

Volunteer Tax Preparation Site Visitation Report



Site Name/Address _____ Date _____

Territory/Area _____ Site Type: (VITA or TCE) _____

Name of Reviewer _____ Name of Volunteer Reviewed _____

QUESTIONS	Yes	No	N/A	QUESTIONS	Yes	No	N/A
1 Training and Development				Do you have a volunteer publicity coordinator for this site?			
Did all volunteers attend training?				6 Tax Forms and Supplies			
Are technical and procedural updates provided to volunteers regularly?				Are sufficient tax forms and supplies available?			
Did all volunteers pass VITA/TCE test?				Are volunteers using overprinted VITA/TCE forms or marking completed returns with appropriate acronym?			
Were training needs met to support the site? If no, please explain				7 Procedures			
2 Planning and Recruitment				Were overprint instructions provided and explained?			
Was site coordinator involved in recruitment efforts? How?				Is the fact that all VITA/TCE tax assistance is "Free" being emphasized at the site?			
Are recruitment brochures displayed?				Is the site number being placed under the acronym on all returns?			
3 Site Coordination				Are copies of returns being given to taxpayers for their records?			
Does site coordinator have a list of volunteers scheduled to work?				Are volunteers familiar with IRS toll-free numbers: 1-800-829-1040, 1-800-829-VITA, and 1-800-829-FORM			
Has site coordinator been provided with names of local IRS management?				8 E-file Activities			
Is site open as scheduled?				Is site equipped for TeleFile?			
Is site coordinator or alternate present?				Are taxpayers inquiring about the new self-select PIN?			
Is IRS communications with coordinator timely and applicable? How				Have volunteers attended e-file training?			
Is the site adequately staffed by volunteers?				Are the advantages of e-file explained to taxpayers at the site?			
4 Site Selection				Does site have a sufficient number of computers, printers, paper and ink cartridges, etc., available?			
Is site easily accessible to taxpayers and volunteers?				Does the site coordinator and/or volunteers know the correct EFIN number?			
Is adequate space and privacy available to taxpayers?				Does the site coordinator and/or volunteer know how to report computer hardware and software problems? Was a contact name provided?			
5 Publicity				Are taxpayers advised that they will receive an e-file acknowledgment letter?			
Are posters identifying site displayed in prominent location?				Are Forms 8453 sent to IRS Territory office and correct Submission Processing Campus (service center) timely?			
Is site adequately publicized?							
Have site coordinator and volunteers been instructed on how to handle media inquiries?							

