

LIVE UNITED



Orange County United Way

VOLUNTEER INCOME TAX ASSISTANCE (VITA) VOLUNTEER OPPORTUNITY

Students, community members, and professionals across the country are volunteering with VITA!

ABOUT VITA

VITA is an IRS-based volunteer program that provides you the opportunity to give back to the community and make a difference. Volunteers are trained and certified to offer free tax help and preparation to low-income taxpayers, persons with disabilities and limited English speaking taxpayers who need assistance in preparing their tax returns. Whether you are a seasoned tax expert wishing to work with the community, or a student looking to develop new skills and build experience and knowledge – there is a role for you!

Orange County United Way partners with the IRS and community-based organizations to offer this service. We will provide you with all the necessary materials and assist in placing you (based on your preferences) with partnering organizations during the tax season. There are multiple sites and options including evenings and Saturdays.

REQUIREMENTS

No previous experience is necessary! All volunteers are required to complete and pass the online Volunteer Standards of Conduct training and certification. Volunteer Tax Preparers, Quality Reviewers and Tax Guides are also required to complete additional tax law and tax preparation training and must pass certification exams prior to serving. Exams are self-paced, open-book, multiple-choice and are offered online. In-person trainings will be offered at various locations and online beginning in October 2016.

**For additional information or to register as a volunteer please contact
Livi Kerszenbaum, OC Free Tax Prep Campaign Manager,
LiviK@unitedwayoc.org or 949-263-6167.**

VOLUNTEER POSITIONS

- **Greeter/Screeners:** Welcomes taxpayers and ensures that their necessary documents are correct and forms are complete. Determines the type of assistance taxpayer needs.
- **Interpreter:** Aids taxpayers and tax preparers overcome language differences. Spanish, Vietnamese, Mandarin and Farsi languages are always in great need.
- **Tax Preparer:** Prepares electronic federal and state tax returns for taxpayers. Upon completion of the tax preparation process, reviews federal and state tax returns for accuracy.
- **Quality Reviewer:** Upon completion of the tax preparation process, reviews federal and state tax returns for accuracy and discusses results with taxpayer and volunteer preparer.*
- **Tax Guide:** Assists taxpayers who are self-preparing tax returns on MyFreeTaxes.com at one of our sites.

** Enrolled Agents and Other Tax Return Preparers who volunteer as Preparers, Quality Reviewers and/or Instructors may be eligible for CE Credits.*

The success of the campaign is based upon the wonderful effort of volunteers such as yourself. In the 2016 tax filing season, over 300 volunteers donated a total of 11,000 hours in free tax preparation assistance helping over 17,000 taxpayers and returned \$15+ million in refunds back to the community.



EARN IT.



KEEP IT.



SAVE IT.

Frequently Asked Questions: Volunteering with VITA

1. What is the time commitment for volunteering?

We request that a minimum of 30 hours is served throughout the tax season (Feb, Mar, and Apr). Without volunteers, VITA would be unable to operate so any time you can give is much appreciated. With over 20 VITA sites located across Orange County, hours are available during day, evening, and weekends. Later this year a full list of locations and hours will be posted.



2. How do I sign up as a volunteer?

In fall 2016, Orange County United Way will contact you with detailed information about how to register as a volunteer online at the program's VolunteerHUB. Here you will complete a volunteer profile with your contact information and select the locations and dates at which you will serve.

3. Am I liable for the tax returns I prepare?

The Volunteer Protection Act of 1997 protects volunteers from liability for negligent acts they perform within the scope of their responsibilities in the organization for which they volunteer. The Act excludes conduct that is willful or criminal, grossly negligent, or reckless, or that constitutes a conscious, vagrant indifference to the rights or safety of the individual potentially harmed by the volunteer. Basically, if volunteers successfully complete required training and certifications, and are performing their responsibilities under the Volunteer Standards of Conduct, they are protected.

4. How complicated is the average return?

The VITA program files both federal and state tax returns using an IRS provided software. The average return you will prepare will be relatively simple. The VITA program has limitations on what volunteers can and cannot prepare. These "out-of-scope" returns are considered to be too complicated and will be referred to a professional tax preparer.

5. What if I have a problem with a return?

Volunteers will only prepare returns that are within the scope of their training. Your Site Coordinator will be certified at the Advanced Level and is able to provide assistance if needed. Please keep in mind that the Volunteer Resource Guide (Publication 4012) and Publication 17 can be used as reference materials. Please do not hesitate to ask your Site Coordinator if you are unsure about the complexity of a tax return or if something seems unusual or questionable regarding the tax return.

6. What do I do when arriving at the site?

All volunteers are asked to arrive at the VITA location 10-15 minutes before their scheduled volunteer time. When arriving, please be sure to sign in with your Site Coordinator. If volunteering at a VITA site for the first time, remember to bring your signed Volunteer Standards of Conduct (VSoC) Agreement and a photo ID to verify your identity. Each site you volunteer at (if more than one) will need to have a copy of your signed VSoC Agreement. Your Site Coordinator will assign you your work station and share with you any updates.

7. Although I have completed the required training, I am nervous about making a mistake. What ensures that I prepare each return correctly?



The VITA program has several ways of ensuring that each return is prepared correctly. Taxpayers are initially screened by the Greeter or Intake Specialists when entering the location. The taxpayer completes an Intake Interview to ensure that the tax preparer has all of the necessary information to complete an accurate return. After the preparer completes the return, another preparer or a Quality Reviewer will review the return for accuracy. Before any return is submitted, it is printed and reviewed with the taxpayer. Basically, three sets of eyes review the return before it is submitted.