

Vita E³

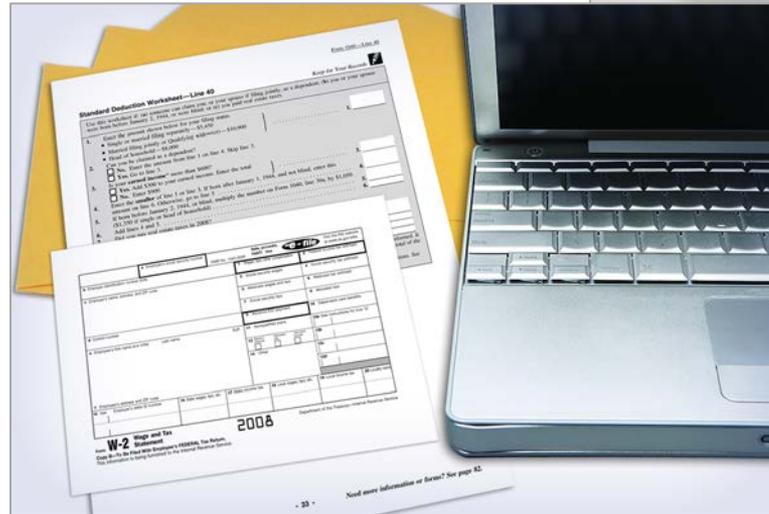
Welcome to the IRS VITA e³ Program

A Volunteer Income Tax Assistance program
for schools with an emphasis on e-file,
education, and volunteer experience



What are the signs of a change for the better?

- Convenience
- Accuracy
- Reliability
- Efficiency



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The IRS is changing too!



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Electronic Filing

- Quick, easy, convenient
- More accurate
- Secure and private
- Increases speed of refund
- Provides acknowledgement return was received.



VITA e³

- e-file
- education
- experience



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As a VITA e³ host, you'll...

- set up a site within your school
- train selected volunteer students/staff to do electronic filing
- process tax forms for the community and students



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What's in it for you?

- Satisfy students' community service requirements
- Enhance students' tax education by joining theory with experience
- Allow real-life applications of learning
- Offer community services, extending value of school to community
- Provide teacher development opportunities
- Foster the development of "intangibles" – empathy, personal values

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What do you have to do?

- Select a teacher/staff Volunteer Coordinator.
The right person is essential!
 - Eager
 - Energetic
 - Enthusiastic
 - No tax expertise required
 - No prior experience required



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Volunteer Coordinator Responsibilities

- Recruit tax preparers
- Supervise/conduct training of volunteers
- Select location of site in school and gather all approvals
- Schedule/supervise all volunteers
- Answer questions/field problems

Estimated Time Commitment

- Amount of time depends on your level of commitment
- IRS VITA/e-file training of coordinators and volunteers in November and December
- Ongoing commitment from February through April



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What do you have to do?

- Program is flexible – your school decides what types of returns you will process:
 - 1040EZ
 - 1040A
 - 1040 and related schedules



How will you select your volunteers?

- Select students from a variety of classes or groups
 - Honors
 - Math
 - Accounting
 - Civics
 - Social Studies
 - Business
 - Entrepreneurial

What will volunteers do?

- Prepare selected tax forms (1040EZ, 1040A, 1040 and related schedules)
- File returns electronically
- Answer questions
- Refer taxpayer to appropriate help



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What volunteers will NOT do?

- Prepare complicated returns
- Answer technical questions for which they have not been trained
- Accept pay or compensation from individuals or organizations for providing tax assistance or preparing tax returns

Additional Help Needed at Site

- Screener
- Publicity
- Technical Support



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The school determines the schedule

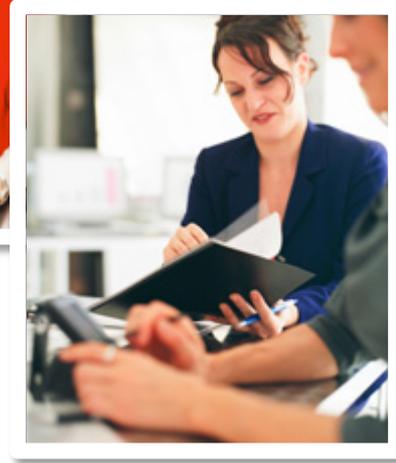
- During school hours
- After school hours
- Weekends
- Super Saturdays
- During high-traffic periods – February through April



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To whom will you make the service available?

- Students
- Qualifying Faculty/Administrative Staff
- Community



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How will we help you?

- Self-paced training modules for preparers with IRS guidance and support as needed
- Step-by-step instructions for setting up your site
- Ongoing support from IRS Tax Consultants
- www.irs.gov

What do we do next?

- Determine who will be responsible for the VITA e³ site in your school
- Get all start-up materials to Volunteer Coordinator as soon as possible
- Apply for an EFIN number

The IRS is available to answer questions and offer support



VITA e³

- provides an excellent opportunity to satisfy community service requirements
- enhances students' tax education by joining theory with experience
- allows real-life applications of learning
- offers community services, extending the value of school to the community
- provides teacher development opportunities
- fosters the development of “intangibles” – empathy, personal values

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Join the team!

