

### *What is Facilitated Self-Assist (FSA)?*

FSA is a mode of delivery for the free tax program (VITA/TCE) sponsored by the Internal Revenue Service. The FSA model allows for organizations to be involved in VITA/TCE with minimal resources. The taxpayer visits the site and is provided a kiosk to prepare their own federal and state income tax return. An IRS certified volunteer is available on site to answer tax related questions if needed. The volunteer can be available via phone, e-mail, web-chat or in person.

### *Who can be a FSA site?*

Any organization, non-profit or for-profit, can partner with the IRS to offer free tax preparation to their employees or customers. FSA serves as a benefit to employees by providing them the ability to complete their own tax returns with zero cost. Offering FSA to customers allows for the organization to meet the specific needs of the communities they serve. Free Tax Preparation often serves as a vessel to market to individuals that you would not serve traditionally. FSA sites can partner with organizations offering financial education to provide additional assistance if desired.

### *What does a FSA site look?*

FSA sites look different for every organization. Because the Free Tax Preparation program is a fluid program it allows for flexibility in how it is implemented. An organization can determine to whom they want to provide the service for, the hours of operation for the kiosk and when the volunteer will be available. The program can change during the filing season if the organization recognizes there is a need to do so.

### *What does the IRS provide?*

The IRS provides the software for the program at zero cost. Training for volunteers is also provided, either on-line or in-person. The IRS provides all the training material for the volunteers and site material at no cost. Free marketing templates, to include social media posts, are provided throughout filing season. Statistical reports will be provided showing the direct impact your program is having. An IRS Relationship Manager will be available to you directly to help guide you through the process and answer any questions you have at any time.

### *What does the organization provide?*

The organization will need to provide at least one person to serve as the IRS certified volunteer to answer questions throughout the filing season. A computer kiosk with internet access and printer will need to be available for the taxpayer to complete their return and print a copy for their records. The organization will need to market their site to their intended audience. A signed partnership agreement with the IRS must be submitted prior to ordering software.

*Contact your Relationship Manager today about becoming a Free Tax Preparation site!*

*Holly McCarroll, IRS @ 850/316-7780      [holly.r.mccarroll@irs.gov](mailto:holly.r.mccarroll@irs.gov)*