



Site Coordinator Training

Denise Rivera | Region 1 Coordinator

This presentation is for educational purposes only and does not provide tax advice. It is meant to accompany an oral presentation and not to be used as a standalone document.

This presentation is based on the facts and circumstances being discussed, and on the laws in effect when it is presented. It does not supersede or alter any provisions of Minnesota laws, administrative rules, court cases, or revenue notices.

Agenda

- Responsibilities
- Site Coordinator Hub
- How to e-file
- How to check for errors
- TaxSlayer blog
- Volunteer training
- Certifications
- Site operation requirements
- Regions
- Resources



Site Coordinator Responsibilities

Site Coordinator Role

- Lead the quality of tax return preparation services
- Provide effective site management
- Manage, organize, and supervise site operations
- Gather and maintain timely statistical reports

Site Coordinator Responsibilities

- Verify volunteer information
- Recruit, train, and certify volunteers
- Determine days and hours of operation
- Follow Volunteer Standards of Conduct
- Oversee site operations
- Follow Quality Site Requirements

- Form 13615, Volunteer Standards of Conduct Agreement
- Form 13206, Volunteer Assistance Summary Report

Site Coordinator Webpage Demo

Site Coordinator Hub Demo

How to e-file

Form 8879, IRS e-file Signature Authorization

- Gives site permission to e-file
- Taxpayer must:
 - Review return before signing
 - Sign before site can e-file
 - Have spouse sign if married filing jointly

1. Go to <https://vita.taxslayerpro.com>
2. Select **Pro Online** tile to log in
3. Enter your username and password

How to e-file

Start New 2023 Tax Return

Create a brand new tax return for a client.

Select

Client Search

Edit returns you previously started.

Select

Review Returns

Returns that are currently waiting to be reviewed

Select

Reports

Print acks, mailing labels, bank reports, and old reports.

Select

Transmissions

Transmit returns to IRS.

Select

e-file Transmissions

Search:

Show

100

 entries

Showing 1 to 1 of 1 entries

Previous

1

Next

	SSN	FIRST NAME	LAST NAME	PHONE	PREPARER	RETURN TAGS	STATUS	FEDERAL TYPE	FEDERAL REFUND/ AMT DUE	STATE TYPE	STATE REFUND/ AMT DUE	STATE CODE
<input checked="" type="checkbox"/>								E-file: Mail Payment	\$ 0.00	E-file: Direct Deposit	\$ 510.00	MN

Add Returns

Check All

Uncheck All

Delete Selected

Delete All

< Back

Transmit selected return(s) to IRS

- Submit to IRS within three days
- Retrieve acknowledgements within two days
- Resolve rejected returns quickly
- Notify taxpayers of problems

Check for Errors

Resolving Rejected Returns

Sign corrected Form 8879 if return changes by more than either:

\$50 for:

- Total income
- Adjusted gross income

\$14 for:

- Total tax
- Federal income tax withheld
- Refund
- Amount you owe

Identifying Rejections

Search:

Show

100 ▼

 entries

Showing 1 to 1 of 1 entries

Previous

1

Next

	SSN	FIRST NAME	LAST NAME	PHONE	PREPARER	RETURN TAGS	STATUS	FEDERAL TYPE	FEDERAL REFUND/ AMT DUE	STATE TYPE	STATE REFUND/ AMT DUE	STATE CODE
<input checked="" type="checkbox"/>							Rejected	E-file: Mail Payment	\$ 0.00	E-file: Direct Deposit	\$ 510.00	MN

[Add Returns](#)[Check All](#)[Uncheck All](#)[Delete Selected](#)[Delete All](#)[< Back](#)[Transmit selected return\(s\) to IRS](#)

TaxSlayer Blog

1. Go to <https://vita.taxslayerpro.com>
2. Select **VITA/TCE** tile
3. You do not need username or password

Volunteer Training

Minnesota Trainings

- Family Credits
- Minnesota Homestead (M1PR) and Minnesota Credit for Renters
- Military and Retirement
- Site Coordinator Training
- Basic Training for New Volunteers
- American Indian VITA and TCE Training

Minnesota Training Schedule

New Volunteers

Date: Wednesday, December 11, 2024

Time: 10:30 a.m. to noon

Family Credits

Date: Wednesday, December 18, 2024

Time: 10 a.m. to 11:30 a.m.

American Indian VITA and TCE Training

Date: Wednesday, January 8, 2025

Time: 10:30 a.m. to 11:30 a.m.

M1PR, Homeowners Return, and M1, Renter's Income Tax Credit

Date: Tuesday, January 14, 2025

Time: 9 a.m. to 10:30 a.m.

Retirement and Military Income

Date: Thursday, January 16, 2025

Time: 1 p.m. to 2:30 p.m.

Certifications

Required Certifications

All certifications require a passing score of 80% or higher.

