



The CCAA's Mission is to advance economic security for Colorado individuals, families, and communities through maintaining and growing organizational capacity of partner agencies, providing training and technical assistance, and supporting strategic partnerships, best practices, and innovative solutions to poverty.

CABC VITA Preseason Meeting Agenda and Minutes

March 18, 2025

1:00 – 2:00 pm

1. Welcome and Introductions

2. General Updates

- Reminder to send in your MOU and Sub-Award Agreements
- Customer testimony/story form on VITA Website
- Customer satisfaction survey update
 - i. Will send to Site Coordinators after March 20th
 - ii. If you are currently using a customer satisfaction survey and can share with CCAA, please email to Abigail.
- Reminder: Abigail will be following up with you after March 20th to schedule your annual monitoring visit.

3. UEI Registration Q & A

- <https://sam.gov/entity-registration>
- [Video Tutorial](#)

4. General VITA Site Updates

- PPUW/Central – No appointments available, difficult conversations with new clients
 - i. Frustration with 211... some carriers won't connect the call
 - ii. Approaching 1,000 returns
- Durango – Some difficult clients, unable to provide necessary docs
 - i. Getting some rejects for various reasons (fraud (used ssn), pin)
- Littleton – Booked up and dealing with unhappy clients. AARP full in south Denver metro also.
 - i. 2 outreach events with financial literacy at local credit unions
 - ii. Enterprise Zone credit not in TSO software this year. No ETA on a fix.
 - a. Must do a paper return currently
 - iii. Senior housing units for part year residents
 - a. Thrown off by income only from retirement below threshold. It will not give credit if income is \$0
- Longmont – walk in site, tough to keep returns in time limit
 - i. Reject for 2008 home buyer credit
 - a. Lookup website didn't work for their client
 - i. Must look up by address that credit was used on (might not be the same as current address)
 - ii. Problems/delays with documents being on customers phones. Considering getting a dedicated printer to use for customers to print documents through
- High Country – Hitting new record for serving clients!
 - i. Improved training helped volunteer preparers
 - ii. Got reject around repaying 2008 home buyer credit also



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- **Pueblo – Busy with up to 80 appointments per day on the busiest days**
 - i. **Some volunteer turnover, both leaving and gaining via local AARP discontinuing service**
 - ii. **Did a Spanish speaking focused event that was well received**
 - iii. **Veterans celebration on 3/25**
 - iv. **Gained efficiency by having dedicated QR's and reduced printing by just having QR's do the printing**
- **AIM – Out of town. Internet was down at church last session. Reaching out to CCAA staff about supplies and questions.**
- **SPEC – Quality site reviews, the majority have been completed.**
 - i. **Results were positive on QSR**
 - ii. **Nationally VITA production is down, but we are trending to repeat last year's success**
 - iii. **Attend TSO national VITA call on Thursday's**
 - iv. **13614-C – new format update coming soon (removing some questions)**

5. Questions/Discussion

6. Next Meeting: April 1st

7. Attendees Ann, Barb, Martha, Jerry, Mary, Debbie, Sean from SPEC