



Southwest Iowa
Volunteer Income Tax Assistance (VITA)
Program
Volunteer Responsibilities



Training

- * Training will be on basic tax returns including 1040, 1040A and 1040EZ.
- * Training will be self study using a training manual provided by the IRS and/or on-line at the IRS Link & Learn Tax site www.irs.gov/app/vita/index.jsp
- * Training materials for the upcoming tax season will be available in November.
- * A face to face training on the IRS Tax Wise software will be held in late December or early January at a location in Southwest Iowa TBA. Expenses to attend the training will be reimbursed.
- * Volunteers must pass a test to be fully certified as a VITA volunteer. Volunteers must be certified in the Basic Module to prepare taxes. Completion and testing of the Intermediate Module is recommended. The Advanced and Military Modules are optional.
- * VITA volunteers will receive support from the IRS VITA program and the SW Iowa Making Connections coordinator, Mary Beth Kaufman; phone: 877-256-0801, mbkaufma@iastate.edu

Tax Services

- *In exchange for the training, VITA volunteers are asked to work in SW Iowa with low and moderate income individuals and families in preparing basic tax returns.
- * The IRS waives liability for VITA volunteers.
- * Laptops computers and printers will be provided for use by the volunteers.
- *Tax returns will be sent electronically by a site coordinator.
- *VITA volunteers may receive a small stipend to reimburse them for some personal expenses (i.e. mileage, meals, copies, etc.).
- *Specific community tax preparation sites will be identified and coordinated with VITA volunteers. A site host will be available. Efforts will be made to have an interpreter available for Spanish speaking clients.
- * The SW Iowa Making Connections Program will publicize the tax services.
- *Appointments for tax services at specific sites will be coordinated via a central call-in 800#.
- *Possible sites could be located in Shenandoah, Clarinda, Red Oak, Lenox, Sidney, Atlantic, Harlan, Glenwood, and Logan/Mo. Valley.