



IRS Taxpayer Services (TS)

STAKEHOLDER PARTNERSHIPS, EDUCATION & COMMUNICATION

Volunteer Income Tax Assistance (VITA) Program Filing Options

Beta Alpha Psi (BAP) VITA Program Options





VITA Program - Benefits

Chapters

- Provides an additional community service opportunity
- Potential to receive IRS recognition
- Receive free income tax preparation software URL

Members

- Learn a life skill as certified VITA volunteer
- Resume building



VITA Program—Tax Software Providers

- TaxSlayer
- Other Free File/VITA providers:
 - On-Line Taxes
 - Tax Act



VITA Categories/Methods

- Traditional Face-to-Face
- Facilitated Self–Assistance (FSA)
 - Non-Contact
 - Limited Contact



VITA Program – Volunteer Prepared Options (Traditional)

- Requires face-to-face interaction
- At least 3 volunteers are required to operate site
- IRS provides free software
- Chapters determine site availability
- Students must certify to prepare income tax returns via Link and Learn Taxes



VITA Program – Facilitated Self-Assistance (FSA)

- Requires minimum resources to operate VITA site
- Software options:
 - TaxSlayer
 - Online Taxes
 - Tax Act
- Student BAP VITA volunteer must be available to assist client with return preparation, if necessary
- Chapters receive credit for returns prepared
- Income limitations apply. Refer to software provider's criteria.



VITA Program – Facilitated Self-Assistance (FSA)

FSA Options

- Stand-Alone

Student prepares its own return

- Fusion

Combination of traditional and self-help

- Remote

Return prepared at home or location away from VITA site



VITA Program – FSA Non-Contact Method

Remote Option

- Chapter requests URL from local SPEC contact:
 - VITA Free File software:
 - Online Taxes (OLT)
 - Tax Act
- Link can be placed on local chapter's website
- Returns are self-prepared by student
- Certified VITA volunteer must be available to assist client with return preparation, if necessary



VITA Program – Volunteer Prepared Options (Non-Contact)

100% Virtual

- No face-to-face interactions between VITA volunteer and student requesting tax preparation assistance
- Intake and Preparation are executed in separate locations
- Returns are prepared by VITA certified preparers
- Requires collaboration between different BAP chapters



VITA Program – Volunteer Prepared Options (Limited-Contact)

Drop-Off

- Student leaves income tax documents for preparation later by certified VITA volunteer
- All identifications and documentations are completed when tax documents are dropped off



BAP Special Recognition

Return Preparation

- More than 500 Returns Prepared

Alternative Filing Method

- Non-Contact Returns Prepared
- Less Contact Returns Prepared

Volunteerism

1040NR Returns

Special Ad Hoc Event



Reminders:

Contact Local Relationship Manager:

- Additional information
- Software URL
- VITA certification
- Site material and supplies



SPEC Contact:

Amelia Dalton

Email Address: Amelia.Dalton@irs.gov

Phone Number: 470-639-2864