

EarnIt!KeepIt!\$aveIt!

Site Coordinator Requirements

MATERIALS REQUIRED ON SITE

Please insure that at least one copy of the following is available at your site at all times:

1. **IRS Publication 17** *Tax Guide for Individuals (available in January)*
2. **IRS Publication 4012** *VITA/TCE Volunteer Resource Guide*
3. **IRS Publication 4481** *Your Civil Rights are Protected* OR provide *IRS Publication 730* Envelope to all clients
4. **IRS Publication 1084** *Site Coordinator Handbook*
5. **IRS Publication 4299** *Privacy, Confidentiality and the Standards of Conduct*
6. **Form(s) 13614-C** *Intake/Interview & Quality Review Sheet(English & Spanish)*

Additional Documents to be used at your Site:

1. Volunteer Sign-In Sheet
2. Client Sign-In Sheet
3. Client Survey in English and Spanish (*To be provided to each client with Intake form.*)
4. Client Screening Tool
5. IRS Volunteer Name Badge (mandatory)

Verify With Volunteers Prior to First Shift:

1. Identification and legal residency - This can be verified by checking volunteer ID
2. Completion of Volunteer Standards of Conduct Exam and Agreement – Site Coordinator or United Way Staff must sign-off at the bottom of the Volunteer Standards of Conduct Agreement.
3. Completion of Certification Test (required for Tax Preparers only) and Certification Level (Basic, Advanced, etc.)
4. Emergency Contact Information

Please keep a copy of all of the above documents for each volunteer at the site at all times. Our Quality Assurance team will be conducting site visits to verify that the above information is in place.

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REPORTING REQUIREMENTS

Monthly Reporting:

1. Form 13206 – Volunteer Assistance Summary Report should be submitted to our IRS SPEC Manager one time at the beginning of the season, **unless** your volunteers change and then you will need to submit another form 13206 by the 25th of the month. This form should list all volunteers who have served your site over the course of the previous month. Each volunteer need only be listed once. Please copy Kelsey when you submit this form to Kimberly.

End of Tax Season Reporting:

1. Keep mileage log showing date, purpose, to, from, and number of miles
2. Record number of VITA related phone calls (e.g. scheduling appointments), if relevant
3. Record staff time spent on scheduling appointments
4. Tabulate volunteer hours collected from volunteer sign-in sheet in binder.
5. Submit Volunteer Sign In Binder to United Way at the end of the season
6. Collect Timesheets from each person receiving a grant stipend for their work
 - a. Insure that tax preparation time is entered separately on a volunteer timesheet (Grant monies cannot pay for tax preparation, even for correction of rejected returns)
 - b. Sign each timesheet
 - c. Bundle timesheets to submit to Kelsey

RESOURCES AND MATERIALS

1. Site Coordinator Resources can be found online at:

<http://www.unitedwaywinecountry.org/our-work/income/eks/site-coordinator-resources/>

2. All IRS Forms and Publications can be found online at:

<http://apps.irs.gov/app/picklist/list/formsPublications.html>