



# VITA

**Volunteer Income Tax Assistance**



2020 VITA Tax Program

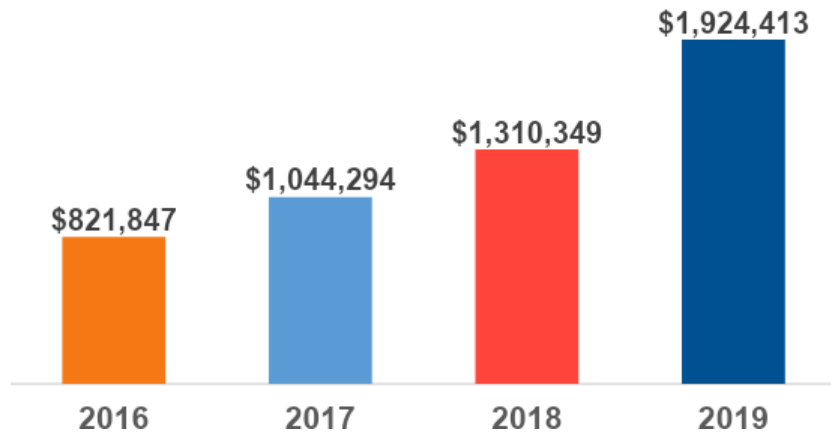


# VITA Tax Preparation Program

- **VITA or Volunteer Income Tax Assistance** provides basic tax preparation assistance to individuals and families with a household income of approximately \$56,000 a year or less.
  - Nationwide IRS sponsored program
  - Located at United Way 2305 Platt Road, Ann Arbor
  - February 1<sup>st</sup> to April 4<sup>th</sup>, every Tuesday and Thursday 5-8:30 pm, Saturday 10am-4pm,
  - **By appointment only – 734-677-7235**
  - **Online via [uwashtenaw.org/freetaxhelp](http://uwashtenaw.org/freetaxhelp)**
- **VITA at EMU College of Business**
  - Saturdays 10-4pm
  - **By appointment only – 734-677-7235**
  - **Online via [uwashtenaw.org/freetaxhelp](http://uwashtenaw.org/freetaxhelp)**

# VITA Community Impact

**Total Dollars Returned to Washtenaw County from Tax Refunds and Credits**



FY19	
Number of Returns*	1,248
Average Refund	\$1,542

*\*Includes UWWC VITA, EMU VITA, Virtual VITA, and MyFreeTaxes*

# MyFreeTaxes

- MyFreeTaxes.com
- H&R Block's premium online tax prep product
- Taxpayer self prepared, easy-to-use, anywhere online
- Free for annual household incomes under \$66,000
- Sponsor a MyFreeTaxes partner event!
- Laptops or computer lab

# VITA Scan & Go

- Scan & Go service allows clients to have their tax documents prepared at United Way without having to travel.
- Scan & Go requires TWO appointments: Drop-off and pick-up
- Clients may receive a phone call from a VITA staff or volunteer if we have questions about their tax situation.

# INTAKE CENTER



# Becoming a Scan & Go Site

- Contact United Way!
- We will provide training for your staff on intake procedures
- Must have access to a scanner
- Option to control your own scheduling (your client base) or scheduling through our system (wider community)

# Benefits of Scan & Go and MyFreeTaxes



- ❑ A paid preparer costs an average of \$225
- ❑ VITA clinic appointments are limited
- ❑ Allows people to access flexible services in spaces they are familiar with
- ❑ Reduces reliance on refund anticipation loans



# Scan & Go Site Locations

- Manchester Community Resource Center
  - Housing Bureau for Seniors
  - Washtenaw Literacy
  - Ypsilanti District Library- Superior Township Branch
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- More sites to be confirmed!

# Out of scope for VITA

- We cannot prepare returns with:
  - Schedule C with more than \$25,000 in business expenses
  - Schedule E (Rental property income)
  - Schedule F (Profit or loss from farming)
  - Income over \$56,000 (unless the client has a disability, elderly, or ESL)
  - Some cancellation of debts

# Important Documents

- W-2s for each job held in 2019 for each person in the household
- Photo ID for tax payers and Social Security Cards for every member of your household
- 1099s showing other income (unemployment, social security, school loans, health care reimbursement, state tax refund, gambling winnings, contract work)
- 1098s showing payments you've made (school loans, property tax)
- 1095-A if you received credit from the healthcare.gov marketplace
- Income/interest statements received for any savings account/investments
- Bank account numbers: a voided check or your bank or credit union's routing number and savings or checking account number for your refund to be deposited automatically into your account through direct deposit
- Last year's tax return (if you have it)
- What to Bring Checklist: [www.uwgive.org/freetaxhelp](http://www.uwgive.org/freetaxhelp)

# Volunteer for Vita

- Three ways to volunteer
  - Intake and exit specialist
  - Tax preparer
  - Quality Reviewer (for returning volunteers)
- Training provided to become certified
- Resume Builder
- Give Back to Community
- [uwgive.org/volunteerforvita](http://uwgive.org/volunteerforvita)
- Training in December and/or January (3-9 hours, depending upon volunteer experience & role)
- Self-study and completion of certification tests (2-12 hours, depending upon volunteer experience & role)
- A minimum of four 3.5 hour shifts from February through early April.

# Contact Us

- **VITA Program Email: [vita@uwwashtenaw.org](mailto:vita@uwwashtenaw.org)**
- **VITA Phone Line: 734-677-7235**
  
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Questions?