



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 6, 2025

2:00 – 3:00 pm

1. Welcome and Introductions

- Attendees: Blake Duvall CCAA, Jerry Ryan Longmont, Jon Stone Canon City, Mary Moon Glenwood, Ann P Littleton, Barbara Cannon Durango, Harry Love Loveland, Alyson Robnett IRS, Roberta Herron IRS, Sean Schweiger IRS, Abigail Smith CCAA.
- General Updates
 - i. Website updates
 - 1. Training resources
 - a. Martha from Pikes Peak created some new training videos. They are available on the Colorado VITA website.
 - 2. Forms
 - a. Updated MOU, Sub-Award Agreement, Reimbursement, and Mileage form are up on the VITA site as well.
 - b. If you have not submitted your MOU and Sub-Award Agreement form for the 2024-2025 year, please fill them out and email to Abigail.
 - 3. Review your site location information, including appointment/drop-in information on the VITA website to see if they are up to date. Email all updates to Abigail.
 - ii. Expense Reimbursements
 - 1. This year's mileage form is on the website with updated mileage rate
 - 2. Reimbursements must be made to an agency, not an individual
 - 3. Sub-Award form is on the website as well.
 - a. We are requesting you complete the form and return to Abigail to streamline end-of-year paperwork.
 - b. This year you will need to provide us with the UEI number in addition to the DUNS number for your organization.
 - i. The UEI number was instituted a couple of years ago, but is now becoming a requirement to have.
 - ii. If you do not currently have a UEI number, visit the sam.gov website where you can register for a UEI: <https://sam.gov/entity-registration>
 - iii. Here is an instructional video walking you through the process of registering: <https://youtu.be/my9eIQheQDw?si=kem7MK5nC3MBwgH0>
 - iii. MOU
 - 1. Need signed and dated copy from all VITA site groups



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2. Site supplies/needs

- Contact Abigail via form email or form on website

3. Site Visits/Monitoring Schedules

- Currently working on the schedule. Please email Abigail with date preferences.

4. Updates from IRS SPEC Office

- Alyson will send out updated information by email, including forms
- There are things on the forms that need to be crossed out
 - i. Pronouns
 - ii. Voter Registration
- SPEC is not going to reprint forms without these fields. Do not throw away the printed materials you have.

5. Questions/Discussion

- Group discussion on whether VITA check-ins should be weekly or bi-weekly and preferred date of the week
 - i. Various availability for Mondays, Tuesdays, Wednesdays, Thursdays
 - ii. No objections to meeting bi-weekly
- Randy asked if any sites have information on when e-filing will be available?
 - i. Ann: Tax Slayer blog said it should be available next week
- Randy asked how sites are handling senior property tax credit as they are having to manually look it up
 - i. Ann: Tax Slayer includes that calculation in the software
- Barb asked how sites are responding to new intake forms, it has been an adjustment
 - i. Mary: It has been overwhelming for clients, but she's explained it as it is the same information just in a different way

6. Next Meeting:

- February 18, 2025 at 1 pm via Zoom