Fact Sheet

Ordering Procedures for VITA/TCE Training and Site Materials

for Partners and Volunteers

This document provides guidance for ordering VITA/TCE training and site materials. This document is for VITA/TCE partners and volunteers who order products.

Background

Each summer, SPEC projects the number of products needed for the upcoming filing season. These projections help the IRS determine how many products to print in the fall. This ensures the availability of sufficient product quantities to deliver to stakeholders who support SPEC initiatives and the VITA/TCE program.

Note: Please only order quantities in the amount needed.

Methods for Ordering Training Products

There are three ways to order Training Products:

1. Electronic **Form 2333-V,** Order for VITA/TCE Program

2. Request through an IRS SPEC Relationship Manager.

3. Pre-Populated Spreadsheets

The method chosen will depend on the information available and the type of product(s) needed.

Note: The National Distribution Center (NDC) does not accept fax order forms.

Ordering Method #1: Electronic Form 2333-V (preferred method)

In October, each VITA program account with a valid e-mail address in CAPS, will receive an e-mail with a PDF Form 2333-V, Order for VITA/TCE Program. Form 2333-V is pre-populated with the partner's contact and account information.

CAUTION: Never share the electronic Form 2333-V. The form encodes the account number on the PDF file. Changing the address information will update the embedded account number.

Review and update contact information, if needed, and enter order quantities on the order form. Refrain from using cut-and-paste options for data when completing the order form and only use the following characters:

- Upper- or lower-case alphabets: A-Z, a-z

- Numbers: 0-9

- Special characters: <>|\{}¢¦:";`~!@#$%¬&*()_+-='

Once the order form is complete, save a copy on your computer. Then prepare an e-mail, attach a copy of the order form, and submit to **pdf.orders@eforms.enterprise.irs.gov** for processing.

If the submitted order form has errors, you will receive an error notification explaining why the order rejected and what information to correct. If the order form does not contain errors, you will receive an order acknowledgement.

CAPS will generate an e-mail notification when the order ships from the National Distribution Center (NDC).

Note: If you lose or misplace the order form, the relationship manager can email an electronic Form 2333-V to the VITA/TCE partner again.

Ordering Method #2: Request through an IRS SPEC Relationship Manager

If you don't have a CAPS account with a valid e-mail address, you can ask the relationship manager to manually input an order into CAPS for you. Provide a list of the products needed, the quantity requested and the recipient's name and address. The relationship manager may choose to create an account and then send you an electronic Form 2333-V.

Ordering Method #3: VITA Pre-Populated Spreadsheet

The pre-populated spreadsheet saves time on inputting existing account information for regional coordinators who serve a large population of partners. Any product listed on the spreadsheet are available for order. The relationship manager can send the prepopulated spreadsheet and instructions to the partner.

Troubleshooting Orders

If you have not received your product order:

Contact your SPEC relationship manager to confirm your order was placed, or

Contact the ordering distribution department at **vita.administrator@irs.gov**. When you e-mail messages to the ordering distribution department, include the account number (if known), and copy the SPEC relationship manager.

Note: Only send issues related to troubleshooting orders to the ordering distribution department.

Training materials delivered via UPS require a valid street address. Common omissions that cause delays or undeliverable orders:

- **Missing or incomplete street suffixes such as Avenue (AVE), Court (CT), Street (ST), Road (RD), etc.** – Maple Street and Maple Court could have the same house numbers.

- **Missing directionals such as North (N) or South (S)** – The post office that delivers to Monument Blvd E could deliver differently to Monument Blvd W, for example.

- **Missing secondary street indicators such as Apartment (APT), Building (BLDG), Floor (FL), Suite (STE), Room (RM), etc.** date.

- *Note: UPS delivery drivers will not hunt for a recipient when delivering a package to a building with multiple floors, suites, etc. UPS will return packages with an incomplete address back to the terminal. This will cause a delay, at best, or possible return to the National Distribution Center (NDC) and is subject to extra charges. Please be sure to provide complete addresses.*

- **Abbreviation of city names** – People living in some towns across the country use their own "shorthand" when writing the names of certain cities. LA might mean Los Angeles, but what if the letter really belongs in Los Alamitos or Los Alamos? Please spell out the complete city.

- **Missing state** – Remember to include the state, using the Postal Service two-character state abbreviation. You may think Cleveland is sufficient if you live in Ohio, but there is also a Cleveland, Georgia, and a Cleveland, Tennessee. In fact, there are cities or towns named Cleveland in 19 states.

- **Incorrect or no Zip code** – If you require access to address information frequently, the National Five-Digit Zip Code and Post Office Directory makes a convenient companion. You can also obtain zip codes by accessing the USPS website at **www.usps.com**, or call 1-800-ASK-USPS.

- **Both a PO box and street address** – Remember to only have one address listed in CAPS. A street address is the preferred address for delivery.