Form **8654**

(June 2008)

Department of the Treasury — Internal Revenue Service

Tax Counseling for the Elderly Program Quarterly / Final Program Report

1. Report Type ☐ Quarterly ☐ Final

2. Fiscal Year

3. Recipient Organization Name

Street Address | City | State | Zip Code

4. Report Period *(Month, day, year)*

From / /

To / /

Account/Identifying Number

		(a) Numbers	(b) Cost
Reimbursement Expenses	**5.** To Volunteer tax assistors/quality reviewers		
	6. To Volunteer instructors		
	7. To Volunteer coordinators/administrators		
	8. TOTAL (ADD lines 5-7)		
Administrative Expenses	**9.** Salaries/benefits (Clerical Staff Only)		
	10. Supplies—For TCE Program		
	11. Rent/utilities/custodial services—Prorated for TCE Program		
	12. Auditing		
	13. Travel (includes travel of paid staff to monitor sites, meet with IRS SPEC Territory personnel, etc.)		
	14. Development of program publicity		
	15. Report processing		
	16. Telephone installation (No WATTS or 800 Lines)		
	17. Postage		
	18. Total administrative expenses (ADD lines 9 through 17, column (b)). This figure should not be more than 30% of line 19		
	19. Program cost (ADD lines 8 and 18 column (b))		
	20. Cost of Orientation Meeting		
	21. Costs for Electronic Filing		
	22. Total program cost (ADD lines 19, 20, and 21 column (b))		
	23. Total amount of federal advance		
	24. Unexpended balance of federal advance (Subtract line 22 from 23)		
	25. Refund to IRS (Complete on final report ONLY) (Take amount from line 24)		

Account/Identifying Number		60+	Other
Other Information	**26.** Number of individual Federal tax returns prepared (paper)		
	27. Number of individual Federal tax returns prepared (e-file)		
	28. Total number of individual Federal tax returns prepared (paper and e-file)		
	29. Number of taxpayers assisted—all other (excludes return preparation)		
	30. Total number of taxpayers assisted (add lines 28 and 29)		
	31. Number of Tax Preparation sites		**Numbers**
	a. e-file sites		
	b. Combination of paper and e-file sites		
	c. Total lines 31a and 31b		
	32. Please attach to this form, a listing of each site's Location ID, its EFIN Number, whether the site is a combination paper/e-file site, and the volunteer return preparation hours for each site.		

Signature of responsible office	Date	Agency Use

IRS Volunteer Income Tax Preparation and Outreach Programs Privacy Act Notice

Privacy Act Notice– The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.

Instructions

Line 1. Enter the Report Type. If it is a quarterly report put an X or if it is the final report put an X in the box.

Line 2. Enter the Fiscal Year.

Line 3. Enter the recipient's organization name, street address, city, state, zip code, and the account/identifying number. The account/identfying number is the Employer Identification Number (EIN).

Line 4. Enter the report period (month, day and year) on the From and To lines.

Lines 5-8. Enter the number of volunteer tax assistors/quality reviewers on line 5(a), the number of volunteer instructors on line 6(a), and the number of volunteer coordinators/administrators on line 7(a). Enter the total number of volunteer tax assistors/quality reviewers, volunteer instructors, and volunteer coordinators/administrators on line 8(a). DO NOT count any volunteer twice, even if he/she serves in two or more capacities.

Enter the final amount of reimbursement for volunteer tax assistors/quality reviewers, volunteer instructors and volunteer coordinators/administrators on the appropriate line in column (b). DO NOT include expenses for any volunteer twice (i.e., if an individual serves as a volunteer coordinator as well as a tax assistors/quality reviewers all of his/her expenses should be estimated on line 7, only).

Line 9. Enter the number of clerical you will pay in the Numbers Column and the dollar amount in the Cost Column.

Line 10. Supplies include pencils, pens, paper, etc. These are supplies for the TCE Program other than those directly attributable for e-file.

Line 11. Enter the rent, utilities and/or custodial services costs for the TCE Program.

Line 12. Enter the cost for audit services for the TCE Program.

Line 13. Enter travel of program sponsors or expenses incurred by program administrators or coordinators who are paid staff to monitor sites, meet with the IRS SPEC Territory Coordinator, travel to IRS SPEC Headquarters Office or the IRS SPEC Territory Office to attend an orientation meeting and/or training sessions.

Line 14. Enter the final cost for the development of publicity (*i.e., public* service *announcements, posters, brochures)* and other publicity materials.

Line 15. Enter the final cost for report processing.

Line 16. Enter the final cost of installing temporary telephone lines at "telephone answering sites."

Line 17. Enter the final cost for all postage, including postage used for the fulfillment of orders for program materials.

Line 18. Total the administrative expenses (add lines 9-17 in the Cost Column (b)). This figure should not be more than 30% of line 19.

Line 19. Enter the program cost by adding lines 8 and 18 in the Cost Column (b).

Line 20. Enter the costs incurred for attending the TCE orientation meeting. Provide lodging receipts, taxi receipts, air fare, meals and incidental expenses, gas receipts, etc.

Line 21. Cost for diskettes, paper, printer cartridges, toner, envelopes to mail Form 8453, and anything else directly attributable to e-file expenses.

Line 22. Enter the total program costs (add lines 19-21 in the Cost Column (b)).

Line 23. Enter the total amount of the federal advance.

Line 24. Enter the unexpended balance of the federal advance (subtract line 22 from line 23).

Line 25. Enter the remaining grant funds from the grant award. Only list this on the final report. This amount should be taken from line 24.

Line 26. List the number of individual paper Federal tax returns prepared for taxpayers 60+ and all other taxpayers.

Line 27. List the number of individual e-file Federal tax returns prepared for taxpayers 60+ and all other taxpayers.

Line 28. List the total number of individual paper and e-file Federal tax returns prepared for taxpayers 60+ and all other taxpayers.

Line 29. List the number of taxpayers assisted—All other (exclude return preparation) for taxpayers 60+ and all other taxpayers.

Line 30. Add figures from lines 28 and 29 and insert that total in line 30.

Line 31. Line 31. List the number of tax preparation sites for e-file sites, the combination of paper and e-file sites, and the total of lines 31a and 31b on line 31c.

Line 32. Provide the site name, Site Identification Number (SIDN), Electronic Filing Identification Number (EFIN), type of site i.e., e-file or combo, and the volunteer return preparation hours for each site. The volunteer return preparation hours are the actual hours the volunteers work and not the hours of operation.

Form 8654 is due 30 days after the quarter ends.
The quarter ending dates are December 31, March 31, June 30, and September 30.