



**Department of
Taxation and Finance**

Facilitated Self Assistance (FSA) E-file Training

Outreach Services

Office of the Taxpayer Advocate

Agenda

- Mission
- Advocacy Groups – Free Tax Prep Sites
- Volunteer Income Tax Assistance (VITA)
- Benefits to taxpayer, the department and employees
- Volunteers requirements - IRS Ethics Training
- Confidentiality and Taxpayer Information
- Representing the Tax Department
- Equipment, materials and resources
- Site operations and reports
- Software – MyFree Taxes
- Online Services

Mission

The primary mission of the Department of Tax and Finance (DTF) hosted FSA free tax preparation program is to increase voluntary compliance in regards to tax obligations and electronically filing (e-filing) tax returns.

We do this by assisting eligible taxpayers with electronically preparing and filing both their federal and state income tax returns using free tax software.

Advocate Groups

- Advocate across New York prepared 304,200 returns in 2015.
- Last season DTF employees served over 3,500 taxpayers and assisted with over 2,100 returns.

IRS Volunteer Income Tax Assistance

- **VITA** - IRS certified volunteer will prepare if 2015 FAGI is \$54,000 or less
- **AARP Tax-Aide/TCE** - Offers free tax help to individuals who are age 60 or older
- **Facilitated Self-Assisted (FSA)** - Self prepared if 2015 FAGI income is \$62,000 or less

NYS E-File Program

- **DTF Hosted FSA** - File both federal and state returns if your income is \$62,000 or less with assistance from a tax department employee.
- **NYS Web-file** – E-file your return using an Online Services Account (OLS)
 - IT-201
 - IT-214
 - NYC-210

Benefits to Taxpayer

- Safe and secure e-filed transmission
- Faster refunds
- Increased education and understanding
- Builds confidence – empowering taxpayers
- Save taxpayers filing fees

Benefit to DTF and Employees

- Direct contact with taxpayers as well as to serve community members
- Promote voluntary compliance and increase E-filed returns
- Reduced processing time and increase in accuracy of returns
- Increase education and understanding

LATS and Division reports

- Hours worked at site should be reported on LATS
 - Category: DTF Projects
 - Task: Facilitated Self Assistance 2016

- MIS Time should be reported as special project
 - Audit - GNA 027

Volunteer Requirements

- IRS Ethics Training
 - www.linklearncertification.com
 - Ethics Course (SLMS)
 - Ethics Test
 - Form 13615 must be with you at site(s)

- NYS ID badge

Standards of Conduct Agreement (pg.1)

Department of the Treasury - Internal Revenue Service

Form **13615**
(October 2015)

Volunteer Standards of Conduct Agreement – VITA/TCE Programs

The mission of the VITA/TCE return preparation programs is to assist eligible taxpayers in satisfying their tax responsibilities by providing **free** tax return preparation. To establish the greatest degree of public trust, volunteers are required to maintain the highest standards of ethical conduct and provide quality service.

Instructions: All VITA/TCE volunteers (whether paid or unpaid workers) must pass the *Volunteer Standards of Conduct Test*, and sign and date Form 13615, *Volunteer Standards of Conduct Agreement*, prior to working at a VITA/TCE site. In addition, return preparers, quality reviewers, and VITA/TCE tax law instructors must certify in the Intake/Interview & Quality Review and tax law prior to signing this form. This form is not valid until the site coordinator, sponsoring partner, instructor, or IRS contact confirms the volunteer's identity and signs and dates the form.

Standards of Conduct: As a volunteer in the VITA/TCE Programs, you must:



Standards of Conduct Agreement (pg. 2)

Volunteer:

By signing this form, I declare that I have completed Volunteer Standards of Conduct Certification and have read, understand, and will comply with the volunteer standards of conduct.

Full name <i>(please print)</i> Michelle Duchowny		Volunteer position(s) 09 - Other	<input type="checkbox"/> IRS Employee - VITA/TCE Volunteer
Home street address: city, state and ZIP code W.A. Harriman Campus, Albany, New York 12227			
Email address Michelle.Duchowny@tax.ny.gov	Daytime telephone None	Sponsoring partner name/site name	
Number of years volunteered <i>(including this year)</i> 0	Volunteer signature Michelle Duchowny		Date 11/10/2015

Volunteer Certification Levels

	Standards of Conduct <i>(Required for ALL)</i>	Intake/ Interview & Quality Review	Basic	Advanced	Military	International	HSA	Puerto Rico		Foreign Students
								1	2	
Add the letter "P" for all passing test scores	P	P								

Site Coordinator, Sponsoring Partner, Instructor or IRS: By signing this form, I declare that I have verified the required certification level(s) and proper identification for this volunteer prior to allowing the volunteer to work at the VITA/TCE site.

