

VITA Services for West Michigan Intro



Volunteer Income Tax Assistance

Families paying too much for preparation

Tax preparation costs \$40-\$250 - imagine the savings if we served 10%!

Tax time is an opportunity to engage low-income families

Free income tax preparation for low-income families with incomes below \$60,000 and have simple tax needs.

Money left on the table

It's estimated that 20% of people are not claiming the Earned Income Credit that qualify. That's \$370 million dollars not coming back families and our communities (2009).

Tax Sites

This schedule is based on site operations last year. It may change slightly. Evening hours in Muskegon are still to be identified.

Baker College - Muskegon, Room T108 (Muskegon)

Operates Monday, Wednesdays, Fridays

10:00 a.m. - 4:00 p.m.

Community enCompass - Sacred Suds (Muskegon)

Monday and Tuesday

9:00 a.m. - 4:00 p.m.

Goodwill Industries of West Michigan Corp. Office (Muskegon)

Operates Monday, Tuesday, Thursday, Friday, & every other Saturday

9:00 a.m. - 4:00 p.m.

Holton Library (Holton)

Operates Fridays

9:00 a.m. - 3:00 p.m.

TrueNorth Community Services (Fremont)

Operates Monday, and Tuesday, and Tuesday evening

9:00 a.m. - 12:00 p.m., 1:00 p.m. - 4:00 p.m., 5:30 p.m. - 8:30 p.m.

Hart City Hall (Hart)

Operates Tuesdays and Thursdays

3:00 p.m. - 8:00 p.m.

Benefits VITA provides to volunteers

- Provide quality and honest tax services to a family in need.
- Connect families to other great services in the community.
- Help our local economy by bringing more credits to the community
- Meet other volunteers and clients.
- Use volunteer hours for a school, professional, or other requirement.
- Develop professional skills.
- Learn something new!

What does a VITA site need?

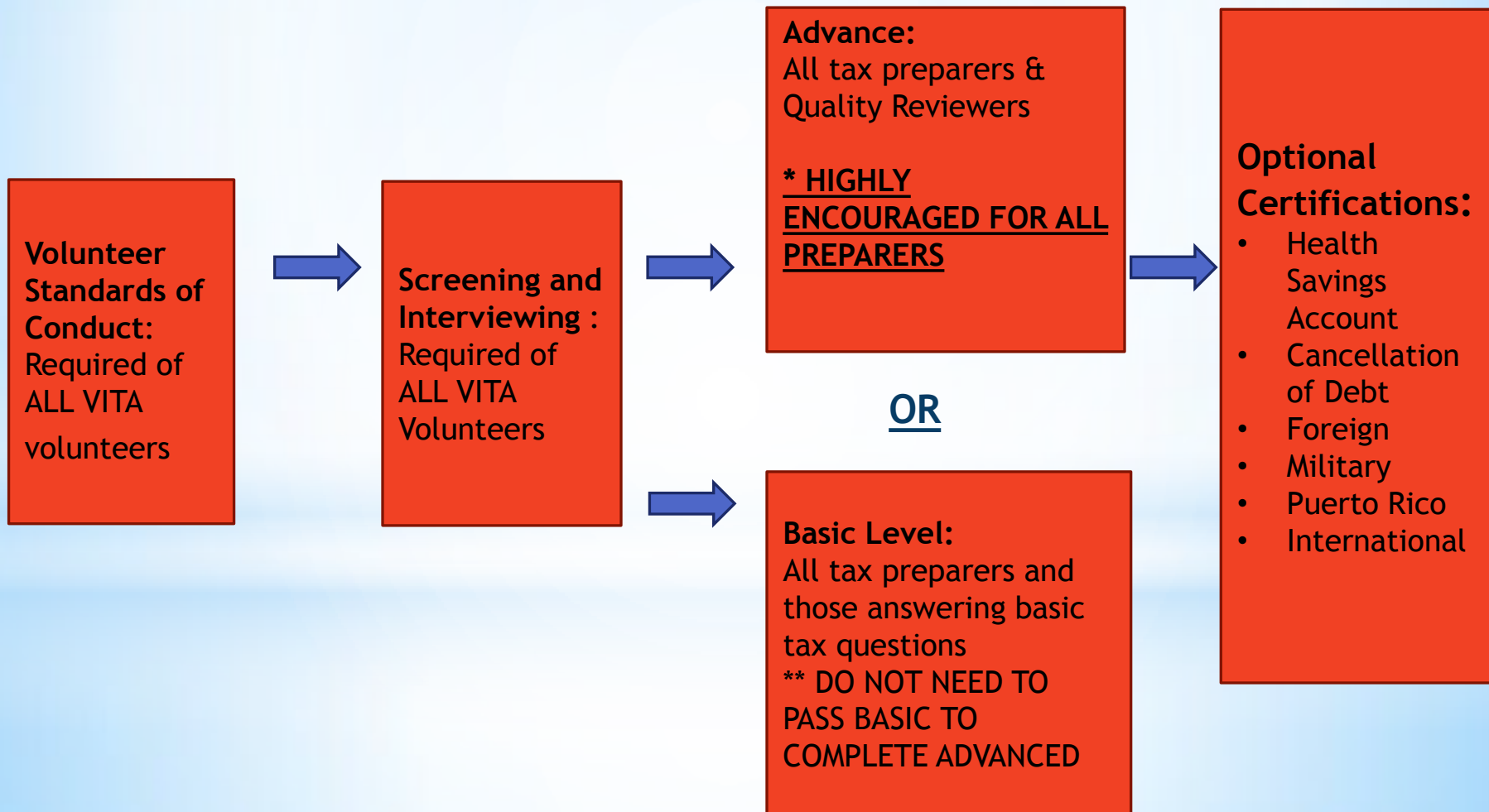
Volunteers and staff:

