



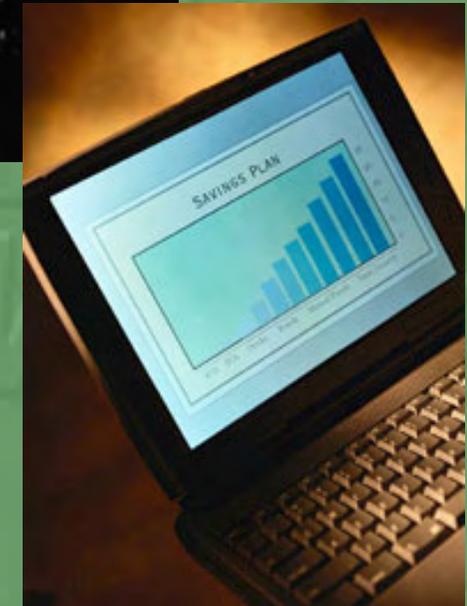
# Welcome to the IRS VITA e<sup>3</sup> program

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



The IRS is changing  
too!



# Electronic Filing



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



VITA e<sup>3</sup>

e-file

education

experience



As a VITA e<sup>3</sup> 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.



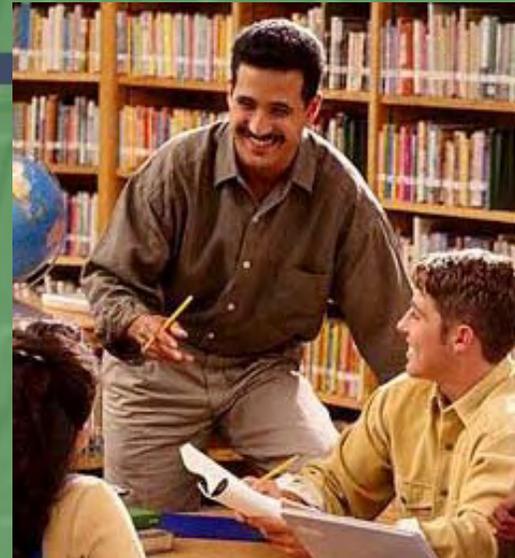
## What's in it for you?

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



# 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



# 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 coordinator and volunteers in November and December
- Ongoing commitment from February through April



# 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 (1040 EZ, 1040A, 1040 and related schedules).
- File returns electronically.
- Answer questions.
- Refer taxpayers to appropriate help.



## 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



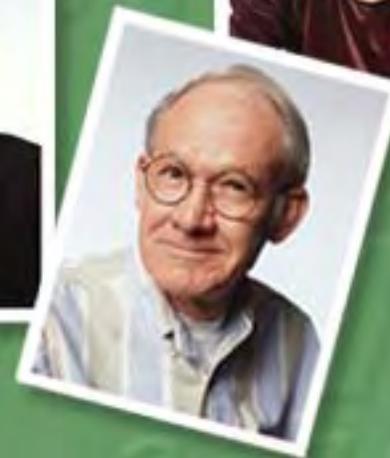
## The school determines the schedule

- During school hours
- After school hours
- Weekends
- Super Saturdays
- During high-traffic periods—February and April



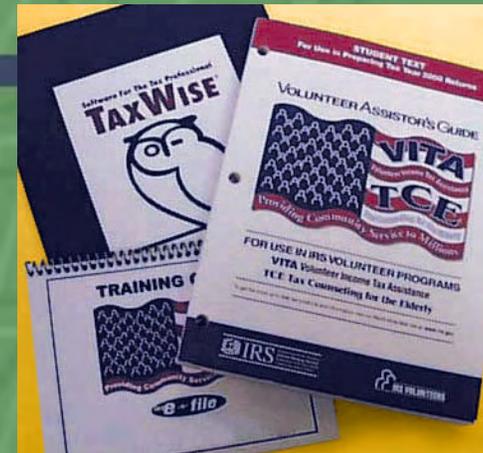
# To whom will you make the service available?

- Students
- Qualifying Faculty/  
Administrative Staff
- Community



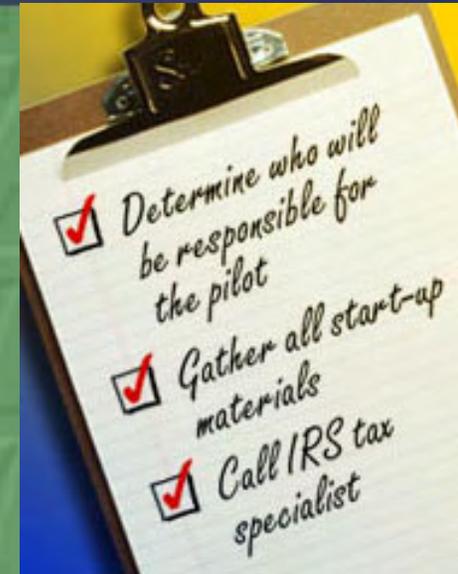
# How will we help you?

