**VITA Volunteer FAQ’s**

# What is VITA?

The Volunteer Income Tax Assistance (VITA) Program is a national initiative to offer accurate, secure, and free tax help, to lower income households. Today the VITA program boasts over 90,000 IRS Certified volunteer tax preparers, serving at over 12,000 locations across the country. Those volunteers filed 3.3 million free tax returns, resulting in $3.5 BILLION in refunds last year.

In Miami-Dade County, VITA services are offered by the Miami-Dade VITA Coalition – a group of 18 local organizations led by Branches. Together they operate 38 tax preparation sites located from North Miami to Florida City. The Coalition’s 465 volunteers helped file 9,918 free tax returns, securing over $13 million in refunds last year. Because VITA is free, those clients got their *entire refund* instead of paying over $2.65 million in tax preparation fees they would have been charged elsewhere.

While we are truly proud of our Superhero Volunteers, we want to do even more. Last year only about 1% of the people eligible for VITA services in our county had their taxes done by us. We need your help, both as a volunteer and as a publicity agent, to help more people learn about these crucial services.

# Why should I volunteer with VITA?

Because VITA is about so much more than just taxes! We have fun, meet interesting people, and go home knowing we made a real difference in people’s lives!!!

*YOU WIN.* By serving just a few hours a week you will learn valuable resume building skills, earn IRS Certifications, and most importantly – *give back to your local community*. CPAs, Enrolled Agents, CFPs, and Attorneys can earn up to 18 Continuing Education (CE) Credits for volunteering with the VITA program. Give back and get rewarded!

*THE TAXPAYERS WIN.* VITA tax preparers have the highest accuracy rate among all tax preparation services, so clients feel confident their return was prepared properly, and they received every credit they were eligible for. Since VITA is a free service, clients get their *entire* refund. Last year we saved our clients $2.65 million in tax preparation fees!

*THE COMMUNITY WINS.* This year alone, the Miami-Dade VITA Coalition secured $13 million in refunds for its clients. Those refunds are critical in the fight against poverty for hard-working families in our community. Improved financial health of families increases the overall quality of life for children, and significantly improves their chances at success in life.

# Do I need experience with taxes to volunteer?

Absolutely not. In fact, very few of our 465 volunteers had prior tax experience. We welcome anyone who is willing to learn, follow our Standards of Conduct, and serve a few hours a week to help improve the lives of hard-working families in their neighborhoods. We use software to prepare taxes, so basic comfort using a computer is required.

We provide free comprehensive training on both tax preparation rules and the software we use. Training is available in both classroom and online self-study environments. We know our training is effective because VITA preparation sites have the highest accuracy rate of the entire tax preparation industry. (Yes…even better than the big-name companies!)

# What skills do you need to be a successful VITA Volunteer?

We look for people with the following skills:

* Interest in learning new topics
* Strong interpersonal skills
* Comfort working with a diverse group of clients
* Patience, and the ability to answer questions effectively
* Commitment to serve a few hours a week to make a real difference in the lives of families in their community

# Are there any specific language skills required for VITA Volunteers?

The IRS training materials and certification exams are in English, so fluency is required.

Our clients speak many languages including: English, Spanish, Creole, Portuguese, Chinese, and Russian, so volunteers with multiple language skills are always a valuable asset for us.

# What if I want to volunteer, but I really do not want to prepare taxes?

We understand, taxes can seem scary. We recommend attending a training seminar anyway as many people are surprised by how simple the process actually is. If, after the training, you still do not want to prepare taxes, we won’t judge you, but we will still need your help.

# What roles can volunteers perform with VITA?

These are the positions available at VITA sites:

* Greeter – As the first volunteer to interact with our clients, you set the tone for their experience. You have to be friendly and willing to be patient answering questions. Greeters manage waiting lists and appointments, and make sure things are running smoothly.
* Preparer: You are the face of VITA for your clients. Our preparers create a fun, professional, welcoming atmosphere that makes clients want to refer their friends.
* Financial Resources Coordinator – This role is designed to educate clients about how they can improve their financial decision-making skills. Key strategies you will be encouraging are: saving at least part of any potential refund; participating in traditional banking services; and improving financial planning skills through access to financial coaching services. You will be given training on how to approach clients, and how to refer them to free services available from VITA partner organizations.
* Site Coordinator – You are responsible for executing the operational plan for your site. This includes helping to recruit volunteers, coordinating local marketing efforts in the community, and managing the daily operations of your volunteer team. This position does require a larger time commitment, but it offers a more rewarding experience as well. Typically, Site Coordinators volunteer for at least one full season shadowing an existing Site Coordinator prior to accepting their own site.

