



# UNITED WE THRIVE

## Free Tax Prep Information Session

**LIVE UNITED**  
[www.uwgc.org](http://www.uwgc.org)



United Way  
of Greater Cincinnati

# Welcome To Free Tax Prep – Your Volunteer Pathway

Today:  
**Information Session:**  
United Way of Greater Cincinnati  
History of VITA  
EITC and CTC  
Volunteering with VITA

Watch the **Tax Tech Video:** It will guide you through creating accounts, accessing IRS training resources, and taking your Volunteer Standards of Conduct and Intake/Greeter tests.

Volunteer Training Session A:  
**Intro to Basic Taxation** for new and relatively new preparers

Volunteer Training Session B:  
**Tax Concepts – Federal and State** for all volunteer preparers

Tax Preparer Certification:  
• **Take Tests in Link&Learn**  
• Advanced or Basic  
• Use TaxSlayer Practice Lab to complete returns for the test

## Volunteer at a Tax Site

- In-person
- Virtual
- Hybrid
- 30+ sites across the Greater Cincinnati region
- Variety of volunteer roles
- Join the fight for economic well-being for all our community members!
- Looking for a site? Contact us at [freetax@uwgc.org](mailto:freetax@uwgc.org)





**We fight for the economic well-being of all people in Greater Cincinnati so our entire community can thrive – now and in the future.**

# Volunteer Income Tax Assistance (VITA)

**A national volunteer program assisting families at tax time. Authorized by the Department of Treasury and administered by the Internal Revenue Service (IRS).**



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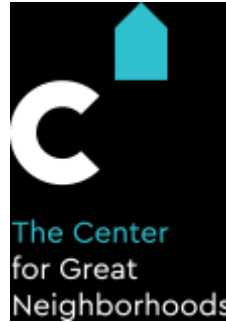
# Why: Earned Income Tax Credit and Child Tax Credit

- EITC (EIC) and CTC are tax credits designed to promote work and to lift families out of poverty. Free Tax prep helps provide this information and connect taxpayers to services. **These credits are only available to people who file federal tax returns.**
- The EITC and Child Tax Credit together lifted **10.6 million people above the poverty line** and made poverty less severe for 17.5 million others in 2018.
- Census data show that in 2018 the EITC lifted about 5.6 million people above the poverty line, including nearly **3 million children.**
- EITC reduced the severity of poverty for another 16.5 million people, including about 6 million children.

# Some of our Sites and Partners



BRIGHTON CENTER  
A COMMUNITY OF SUPPORT



**Cincinnati -  
Hamilton County**

A proud partner of the  
American Job Center network



**Butler County**

A proud partner of the  
American Job Center network



# Our Region

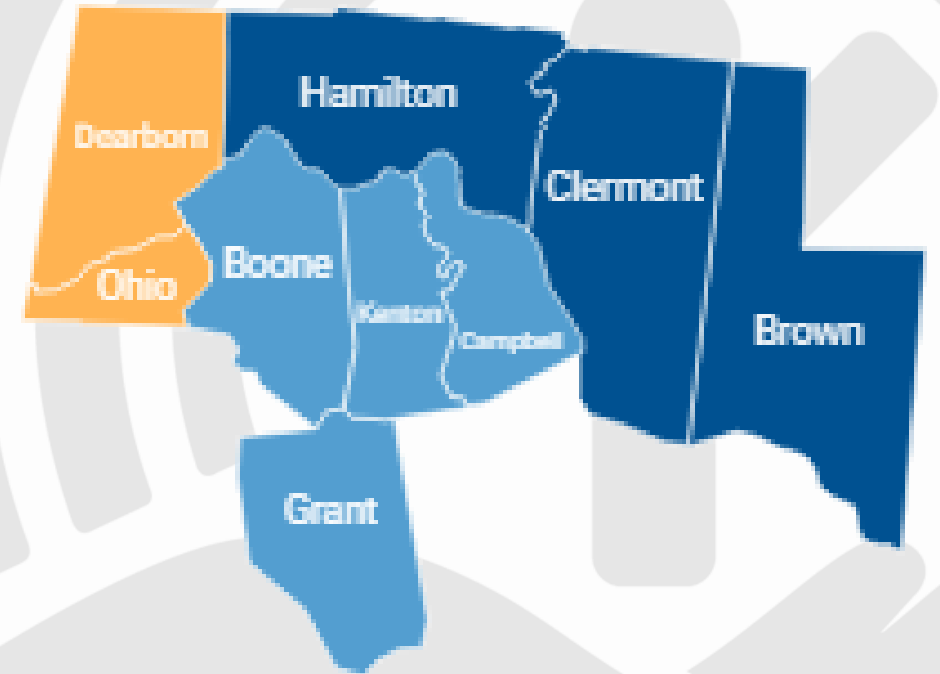
## United Way of Greater Cincinnati serves communities in 9 counties:

- Hamilton, Brown, and Clermont counties in Ohio
- Boone, Campbell, Grant, and Kenton counties in Northern Kentucky
- Dearborn and Ohio counties in Southeast Indiana

## Free Tax Prep serves the same communities and:

- Gallatin and Pendleton counties in Northern Kentucky
- Butler county in Ohio

**There are opportunities to explore adding new site locations!**



# Our Results

2023	RETURNS	EIC Dollars	CTC Dollars	Total Refund Dollars	Volunteers
VITA	7,273	\$2,127,125	\$1,283,633	\$8,211,800	398
MyFreeTaxes	469	\$146,914	\$133,526	\$635,211	-
<b>TOTAL</b>	<b>7,772</b>	<b>\$2,274,039</b>	<b>\$1,417,159</b>	<b>\$8,847,011</b>	<b>398</b>

