

Why Ask the Disability Question at VITA Sites?

A Script for VITA Site Preparers

Through evaluations, reports from VITA sites, and conversations with IRS Tax partners across the country, we often hear the same questions as to what to ask the disability question because they do not know why the question is why it is on the return form. The script allows VITA site preparers share the call or accept or to read the information about.

The call would be read with a copy could be placed at each VITA computer to allow the tax preparer to read it should they need any questions.

The calls are available for download at <http://www.irs.gov/charities/vita>

How will the disability question script be beneficial to volunteers?

- Each provide answers the information they need to be comfortable if offering assistance by using the question.
- Each provide answers guidance on how to record if the taxpayer says differently they are using.
- Explain volunteers will be importance of the survey question.

Where can I find the disability question?

- IRS Form 1041 (e) Individual Income & Quality Review Sheet (see 8-01-15)
 - Question #10: Was you or a member of your household ever blind or disabled?
- Taxpayer Program (see Form 1041)
 - Question #11: Was you or any member of your household ever a disabled?
 - Use IT function key to make the a request form.

Why is this question important?

- Provide information on demographic being served at your VITA site.
- Explain current effects on VITA customers with disabilities.
- Information collected is often used to report back to leaders and potential leaders.
- Helps the IRS in determining their need to serve persons with disabilities through Outreach, Free Tax Preparation, and Financial Education.