

# VITA/TCE Quality Site Requirement Alert

## QSRA 2025-03 Form 13614-C Updates

### Purpose

To share updates on Form 13614-C, Intake/Interview and Quality Review Sheet, for VITA/TCE volunteers. The changes may impact Quality Site Requirement (QSR) #2: Intake/Interview and Quality Review Process.

### Issues Identified on Form 13614-C

- Removal of (pronouns, optional)
- Removal of voter registration question
- Updated certification indicators
- Optional demographic questions and answers
- Duplication of translated wording on Spanish version
- Status update on language translations

#### Removal of (pronouns, optional)

To comply with Executive Order 14168 of January 20, 2025, Defending Women From Gender Ideology Extremism and Restoring Biological Truth to the Federal Government, SPEC removed (pronouns, optional) from the first name fields on page 1 of Form 13614-C.

#### Removal of voter registration question

To comply with Presidential Actions of January 20, 2025, Revocation of Orders and Actions, including Executive Order 14019 of March 7, 2021 (Promoting Access to Voting), SPEC removed the question “Would you like information on how to vote and/or how to register to vote” from page 1 of Form 13614-C.

#### Updated certification indicators

On page 3 of Form 13614-C, under “To be completed by certified volunteer”, SPEC updated the following:

- Added Advanced certification indicators for (A) HSA contributions and (A) HSA distributions.

- Changed certification indicator from (B) Basic to (A) Advanced for Energy efficient home improvement credit and specified Form 5695, Part II only.

Reminder: Form 5695, Part I Residential Clean Energy Credit, is out-of-scope.

- Added Basic certification indicators for (B) Estimated tax payments and (B) Last year's refund applied to this year.

### **Status of optional demographic questions and answers**

The six optional demographic questions and answers on page 4 will remain on Form 13614-C.

### **Duplication of translated wording on Spanish version**

On the Spanish version of Form 13614-C, "Separado legalmente pero no divorciado" (the Legally Separated filing status) was duplicated in error during translation. As a result, the Widower filing status was left off the form. The correct translation for Widower should read "Cónyuge sobreviviente".

When using the Spanish version, please discuss with taxpayers the missing Widower filing status during the interview and quality review to ensure the taxpayers' returns are correctly prepared.

### **Status update on language translations**

The language translations, including Spanish, are expected to be available on IRS.gov soon.

Please have IRS tax law certified volunteer preparers and quality reviewers use the printed English or Spanish versions to complete the form with the taxpayer by asking all questions and recording the answers.

## **Message for VITA/TCE Volunteers and Coordinators**

Please review and make note of the Form 13614-C updates. The new revision, March 2025, is attached and is expected to post to IRS.gov soon.

The new revision is available electronically only and will not be printed. Volunteers may continue to use existing printed copies of the November 2024 revision and may order additional quantities if needed.

Please direct questions about this QSRA to your SPEC relationship manager.

Thank you for your dedication to the VITA/TCE program.