

# Volunteer Assistance Summary Report

**Instructions:** Partners have the choice of reporting their volunteers at the partner level or site level. However, care must be taken not to report volunteers more than once. Military sites should complete this form at the site level. Mail, fax or email this form, or a similar listing containing the same information, to your SPEC Territory Office by February 3rd but no later than February 15th. As new volunteers report to the site(s), additional submissions are required by the 3rd of each month. Current year Form 13206, or Form 13615, should be available at the site and/or partner level as proof of volunteer certification for as long as the volunteers are working in your VITA/TCE Program or until new Form 13615 are secured for the new filing season. If Form 13206, or Form 13615, are not located at the site, the coordinator is required to have a method in place to track volunteer certification levels and be able to provide this information upon request. See [Publication 1084](#), *VITA/TCE Volunteer Site Coordinator Handbook*, or [Publication 4396-A](#), *Partner Resource Guide*, for more information.

Date \_\_\_\_\_ Site Identification Number \_\_\_\_\_ S \_\_\_\_\_

Partner or site name \_\_\_\_\_ (Only required if reporting by site level)

Partner or site address \_\_\_\_\_

Primary contact name \_\_\_\_\_ Primary contact phone number \_\_\_\_\_

Primary contact address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

By checking this box, I certify that all volunteers listed below have signed [Form 13615](#), *Volunteer Standards of Conduct Agreement - VITA/TCE Programs*. In addition, all volunteer identities were validated using a government issued ID, certification was verified, and the agreement was signed and dated by the partner, site coordinator, instructor, IRS employee, or other partner designated official.

Volunteer Information	Volunteer Certification	Volunteer Applying for Continuing Education (CE) Credits
<p><b># of Years Vol</b> - Number of years the volunteer has participated in the program including this year.</p> <p><b>Position</b> - Site Coordinator, Greeter, Tax Preparer, Quality Reviewer, Interpreter, etc.</p> <p><b>IRS Emp</b> - Current IRS Employee</p>	<p><b>VSC</b> - Volunteer Standards of Conduct</p> <p><b>I/I &amp; QR</b> - Intake/Interview &amp; Quality Review</p> <p><b>Adv</b> - Advanced</p> <p><b>QEV</b> - Qualified Experienced Volunteer</p> <p><b>Cir 230</b> - Federal Tax Law Update Test for Circular 230 Professionals</p>	<p><b>Mil</b> - Military</p> <p><b>FS</b> - Foreign Student</p> <p><b>Int</b> - International</p> <p><b>Puerto Rico 1 &amp; 2</b> - Level 1 and Level 2</p> <p><b>SC Trg</b> - Site Coordinator Training</p>

Check the box below if the volunteer will be applying for CE Credits. The Form 13615, *Volunteer Standards of Conduct Agreement*, CE Credits section must be completed and submitted to the SPEC Territory Office for processing. Please see Publications 1084 and/or 4396-A for more information on volunteers applying for CE Credits.

Volunteer Information	Last Name	# of Years Vol	Position	IRS Emp	VSC	I/I & QR	Basic	Adv	QEV	Cir 230	Mil	FS	Int	Puerto Rico		SC Trg	Volunteer Applying for CE Credits
														1	2		



**IRS Use Only**

Make sure all information is correct before entering it in SPECTRM. Once verified, enter the amount on line 1 below.

- 1. Total number of volunteers reported on this Form for the partner \_\_\_\_\_
- 2. Total number of volunteers previously reported this filing season \_\_\_\_\_
- 3. Total number of volunteers reported this filing season (Add 1 & 2) \_\_\_\_\_

Employee name \_\_\_\_\_ Employee SEID \_\_\_\_\_ Date entered into SPECTRM \_\_\_\_\_

By checking this box, I verified the volunteers listed on this form are NOT included on the Volunteer Registry.

**Privacy and Paperwork Reduction Act Notice**

Our legal right to ask for information is 5 U.S.C. 301 and 26 USC 7801.

The primary purpose of asking for this information is to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs, and to identify your skills. The time estimated for participation is 30 minutes. We may provide information to volunteers who coordinate activities and staffing at taxpayer assistance sites. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to promote your assistance in these programs. For more information about uses, see the Privacy Act Notice for the Taxpayer Assistance Reporting System (SPECTRM) in the Federal Register: July 19, 2004 (Volume 69, Number 137) [Notices] [Pages 43055-43056].