Hello my name is Volunteer Jane and I am here to help you :

- Create
- Plan &
- Execute

A successful Volunteer Income Tax Assistance (VITA) site

Create

- Start Simple
- Be Creative
- Determine Site Location

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Plan

- It is never to early to start planning!

Timeline of Key Events

June

and

July

New VITA Site

- Apply for an EFIN
- Establish site location

Existing VITA Site

- Contact Site Coordinator or Site location to determine if location still available and reserve the space for the season

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Timeline of Key Events

August

and

September

Recruit

- Instructors
- Volunteers

Plan training

- Plan your training needs
  - Volunteer
  - Train the Trainer (TTT) for Instructors
  - Electronic Return Originator (ERO) & Site Coordinator
  - Location for training
  - Dates and tim

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Timeline of Key Events

October

- Continue recruiting
- Hold Train the Trainer class for the VITA instructors
- Hold ERO and Site coordinator training
- Order site and training materials
- Communicate with your Tax Specialist on ordering the software for your site
- If Applicable, secure Title Vi Civil Right Acts

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Timeline of Key Events

November

- Continue recruiting
- Start training your volunteers
- Plan additional training for January
- Develop publicity plan and outreach materials

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Timeline of Key Events

December

- Finalize site information
- Continue VITA training
- Start advertising your site
- Determine site supplies

Timeline of Key Events

January

- Finalize Volunteer tax training.
- Hold Volunteer Orientation meeting
- Advertise your site
- Install Software
- Open the site
- Follow E-File procedures

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Timeline of Key Events

February

- Communicate with your local Tax Specialist
- Continue advertising
- Communicate with your volunteers
- Support your volunteers

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Timeline of Key Events

March

- Advertise
- Plan volunteer recognition event
- Initiate formal appreciation of site sponsor
- Continue supporting your volunteers

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Timeline of Key Events

April

- Initiate site close-out procedures
- Plan/ attend volunteer recognition
- Submit any final reporting

Timeline of Key Events

May

- Follow E-File procedures
- Evaluate filing season with volunteers
- Schedule close out meeting with local SPEC office
- Starting recruiting for next year

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Execute

Minimum Quality Site Requirements

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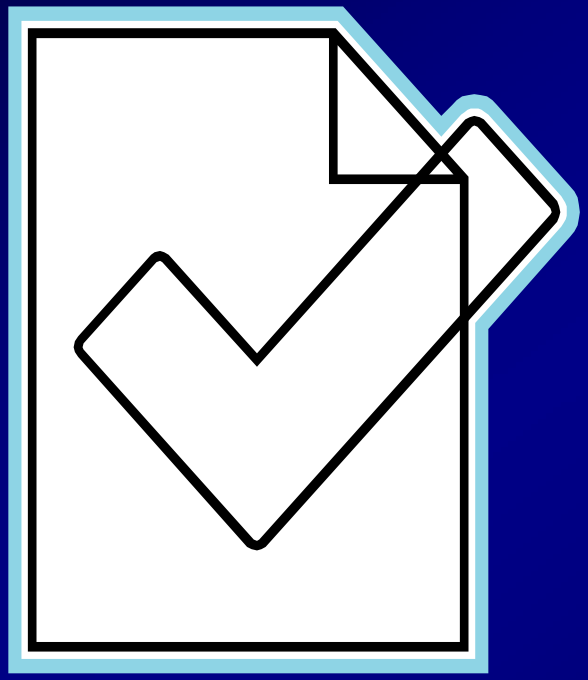
Privacy and Confidentiality

