

FACT SHEET

2014 Filing Season: VITA/TCE Training & Site Products

September 2013



This document provides information regarding volunteer training and site materials for the 2014 filing season.

Background

IRS is committed to offering technically accurate, timely, and relevant electronic and printed products for internal and external use. These products support the leveraged approach to meet taxpayer needs for tax education and assistance through a network of partnerships with national and local organizations and businesses. Benefits to taxpayers also include more accurate return preparation in our volunteer program.

Available Training Products for 2014 Filing Season ^(*denotes electronic product)

- Pub. 4480, *VITA/TCE Link & Learn Taxes Training Kit* – contains Pub. 4012, Pub. 4491-W, Pub. 5051 (CD)*, & Form 6744. **Note: Pub. 4480 will be the only training kit offered**
- Pub. 4012, *Volunteer Resource Guide* (standalone)
- Pub. 4491, *VITA/TCE Training Guide* (standalone)
- Form 6744, *Volunteer Assistor's Test/Retest* (standalone)
- Pub. 5051 (CD)*, *VITA/TCE Electronic Training Materials* (standalone)

This CD ROM will contain Publications 4011, 4012, 4491, 4491-W, 4704-FS, 4942, 4961, 4695 (PR), and Forms 6744, 13614 C, and 13614 C (SP)

Note: Pub. 5051 (CD), is the substitute product in case of unanticipated demand for the printed kit and standalone products. Pub. 4491 CD is obsolete

- Publication 1290 (CD), *Link and Learn Taxes on CD-ROM*, will be available for sites without internet access

General Information about Training Products

- Printed products ordered between October 16 and December 18 will ship from the vendor the week of November 12 until the week of January 6. Orders **must be placed in CAPS by December 18** in order to receive printed products prior to the start of the filing season. Orders placed after the December 18 date will ship from the National Distribution Center in 7 to 10 business days.

CAPS Order Entry and Shipping Schedule

Orders approved in CAPS by SPEC by 2:30pm ET on Wednesday...	Can expect delivery during the week of...
October 16, 2013	November 11, 2013
October 23, 2013	November 18, 2013
October 30, 2013	November 25, 2013
November 6, 2013	December 2, 2013
November 13, 2013	December 9, 2013
November 20, 2013	December 16, 2013
No activity the week of November 25 due to the Thanksgiving Holiday	
December 4, 2013	December 23, 2013
December 11, 2013	December 30, 2013
December 18, 2013	January 6, 2014
After December 18, 2013	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.

- Publication 4491 and Publication 4491-W are evergreen products that require minimal updates and will be updated every 2-3 years. **Note: Evergreen products should be maintained at the end of the filing season and used again the next filing season.**
 - Volunteers are encouraged to order copies of both products this year. In 2014, quantities of these products will decrease significantly and will only be available for new volunteers.
 - Publication 4491-X will contain updates to the Publication 4491 and Publication 4491-W.
- Electronic files of training and site products will be accessible on the IRS website by October 4, 2013.
- All electronic files (whether on CD or IRS.gov) will include a table of contents as well as bookmarking and hyperlinks features in order to allow volunteers to quickly locate content. The bookmarks are organized into table of contents/chapter/topic hierarchy and can be expanded and/or collapsed. In addition, all index entries are hyperlinked to their page occurrence(s). Files will also contain hyperlinks to IRS forms and publications. Finally, all page numbers in the files will be consecutive.
- Emergency orders will not be processed and can be satisfied with the Internet products.
- Link and Learn Taxes and the Practice Lab will be available on Friday, November 8, 2013.
- Publication 17 is not normally available for training. Volunteers and partners are encouraged to use the Interactive Tax Assistant on the IRS web site until printed copies of the Publication 17 become available.

Update on Volunteer Site Materials

- Electronic only files of site products will be accessible on the IRS website by October 4, 2013. These include:
 - Pub. 1084, *Volunteer Site Coordinator's Guide*
 - Pub. 3189, *Volunteer e-file Administration Guide*
 - Pub. 4396-A, *Partner Resource Package*
- Publication 5052 (CD), Volunteer Site Assistance Guides will contain Publications 1084, 3189, 1345, 3112, and 5110.
- Available Civil Rights Materials include the Publication 4053 EN/SP (poster) and Publication 4454 (brochure). Publication 4053 is an 11X17 poster and will contain both English and Spanish on one side. **Note: These two products should be substituted for the now obsolete Pub 4481.**
- Publication 1303 (Volunteer Badge) and Form 13645 (Wallet Card) are obsolete. They have been replaced with the Form 14509 (Volunteer ID Insert) and Document 13123 (Volunteer ID Holder).

Note 1: There will only be one of each available per volunteer.

Note 2: Document 13123 is an evergreen product that should be maintained at the end of the filing season and used again the next filing season. Additional holders may be ordered each year for new volunteers.

Product Titles Not Defined Above

Publication 4491-W, VITA/TCE Problems and Exercises
Publication 1290, Link and Learn Taxes on CD-ROM

Fact Sheet – 2013 VITA/TCE Training & Site Materials

Publication 17, Your Federal Income Tax (For Individuals)
Publication 4942, VITA/TCE Specialty Courses – Cancellation of Debt & Health Savings Accounts
Publication 4961, Volunteer Standards of Conduct (Ethics)
Publication 4695 (PR), VITA/TCE Puerto Rico Volunteer Test
Publication 4704-FS, Foreign Student and Scholar Volunteer Test
Form 13614-C EN/SP, Intake/Interview and Quality Review Sheet
Publication 4491-X, VITA/TCE Training Supplement
Publication 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns
Publication 3112, IRS E-File Application and Participation
Publication 4053 (EN/SP), Your Civil Rights Are Protected! (Poster)
Publication 4454 (EN/SP), Your Civil Rights Are Protected! (Brochure)
Publication 4481 (EN/SP), Your Civil Rights Are Protected!