

Lend a hand with Volunteer Income Tax Assistance (VITA)



Learn about the many ways to be a VITA Volunteer! Contact TaTyana Abreu, VITA & Community Engagement Manager, to learn more!
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Greeters:

- Welcome and sign in all clients to the VITA site
- Screen all taxpayers for VITA assistance
- Provide taxpayers with intake forms and answer non-tax questions
- Manage the flow of taxpayers according to site operational procedures
- Manage waiting and entry areas
- Refer taxpayers to Tax Preparers or Site Coordinators for tax questions

Tax Preparers

- Must be certified at Basic Level or higher through the IRS Link & Learn website
- Interview taxpayers using the IRS Intake/Interview & Quality Review sheet
- Prepare only those tax returns for which certification levels were achieved
- Ensure the Quality Review Process is followed for all returns completed
- Obtain signatures for E-File authorization
- Refer taxpayers with returns out of the scope of VITA to a paid practitioner

Site Coordinators

- Must be certified at the Advanced Level through the IRS Link & Learn website
- Must complete Site Coordinator Training
- Are responsible for operations of the VITA location
- Must ensure that the VITA site is open as scheduled and adequately staffed
- Supervise volunteers to ensure adherence to Standards of Conduct and Quality Site Requirements
- Ensure the Quality Review process is followed for all returns completed at the site
- Ensure that copies of required paperwork are collected and disposed of properly
- Submit tax return E-files to the IRS promptly
- Ensure rejected returns are either corrected or the affected taxpayer contacted
- Complete and submit reports as requested
- Refer taxpayers with returns out of the scope of VITA to a paid practitioner