2021	RETURNS	EIC Dollars	CTC Dollars	Total Refund Dollars	Volunteers
VITA	6,835	\$2,160,749	\$1,236,407	\$10,747,731	346
MyFreeTaxes	113	\$39,587	\$35,753.00	\$213,404	-
<b>TOTAL</b>	<b>6,948</b>	<b>\$2,200,336</b>	<b>\$1,272,160</b>	<b>\$10,961,135</b>	<b>346</b>

2018	RETURNS	EIC Dollars	CTC Dollars	Total Refund Dollars	Volunteers
VITA	8,187	\$3,277,606	\$1,539,861	\$9,865,172	457
MyFreeTaxes	1,983	\$935,413	-	\$2,666,681	5
<b>TOTAL</b>	<b>10,170</b>	<b>\$4,213,019</b>	<b>\$1,539,861</b>	<b>\$12,531,853</b>	<b>462</b>



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# What makes a great tax volunteer?



- Personable and friendly
- High ethical standards
- Comfortable working with a diverse group of filers
- Willing to ask questions
- Enjoys computers, software systems, and learning new skills



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# Volunteer Opportunities



- Greeters + Screeners
- **Tax Preparers and Quality Reviewers**
- Site Coordinators



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# Volunteer Time Commitment

## **TRAINING:**

**December & January dates for virtual training**  
**Self-paced training available December through tax season**

## **TAX SEASON:**

**January 18, 2024 – April 15, 2024**

## **COMMITMENT:**

**Three shifts per season. Each shift is 4 hours on a weeknight or Saturday (some weekdays available).**





# Quality & Certification

## IRS CERTIFICATION

- Certification is an annual, online IRS test
- More complex than actual tax returns
- CEs for CPAs and CFAs
- Certified volunteers are protected from liability

## ASSURING QUALITY

- Strict code of ethics
- New volunteers shadow experienced volunteers
- Multiple volunteers review each return
- Experienced coordinator onsite



### **Volunteer Protection Act**

Public Law 105-19, Volunteer Protection Act of 1997 (VPA)

*Protects volunteers from liability for acts they perform within the scope of their responsibilities as a volunteer.*



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# FTP Site Framework



## In-Person Service

*Traditional Face-to-Face Service*



## Drop-Off In-person

*Tax filers completing paperwork separate from volunteers; Returns prepared primarily on site with filers waiting in separate space*



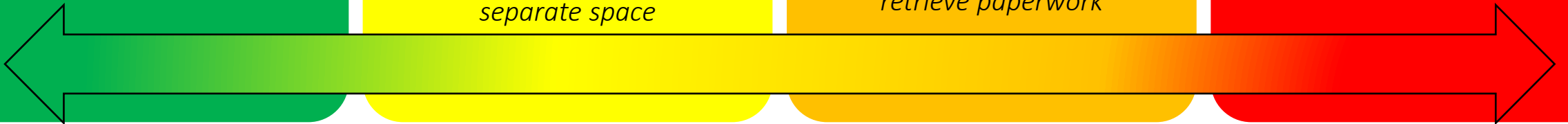
## Drop-Off Virtual-Hybrid

*Administered with tax filers dropping off tax documents; Volunteers preparing off-site and filers returning later to retrieve paperwork*



## Virtual Only

*Tax filers completing and submitting documents online*



# FTP Volunteer Role By Level

## In-Person Service

- **Greeter**-Welcome tax filers to facility, manage traffic and expectations.
- **Greeter + Screener/Intake** - Explain tax forms and review documents.
- **Preparer** - Prepare return on-site, face-to-face with filer.
- **Reviewer** - Review return on-site, face-to-face with filer.
- **Site Coordinator** - Oversee site, ensure QS followed, and monitor submission/rejects.

## Drop-Off / In-Person

- **Greeter**- Welcome tax filers to facility, manage traffic and expectations.
- **Greeter + Screener/Intake** - Explain tax forms and review documents.
- **Preparer** - Prepare return on-site, separate from filer.
- **Reviewer** - Review return on-site, separate from filer.
- **Site Coordinator** - Oversee site, ensure QS followed, and monitor submission/rejects.

## Drop-Off / Virtual-Hybrid

- **Greeter + Screener/Intake** - Explain tax forms and review documents in-person.
- **Preparer** - Prepare return remotely; pick-up and drop-off returns weekly at site
- **Reviewer** - Review return remotely via phone or remote meeting.
- **Site Coordinator** - Oversee site/process and follow up, ensure QS followed, and monitor submission/rejects





# Next Steps...

**1. Share your contact information at <https://www.uwgc.org/get-help/free-tax-prep/free-tax-prep-volunteer>**

- Signing up on our webpage will add you to our mailing list through which we will send future training dates, sites at which to volunteer, and important resources
- You can also find our recordings of the Information and Tax training videos here for your reference.

**2. Register for Training**

- Visit our Eventbrite page in the next two weeks to schedule for training sessions, <https://www.eventbrite.com/o/united-way-free-tax-prep-12024110689>
- When it becomes available, view our **New Volunteer Tech Training Video** to set up your software accounts and continue your volunteer journey.

**3. Start Studying:**

- The best place to get started is on the Prosperity Now website, <https://prosperitynow.org/vita-train>. TY22 still showing but this is a a great place to start before our training in December and January.

**4. Certify online at the IRS Link and Learn website.**

- [Linklearntaxescertification.com](http://Linklearntaxescertification.com)

**5. Schedule and volunteer!**



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# Questions?



# THANK YOU

FOR BEING OUR PARTNER IN SUPPORTING THE  
ECONOMIC WELL-BEING OF INDIVIDUALS &  
FAMILIES ACROSS OUR REGION