1. Complete Volunteer Standards of Conduct certification
2. Complete Intake and Interview and Quality Review certification
3. Complete VITA and TCE Site Coordinator test

Recommended Certifications

These are recommended, but not required:

- Basic Tax Preparation Certification
- Advance Tax Preparation Certification
- Optional certifications

Where to take the test:

- Practice Lab
- Link and Learn

Site Operation Requirements

- VITA and TCE Site Review Sheet
- Review compliance guidelines
- Prepare for IRS SPEC visits

Required IRS Resources

- Privacy, Confidentiality, and Civil Rights
- Publication 17, Your Federal Income Tax
- Publication 4012, VITE/TCE Volunteer Resource Guide

New Region Coordinators

New Region Coordinators



Denise Rivera

Region 1 Coordinator

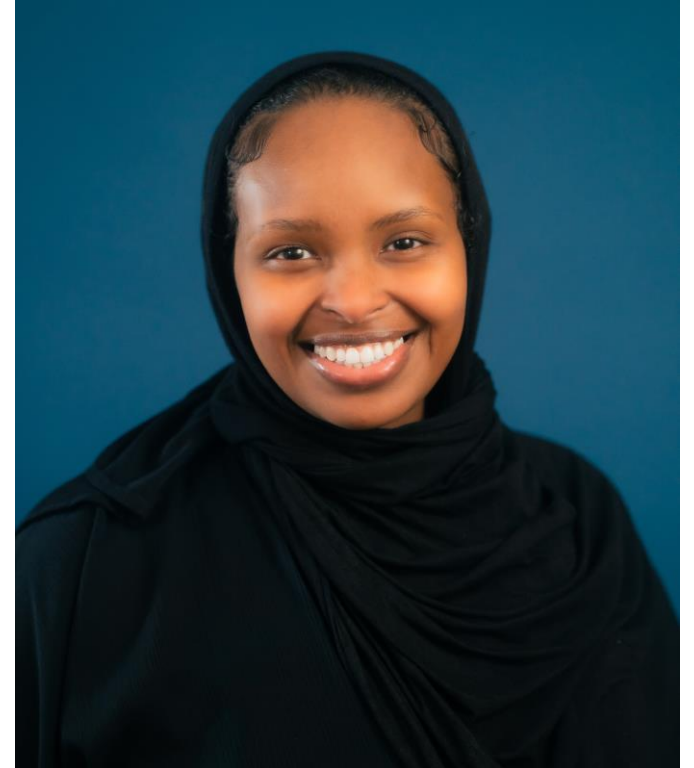
Region1.mdor@state.mn.us



Meiko Yang

Region 2 Coordinator

Region2.mdor@state.mn.us



Safiya Farah

Region 3 Coordinator

Region3.mdor@state.mn.us

Benefits of Region Approach

- Dedicated contact at Revenue
- Better understand your site's unique needs
- Build relationships with you and your team

Your region coordinator will:

- Answer your questions
- Provide training
- Connect you to resources
- Offer guidance
- Check-in with your site

- Support from your region coordinators
- Public information provided from region contacts
- Courteous and respectful responses

Region 1, Northern MN

Denise Rivera

Region 1 Counties:

Aitkin	Becker	Beltrami	Carlton
Cass	Clearwater	Cook	Crow Wing
Hubbard	Itasca	Kittson	Koochiching
Lake	Lake of the Woods	Mahnomen	Marshall
Morrison	Norman	Otter Tail	Pennington
Polk	Red Lake	Roseau	St. Louis
Todd	Wadena		

Meiko Yang

Region 2 Counties:

Benton	Big Stone	Chisago	Clay
Douglas	Grant	Isanti	Kanabec
Kandiyohi	Meeker	Mille Lacs	Pine
Pope	Sherburne	Stearns	Stevens
Traverse	Wilkin	Wright	

Region 3, Southern MN

Safiya Farah

Region 3 Counties:

Blue Earth	Brown	Chippewa	Cottonwood	Dodge	Faribault	Fillmore
Freeborn	Goodhue	Houston	Jackson	Le Sueur	Lincoln	Lyon
McLeod	Martin	Mower	Murray	Nicollet	Nobles	Olmsted
Pipestone	Redwood	Renville	Rice	Rock	Sibley	Steele
Swift	Wabasha	Waseca	Watsonwan	Winona	Yellow Medicine	Lac Qui Parle

Denise Rivera, Meiko Yang, and Safiya Farah

Email: Region4.mdor@state.mn.us

Region 4 Counties:

Anoka	Carver	Dakota	Hennepin
Ramsey	Scott	Washington	

Visit our Site Coordinator Information webpage for:

- Revenue resources
- IRS resources
- On-site required resources

Minnesota Contact Information

Taxpayer Assistance: 651-296-3781 or 800-652-9094

Email: individual.incometax@state.mn.us

Monday through Friday, 8 a.m. to 4:30 p.m.



Thank You!

Denise Rivera

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651-556-6600