

RECOMMENDED VITA SITE MATERIALS - TAX YEAR 2017

Publication/Form	Title	Quantity	Purpose	Use Order Form
Pub 17	Your Federal Income Tax	Minimum 1 per VITA site	Tax Law Reference- REQ	F2333V
Pub 4012	Volunteer Resource Guide	Minimum 1 per VITA site	Quick reference guide, comes in training kits- REQ	SPEC RM
Form 13614-C	Intake/Interview and Quality Review Sheet	1 per taxpayer	Information gathering prompt and checklist for return preparer- REQ	F2333V
Form 13614-C (SP)	Intake/Interview and Quality Review Sheet - SPANISH	1 per taxpayer if serving Spanish-speaking public	Information gathering prompt and checklist for return preparer- Spanish translation	F2333V
Pub 4053 (EN/SP)	Your Civil Rights Are Protected	1 per VITA site	Non-discrimination statement- REQ	F2333V
Pub 4053 – Chinese, Korean, Russian or Vietnamese	Your Civil Rights Are Protected	1 per language if serving these populations at VITA site	Non-discrimination statement	Electronic Only download www.irs.gov
Pub 4836 (EN/SP)	VITA/TCE Free Tax Program	1 per VITA site	Vol-Tax contact information for taxpayer complaints- REQ	Printed on back of P4480 title sheet or download
Pub 730 Envelope	Important Tax Records	1 per taxpayer, optional	For tax return copies & records	F2333V
Pub 4961	Standards of Conduct (Ethics)	1 per non-certifying volunteer, if not using Link and Learn	Standards of Conduct training, signature copy must be on file for all non-certifying volunteers	Electronic only-download www.irs.gov
Form 14509	Volunteer ID Card/Insert	1 per certified volunteer	Identifies certified volunteers	Use own or download from irs.gov
Document 13123	Volunteer ID Holder	1 per certified volunteer	Holder for volunteer ID insert	Use own or SPEC RM
Publication 5051(CD)	Volunteer Site Assistance Guide (Electronic Pub 1084,3189, 4491)	1 per VITA site, optional	Site and e-file procedures on CD, includes training/reference products	F2333V

Use Volunteer Order Forms 2333V available from IRS:

- Use electronic ordering if you have an account with the Distribution Center, or fax this form to your SPEC contact: 855-513-5136.
- All orders will be routed to SPEC for approval before processing by the Distribution Center. Orders may take 3 – 6 weeks to arrive.