

FACT SHEET

VITA/TCE Training and Outreach Products — Ordering Procedures and Other Updates



December 2016

This document provides guidance for ordering VITA/TCE training and site materials. It is intended for VITA partners/volunteers who support product ordering.

Background – Ordering Procedures

Products needed for the upcoming filing season are projected each summer. These projections help determine how many products will be printed in the fall to ensure the preparation of quality returns.

Also during the summer, products needed for Return Preparation Training classes are forecast through the Quantity Needs Survey (QNS). Partners participate in this process by telling their IRS SPEC relationship manager how many volunteers they expect for the upcoming filing season. After an assessment of the final QNS, the printing contract is finalized and the products are printed.

Outreach products for the Earned Income Tax Credit (EITC) are also forecast, and only very large orders for the EITC are identified for product ordering.

Orders are placed through the Computer Assisted Publishing System (CAPS), which electronically submits them to the print and fulfillment vendors for shipping.

Products are printed and shipped to the partners directly from the shipping warehouse. Shipping usually takes place in late November or early December.

Process for Ordering Printed Products

There are 3 ways to order training products:

1. Use electronic Form 2333-V to order for the VITA/TCE Program
2. Request through the IRS SPEC Relationship Manager
3. Use the VITA Pre-Populated Spreadsheet

Ordering Method #1: Electronic Form 2333-V (preferred method)

In October, an e-mail with PDF Form 2333-V, *Order for VITA/TCE Program*, is sent to each VITA program account that has a valid e-mail address. The Form 2333-V is pre-populated with the partner's contact and account information.

The partner receives the order form, then reviews and updates the contact information as needed. Then they enter order quantities on the order form and save a copy of the order on their computer. Next, partners e-mail their completed order form to the virtual mailbox for processing. E-mail completed order forms to pdf.orders@eforms.enterprise.irs.gov.

If the submitted order form has errors, an error notification will be sent explaining why the order was rejected and what information needs to be corrected. If the order form does not contain errors, the partner/volunteer will receive an order acknowledgement.

The order is forwarded for fulfillment after it's approved by the relationship manager in CAPS. If the order form is lost or misplaced, the relationship manager can email Form 2333-V to the VITA partner again.

IMPORTANT: Never share the electronic Form 2333-V. The form encodes the account number on the PDF file, and the address information will update the embedded account number.

Ordering Method #2: Request through an IRS SPEC Relationship Manager

If a partner doesn't have a CAPS account with a valid e-mail address, the partner can request that the relationship manager manually input an order into CAPS. The partner should provide a list of the products needed, the quantity requested and the recipient's name and address. Instead of manually inputting an order into CAPS, the SPEC relationship managers can also send a replacement electronic form 2333-V.

Ordering Method #3: VITA Pre-Populated Spreadsheet

The pre-populated spreadsheet saves time on inputting existing account information for regional coordinators who serve a large population of partners. Any product listed on the spreadsheet may be ordered. The relationship manager can send the prepopulated spreadsheet and instructions to the partner.

Troubleshooting Orders

If an order for materials was placed but not received, according to the shipping schedule, e-mail the relationship manager to confirm the order was placed. Contact the ordering distribution department at vita.administrator@irs.gov. When you e-mail messages to the ordering distribution department include the account number (if known) and copy the relationship manager.

Note: Only send issues related to troubleshooting orders to the ordering distribution department.

Reference

Publication 4396-A, *2016 Partner Resource Guide*, Stakeholder, Partnerships, Education and Communication (SPEC) – Chapter 5-1: Product Ordering

Other Product Updates

Publication 4491A, VITA/TCE Training Guide - Consolidated Changes

Guidance has changed in **Pub 4491A**. Under the section Introduction, **Changes to Publication 4491**, October 2015 version, item 2, guidance now reads *Print out Publication 4491A for reference when using Publication 4491. Print the pages you need from the posted 2016 version and add to your book, or make pen/ink corrections where needed.*

We no longer provide updated pages for printing. We now provide a summary of all changes for reference. This summary or crosswalk is the new **Pub 4491A**.

You will be able to print any page as a single page or, if you have print capability, you can print front and back. You decide how you will use the content.

In some cases, if most of the content changed, you may want to print several pages or replace an entire lesson. However, if there are only minor updates, you may prefer to write that information in.

Publication 4053 (EN/SP), Your Civil Rights are Protected Poster

Pub 4053 (EN/SP), *Your Civil Rights are Protected Poster for IRS Assisted Programs*, will not be updated this year. The current version available to order was revised 04-2015. If you have the publication from last year please use that copy or order one copy to post at your volunteer site. Please order only one copy per site.