- Site Coordinator
- Tax Preparers
- Greeters



VITA Certification Path

www.linklearncertification.com



What does a site look like and how does it operate?

Step 1: Appointment specialist (through CALL 2-1-1) sets appointments & screens clients over the phone.



Step 2: Client arrives at the appointment. Greeter welcomes them, assures they have correct documents, confirms appointment, and assists with intake and interview form.



Step 3: Client meets with tax preparers. Preparer goes through intake and interview form to complete tax return



Step 4: Site coordinator/quality review checks the return and information to confirm completeness. After the return is reviewed, the preparer goes through the return with the client.



What is done for clients who are not able to get an appointment?

Many times, there is a higher demand than can be met for traditional free tax preparation.

My Free Taxes

www.myfreetaxes.com is available to anyone earning \$60,000 or less. This website provides H&R Block software for free if the person falls in this income bracket. Website is very user friendly. It prepares both federal **AND** state tax returns. Public may come to specific tax preparation tax sites and use computers if internet access is an issue for them.



What will I learn as a greeter?

- Screening and Interviewing
- IRS's Code of Conduct
- Verify client's identity
- Program eligibility
- General tax information/ forms
- Make appointment reminder phone calls
- Print and view appointment schedule

What certification level do I need:
VITA Standards of Conduct
Screening and Interviewing Training

Total estimated training time:
3 hours



What will I learn as an tax preparer?

Generally, the returns completed at the VITA sites are very basic. You will have an hour to complete a return, which is usually more than enough time. If more time is alright.

What certification level do I need?
VITA Standards of Conduct Screening, Interviewing Training, and Advanced Level

What you will learn to do to prepare a tax return:

- Screening and Interviewing
- Filing Status
- Personal Exemptions
- Dependency Exemptions
- Wage Income
- Investment Income
- Alimony Income
- Taxable Refunds
- Unemployment Compensation
- Social Security Benefits
- Pensions and Retirement
- Adjustments
- Standard Deduction
- Itemized Deduction
- Tax Computation
- Child & Dependent Care Credit
- Child Tax Credit
- Education Credit
- Affordable Care Act Penalties & Credits
- Earned Income Credit
- Refund & Amount of Tax Owed
- Quality Review of Tax Return
- Amended Returns
- Unreported tip income
- Pensions, annuities & IRAs
- Limited K-1
- Sale of stock
- First-time homebuyer credit
- IRA Deduction
- Additional tax on IRAs & other retirement plans
- Cancellation of debt

What is available to help me learn all this?!

