



*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**

February 18, 2025

1:00 – 2:00 pm

### **1. Welcome and Introductions**

- General Updates
  - i. Resources and forms on website
  - ii. MOUs Needed

### **2. Site supplies/needs**

- Contact Abigail via form email or form on website

### **3. Updates from IRS SPEC Office**

- 13206 is due Volunteer Assistance Summary Report
- Pub 4454 and pub 4053 - both civil rights related publications. Are no longer required and recommended to be taken down because it references DEI
- 13614 C is not available on IRS.gov currently, but contact your SPEC RM to let them know if your sites need additional forms.
  - i. Can omit (strike through) demographics page 4, pronouns, voting
- Site coordinator handbook is being updated this year.

### **4. General Site Updates**

- Littleton – Less volunteers this year but still very bust
  - i. Family Leave FMLI (1099 G) requires manual entry... in TaxSlayer
    - a. TaxWise seems to recognize better than Tax Slayer
    - b. This is similar to 1099 G for unemployment, but there is no amount in box 1.
- Mercy's Gate – Busy, but good when is CO going to start accepting returns?
  - i. Problems with 1095A and IP PIN numbers, mainly people don't know they have these.
- Durango – Doing well after a recent snow storm dropped 15" in town.
- PPUW – Martha moving to North Carolina after the season to be near family. She will be missed in Colorado, but we wish her all the best on her new adventure!
- High Country – 3 new volunteers, and technology is working well so far.
- Pueblo – 7 americorps volunteers this year, lost a few volunteers relative to last year, but the local AARP site shut down so there is much more demand.
- Longmont – Experiencing a variety of rejects IP PIN, 1095A mainly.
- CECAA – 1 new preparer, and going well so far. About to start satellite location days.

### **5. Questions/Discussion**

**Attendees: Ann, Martha, Tom, Barb, Adrian, Mary, Sean (SPEC), and Roberta (SPEC)**



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