

VITA Frequently Asked Questions (FAQs)

What is VITA?

The Volunteer Income Tax Assistance (VITA) Program provides FREE income tax preparation services to low and moderate-income individuals and families. Community volunteers are trained as tax preparers and meet with clients one-on-one to file their taxes. VITA is an IRS Program provided locally by United Way of Lancaster County.

Is VITA just for low-income or under-privileged people?

No, VITA is for anyone who makes less than \$50,000 and doesn't want to pay to have their taxes prepared.

Where are the VITA sites located?

There are 14 VITA sites throughout Lancaster County including sites in Lancaster City, Ephrata, Elizabethtown, New Holland, Columbia, and Gap (please reference the back of the brochure for a complete list of sites).

How can I schedule an “in-person” tax preparation appointment?

Dial 2-1-1 (Lancaster County's free and confidential information and referral service) or 717-291-5462.

Can I file my own taxes for free online?

Yes, visit www.MyFreeTaxes.com/pmhs to file your own taxes for free.

Is there an income limit to have my taxes prepared for free in-person?

Yes, you must have a total income (yours and your spouse's if filing jointly) of less than \$50,000.

Is there an income limit to do my own taxes for free online?

Yes, you must have a total income (yours and your spouse's if filing jointly) of less than \$58,000.

Are there other limitations to have my taxes done in person?

Yes, you do not qualify if you:

- Have income as a clergy member
- Have income from active or reserve military duty
- Have income from a farm
- Sold stocks, bonds or mutual funds in 2013
- Have income from Puerto Rico
- Have income that is reported on a Schedule K-1
- Have income as a landlord
- Or had a cancellation of debt or a foreclosure in 2013

Are there other limitations to do my own taxes for free online?

No.

Is the online filing option available in Spanish?

No, unfortunately, at this time it is only available in English.

VITA Frequently Asked Questions (continued)

Are Spanish-speaking VITA volunteers available to prepare my tax return at an in-person location?

Yes, at our Spanish American Civic Association (SACA) VITA site.

Does VITA prepare Federal, State, and Local tax returns for free?

At an in-person site, your Federal, State, and Local taxes will all be prepared.

If you prepare your own taxes online, only your Federal and State taxes will be prepared, you will need to file your local taxes separately at <http://lctcb.localetaxonline.org/>.

Is there help available if I do my own taxes using www.MyFreeTaxes.com/pmhs?

Yes, if you have questions about the software or tax-related questions, call 1-855-My-Tx-Help (1-855-698-9435) Monday-Saturday from 9am-10pm (ET). As you are doing your taxes online, you can also chat with a support agent to answer your questions.

How do I ensure that I do not accidentally get charged a fee to have my tax return prepared, even if my income is less than \$58,000?

To help tax filers avoid getting accidentally charged, make sure you:

1. Start by using MyFreeTaxes.com or your custom URL link.
2. Create a new account.
3. Do not import data from a previous year.

Does VITA e-file tax returns?

Yes, VITA sites e-file all Federal and State tax returns.

What if I need to file a return for a state other than Pennsylvania, can VITA do that?

VITA in-person sites can only prepare PA tax returns, but you can visit our website and do your own return to file state returns other than PA.

Are the volunteers who will do my taxes trained?

Yes, all volunteers who prepare tax returns are trained extensively by the IRS and hold an IRS certification.

What do I have to bring with me for my tax appointment?

Social Security Cards, Photo ID, all tax forms. A complete list can be found in the VITA brochure, on www.FreeTaxPrepLancaster.org, or by calling 2-1-1.

What is the appointment cancellation policy?

If you are unable to keep your scheduled appointment, PLEASE call us so we may adjust our schedule. If you do not notify us at least 24 hours prior to the time of your scheduled appointment, your eligibility for the services in the future may be terminated.

What happens if there is bad weather and I can't make my appointment?

Each site will follow the decision of the school district in which the VITA site is located. *Example: If Ephrata School District closes, Ephrata Public Library will not be open for VITA purposes that day. Two-hour delays will not affect the VITA schedule.* Exceptions:

- Franklin and Marshall College: Follow decisions of F&M College.
- Millersville University: Follow decisions of Millersville University. Please call 2-1-1 or (717) 291-5462 with any questions or concerns.

Volunteer Income Tax Assistance (VITA)
United Way of Lancaster County

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VITA Fact Sheet

The Volunteer Income Tax Assistance (VITA) program provides free tax preparation services to individuals and families making less than \$50,000. Clients save an average of \$200 in tax preparation fees through VITA. **Last year, VITA returned over \$4.2 million back into the pockets of Lancaster County residents. Let VITA help you get your hard-earned money back!**

HOW IT BEGAN

Lancaster County's VITA program started with outreach efforts from our Women's Council whose members learned that each year, millions of dollars of tax refunds went unclaimed because taxpayers didn't know they were eligible for, or didn't claim, valuable tax credits for working families. Recognizing that income is an important building block for a better life, the Women's Council began outreach efforts to educate families about the opportunities available.

HOW DOES VITA HELP YOU?

VITA helps put hard-earned money back in the pockets of low-to-moderate income wage earners in the form of tax refunds and tax credits. And the free service saves taxpayers the expense of tax preparation services, which average about \$200. Last year we saved taxpayers \$740,200 in fees.

| Schedule a FREE in-person tax preparation appointment | File your own taxes for FREE online |
|---|--|
| Dial 2-1-1 to set up an appointment | Visit www.MyFreeTaxes.com/pmhs |
| Trained volunteers file your Federal, State, and Local Tax Forms. | You file your own Federal and State Tax Forms. You will need to fill out and submit your local tax forms separately and can obtain a printed form by calling 717-569-4521 or file online at http://lctcb.localexonline.org/ . |
| 14 VITA sites around Lancaster County | File online with FREE software at: www.MyFreeTaxes.com/pmhs Tax experts are available via phone to answer questions. |
| You qualify to have your income taxes prepared for free by an IRS trained VITA volunteer if in 2013: <ul style="list-style-type: none">• Your total household income was \$50,000 or less• You did not receive military pay• You did not receive clergy pay• You did not have income from the ownership of a farm• You did not have rental property income• You did not own a business• You did not have income from trading stocks or bonds• You did not have a cancellation of debt• You did not have a foreclosure• You did not have income from Puerto Rico | You qualify to do your taxes for free if your total household income (yours and your spouse's if filing jointly) was \$58,000 or less in 2013 |