training Guide*
- **Pub 4491-W**, *VITA/TCE Problems and Exercises*
Note: *We will provide answers in December based on the 2016 tax tables.*
- **Pub 4695 (PR)**, *VITA/TCE Puerto Rico Volunteer Test*
- **Pub 4696 (PR)**, *VITA/TCE Puerto Rico Volunteer Resource Guide*
- **Pub 4704-FS**, *Foreign Student and Scholar Volunteer Test*
- **Pub 4836 (EN/SP)**, *VolTax Poster*
- **Pub 4942**, *VITA/TCE Health Savings Accounts*
- **Pub 4961**, *Volunteer Standards of Conduct (Ethics)*
- **Pub 5166**, *VITA/TCE Quality Site Requirements*
- **Pub 5157-A**, *Affordable Care Act - Taxpayer Scenarios*
Note: *Pub 5051 (CD) is available to people who have CD/DVD drives and would like to have copies of all training products in one place. Please access the website to link to other products.*

Other printed documents:

- **Form 13357**, *Community Service Leadership Certificate of Appreciation*
 - **Form 13446**, *Internal Customer Certificate of Appreciation*
 - **Form 13614-C (EN & SP)**, *Intake/Interview and Quality Review Sheet*
 - **Form 13614-NR**, *Nonresident Alien Intake and Interview Sheet*
 - **Form 9234**, *Volunteer Certificate of Appreciation*
 - **Pub 17**, *Your Federal Income Tax (for individuals)*
Note: *Printed copies will only be available for IRS volunteers. An electronic copy is available on irs.gov.*
 - **Pub 730**, *Important Tax Records Envelope (VITA/TCE)*
Note: *There were no updates to the publication this year, so please be sure to keep last year's copies. Only order what's needed to supplement what you already have in stock.*
 - **Pub 1290**, *Link and Learn Taxes on CD-Rom*
 - **Pub 3676-A**, *VITA/TCE Site Location Poster (EN/SP)*
 - **Pub 3711**, *VITA/TCE Certificate Folder*
 - **Pub 4053 (EN/SP)**
 - **Pub 4695-PR**, *VITA/TCE Puerto Rico Volunteer Test*
 - **Pub 4696-PR**, *VITA/TCE Puerto Rico Resource Guide*
 - **Pub 5055**, *Facilitated Self-Assistance (FSA) Tabletop Sign*
- **Electronic only publications:**
 - **Pub 1084**, *VITA/TCE IRS Volunteer Site Coordinator Handbook*
 - **Pub 4011**, *Foreign Student and Scholar Volunteer Resource Guide*
 - **Pub 4299**, *Privacy, Confidentiality and Civil Rights - A Public Trust*
 - **Pub 4396-A**, *2017 Partner Resource Guide*
 - **Pub 4491**, *VITA/TCE Training Guide*
 - **Pub 4491-W**, *VITA/TCE Problems and Exercises*
 - **Pub 4491-X**, *VITA/TCE Training Supplement (available January 2017)*
 - **Pub 4704-FS**, *VITA/TCE Foreign Student and Scholar Test*
 - **Pub 4942**, *VITA/TCE Specialty Course - Health Savings Account (HSA)*
 - **Pub 4961**, *Volunteer Standards of Conduct (Ethics)*
 - **Pub 5166**, *IRS Volunteer Quality Site Requirements*

General Information about Training Products

- Electronic files of training and site products are now accessible on the IRS website.
- To reduce pen and ink changes, electronic updates will be made in December. We will send Product Alerts to notify Relationship Managers and volunteers of changes. All individuals should

print revised pages and replace them with the printed training materials. Updates made after December will require pen and ink changes which will be published in Pub 4491-X.

- CAPS is now available for orders. Orders placed in CAPS by **Oct. 12** will ship first. This means the system will now share the 2016 versions of Form 2333-V or pre-populated spreadsheets.
- Printed products ordered between Oct. 12 and Dec. 14 will ship from the vendor beginning the week of Nov. 7 through the week ending Jan. **6**. Orders **must be placed in CAPS by Dec. 14** to receive printed products before the filing season begins. Orders placed **after Dec. 14** will ship from the National Distribution Center (NDC) in 7 to 10 business days.

CAPS Order Entry and Shipping Schedule

Orders approved in CAPS by SPEC by 7:00 pm ET on Wednesday...	...can expect delivery to begin during the week of...
Oct. 12, 2016	Nov. 7, 2016
Oct. 19, 2016	Nov. 14, 2016
Oct. 26, 2016	Nov. 21, 2016
Nov. 2, 2016	Dec. 5, 2016
Nov. 9, 2016	Dec. 5, 2016
Nov. 16, 2016	Dec. 12 , 2016
No activity the week of Nov. 23 due to the Thanksgiving Holiday	
Nov. 30, 2016	Dec. 19 , 2016
Dec. 7, 2016	Dec. 27, 2016
Dec. 14, 2016	Jan. 3, 2017
After Dec. 14, 2016	You must allow at least one week for the vendor to send the remaining products to NDC. Then orders will ship from the NDC within 7 to 10 business days.

Updates are in red font.

- Emergency printed product orders will not be processed, and needed information can be satisfied with electronic products available on IRS.gov.
- **Link and Learn Taxes** and the **Practice Lab** will be available in early November 2016.
- **Understanding Taxes** remains a viable training system for educators and students even though the information is based on 2014 tax law. There are no plans to update this system. Please encourage individuals who want current tax law to use Link and Learn Taxes.
- Civil Rights Assurance Agreements for partners and sub partners has merged into **Form 13533**, *VITA/TCE SPEC Partner Sponsor Agreement* (revised October 2015). There is now one form and one signature for each partner.
- **Pub 4053 (EN/SP)**, *Your Civil Rights are Protected Poster for IRS Assisted Programs*, has a 2016 revision. Please order this version (only 1 copy per site) to post at your volunteer site.