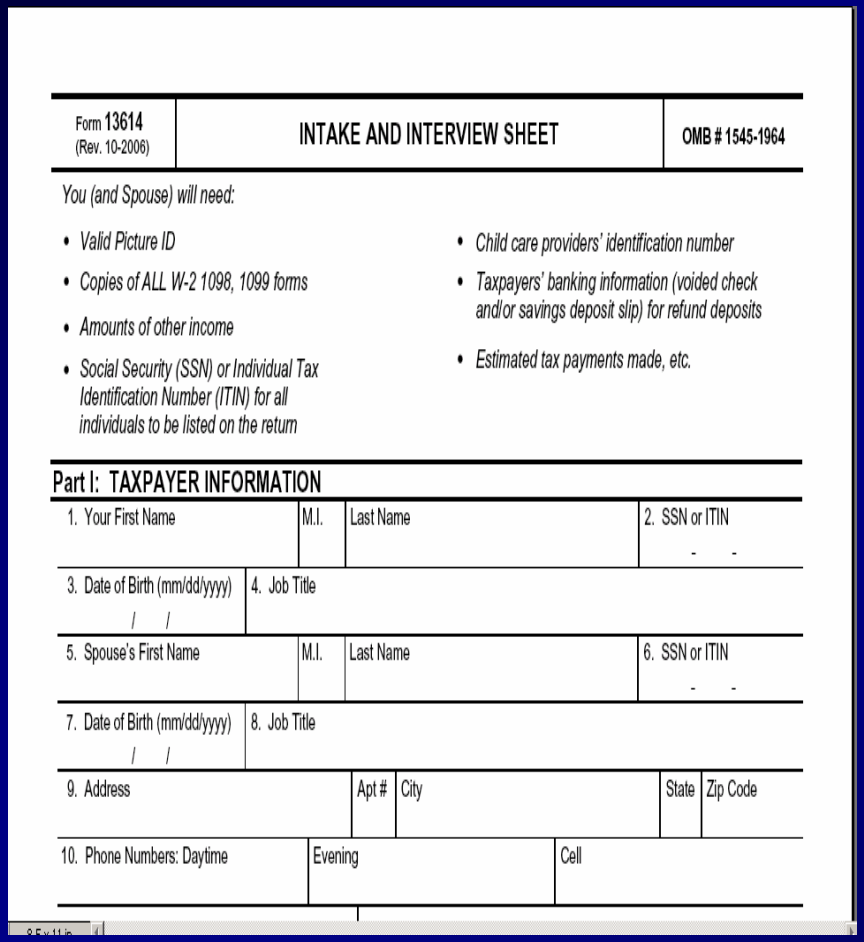
- It is very important that all customer information is kept confidential. Only discuss necessary information with the site coordinator.

Quality Review



- Implementing a quality review process will ensure the accuracy of the return based on the correct application of tax law given the facts provided.

Interview and Intake Process



Form 13614 (Rev. 10-2006)	INTAKE AND INTERVIEW SHEET	OMB # 1545-1964

You (and Spouse) will need:

- *Valid Picture ID*
- *Copies of ALL W-2 1098, 1099 forms*
- *Amounts of other income*
- *Social Security (SSN) or Individual Tax Identification Number (ITIN) for all individuals to be listed on the return*
- *Child care providers' identification number*
- *Taxpayers' banking information (voided check and/or savings deposit slip) for refund deposits*
- *Estimated tax payments made, etc.*

Part I: TAXPAYER INFORMATION

1. Your First Name	M.I.	Last Name	2. SSN or ITIN - -
3. Date of Birth (mm/dd/yyyy) / /	4. Job Title		
5. Spouse's First Name	M.I.	Last Name	6. SSN or ITIN - -
7. Date of Birth (mm/dd/yyyy) / /	8. Job Title		

9. Address	Apt #	City	State	Zip Code
10. Phone Numbers: Daytime	Evening	Cell		

- Using the Intake and Interview Sheet along with the proper reference materials will help in preparing a quality return