# How do I become a VITA tax preparer?

Sign up through our VITA Volunteer Application [here](https://unitedwaymiami.org/get-involved/give-an-hour-give-a-day-give-of-yourself/become-an-irs-certified-tax-preparer-and-enjoy-many-happy-heartfelt-returns/), and begin your journey! After you sign up you will: 1) go through some training; 2) get IRS Certified; and then 3) start helping people change their lives!

Training/Certification

All VITA Volunteers MUST be IRS Certified. That is how we protect the taxpayer, and ensure we maintain the highest accuracy rate in the industry. But do not worry - we provide comprehensive training materials in both classroom and structured online self-study environments. The certification exam is open book, so you never need to memorize anything. The entire certification process typically takes around 25-30 hours of studying, practice, and testing. Non-preparation roles require much less studying, for obvious reasons.

Available classroom training sessions are listed on the VITA Volunteer [Application](https://unitedwaymiami.org/get-involved/give-an-hour-give-a-day-give-of-yourself/become-an-irs-certified-tax-preparer-and-enjoy-many-happy-heartfelt-returns/). If you choose online self-study you can follow our Training Guide (available for download [here](https://unitedwaymiami.org/get-involved/give-an-hour-give-a-day-give-of-yourself/become-an-irs-certified-tax-preparer-and-enjoy-many-happy-heartfelt-returns/)) to help you through the process.

Serving at VITA sites

This is the really fun part! And it is so easy to do. Just pick one of our 38 locations spread from North Miami to Florida City based on location or times they are open (we have sites open days, nights, and weekends), and show up!

# I am a CPA, Attorney, or Enrolled Agent (EA). Are there different Certification Options available for Tax Professionals?

Although you are welcome to attend our full “New Volunteer Trainings,” you are eligible to choose an alternative VITA certification process – including the *Circular 230 Federal Tax Law Update Test* – which totals approximately 5-7 hours. Fill out an [application](https://unitedwaymiami.org/get-involved/give-an-hour-give-a-day-give-of-yourself/become-an-irs-certified-tax-preparer-and-enjoy-many-happy-heartfelt-returns/) and download our VITA Volunteer Training Manual [here](https://unitedwaymiami.org/get-involved/give-an-hour-give-a-day-give-of-yourself/become-an-irs-certified-tax-preparer-and-enjoy-many-happy-heartfelt-returns/).

You can also earn up to 18 Continuing Education (CE) Credits for their volunteer efforts, see details under “Can I get Continuing Education (CE) Credits for volunteering with VITA?” in these FAQ’s.

# Can I get Continuing Education (CE) Credits for volunteering with VITA?

Yes. CPAs, Attorneys, CFPs, and Enrolled Agents can earn up to 18 Continuing Education (CE) Credits for their volunteer efforts. We will provide you with information on how to apply for CE credits upon request.

\*NOTE: You must choose between the Circular 230 streamlined certification process and CE Credits. You cannot do both.

# Do I have to commit to a number of service hours?

In exchange for the extensive training investment we provide, we ask all volunteers to commit to serving at least 24 hours at a tax site throughout the year. Most volunteers find the work so rewarding that they serve well over the minimum hours. The Coalition has sites open weekdays, weeknights, and weekends, so almost any schedule can be accommodated. We even have sites that prepare taxes year-round, so you can help us help even more families!

# Where will I be volunteering?

The Miami-Dade VITA Coalition operates 38 tax preparation sites spread across the county from North Miami to Florida City. There are always sites close to where you work or live, so you can choose sites that meet your location and time preferences. Please be aware, sites do need a balance of experience and skills among their volunteer staff, so not every request can be accommodated, though we will try our best to do so. We are all working towards the same goal – changing family’s lives by providing accurate, secure, and FREE tax preparation – so anywhere you serve will help make a difference!

If you are flexible in where or when you can volunteer, we may ask you to participate in our “Volunteer Reserve” that helps cover urgent staffing needs across the county.

Ready to have fun, learn a new skill, and change people’s lives? Apply [here](https://unitedwaymiami.org/get-involved/give-an-hour-give-a-day-give-of-yourself/become-an-irs-certified-tax-preparer-and-enjoy-many-happy-heartfelt-returns/).