

## Volunteers' Frequently Asked Questions

### What is Community Action Duluth?

Community Action Duluth is a nonprofit organization committed to eliminating poverty. The Free Tax Site, one of our core programs, provides tax preparation assistance to families and individuals with limited resources. Dedicated, skilled volunteers provide the majority of our services. We operate with technical assistance from the IRS VITA (Volunteer Income Tax Assistance) program and Prepare+Prosper. In 2017 the tax site helped 1400 households and individuals claim almost \$2.7 million in refunds!

### Who will I be helping?

Individuals and families with annual income up to \$54,000 are eligible to use the tax site. The average income of our customers in 2017 was \$16,153 and 79% of our families have income under 200% of federal poverty guidelines. We serve many seniors, people with disabilities and people who live in group homes or adult foster care. A fifth of our customers are people of color. Our clients generally have little access to affordable, professional tax preparation.

### What will I do if I prepare taxes?

You will prepare federal, state and property tax returns for tax year 2017 using TaxSlayer Pro Online™ software under the supervision of a Community Action Duluth site coordinator. The site coordinator and experienced volunteers are available to assist you and to review your work. Tax clinics run January 27 – April 17, 2018 (regular season) and May 1 – June 28, 2018 (post-season).

### What will I do if I do not prepare taxes?

There are many other opportunities to help. Site assistants greet our customers and sign them in. They meet individually with each person to review their income forms, verify their identification documents and complete the intake process. Assistants also assemble completed tax returns to provide clients with their own hard copies.

### What difference will I make?

One hour of your time can put an average of \$1,895 in the pockets of low- and moderate-income families and individuals. You will help our clients claim refundable tax credits such as the Earned Income Tax Credit (EITC) and the Minnesota Working Family Credit. These credits can be received even if a person owes no tax. Taxpayers may also be able to utilize child tax credits and education credits to offset their tax bill. Every volunteer on our team plays a crucial role, and your participation at the tax site can help boost a person's annual income by as much as 50%.

### What specific training will I receive?

A first-year tax preparer completes 12-16 hours of IRS-mandated training in January prior to working at a site. Experienced volunteers take the same 12-16 hours of training, as a refresher, to receive updates on the most current and relevant changes to state and federal tax law. Training and practice in using the tax preparation software are provided. Assistants train in tax site procedures. All volunteer assistants, preparers, and reviewers train and certify in volunteer standards of conduct (ethics and confidentiality). An optional training, "Tax Basics for Beginners," is open to new preparers and all assistants.

### **Do I have to be a tax professional to help?**

NO. Volunteers receive all training necessary for their position. A background in tax preparation or experience in preparing your own personal return is helpful but not required. Volunteer preparers must pass an IRS certification test.

### **What should I wear to the tax site?**

Casual dress is fine. Please be respectful of the clients, other volunteers and the agency. Remember you represent Community Action Duluth to the public, including clients and volunteers. We also provide an official long or short-sleeved cotton T-shirt.

### **Does Community Action Duluth file client returns?**

*For Electronic Filing (e-File):* YES. Site coordinators complete the electronic filing of federal, state and property tax returns at our office. We provide taxpayers with one free paper copy of each return we file for them.

*For Paper Filing:* NO. Site coordinators provide the taxpayer with one copy each of the federal, state and/or property tax return and addressed envelopes for filing the returns. For each payment due, we also provide a payment voucher and mailing envelope. The taxpayer is responsible for mailing in the return(s).

### **Are we liable if we make a mistake on a client's return?**

NO. We participate in the IRS Volunteer Income Tax Assistance (VITA) program. We take the information that the individuals provide and complete the tax returns to the best of our abilities. All tax returns are reviewed by an experienced tax preparer certified to be a reviewer, ensuring the highest accuracy of the return prior to e-filing it on behalf of the client. We do not sign the tax return but indicate a VITA program number on the return.

### **Do I need to bring anything to the tax site?**

No, although you may prefer to bring your own calculator, pen or pencil, and training resource materials to reference at the site. You will be provided with resource materials at your first training session.

### **What if I know an organization interested in getting more information or seeing a presentation about volunteering at the tax site?**

Contact Community Action Duluth Tax Site Program Coordinator Julia Cheng at 218-726-1665, ext. 225 or by email at [julia@communityactionduluth.org](mailto:julia@communityactionduluth.org). We can conduct a new volunteer orientation tailored to your business or civic organization.

### **How do I get more information about volunteering at Community Action Duluth?**

Again, contact us at 218-726-1665, ext. 225 or by email at [julia@communityactionduluth.org](mailto:julia@communityactionduluth.org). We would be happy to talk with you about volunteer opportunities or answer specific questions.

**1 hour** OF YOUR TIME CAN PUT  
**\$1895** IN A FAMILY'S POCKETS