Approving Official's <i>(printed)</i> name and title	Approving Official's signature and date
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Ensuring and Maintaining Confidentiality

- In accordance with Internal Revenue Service (refer to IRS publication 4299) partners and volunteers must maintain confidentiality of taxpayer information.
 - Protect the information
 - Provide a safe environment for Information
 - Delete or dispose of taxpayer Information

Representing the Department

- Respectful
- Professional
- Prompt
- Be responsible

Volunteers should not...

- Give tax advice
- Answer tax questions related to open tax business with the Department
- Access the taxpayer information on non-FSA assigned equipment
- Email taxpayer information to personal email

Equipment

- Storing and securing
- Use of
- Problems with
 - Contact your outreach specialist

Note: You may install adobe reader if print option is not working

Equipment Set-Up

- Demo on how to setup and navigate equipment.
 - Connect to hotspot or Wi-Fi
 - Setup printer
 - Add printer toner and paper
 - Print document

Site Operations

- Arrive at site 15 minutes early
- Check appointment Schedule
- Set up equipment
- Greet Taxpayer
 - Check ID (Some may have durable power of attorney)
 - **Have taxpayer sign in and verify phone number**
 - Confirm if taxpayer has an E-mail account
 - Refer taxpayer to an advocate site or NYS website if unable to serve
 - If proceeding, have taxpayer complete brief survey

Interview Questions

- **May I please see a Photo ID?**
 - Yes – Thank you. Durable Power of Attorney is acceptable.
 - No – I'm sorry but I need to see a photo ID. Would you like to reschedule for another time?

- **Do you currently have an email account?**
 - Yes – Great, we need it to create the tax software account.
 - No – You may want to go to a VITA site for assistance, or we will have to create an email account for you, do you feel comfortable using email on your own?

Interview Questions Cont.

- **Did you bring all your documents?**
 - Yes – Ok. Let's continue.
 - No – We can get started but you will need to finish it later.

- **Did you bring a copy of last years tax return with you?**
 - Yes – Good we will need to verify some information from last year to e-file this year.
 - No – We may not be able to successfully submit the return until you get some information from last years return.

- **Would you please complete this brief survey?**



Creating an Email Account

- www.google.com or www.yahoo.com or aol.com
- Click on gmail or sign in for yahoo
- Add Account and/or Create Account
- Enter first and last name
- Choose a username
 - don't add gmail.com it will automatically populate
- Choose a password and reenter to confirm
- Uncheck set as default
- Type text in box
- Agree to Terms of Service and Privacy Policy



Software – MyFree Taxes.com

- For taxpayers who are comfortable with using a computer
 - Access computer at any location
- Brand name software accessed online through www.tax.ny.gov
- Free – Income \$62,000 or less
- Create a log in account
- Need an email account



How to Access Software

- 5 Easy Steps
 - Go to WWW.TAX.NY.GOV
 - Click on “E-FILE FOR FREE”
 - Click on “FILE MY TAXES” scroll down
 - Click on “I want to e-file: Both my Federal and state income tax returns
 - Answer the questions

Create MFT Account

Create Your Account

E-mail

Use my E-mail as my Username

Username

Password

Confirm Password

Security Question

Answer

Remember This Computer

[LEARN MORE](#)

I agree to the terms and conditions of the [H&R Block Online Services Agreement](#) and I acknowledge that the [H&R Block Privacy Notice](#) was made available to me

[Create Account](#)

MyFreeTaxes Partner Portal

- Demo
- Webinar
- Testing Link

State only credits or Zero Income

- Taxpayers with “zero” income can create a NYS online service account to file
 - Full year resident
 - IT-201 (some credit restrictions)
- IT-214 Real Property Tax credit
- NYC-210 (New York City only)

Create an Individual OLS Account

- Social Security Number (SSN)
- Verification information
 - **Federal Adjusted Gross Income** from the past 3 years, or
 - An **assessment ID number** from a New York State issued tax bill, or
 - Confirmation that **no NYS returns** have been recently filed, or
 - A five digit NYS Department of Tax issued PIN number
- Your personal contact information: name, home address, personal email address, phone number
- <https://www.tax.ny.gov/e-services/otc/demos/indreg/indacctdemo.htm>

Taxpayer should...