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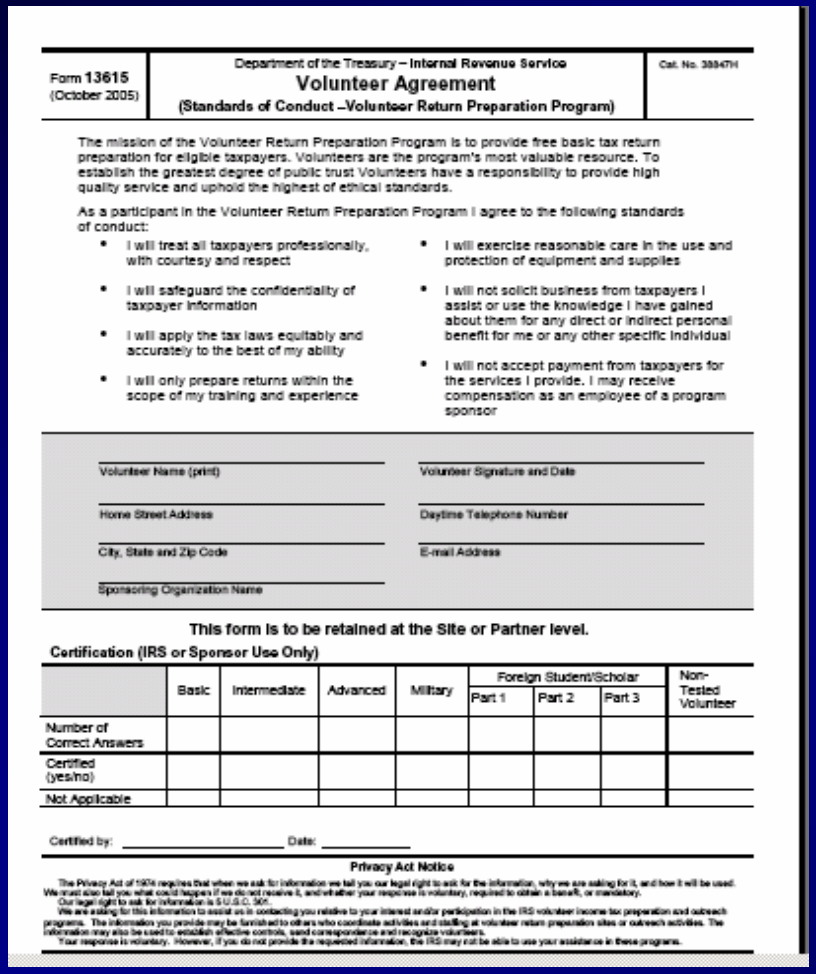
Volunteer Certification



Form 13615 (October 2005)

Department of the Treasury – Internal Revenue Service

Volunteer Agreement

(Standards of Conduct –Volunteer Return Preparation Program)

Cat. No. 38947H

The mission of the Volunteer Return Preparation Program is to provide free basic tax return preparation for eligible taxpayers. Volunteers are the program's most valuable resource. To establish the greatest degree of public trust Volunteers have a responsibility to provide high quality service and uphold the highest of ethical standards.

As a participant in the Volunteer Return Preparation Program I agree to the following standards of conduct:

- I will treat all taxpayers professionally, with courtesy and respect
- I will safeguard the confidentiality of taxpayer information
- I will apply the tax laws equitably and accurately to the best of my ability
- I will only prepare returns within the scope of my training and experience
- I will exercise reasonable care in the use and protection of equipment and supplies
- I will not solicit business from taxpayers I assist or use the knowledge I have gained about them for any direct or indirect personal benefit for me or any other specific individual
- I will not accept payment from taxpayers for the services I provide. I may receive compensation as an employee of a program sponsor

Volunteer Name (print) _____ Volunteer Signature and Date _____

Home Street Address _____ Daytime Telephone Number _____

City, State and Zip Code _____ E-mail Address _____

Sponsoring Organization Name _____

This form is to be retained at the Site or Partner level.

Certification (IRS or Sponsor Use Only)

	Basic	Intermediate	Advanced	Military	Foreign Student/Scholar			Non-Tested Volunteer
					Part 1	Part 2	Part 3	
Number of Correct Answers								
Certified (yes/no)								
Not Applicable								

Certified by: _____ Date: _____

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.

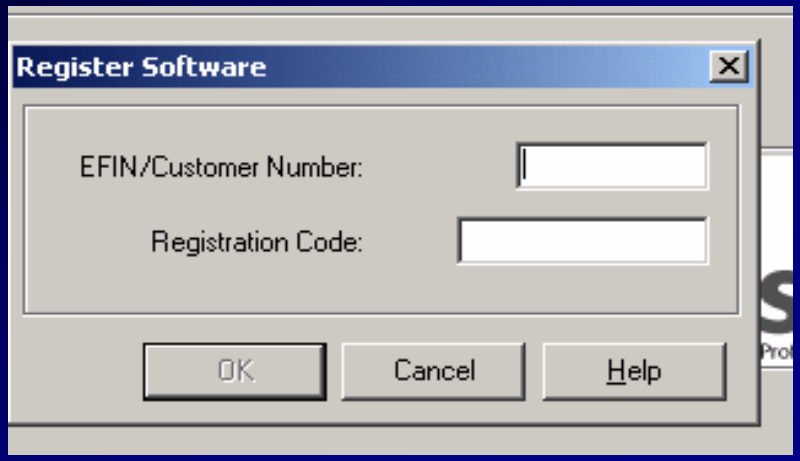
Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.

