

FACT SHEET

2017 Filing Season: VITA/TCE Training & Site Products



September 2016

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

Background

IRS is committed to offering technically accurate, timely, and relevant electronic and printed products for internal and external use. Benefits to taxpayers also include return preparation that is more accurate in our volunteer program.

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

- 2013 was the last year we printed the Pub 4491-W
- 2014 was the last year we printed the Pub 4961
- 2015 was the last year we printed the Pub 4491
- 2016 will be the last year we print the Form 6744
- 2017 will be the last year we print the Pub 4012 (*Volunteer Resource Guide*) and the Pub 4011 (*Foreign Student and Scholar Volunteer Resource Guide*)

Note: *We will attempt to print the Pub 4011 and the Pub 4012 if funds are available. The final decision will always be based on our budget.*

Volunteers are encouraged to adopt electronic products as soon as possible.

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

- **Pub 4480, VITA/TCE Link & Learn Taxes Training Kit** 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 is unbound, 3 hole punched, tabs, 1" ring (no binder), shrink-wrapped*
- **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 (English & Spanish)**, *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*

Fact Sheet – 2016 VITA/TCE Training & Site Materials

- **Pub 4491**, *VITA/TCE Training Guide*
- **Pub 4491-W**, *VITA/TCE Problems and Exercises*
Note: *Answers will be provided 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 those that have CD/DVD drives and would like to have copies of all the training products in one place. To link to other products, access to the website is necessary.*

Other printed documents:

- **Form 13357**, *Community Service Leadership Certificate of Appreciation*
 - **Form 13446**, *Internal Customer Certificate of Appreciation*
 - **Form 13614-C (English & Spanish)**, *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 and electronic copies will be available for IRS volunteers only.*
 - **Pub 730**, *Important Tax Records Envelope (VITA/TCE)* **Note:** *There were no updates to the publication this year, so don't throw away last year's copies. Keep your current copies and only order what's needed in addition to 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 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 4299**, *Privacy, Confidentiality and Civil Rights - A Public Trust*
 - **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 4961**, *Volunteer Standards of Conduct (Ethics)*

General Information about Training Products

- Electronic files of training and site products will be accessible on the IRS website by the week of **10/03/2016**.
- To reduce the number of pen and ink changes, updates will be made electronically in December. Relationship Managers and volunteers will be notified of the changes via a Product Alert. All individuals are encouraged to print the revised pages and replace the pages in their printed training materials. Updates made after December will require pen and ink changes that will be published in the Pub 4491-X.
- CAPS will be available for orders on **10/01/2016**. Orders placed in CAPS no later than **10/12/2016** will be in the first shipment. This means the system will share the 2016 versions of the Form 2333-V or pre-populated spreadsheets on **10/01/2016**.

- Printed products ordered between October 12 and December 14 will ship from the vendor beginning the week of November 7 through the week ending January 9. Orders **must be placed in CAPS by December 14** in order to receive printed products prior to the start of the filing season. Orders placed **after the December 14** date 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 | ...can expect delivery to begin during the week of... |
| Wednesday... | |
| October 12, 2016 | November 7, 2016 |
| October 19, 2016 | November 14, 2016 |
| October 26, 2016 | November 21, 2016 |
| November 2, 2016 | December 5, 2016 |
| November 9, 2016 | December 5, 2016 |
| November 16, 2016 | December 9, 2016 |
| No activity the week of November 23 due to the Thanksgiving Holiday | |
| November 30, 2016 | December 16, 2016 |
| December 7, 2016 | December 23, 2016 |
| December 14, 2016 | December 30, 2016 |
| After December 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. |

- Emergency printed product orders will not be processed and can be satisfied with the 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 although 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 the partner and sub partner 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 (1 copy per site) to post at your volunteer site.