- 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 Specialists
- Web site: [www.irs.gov](http://www.irs.gov)



## What do we do next?

- Determine who will be responsible for the VITA e<sup>3</sup> site in your school
- Get all start-up materials to Volunteer Coordinator ASAP
- Apply for an EFIN number

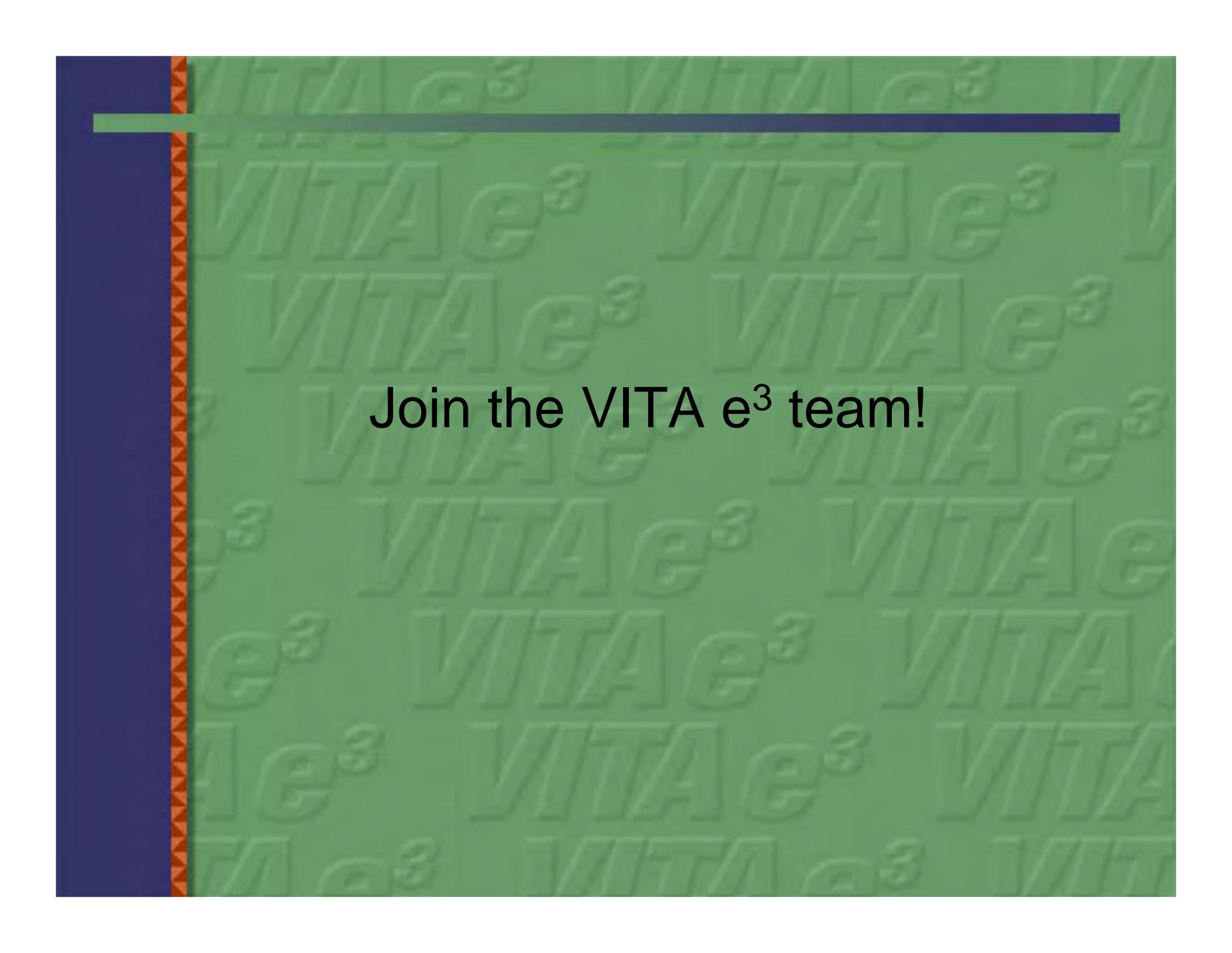


The IRS is available to answer questions and offer support



## VITA e<sup>3</sup>

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



Join the VITA  $e^3$  team!