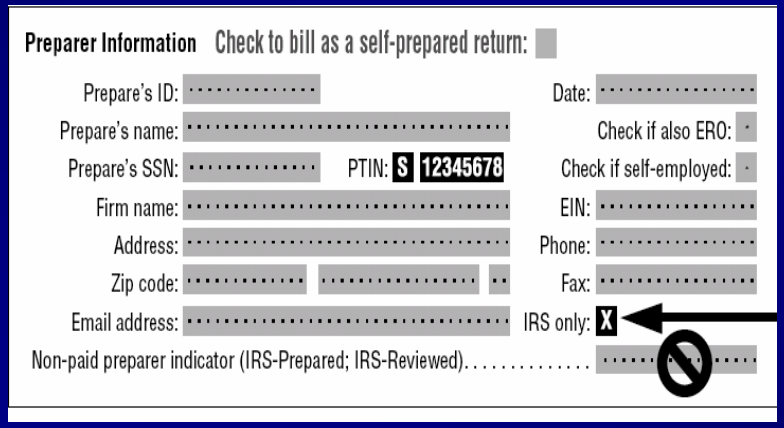
- All Volunteers who:
  - Prepare
  - Answer tax Questions
  - Teach Tax Law to volunteers
  - Perform Quality Review

MUST be certified

IRS

Site Identification Requirements





- Must use assigned Electronic Return Identification Number (EFIN)
- Site Identification number must be shown on all returns.

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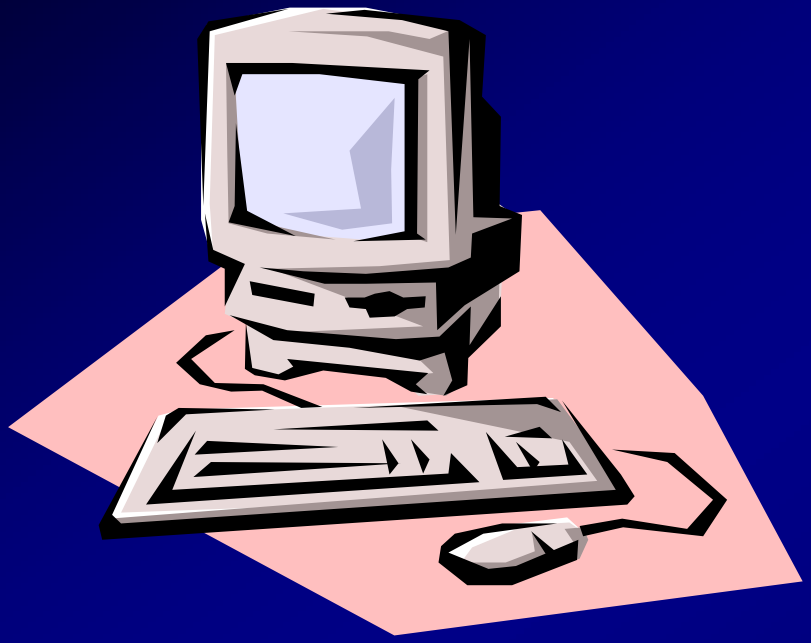
Follow E-File Procedures



- Process all electronic filed returns in a timely manner

IRS e-file

IRS

Best Practices

Local SPEC Practices

- Site Manual
- Screener Training and manual
- Integrated Training Syllabus
- Volunteer Orientation

IRS

Go forth and prepare

Remember .....

“One hour can boost a Families Income

an average of $1800.00”

Help Resources

- National Community Tax Coalition http://www.tax-coalition.org/
- The Brookings Institutions http://www.brookings.edu/
- Internal Revenue Service www.irs.gov

IRS

- Questions?