



*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 4, 2025

1:00 – 2:00 pm

Attendees: Tom Saponas, Vicki Rector, Martha Lewis, Jon Stone, Adrian Gomez, Jerry Ryan, Vida Clark, Abigail Smith

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

### **2. General Updates**

- IRS SPEC Office at staff meeting today
- Updated forms on website to include pdf & Word formats
  - i. Please use and submit requested forms in the document format that works best for you.
  - ii. If you have not submitted your signed MOU and Sub-Award Agreements, please do so asap.
- Mileage Reimbursement Deadline: May 31, 2025
  - i. This year we are requesting all mileage reimbursements for VITA sites to be submitted to CCAA by May 31, 2025. This will ensure CCAA is able to process all requests in a timely manner.
- Monthly reporting updates
  - i. In an effort to streamline Site Coordinator requirements, we are no longer requiring the monthly report that you have done in previous years. We can get the same data from the IRS SPEC Office.
- Customer Surveys & Feedback
  - i. Instead of the monthly report, we are requesting customer feedback, testimonies, and stories we can share with the community and general public about the importance of the VITA program.
  - ii. This form will be up on the VITA website for you to fill out and submit.
  - iii. Please remember to ask permission to share testimonies and stories. If customer would prefer to be anonymous, we can change their name and not share any identifying information.
- Monitoring Schedule being drafted
  - i. Friendly reminder that if you have not already emailed Abigail with the preferred days of the week for your monitoring visit, please do so asap.
  - ii. Abigail will be contacting you individually about your monitoring visit.

### **3. Site supply order updates**

- Amazon delays



*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.*

- i. There have been some lengthy delays in Amazon deliveries this year. When you are ordering supplies, we recommend you check other vendors as well to see if they can get you the supplies you need in a reasonable amount of time, assuming the cost is comparable. You can still order from Amazon, just be aware there may be shipping delays on their end.

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

- Martha: have been doing rural visits to High Prairie Library in Peyton. Eight volunteers, five hours, and completed 29 returns. Also went to Alamosa for four days and did 58 tax returns. Community was very appreciative of their service. Will do High Prairie once more in March and then again in April.
- Tom: Finding that Colorado returns taking a lot of paper. Has started to double side the returns. Had a client that gave wrong mailing address, customer was able to call IRS and correct the mistake. Has also found that ID.me does not work for most people – not intuitive and difficult to navigate. 1095As are problematic this year.
- Vicki – Now in 4 locations. Volunteers are a wonderful team. 95% full on appointments. Estimate about 500 appointments a year with 22 volunteers. Weather has been unpredictable and an issue, but they rebook appointments. Don't want to turn anyone away due to weather. They work closely with AARP.
- Adrian – Local AARP that normally files taxes is not doing their program this year, so they have been able to absorb some of the volunteers. Estimate will do over 4k returns this year. Publicizes through press releases in local newspaper, social media, and website. Biggest need for program is more preparers. They are working on recruiting.
- Jerry – doing ok in Longmont in new space. Similar struggles as other sites around 1095As, IP PINs, wrong names in places, etc. Had an unusual situation this year: 1042-S. Has not been able to find much information on this particular form.
- Tom: Medicaid Waiver W-2s, for instance if people who are certified CNAs and taking care of their own disabled child and are paid and that's excluded from income. That is covered in the 4012. It used to be you would get a W-2 where it would show the Medicaid waiver payment and not anything in gross income, but they are not coming that way anymore. The customer/client has to tell you it is a Medicaid waiver payment. Some places are paying them on 1099 NECs. It can be on a 1099 NEC, but they don't tell you how to handle it. Tom researched it and you put as an expense the exact gross income and say it's a Medicaid waiver payment. This will essentially wipe it out.

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

#### **6. Next Meeting 3/18/25**