

Publication 3189, Volunteer e-file Administration Guide

Crosswalk

Table of Contents	P 4012, Volunteer Resource Guide	P 1345, Handbook for Authorized e-file Providers of Individual	P 1084, <i>Site Coordinator Handbook</i>	P 4396-A, Partner Resource Guide	P 4299, Privacy, Confidentiality, and Civil Rights	TaxSlayer User Guide
Guidelines						
General Guidelines -- Position Description-ERO Duties		X	X			
e-file Quality Review						X
Emphasizing Separation of Duties (<i>Information</i>)			X			
Prior Year Returns in MeF						X
Volunteer Tax Alerts (VTAs)			X			
Facilitated Self Assistance (FSA) & Virtual VITA/TCE				X		
Minimum Operating System Requirements	X			X		X
Security						
Protection of the Information (<i>Information</i>)			X		X	
Protection of Equipment				X	X	
Signature Methods and IRS Recordkeeping						
Signature Methods for e-file Returns		X				
Practitioner PIN Method	X	X				
* Self-Selected PIN Method		X				
Rejected Returns	X	X	X	X		
Recordkeeping Requirements		X				X
Record Retention Requirements		X		X		
State Returns	X					
Frequently Asked Questions (<i>Information</i>)			X		X	
Form 8453, U.S. Individual Income Tax Transmittal for an IRS e-file Return	X			X		

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Ordering Software						
EFIN Application Process				X		
Acceptance to the e-file Program				X		
Sanctioning		X		X		
Software Ordering				X		
License Agreement				X		
<ul style="list-style-type: none"> Base Site Ad-hoc visits 						
<ul style="list-style-type: none"> Special Event 				X		
<ul style="list-style-type: none"> One Electronic Return Originator (ERO) with Multiple Sites 						
Template Sharing (Multi-Site Admin)				X		
Quick Alerts				X		
What's on Install CD (Desktop only)						X
Client ID	Eliminated, no longer required.					
Online Pre-Filing Season						X
Online Filing Season						X
Online Post Filing Season						X
Desktop Pre-Filing Season						X
Desktop Filing Season						X
Desktop Post Filing Season					X	X
Exhibits (<i>Information</i>)	X	X	X	X		X
Glossary		X				X