



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 Meeting Agenda and Minutes

April 1, 2025

1:00 – 2:00 pm

Attending: Tom Saponas, Barb Cannon, Martha Lewis, Jerry Ryan, Ann Palen, Deb Rogers, Vida Clark, Pat Vice

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 sent out in this week's email
 - i. If you are already using a customer satisfaction survey, please share responses with CCAA.
- Monitoring emails will be sent this week. We appreciate your prompt response so we can get your monitoring visit scheduled.
- Discussion around moving the previously scheduled check-in from April 15th to April 8th. General consensus is it is preferred to meet on April 8th due to last day of the tax season being too busy. Abigail will send updated calendar hold to everyone. Will focus the discussion on lessons learned this year.

3. General VITA Site Updates

- Barb: Not much to report. Still struggling with rejects due to PIN number. Didn't happen for a while and then encountered it today. Happened to someone that did not have an issue in previous years with a PIN, but now has to follow up with the customer.
- Jerry: Doing well in Longmont. Six sessions left and some volunteers are getting worn out. Seeing PIN issues and also 1095A – having to chase folks up to get information needed. Also, an issue when dependents are filing their taxes and not notifying their parents.
- Martha: Just hit 1000th person to serve and everyone is excited about it. Her and team are tired but still happy to be helping customers. Brought up issue with FAMILI Leave (1099G). Ran into some issues but had one of Tom's volunteers there to provide training. The key indicator is the EIN starts with a 99 and you have to go into the Colorado return and back out the monies because they don't get taxed on that money for Colorado, but you do for Federal. Felt that this year there were some changes to the CO tax return that we did not get a lot of training on. Big thanks to AARP for their training. Barb also said that part of the difficulty was figuring out on the Federal is that the form is a 1099G. Usually that is an unemployment form. But on Tax Wise they figured out they can change the EIN to match the one that's on the FAMILI one, so that it looks like it is unemployment. Barb worked in forms tree (not interview) so they pulled up unemployment and changed the EIN and all was well. Ann also said she ran it back into all of the regs through the Colorado system to make sure she knew what was happening. They did appropriate the 1099G form to do this work and gave it a separate EIN.
- Martha continued: Ran into an issue with the new childcare tax credit in Colorado. Had a part year resident and when you put a part year resident in the system, they do not get any credits.



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You have to go in and change some things in order for them to get the credit. Mother called the IRS, they said she needed to file an amendment, Martha researched to figure out the situation. Found she should get the credits except for Tabor. With Tax Slayer, you have to go into the program and put the numbers in.

- Ann: Has run into similar issues with part year residents and the Senior Housing Credit. There's a multiplier in the part year that can be zero if you only have pension income and it's less than the \$24,000. That makes the multiplier zero so they get no senior housing credit. However, if they have a dollar of interest or other income, now they get the whole thing. Is currently working on a letter to send to the Dept. of Revenue and the legislators who wrote the legislation. She said it is not a Tax Slayer issue.
- Martha: Aside from these issues, PPUW is doing well. They are closing on the 14th to deal with rejects on the 15th. Doing three major pushes this week and headed to Peyton this weekend and anticipate seeing over 30 customers. Next weekend PPUW will be doing a big push downtown and will see probably 50 customers, then doing one more push at the Family Center on the 14th.
- Pat: They are doing their road trips this month with a couple more next week. Staying busy and getting everything wrapped up.
- Ann: Two more dates and then will be done. More IP PIN rejects. Most are Federal return are no need to file so customers are not interested in working with IRS to get their PINs. Struggled to get people to bring all required documents. But overall doing well. Felt this season went faster this year than in past years.
- Debbie: Have done good this year, surpassing last year's numbers. However, none of their ITIN customers showed up. Which was unusual. Martha said that they had a similar situation at PPUW this year too with no ITIN customers. Debbie did some ad hoc sites this year where she drove out to meet customers and help file their tax returns. Shared a story of one organization who serves special needs adults and could not find anyone to help file their taxes. Debbie went to their location and filed their taxes. They were all very appreciative of her help. Other than that, everything has been going well.
- Tom: Knew what to do in Martha's situation with the 1099G as we had discussed in a meeting this year. Would like to know how we can get legislators to change the form/software to correct this error. Things are going fine except for IP PINs, but happy to share you do not have to use ID.me to set up PINs anymore. Many IP PINs are due to seniors who have not filed. They have likely received a letter from the IRS, but seems silly since they do not need to file. How their site deals with them: they reach out to the seniors, try to convince them to come in and pick up a paper file for their federal return. When they do that, the site does an e-file state return so they get their Tabor money. Re: previous year's returns. Rejects are harder to notice because they're not in that system very often. Would be great to have one volunteer dedicated to helping people get set up with ID.me. This year had new volunteers through college program and H&R Block employees. Also had some PTCs sent to them this year.
- Ann: Next year seniors are the only ones who are PTC eligible. Disabled will not be PTC eligible next year, but there will be a new CO disabled tax credit coming. She believes it will be \$1200. Phases out at federal AGI \$25k. Have to be on SS disability or private disability insurance for an entire year before they qualify.
- Tom: Have had 3 or 4 people bring in letter from the State of Colorado stating they do not qualify for the senior housing credit when they were previously given it. Most people do not know whether or not, so it takes some investigating. Ann: the law says there is a penalty for



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applying for the senior housing credit when you get the county property tax exemption. Ann's team looks up property tax bills. Not all counties have that information but that's where you can find exemption information.

4. UEI Registration Q & A

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

5. Next Meeting Discussion

- **April 8th**
- **April 15th**