- Review returns
- Make corrections if required
- Submit returns
- Print returns
- Access Email
 - IRS Submitted
 - NYS Submitted



Volunteer should...

- Attach Taxpayer Information Sheet to return
- Collect Survey
- Complete Appointment Log
- Tally sheet report
- Appointment Log Report site activities to Regional Specialist as soon as possible

Un-available to cover shift?

- Access sign-up tool and remove your self from the schedule for that day
- Inform your Outreach Specialist that you are not available
- If possible see if another volunteer can cover for you

Contact Numbers

- MyFreeTaxes
 - 1-855-698-9435

- NYS – DTF Income Tax
 - www.tax.ny.gov
 - 518-457-5181

- IRS
 - www.irs.gov
 - 1-800-829-1040

DTF Regional Outreach Staff Territories



Western NY Region

Vacant



Central NY Region

Karen Martino (315) 728-2056

Karen.martino@tax.ny.gov



Capital Region

Michelle Duchowny (518) 453-5382

Michelle.duchowny@tax.ny.gov



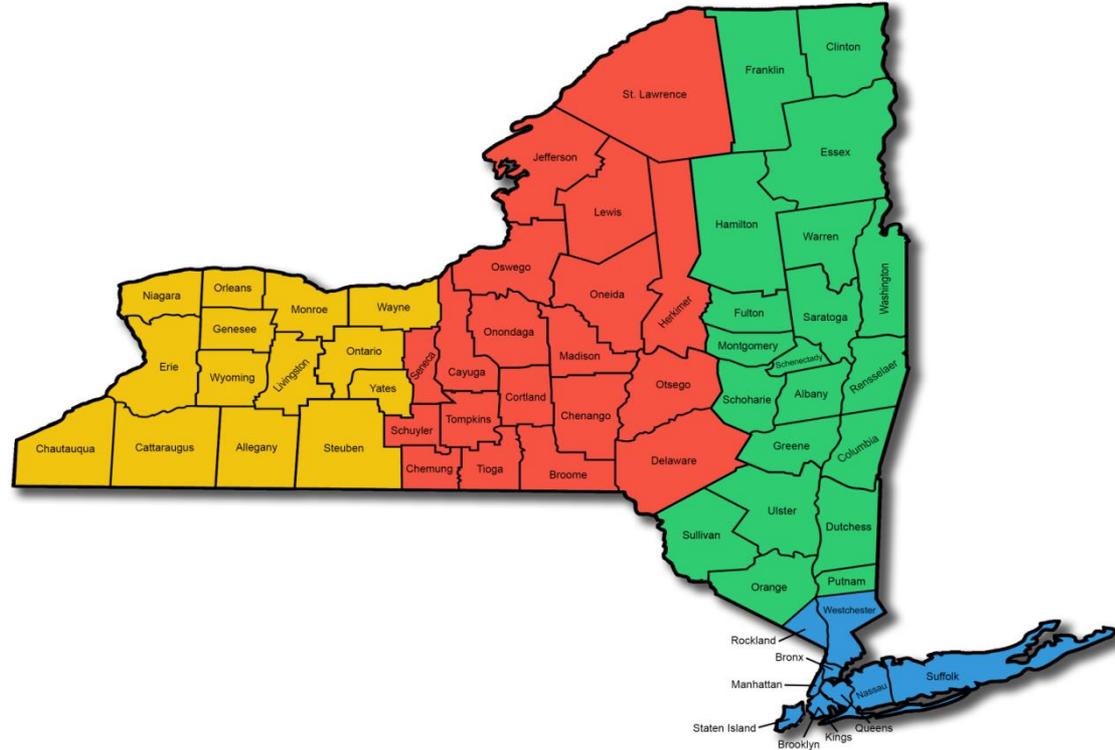
Metro Region

Robert Smith (347) 390-7371

Robert.smith@tax.ny.gov

Sommra Khalid (929) 441-0023

Sommra.khalid@tax.ny.gov



THANK YOU