

## Step-by-Step Quick Guide for VITA Sites

- 1) Promote bonds in multiple stages, beginning with the waiting area. Whichever method you prefer is fine – brief intro to the entire group, or one-on-one (one-on-one is best if possible), but please use marketing materials; we have more if you run out. You should have at least 1 poster for the wall, 1 giant sized savings bond with graphs on the back, glossy brochures for interested clients, and the black and white PDF which can be printed on-site and distributed freely.
- 2) Check back with client when they are nearing the end of their tax return. Ask open-ended questions about their refund, and the topic of savings. If interested, talk to the client, figure out how much (total) in bonds they would like to purchase, and have the client decide if they will be purchasing a bond for themselves only, or for themselves and a co-owner.
- 3) Complete Form 8888 on their tax return. There are 2 paths here:
  - a) If a bond is being purchased for the taxpayer only: Complete Form 8888 on the client's tax return. Enter personal bank account information first. Then list the savings bond account and routing numbers, listed in the Form 8888 instructions. Check the box for "savings", and enter the desired bond amount. Completing Form 8888 is the only step for this type of savings bond purchase; no further action is needed.  
\*Remember, bonds purchased this way are in multiples of \$50.
  - b) If the bond is being purchased with a co-owner: Complete Form 8888 on the client's tax return. Enter personal bank account information first. Then list the H&R Block Bank accounting and routing numbers:  
Bond Account #: 9000046  
Bond Routing #: 101089700  
Check the box for "checking", and enter the total desired bond amount.  
\*Remember, bonds purchased with co-owners are in increments of \$25.

Continue Only if Purchasing Bond with a Co-Owner:

- 4) Go to the portal website: <https://vitabonds.com>. Log in and go to "order bonds."
- 5) On the 4<sup>th</sup> page of the order form you will need to click "print receipt" and choose to open the Adobe PDF in order to continue to click submit. Do not forget to specify that you need TWO copies printed. If for some reason the receipt does not print, remember that you can re-access it for printing by going to "search orders". Once you find the client name, click on the column all the way to the right which is titled "print receipt." You can open the PDF from there.

- 6) Click “next” and click “submit.” You will see a confirmation that your order has been successfully submitted.
- 7) Have the client double-check their personal information on the client receipt, and sign BOTH signature boxes. There should be 1 signature spot on the first page and 1 on the second. If Married, Filing Jointly, both spouses need to sign.
- 8) Keep the signed copy at the site for records. You can keep it in either a separate folder or with the client’s other tax-related paperwork. Give the client the other copy of the client receipt for their records.
- 9) When you are ready to do e-file transmittals, log back in to the portal (<https://vitabonds.com>) and click on “approve orders.” Only un-approved orders will appear here. Double check the following:
  - a) All client information is spelled correctly, SSN is correct, address is correct.
  - b) Verify that you have both pages of the client receipt signed.
  - c) Verify that the 8888 was completed, and completed correctly.

Check the boxes “confirmed” and “verified” and click “approve.” You will then receive a confirmation that your order was successfully approved.

\*Remember: we recommend that you approve bond orders prior to e-filing returns at the end of the day. This will reduce bond-related errors on the tax return and in turn, should result in fewer incidences of clients not receiving their bond due to mistakes.