The IRS has created a lot of tools. These resources can be very comprehensive and act as resource material. Training resources are available based on volunteer preferences, there are online modules to read, online moderated modules, and paper documents of all of the materials.

Intake/Interview & Quality Review Sheet

- Form 13614 C

Volunteer Resource Guide

- Publication 4012

Your Federal Income Tax

- Publication 17

Volunteer Training Guide (PDF)

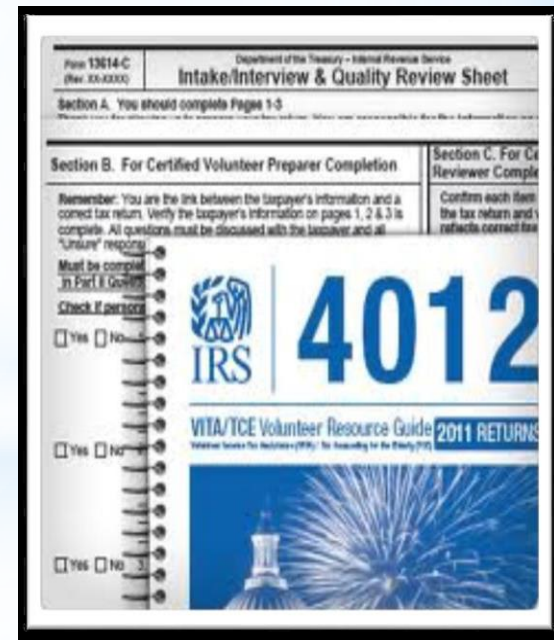
- Publication 4491

Problems and Exercise Guide (PDF)

- Publication 4491W

Test and Retest (Yes, it's open book!)

- Publication 6744



Important Resources:

www.linklearncertification.com

- Link and Learn IRS modules to read and learn about federal tax law. Under the Quick Links, the link is titled “Link & Learn Taxes Lesson.
- To access certification tests, create a log in on the left side of the Link and Learn homepage.

www.abc-wm.volunteerhub.com

Sign up for trainings and/or volunteer shifts by registering this website.

Hard Copies

There are hard copies of the following if you find you would like any of these items: Intake/Interview & Quality Review Sheet (Form 13614 C), Volunteer Resource Guide (Publication 4012), Your Federal Income Tax (Publication 17), Problems and Exercise Guide (Publication 4491W), Test and Retest (Publication 6744)

Many of them are last year’s items as the products are updated late fall.
Available first come, first serve.

How can I best prepare myself to volunteer?

Tax Law Training

In-Class *OR*
On-Line Link &
Learn Modules
OR online
modules *OR*
COMBINATION



Tax Software

Last year's
TaxWise
software,
Program
Coordinator to
provide in
person
orientation



Certification

Pub 6744
Submit Test
online through
Link & Learn
Certification



PRACTICE, PRACTICE, PRACTICE.

Prepare your
own return or
returns for
your friends/
family during
January. Date
TBA

Volunteer Certification and Protections

- Attempt the Test/Retest Publication 6744 - it is easier to prepare the problems in the tax software prior to launching the test online.
- Complete the test online: www.linklearncertification.com
- Two attempts to pass with 80% or higher.
- Certification is open note, open book, untimed.
- E-mail the Volunteer Agreement to program coordinator upon certification completion.

Volunteer Protection

- Prepare returns and provide advice in the topics that you have been trained and certified in.
- Never ask for or solicit donations or business.
- Never willfully prepare a return with mistakes, with omitted or unsubstantiated information.

Tips On Completing Certification

- Do not try to memorize everything.
- Get accustomed to TaxWise Online
- Know the different qualifications for:
 - Earned Income Credit
 - Child Tax Credit
 - Dependency
 - Head of Household
- Volunteer Resource Guide (Pub. 4012) and training documents provide shortcuts in locating information.
- It is okay to ask questions, look things up, or get back to a client to address a tax question or complete a return.

Contact Program Coordinator if you need ANYTHING!

Amanda Grover, Program Coordinator

VITA Services for West Michigan

Goodwill Industries of West Michigan

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